

*We inspire and ignite the health of the Inland Empire*



## **Vibrant Health Fundraising Cohort (2026 Spring)\***

Participants selected for the Vibrant Health Fundraising Cohort (2026 Spring) are expected to attend all classes in their entirety, as classes are not recorded and each class provides a foundation for the class to come. Participants are also required to schedule two individual coaching sessions (45 – 60 minutes each) with Launa Wilson. Upon completion of the class series, participants will receive a Certificate of Completion from IEHP Foundation and the fundraising coaches.

**Participant Expectation:** In order to meet the class attendance requirement, it must be the same person from the organization attending all classes, attending the individual coaching sessions and completing all practical assignments. Please note that coaching sessions are intended to be for individual support – no additional staff from the organization should be joining those sessions.

**Time Commitment:** Practical assignments will be assigned for each class and it is anticipated that these will take approximately 2 hours to complete. In total, considering both assignment and class time, participants should anticipate a commitment of approximately 4 hours per week from May – July 2026.

**Class Location:** All classes will take place in-person at IEHP Center for Learning & Innovation (9500 Cleveland Avenue, Rancho Cucamonga, CA 91730).

*Failure to meet the attendance and engagement requirements may result in dismissal of the participant from the program.*

*\*Classes subject to change with advance notice.*

**Schedule of Classes**

| Class | Class Topic(s)  | Instructor   | Class Learning Outcomes & Assignments   | Room     | Date                     | Time     |
|-------|---|--------------|---|----------|--------------------------|----------|
| 1     | Case for Support & Fundraising Calendar   | Launa Wilson | Participants will be able to articulate a compelling case for support that aligns with their organization's mission. Participants will develop a strategic fundraising calendar that incorporates key fundraising activities.<br><br><b>Practical Assignment:</b> Complete Fundraising Calendar & Case for Support  | Amethyst | Tuesday, May 5, 2026     | 9a – 12p |
| 2     | Stewardship Matrix, CRM and Website Mini Audit  | Lisa Wright  | Participants will design a stewardship matrix to effectively cultivate and retain donors; and coaches will conduct a mini CRM and website audit with each participant and make recommendations.<br><br><b>Practical Assignment:</b> Complete Stewardship Matrix   | Sapphire | Wednesday, May 20, 2026  | 9a – 12p |
| 3     | Review Stewardship Matrices & Portfolio Development                                       | Lisa Wright  | Participants will understand different donor types (major, leadership, event, annual, planned, combination) and the time needed to steward each type of donor.<br><br><b>Practical Assignment:</b> Draft Portfolio of Donors  | Amethyst | Wednesday, June 3, 2026  | 9a – 12p |
| 4     | Tiering Donors and Setting Annual Goals + Accountability Structures                       | Launa Wilson | Participants will create or refine a donor portfolio, including donor tiering and goal setting. Participants will also learn more about effective event fundraising.<br><br><b>Practical Assignment:</b> Finalize Tiering Donors + Annual Goal; Volunteer & Leadership Team Fundraising Engagement Activity   | Sapphire | Wednesday, June 17, 2026 | 9a – 12p |
| 5     | Discovery Visits & Cultivation Visits; Volunteer & Leadership Team Fundraising Engagement | Lisa Wright  | Participants will be able to conduct an effective discovery visit to identify potential donor interests. Participants will be able to plan and execute a cultivation visit with a tailored action plan. Participants will also learn about how to utilize the organization's fundraising staff, organizational leadership, volunteers, other organizational staff and Board for fundraising success.<br><br><b>Practical Assignment:</b> Plan for each donor in portfolio | Amethyst | Wednesday, July 1, 2026  | 9a – 12p |

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|---|---|----------------------------|---|----------|--------------------------|----------|
| 6 | Proposal Development and Ask Role Playing   | Launa Wilson               | <p>Participants will be able to develop a clear and persuasive fundraising proposal. Participants will be able to confidently conduct an ask visit to solicit major gifts.</p> <p><b>Practical Assignment:</b> Draft proposal</p>   | Sapphire | Wednesday, July 15, 2026 | 9a – 12p |
| 7 | Ask Role Playing & Certificate Presentation | Lisa Wright & Launa Wilson | <p>Participants and their organization’s leader will be invited to this class to learn about what was taught during the class and workshop their fundraising plan together.</p> <p>The last hour of the class will include a certificate presentation, where key IEHPF staff and board members will be invited to attend.</p> | Sapphire | Thursday, July 30, 2026  | 1p – 4p  |

**Coaching Sessions:** Participants are expected to schedule (2) individual coaching sessions (45 – 60 minutes each) with Launa Wilson. The first coaching session must be scheduled prior to July 30, 2026 and all coaching sessions must be completed before August 28, 2026. A sign-up link will be provided to participants selected for a cohort at a later date.