

Major Gift Academy: Learning Guide

Certification Course for Fundraising Managers and Executives

Module Titles	Module Content	
MODULE 1		
How to Think About Major Gifts	Problem & Solution	
	Understanding the Problem & the Opportunity	Attrition and revenue lost
	The Solution	The Veritus system
	Philosophy:	
	Treat Donors as partners vs. sources of cash	They are not ATMs. They want impact, they want to know you and be known.
	Donors Have Life	Give more than annually fallacy. If you have a need, you should ask.
	Money Transfers Value	Donors' giving is how they transfer the value of their own past work into the org's mission.
	Money is result not Objective	Two Principles: Donor related, Organization related - get in touch your own thinking on money and why you value it over relationship
	Relationship Over Revenue	Core philosophical point
	Remember who owns your org	A philosophical session on the fact that it is the public that owns the organization not the board or the leader or founder.
	Keeping the right emphasis in leadership	People vs. program Relationship vs. money Doing the right things vs. getting stuff done Impact vs. OH percentages Effectiveness/Opportunity vs. Power/Control Greatness vs. Growth
	Creating The Right Culture	
	Creating a Donor Focused Culture	How to - a must for every leader
	Create a culture of philanthropy	1) Need to get 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.
	Creating the Right Infrastructure	
	Building the Right System for Success	Management how to
	Creating or rebuilding your major gift program	"
	Creating the right structure	"
	Investing in Major Gifts	Juxtaposing expense against revenue lost
	Providing administrative support	This is economically justified.

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	Investing in donor back-office systems	Need to address 7 major problems: receipting/donor care, admin support, data processing, research, lack of donor offers and proposals, lack of measuring impact, MGOs tasked with other duties.
MODULE 2	The Economic Elements of Major Gifts	
Economics of Major Gift Fundraising	Old Money vs. New Money	Value attrition is at 40-60% each year. Just managing a CL will reduce attrition. This reduction of loss is "found" money. The MGO contributes in two ways: found and new money.
	Economics of a caseload	It costs money to manage a donor. Each CL donor must yield NET revenue. An MGO needs to walk away from a donor that doesn't contribute NET revenue.
	Who gets the credit?	The gift is made by a donor who is on an MGO CL. The gift was made after assignment to the CL. The MGO can document activity, prior to gift, of purposeful and meaningful engagement.
	How caseload value grows over time.	A well-managed caseload will yield increasing gifts over time.
	Spotting the few in the caseload	MGOs must tier and prioritize their CL. Understand the difference between liking your donor and understanding her economic potential. Get to know all their donors so they can discern who can contribute substantially. Develop a plan to cultivate and ask.
	The importance of a qualified caseload	Most donors do not want to relate personally. An MGO only has so much time. They must be a good steward of their labor.
	Building An Effective Caseload	
	Caseload principles:	
	2 Objectives	One is donor centered - relational. The other is organization centered - the revenue.
	3 realities	1) As time passes some of the current 150 donors will drop off. 2) As time passes, new donors of higher value will surface. 3) Therefore current lower value donors should be replaced with new higher value donors.
	Conflict between CL Management & Prospecting	MGO should have only qualified donors on CL. There should be a prospecting system in place in the org. The MGO should always have a small pool (10) of prospects she is trying to qualify. Management needs to watch the balance this dynamic.
	Ideal composition of a CL	Not all donors are the same. Learn how to think about and manage the difference.

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How to create a caseload pool	Select from active donor file using 5 criteria: Recency, Gift Amount, Capacity, Relationship, Frequency
The 7 steps to qualifying	1) Send intro letter 2) Call donor 3) Touchpoint & Personal Note 4) If no response, send survey 5) Touchpoint 6) Phone Call 7) Final Note
Marketing Impact Chart	Introduction to the Planning Tool
Setting goals	1) Get context. 2) Get MGO to set goals donor-by-donor. 3) Review goals looking for trends in wrong direction, flat giving, total performance in past years. 4) Identify five high capacity donors and set high goals for them. 5) Have two goals: private/stretch and management.
Cash flow Goals	The process and system for cash flowing goals so the MGO can know when to expect gifts and management can have a better forecast
Tiering Donors	How to tier donors and prioritize use of time against each tier. Use caseload mix chart
Refreshing the caseload	1) ID and remove donors who have gone silent or gone away. 2) Pass donors who notified you of life change that affects their current giving level to someone else. 3) Replace those donors with new ones, using the qualification process. 4) Be sure to tier the new donors
MODULE 3	
Hiring & Retaining MGOs	
Get the job description right	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.
Hiring Criteria	Intellectual/social curiosity. Behaviorally and linguistically flexible. Loves distilling information. Strategic solicitor
4 Characteristics:	Donor Centered - Mission Driven
Attitude vs. aptitude:	Understands a donation is an exchange of values. People oriented. Desires to be in field vs. office. Enjoys getting results through own efforts. High degree of confidence. Handles rejection well. Restless & achievement oriented.
Essential traits:	Why do they leave & how to retain them.
Keeping & Losing Your MGO	Making sure your MGO doesn't burn out.
How you can help avoid MGO burnout	

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MODULE 4		
Securing The Gift And Keeping The Donor		
	Creating Donor Offers	
	Elements of a Donor Offer	
	Connection between large gifts & program packaging	Without a good donor offer management cannot have an expectation for large gifts.
	Program Packaging	
	Phase 1: getting people on board - 3 points	Get leadership on board, make sure program understands what you are trying to do, make sure of overhead allocation commitment.
	Phase 2: The process - 4 points	Create definitions for each program category, divide entire budget in program categories, allocate overhead, remember that the exercise is not about organizational ratios for watchdog agencies
	Bringing major gifts, program, finance together	The interplay between these departments and why management should pay attention to them for major gift success
	The Right Strategy	
	The elements of donor strategy	Learning about the elements of donor strategy that requires management involvement
	Importance of knowing Passions and Interests	1) Build a relationship of trust. 2) Secure information from the donor and third parties.
	Importance of taking the donor to the scene	1) Zero-in on need. 2) Identify and talk about the cause of the need. 3) Document what will happen if need is not met. 4) Why we have trouble talking about the need. 5) The steps you need to take once you have taken the donor to the scene: tell the donor what you are going to do; tell the donor what it will cost; and ask the donor for her involvement.
	Use of the Marketing Impact Chart (MIC)	Scheduling every touch point and move for each donor.
	Asking	
	Being part of donor engagement	Learning about the need to be involved with the asking and stewardship process of the top donors in the organization
	Why asking is important	Ultimate form of serving the donor. 4 reasons an MGO doesn't do it: 1) They're hung up on money. 2) They lack confidence. 3) They have not embraced what fundraising is. 4) They haven't figured out that asking is serving the donor.
	Donors need to trust you	Donors will invest in your mission and project when they believe your organization is trustworthy.

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Dealing with your fears around asking	<p>4 reasons for fear: 1) Fear of rejection. 2) Lack of confidence in the ask. 3) MGO lack of belief in the project or org. 4) MGO with wrong philosophy of giving.</p> <p>How to overcome fear: 1) Get head and heart right, 2) Get educated, 3) Know the donor. 4) Practice, Practice, Practice. 5) Plan for the unexpected.</p> <p>Two big points: the donor does have the right to say no and not engage; It is not personal to you.</p>
Dealing With Objections	
Corporate implications of objections	The common objections major donors have and how management needs to participate in responding.
Proof Of Performance	
Systems needed for impact reporting	Impact and proof of performance is becoming critical to retaining donors. Steps to implement an impact reporting system.
Telling donors they made a difference	
MODULE 5	
Accountability & Evaluation	
What Makes a Good Leader	Take an assessment of your leadership skills and qualities.
Watch for new money covering the loss of old money	How to watch out for the new money covering up for the loss of old money from existing donors.
The importance of class year analysis	A system for analyzing how existing donors are performing over time by class years - the year they first met the major gift metric.
What matters in reporting	The key factors and elements in major gift reporting.
Meaningful Connections vs. Activity	How to measure what really counts with donors.
Evaluating and rewarding MGOs	The major points in evaluating and rewarding MGOs.
Major gift program evaluation	Using the class year analysis to evaluate how the major gift program in general and MGOs in specific are actually performing.