



10 Week Agenda

Week 1 - Program Kickoff

- Program & Instructor Introduction
- The Fund Management Playbook
- Pre and Post Work
 - Weekly Survey
 - Executive Presentation
- Research-Backed Insights

Week 2 - Fund Management Maturity

- The Fund Management Maturity Model
- Participant Introductions
- Program Goals

Week 3 - People & Governance

- Leadership & Strategy
- Staffing Fund Management Teams
- Committees, Workgroups, and Task Forces
- Training Plans and Templates

Week 4 - Processes & Procedures

- Policies, Procedures, Rules
- Guidelines & Practices

Week 5 - Donor Intent & Gift Agreements

- Donor Intent
- Agreement Guidelines Templates
- Amendments
- Approval Process
- Fund Structure

Week 6 - Tools & Technology

- Tools and Technology
- Data Hygiene
- Fields and Funds

Week 7 - Internal Fund Management

- Internal Partner Relationships
- Review Frequency
- Fund Management Metrics
- Internal Reporting Cadence
- Spending Plans/Budgeting
- Reinvestment

Week 8 - Scholarships & Recipients

- Scholarships & Fellowships
- Other Awards
- Award Timeline
- Award Process

Week 9 - Donor Reporting

- Impact & Financial Reports
- Other Campaigns
- Narrative Collection
- Sample Sharing

Week 10 - Program Closing & Presentations

- Executive Presentations
- Executive Leadership, Board, and Committee reporting
- Resource Request
- Program Reflection & Closing