



MODULE 1: How to Manage a Successful Major Gifts Program

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
How to Manage a Successful Major Gifts Program	Focusing on the relationship not the money.	Steps to change how MGOs think, and to help the organization change as well.
	The Veritus Philosophy of Major Gifts	Two Principles: Donor-related and organization-related. Get in touch with your own thinking on money and why you value it over relationship
	Understanding the Problem & the Opportunity	Dealing with donor attrition and value lost. The opportunity to retain donors and recapture revenue.
	The Veritus Way	Learn the 10 step process to ensure you can grow a successful major gift program.
	Major Gifts Readiness & Development	Understand the Major Gift Pipeline and the essential elements of a major gift program survey.
	Understanding the Economics of Major Gifts	Overview of why you should invest in major gifts, when to add MGOs, setting revenue expectations, ROI, and back office investment. How to do each of these will be taught in-depth throughout the course.
	Creating a Culture of Philanthropy	How to create a donor-focused culture. To develop a culture of philanthropy, you: 1) Need to get your head and heart right; 2) Make sure donors are your mission; 3) Leadership must be on board; 4) You must tell your story right; 5) Everyone in the org must be involved; 6) Needs must be expressed in real terms.



MODULE 2: How to Hire and Retain High Performing MGOs

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
How to Hire and Retain High Performing MGOs	Set Up Your People and Numbers the Right Way	Learn the step-by-step process to calculate how many MGOs should be on your team, create your Major Gift Budget, create revenue expectations for your MGOs, create a Major Gift expense budget, set expectations for ROI, and get your expectations right.
	Learn About the Elements of the Right Job Description	Donor-centered title, report to one person, clear objective/purpose statement, leave out non-MGO tasks, five categories of work (qualify, goals, plan, work with program, other MGO duties), accountability section for results.
	Know the Right Hiring Criteria-What Are You Looking For?	Know the qualities of high-performing MGOs and how to find them. How to uncover aptitude vs. attitude characteristics.
	Major Gifts Readiness & Development	Learn the 10 step process to ensure you can grow a successful major gift program.
	Know How to Interview Candidates	Who should be included in the process, develop your list of interview questions, and learn how to listen to the facts and your gut.
	Learn Why MGOs are Leaving and How to Retain Them	Why do they leave & learn key strategies on how to retain them.



MODULE 3: How to Think About and Treat Donors

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
How to Think About and Treat Donors	The Three Operating Principles of Major Gifts	How to identify donor passions and interests. Money is the result, not the objective. Your donors want to know they made a difference. Managing a healthy donor relationship.
	Providing Admin Assistance and Creating a Strong Back Office System.	Learn the step-by-step process for calculating the ROI of adding admin support. Assess your back office system and support. Dealing with donor attrition and value lost. The opportunity to retain donors and recapture revenue.



MODULE 4: Creating Meaningful and Effective Donor Offers

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
Creating Meaningful and Effective Donor Offers	How to Help Your Staff Define the Problem your Organization is Addressing	Steps that are necessary to take in defining the problem.
	How to Assure that Program and Finance are Supportive of the Process of Creating Donor Offers	Setting up the relationship and systems of support with program to ensure you have a flow of stories, pictures, program needs for donor offers and touch points. Re-framing numbers with finance that are stored for organizational purposes into donor-friendly numbers.
	Getting Everyone on Board with Packaging Your Budget for Donor Offers	How to get leadership on board. Making sure program understands what fundraising is trying to do. Ensuring there is a commitment to allocating overhead to program categories and donor offers.
	Packaging Program for Donor Offers	How to create definitions for each program category. Then, divide the entire budget into those categories, allocate overhead and remember that the exercise is not about organizational ratios for watchdog agencies - it is about donors.
	How to Create Proposals that Work	The four elements of a compelling donor offer. Five ways to collect stories for donors. And, the five steps to proposal writing.
	Proof of Performance	Make sure program can tell the donor that their gift made a difference.



MODULE 5: Managing Caseloads with the Right Principles, Systems, and Structures

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
Managing Caseloads with the Right Principles, Systems, and Structures	Caseload Principles	The importance of a qualified caseload. Caseload objectives and realities.
	Creating a Caseload Pool	Step by step process to pull the right donors for the qualifying process.
	The 7 Steps of Qualifying	Seven critical steps of qualifying a donor out of a caseload pool.
	Setting Goals	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.
	Tiering Donors	How to tier qualified donors and use time accordingly.
	The Importance of a Personalized Plan for Every Donor	Have your MGOs be donor centered with a individualized 12 month plan for each donor through the Marketing Impact Chart.
	Conflict Between Caseload Management and Prospecting	Having only qualified donors on a caseload. The importance of a prospecting system within the organization. The MGO should always have a small pool (10) of prospects she is trying to qualify. Management needs to maintain balance in this dynamic.



**MODULE 6: Setting up the Right Accountability and
Evaluation Systems for your MGOS**

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
Setting up the Right Accountability and Evaluation Systems for your MGOS	Old Money vs. New Money	How new money covers the loss of old money and the causes of value attrition, which is at 40-60% each year. Managing a caseload will reduce attrition. This reduction of loss is "found" money. The MGO contributes in two ways: found and new money .
	What Matters in Reporting	The key factors and elements in major gift reporting.
	Meaningful Connections v. Activity - The Veritus Metrics	Most major gift programs measure activity not meaningful connections. What constitutes a meaningful connection. How to focus on what's really important.
	Evaluating and Rewarding MGOs	The major points in evaluating and rewarding MGOs.
	Managing with the Marketing Impact Chart (MIC)	What it is, how it works, how to support your MGOs in building a MIC, using the MIC for accountability, understanding the timeline, donor strategy and moves management.



MODULE 7: Securing the Gift and Keeping the Donor with the Permission-Based Asking™ Model		
MODULE TOPIC	MAJOR TOPIC	CORE POINTS
Securing the Gift and Keeping the Donor with the Permission-Based Asking™ Model	Why Asking is Important	Asking is the ultimate form of serving the donor. Reasons organizations and MGOs don't ask and should.
	The Role of Trust in Major Gift Fundraising	How to trust yourself. Building trust in donor relationships and within the organization. How building trust builds your reputation. How to restore lost trust.
	Steps to Preparing for the Ask	Knowing donor's passions, interests and communication preference. Knowing program and matching the donor to the program. Understanding cost and impact.
	The Permission-Based Asking™ Model	Overview of our new asking model and how it will change your approach with donors. Learn how to effectively perform the roles of partner and facilitator. Understand how to address and prepare for various responses from donors.
	The Leaders Role in Asking	Creating the right systems and culture to ask donors for support. Taking part in and defining your skill set and role in asking.
	Preparing Yourself for the Ask	Learn tools to manage your fears and resistance to asking. Get clear on the donors right to say no or not now and not take their responses personally.



**MODULE 8: Being an Effective Leader and Establishing
Ongoing Planning and Analysis**

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
Being an Effective Leader and Establishing Ongoing Planning and Analysis	Being an Effective Leader	Assess your areas of strength and areas for growth and create a plan for your continued personal development.
	Critical Times for Planning & Analysis	Step by step planning process with worksheets to support key times in the year for analysis and planning.
	Staying Focused	Creating and implementing your MGA Integration Plan.
	Where Does Your Major Gift Program Go From Here	Overview of our new asking model and how it will change your approach with donors. Learn how to effectively perform the roles of partner and facilitator. Understand how to address and prepare for various responses from donors. .