Dear Murdock Essentials Participants,

On behalf of the M.J. Murdock Charitable Trust and the Essentials of Development faculty, we are pleased to welcome you to the virtual 2020 Essentials of Development seminar. As you recall, the Essentials of Development is a nine-month cohort beginning with our first of two seminars in December 2019. This May 18 – 19 seminar represents the second of two seminars. Our focus from the beginning has been to help you establish a comprehensive and sustainable development plan that ensures a solicitation and cultivation strategy for your tier 1, tier 2, and tier 3 donors.

Together with your coach, you have focused on the development of the four Essentials of development—Case Statement, Segmented Donor List, Annual Plan, and Development Team. This May meeting will be your opportunity to report back and interact with your coach on your progress in each of these four Essentials. You will also glean new information that includes The Asking Process, Social Media and Fundraising, Working with a Foundation, and Estate Planning, and Maximizing Events for Tier 3 Donors. You will also have the opportunity to hear from our panel of major donors.

We were of course expecting to hold this meeting in-person, but we are encouraged with the progress of each of your organizations and we believe that together we have laid a good foundation at our December Seminar. The Essentials of Development is about adaptation, learning, and transformation—we feel strongly that we can accomplish these ends through our virtual format.

As a result of this virtual Seminar, our anticipation is that your team will be better equipped to:

- Fully implement and execute each of the four Essentials of development
- Ensure the thoughtful cultivation and solicitation of your partners (donors)
- Change the financial trajectory of your organization for the long haul

To pull off these three outcomes, you will need to be fully engaged over the two days; stay doggedly determined as a team to go home and integrate these principles with your entire board; and continue to execute, execute, and execute. As we have said all along, it takes three years to change the development culture of your organization. With this May seminar, you are more than halfway through Year one. The next two years will be the make or break years in determining if these principles will become institutionalized within your organization. We believe in you and are committed to setting you up for success.

Grateful for all you do,

John Franklin
Program Director
HOW TO CONNECT & ENGAGE DURING THE TRAINING

Please read the information below on how to obtain the most use out of the training. We will be using Zoom technology to host the two-day training and breakout sessions. Most teams have been using Zoom, so hopefully this won’t be too difficult. **We ask that you log into the training 30 minutes prior to the start time on the first day to test the necessary functions that allow you to engage.** Please see the agenda on the following pages for more details.

**WHAT TECHNOLOGY DO I NEED TO USE ZOOM?**
All you need is a computer, an audio connection (computer mic/speaker or phone), and reliable internet access. You will be given the option to dial in to the training or use your computer’s audio. If you choose to join with computer audio, please select “test speaker and microphone”. This will ensure that your microphone works and that you can ask questions live during the virtual training. If you find that your microphone does not work, you can use the Q&A box to ask questions of the presenters.

**HOW DO I JOIN THE TRAINING?**
Click the links in the schedule below. Once you select a link, you will enter that session.

**HOW CAN I VIRTUALLY ENGAGE DURING THE TRAINING?**
As an attendee, you can mute/unmute your audio, chat, raise your hand, and type questions into the Q&A box. You will see these controls on your screen.

**HOW DO I USE THE ZOOM CONTROLS?**

**Audio Settings:** After logging in, click audio settings to test your speakers and microphone.

**Unmute/Mute:** If the presenter gives you permission, you can unmute your line and talk during the training. Your computer microphone must be connected for you to speak in the session.

**Chat:** Please utilize this space to chat with other attendees. If you have formal questions you want the presenter to answer, please either raise your hand or type into the Q&A box.

**HOW DO I LEAVE OR REJOIN THE TRAINING IF NEEDED?**
There will be plenty of breaks throughout the two days, but if for some reason you need to leave the meeting briefly, click “Leave Meeting.” If you do leave or if you get disconnected, you can rejoin by clicking on the same link. You can also choose to stay in the meeting if you are just stepping out for a few minutes.
WHO CAN I CONTACT IF I AM HAVING TROUBLE CONNECTING?

If your coach is…

- **Jay or Deborah’s Groups**
  - Contact Conner Peckham, connerp@murdocktrust.org or 503-720-5071

- **Amy or Jim’ Groups**
  - Contact Amy Dickerson, amyd@murdocktrust.org or 661-319-2989

- **Nancy or Brad’s Groups**
  - Contact Jennifer Larson-Cody, jenniferl@murdocktrust.org or 360-901-2407

**GROUP 1**
Camp Bighorn  
HIS Heart Foundation  
Hope Unlimited  
Mission ConneXion Northwest  
Music Workshop  
Second Cycle

**GROUP 2**
Action USA  
Camp Pinewood  
Guardian Group  
Payette Land Trust  
Pregnancy Care Center  
Project Lemonade

**GROUP 3**
New Earth Recovery  
Ross Pointe Camp & Conference Center  
Royal Ridges  
San Juan Community Theatre  
Youth Dynamics  
Youth Progress Association

**GROUP 4**
Child Beyond International
MONDAY, MAY 18, 2020

9:00am  SESSION 1 | Session 1 Zoom Meeting  Brad and Co.
  • Welcome/Introductions
  • Review (Quiz)
  • Have every group share a win on fundraising
  • What questions need to be answered?

10:30am  Break

10:45am  SESSION 2 | Individual Zoom Links  Coaches
  Review each Organization’s Annual Plan (meet as a cohort)
  • Jim
  • Jay
  • Nancy
  • Brad
  • Amy
  • Deborah
  • John - Backbenchers

12:00pm  Lunch
  Coaches available for special questions during lunch
  • Jim: (503) 449-9615
  • Jay: (503) 784-1383
  • Nancy: (425) 879-7414
  • Brad: (904) 687-7876
  • Amy: (503) 680-9325
  • Deborah: (206) 369-8500

1:00pm  SESSION 3 | Session 3 Zoom Webinar  Brad and Co.
  • The Asking Process
  • Role plays (Brad prepare)
  • Announce Breakouts
  • Announce Summer Coaching

2:15pm  Break

2:30pm  SESSION 4 | Breakout Sessions  Coaches
  Review the 4 Steps of the Asking Process (Role Plays) (Meet as a cohort)
  • Jim
  • Jay
  • Nancy
  • Brad
  • Amy
  • Deborah
  • John - Backbenchers

3:45pm  Break
4:00pm  SESSION 5 | Breakout Sessions - Individual Meetings with Coaches

**Group 1** | 45 minutes each with 1 group to review Segmented List, discuss their Development Team, review Case Statement (if necessary)

- Jim - Mission Connection
- Jay - HIS Heart Foundation
- Nancy - Camp Bighorn
- Brad - Hope Unlimited
- Amy - Music Workshop
- Deborah - Second Cycle

Groups 2, 3, 4 & Backbenchers | Approaching a Private Foundation | John

4:45pm  SESSION 6 | Session 6 Zoom Webinar

- Questions, general discussion, and review tomorrow
- Instructions for tomorrow
- Announce Summer Coaching

4:45pm  SESSION 6 | Session 6 Zoom Webinar | John

5:15pm  Session 7 | Breakout Sessions Individual Meeting with Coach [Group 4 Only]

**Group 4** | 45 minutes each with 1 group to review Segmented List, discuss their Development Team, review Case Statement (if necessary)

Jay – Child Beyond International

Group 1, 2 & 3 | Early Release. See you tomorrow!
TUESDAY, MAY 19, 2020

8:00 am  SESSION 7 | Breakout Sessions - Individual Meetings with Coaches

Group 2 | 45 minutes each with 1 group to review Segmented List, discuss their Development Team, review Case Statement (if necessary)

- Jim - Pregnancy Care Center
- Jay - Payette Land Trust
- Nancy - Camp Pinewood
- Brad - Action USA
- Amy - Guardian Group
- Deborah - Project Lemonade

Group 1 | Approaching a Private Foundation  John

Group 3 | Social Media & Development  Colby Reade

Group 4 & Backbenchers | Late Start (Join Breakout at 8:45am)

8:45 am  SESSION 8 | Individual Meetings with Coaches

Group 3 | 45 minutes each with 1 group to review Segmented List, discuss their Development Team, review Case Statement (if necessary)

- Jim - Youth Dynamics
- Jay - Youth Progress
- Nancy - Ross Pointe Camp
- Brad - Royal Ridges
- Amy - New Earth Recovery
- Deborah - San Juan Community Theatre

Groups 1, 2, 4 & Backbenchers | Social Media & Development  Colby Reade

9:30 am  Break

9:45 am  Affinity Groups  Coaches

- EDs: John & Deborah
- DDs: Brad & Nancy
- Board: Jay, Amy, Jim

10:45 am  Break

11:00 am  Major Donor Panel – Zoom Webinar  Brad

12:00 pm  Lunch & Learn  Brad & Amy

- Estate Planning Lunch Seminar (Brad)
- Maximizing Events for Tier 3 Donors (Amy)

1:00 pm  FINAL SESSION | Final Session Zoom Meeting  John

- Stand & Declare
- Final Questions
- Surveys/Summer Coaching

2:00 pm  Adjourn