



# Certification Course for Managers and Executives

## COURSE OVERVIEW

The Certification Course for Managers and Executives is a comprehensive training designed to support non-profit leaders seeking to strategically and impactfully establish a system and structure that will create major gifts success.

### Key Course Details:

- ✓ 8 modules
- ✓ 36 CFRE Credits
- ✓ Ideal for Directors of Development, VPs of Development, Executive Directors, and other manager roles

This course is not just a series of boring lectures! You'll receive a multi-media experience complete with our best tools and strategies for managing the financial and economic aspects of your mid, major, and planned giving programs. Your instructors will be: Veritus' Founding Partner Richard Perry, Senior Partner Jeff Schreifels, and our Veritus coaches with deep expertise in The Veritus Way of fundraising.

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### Topics Include:

- The leader's role in major gifts and how leaders can impact the success of your fundraising program.
- The Veritus Way of fundraising and how the right system and structure can lead to a more successful program.
- How major gifts programs fit into your non-profit strategy.
- How to hire the right fundraisers.
- How to retain and properly manage your team.
- The right approach to learning your donors' passions and interests.
- How to create meaningful and effective donor offers.



- How to support your fundraisers in effectively managing their caseloads.
- How to create a system of accountability around creating qualified, tiered caseloads with a personalized plan, goal, and strategy for every donor.
- How to establish the right evaluation system.
- Understanding the right metrics to track to measure meaningful connections.
- How to properly evaluate and reward your fundraisers.
- How to use permission-based asking with donors and being active in asking donors for gifts.
- How to be an effective leader and stay focused on managing your fundraising programs for success.

## How Does This Differ from the Economics of the Major Gift Pipeline?

The Economics of the Major Gifts Pipeline	Certification Course for Managers and Leaders
Focused on the financial management side of non-profit leadership	Focused on understanding how to appropriately manage your major gifts program
Audience: Leaders <i>No MGO companion course</i>	Audience: Leaders <i>MGOs are encouraged to take the Certification Course for Major Gift Fundraisers that runs parallel to this course</i>
Deep dive into the donor pipeline and economics of fundraising	Broader training on how to think about major gifts, hiring/retaining/managing MGOs, how to think about donors, supporting your MGOs in donor strategy, learning how to ask and how to support your MGOs in the ask, evaluation/reporting, and accountability
Richard and Jeff's book <i>It's Not JUST About the Donor</i> is required reading and provided as part of the course	Richard and Jeff's book <i>It's Not JUST About the Money</i> is recommended reading and provided as part of the course
<b>CFRE Credits:</b> 19 Hours	<b>CFRE Credits:</b> 36 Hours



***"Veritus' Certification Course for Managers and Executives is extraordinary – it's the best fundraising course I have ever taken – and I have taken many! It is both inspirational and extremely grounded in data. I have learned so much about how to set goals for my team, how to evaluate performance, how to coach my team, as well as how to prepare realistic fundraising revenue projections, based on actual plans for every donor."***

— Mary McGee, Director of Leadership Giving

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## Why Should You Take This Course?

Most leaders are promoted into positions or brought into a role that comes with a number of challenges to address, without receiving any training to support them in their new role. In this course, you'll learn how to manage your program, how to reinforce the systems and structures that will help your fundraisers be successful, and how to effectively evaluate your program. This course not only provides you with encouragement and guidance on how to be a successful leader, but also offers specific tools and resources to help you manage your fundraising program.

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### Connect with us:

If you are ready to learn to lead a successful major gifts program and understand the critical financial pieces of that work, you can learn more about this and other trainings at: <https://veritusgroup.com/training/>

### Questions? Contact our Community Experience Team

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