



Certification Course in Mid-Level Fundraising

COURSE OVERVIEW

The Certification Course in Mid-Level Fundraising is designed to provide a comprehensive training for Mid-Level Officers. We'll focus on how to excel in creating meaningful relationships with donors, how to properly move donors in and out of mid-level, and how to drive increased net revenue for the organization.

Key Course Details:

- 8 modules
- 36 CFRE Credits
- Ideal for Mid-Level Officers and Mid-Level Program Team Leads

This course is not just a series of boring lectures! You'll receive a multimedia experience complete with our best tools and strategies for setting up, executing, and managing your mid-level caseload. You will be instructed by our expert Veritus coaches, who have deep expertise in our approach to mid-level fundraising.

Topics Include:

- The importance of the donor pipeline and the role mid-level plays in a healthy pipeline
- Identifying donor attrition and value attrition, why we believe donors leave, and how a mid-level program can impact this trend
- The right structure and performance metrics for a mid-level program
- Setting the right boundaries for MLOs
- Creating a culture of philanthropy that is focused on creating a system where donors can give to their capacity
- The qualities and skill sets that are most successful in MLOs and how to develop your areas of growth
- How to identify donor passions and interests using open-ended questions
- How to build or re-establish trust with a donor



- Creating meaningful connections with donors and how to measure them
- How to use and adjust the Business Rules
- Important data clean-up steps that need to happen before you get started
- Developing the right caseload of donors
- Tiering your caseload for effective outreach and engagement
- How to move donors out of and into mid-level, including removals, additions, and promotions to major gifts
- The introduction cycle
- How to use and create annual communication plans
- Creating personalized communication pieces
- How to confidently ask for gifts using permission-based asking
- Addressing fears around asking
- Creating offers in mid-level and understanding what you need to ask for internally

“When you complete Veritus’ Mid-Level Fundraising course, you walk away with everything you need to implement the program. I’ve worked in development for 10+ years, and I really appreciate having a process in place that has been proven to be successful. Managing a portfolio makes the work seem possible and not overwhelming. If you are considering the course, do it! You’ll walk away with a process, materials, and a concrete plan to match your donors’ interests and passions with your organization. Your donors will feel like they’re improving the world, and your organization and those it serves will thrive.”

— Beth Frear, Manager of Sustaining and Legacy Gifts



Why Should You Take This Course?

Your mid-level program is a critical way for you to strengthen your donor pipeline to move more donors to major gifts, better retain your donors, and increase net revenue to support your mission. This course provides a comprehensive training with all the resources needed to create or reset your mid-level program.

Connect with us:

If you are ready to learn how to create, manage, and execute your mid-level program, you can learn more about this and other trainings at: <https://veritusgroup.com/training/>

Questions? Contact our Community Experience Team

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