



# Major Gift Coaching Circle

Elevate Your Major Gift Strategy: Join our coaching circle today!

## Why Coaching Circles?

A small number of donors now give most of the money—and the number of individual donors keeps shrinking. As a result, it is more important than ever to have a strong strategy for engaging donors at every level, especially major donors. Many nonprofit leaders and fundraisers don't feel confident in this work. Our coaching circles provide the support, skills, and community they need to succeed.

## Circle Insights & Deliverables

Over six months, participants collaborate with the Excelsior Bay Group coach to:

- create personalized cultivation strategies for major and mid-level donors
- enhance donor interactions and solicitations through preparation and evaluation
- establish and nurture exceptional individual giving programs

Contact Elena Giannetti on our team to learn more or register for our next session: .

[EAGIANNETTI@EXCELSIORBAYGROUP.COM](mailto:EAGIANNETTI@EXCELSIORBAYGROUP.COM)

## Target Audience

- Executive Directors
- Development Directors
- Other Fundraising Staff
- Board Members

## Format

The series consists of six (6) sessions and is delivered:

- in-person
- in monthly, three-hour sessions

## 2026 Circles

- 12:30 - 3:30 pm
- Fourth Wednesday of the month (*November and December are one week prior to accommodate holidays*)

**Winter Circle:** Begins 1/28/2026

**Summer Circle:** Begins 7/22/2026



**EXCELSIOR BAY GROUP**  
FUNDRAISING AND PHILANTHROPIC ADVISORS

# Coaching Circle Details

## **Guidance and Support:**

The circles provide an intimate and confidential setting for participants to share their challenges and success and learn how to:

- Develop an effective case for philanthropic support.
- Clarify fundraising priorities and setting attainable goals.
- Qualify major donors, developing major gift portfolios, and establish appropriate program parameters for sustained success.
- Cultivate major donors to deeper engagement with your organization and make effective major gift solicitations.
- Refocus your organizational development efforts to create more time for major gift fundraising.

## **Coaching Circle Structure:**

- Expert nonprofit consultant and coach Kim Snyder leading the circle.
- Limited to a maximum of 6 participants, ensuring personalized attention.
- Six monthly meetings to foster growth and development.
- Private intake meetings with each participant, evaluating their major gift readiness and identifying specific coaching needs.
- Up to 2 hours of individual coaching per participant, tailored to support efforts to build and grow high performing major gift programs. These sessions can be conducted in person or virtually.
- Cost: \$1950 per person

