



MODULE 1: Setting Your Program Up for Success

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
Setting Your Program Up for Success	Understanding How Organizational Culture Impacts Fundraising	How to embrace the value of a relationship-focused major gifts strategy and celebrate the role a donor plays in your community and mission.
	Must Have Pillars of a Thriving Major Gifts Program	Understanding the impacts of donor and value attrition on your fundraising efforts. An overview of our core system and structure.
	Introducing the Business Protocols	Overview of our Business Protocols template.
	Understanding the Economics of Major Gifts	Understanding the economic side of fundraising. Learn what every fundraiser needs to understand about the financial approach to major gifts.
	Building a Culture of Philanthropy	How to create a culture of philanthropy and address challenges in your culture.



MODULE 2: Using Permission-Based Asking with Donors

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
Using Permission-Based Asking with Donors	What Gets in the Way of Meaningful Conversations	Learn the barriers that can cause you to not connect in an authentic way with your donors.
	Understanding the Permission-Based Asking™ Model	Overview of how to use permission-based asking in any donor conversation. Learn how the model works, the roles you play, and how to use transition questions to check in with your donors.
	Using Permission-Based Asking in Any Conversation	Hear examples and role playing for how to use permission based asking in a variety of donor interactions including learning a donor's passions and interests, making an ask, the qualification intro call, and more.
	Building Authentic Relationships with Donors	Learn how to discover a donor's passions and interests in a genuine way and how to approach building long-lasting relationships.
	Making the Ask and Addressing Common Responses	Learn how to use Permission-Based Asking to ask for a gift and how to address common responses (including getting a "No") in a way that strengthens your relationship with the donor.



MODULE 3: Understanding the Donor Pipeline

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
Understanding the Donor Pipeline	Understanding the Donor Pipeline	Overview of the donor pipeline and all components of the pipeline and how they work together.
	How Your Donor Pipeline and Organization Structure are Connected	Learn the way your pipeline and structure interact and why there needs to be alignment between the two areas.
	Overview of Mid-Level and Planned Giving	Major gifts is deeply connected to your organization's mid-level and planned giving efforts. It's imperative that you have a base understanding of those functions and how they relate to your work in major gifts.
	Managing a Hybrid Caseload	While it's not our recommendation, the reality is that some programs must start as hybrid programs. Learn how to approach this and plan for moving into a full major gifts caseload.



MODULE 4: Creating a Qualified Caseload

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
Creating a Qualified Caseload	Overview of the Donor Engagement Plan	Overview of how to use the Donor Engagement Plan as a caseload management tool.
	Getting the Data Right	Learn what you need to do to ensure you have the right data before you begin creating your caseload(s).
	Managing the Right Donors	Learn how to qualify a caseload of donors so you're managing donors who want to engage and connect with you and have a meaningful relationship with your organization.
	Tiering Your Caseload	Learn how to tier your caseload so that you're prioritizing your time and energy in a healthy and balanced manner.



MODULE 5: Creating the Right Major Donor Strategy

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
Creating the Right Major Donor Strategy	Planning with the Donor Engagement Plan	How to use the Donor Engagement Plan to plan your communication strategy for each qualified donor.
	Creating Meaningful Connections	How to think about creating meaningful connections. Learn how to measure and shift metrics to focus on building authentic relationships with your donors.
	Communication Planning Tools	Learn the tools you have available to create a meaningful, valuable, and relevant communication plan for each qualified donor.
	Mastering Different Types of Touch Points	How to build communication plans using a mix of information to deepen your donor's connection to your organization and speak to their passions and interests
	Creating Strategic Plans	Not only is creating a strategic plan for every donor possible, it is necessary to stay on track and realize success as an MGO. Follow our step-by-step process to put your plan together.
	Setting Goals for Every Qualified Caseload Donor	Gain context. Set goals donor by donor. Review goals, looking for trends in wrong direction, flat giving, total performance in past years. Identify five high capacity donors and set high goals for them. Have two goals: private/stretch and management.
	Planning for Transformational Gifts	Finding the few. Create transformational giving plans that will nurture a deeper relationship and lead to more significant giving.

Metrics, Evaluation, and Accountability

Set up a system for evaluation and metrics that is grounded in developing meaningful relationships with your donors. Incorporate accountability in a positive and supportive way.



MODULE 6: Creating Meaningful Donor Offers

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
Creating Meaningful Donor Offers	Sharing Stories and Reporting on Impact in an Honoring Way	How we share stories about the work our organization is doing can actually cause harm to the people we're serving. Learn how to artfully and thoughtfully share stories that honor those you work with.
	Overview of a Donor Offer	Share the problem in human and emotional ways. Learn the components of a meaningful offer. Understand the obstacles that block fundraisers from creating offers.
	Creating a Donor Impact Portfolio	Learn how to create a Donor Impact Portfolio spreadsheet as a reference document for every fundraiser at your organization.
	Equivalency Language	Learn how to create equivalency language to more directly communicate impact to your donors.
	Creating a Donor Offer Toolkit	Learn to adapt your Donor Impact Portfolio and build out donor offer toolkits to support your fundraising efforts.



MODULE 7: How to Be the Best Major Gifts Officer You Can Be

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
How to Be the Best Major Gifts Officer You Can Be	Skills and Qualities of Great MGOs	Understand the core skills that make successful MGOs. How to develop in the areas that are not your strengths.
	Understanding Your Personality, Gifts, and Talents	You bring a unique perspective and experiences to your work. Learn to understand how you approach this work, how to use your personality to connect meaningfully with your donors, and how to create a learning and growth habit.
	Setting Boundaries to Maintain Healthy Relationships with Donors	It's important to set healthy boundaries with your donors. But when things cross the line, they need to be addressed directly and promptly. Learn how to set boundaries in all of your donor relationships and address inappropriate situations.
	Making Space to Care for Yourself	Learn how to make space for self-care so you are caring for yourself and avoiding burnout.
	Embracing Ongoing Learning and Professional Development	Establish the foundation for building a habit of curiosity and embrace the powerful potential of adopting a learning mindset.



MODULE 8: Keep Working Your Plan

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
Keep Working Your Plan	The Veritus Way in One Year	Get a picture of how this strategy works over the course of a year and what you need to focus on specifically at various times of year.
	The Ideal vs. The Reality	Through this course, you've learned the ideal system and structure. Learn how to adapt it for your reality to stay true to the strategy and create reasonable expectations.
	Completing the Course	To complete the course, ensure you've completed all assessments in the course.