

The MGA Learning Guide: Major Gift Certification Course

Module Topic	Major Topic	Core Points
MODULE 1		
How to Think About Major Gifts	Understanding the Problem & the Opportunity	Dealing with donor attrition and value lost. The opportunity to retain donors and recapture revenue.
	Focusing on Relationship vs. Revenue	Steps to change how MGOs think, and to help the organization change as well.
	Building the Right Systems for Major Gifts	The 7 Pillars of a successful major gift program. How to create a culture of philanthropy. Content includes: having the right donor on a caseload; creating goals and plans for each donor; asking, thanking; reporting back; and setting up management and accountability systems.
MODULE 2		
Being an MGO	Qualities Necessary to be a High-performing Major Gift Officer	The 4 characteristics, 7 essential traits and 6 secrets on being an extraordinary MGO. The importance of dealing with one's ego and having a good attitude. Also, strategies to work from strengths and support weaknesses. Lastly, 7 ways to avoid burnout in major gifts.
	The 6 Indispensables in Major Gifts	Making sure the job description and focus stays right, that administrative support is valued, getting through the daily grind and meeting the expectations and values of management. How to cope with working alone.
	Introduction to the Marketing Impact Chart (MIC)	Setting up and using a system to help MGOs plan strategy for every donor on a caseload. Each module will give additional instruction and provide a step-by-step process to build a MIC, a little at a time.

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MODULE 3		
How to Think About and Treat Donors	The Three Operating Principles in Major Gifts	The importance of treating donors as partners vs. sources of cash. The fact that donors can give more than once in a year and can have a life long relationship with the MGO. The truth that in major gifts, money is about transferring value, nothing more.
	How to Identify Donor Passions and Interests	Specific information on how to secure this important information for donor management.
	In Major Gifts, Money is a Result not an Objective	Two Principles: Donor related, Organization related. And, how to get in touch with our own thinking on money and why some of us value it over relationship.
	What a Healthy Partnership with a Donor Looks Like	Defining donors as mission. Understanding why people give. Strategies to manage donor expectations. Setting boundaries. And, how to identify and create steps to build better partnerships.
MODULE 4		
Creating Donor Offers	How to Define the Problem Your Organization is Addressing	Steps that are necessary to take in defining the problem.
	How to Build a Relationship with Program - Your Best Ally	Making program your best friend; regular program visits are a must. Seven tips for relating to program people, including ideas on gathering stories and pictures. Six program challenges, and how to turn them into opportunities. Also, how to always look at what your organization does through donor eyes.
	How to Maintain a Strong Relationship with Finance	Re-framing numbers that are stored for organizational purposes into donor-friendly numbers.
	Getting Leaders, Managers and Staff on Board with Packaging the Budget into Donor Offers	How to get leadership on board. Making sure program understands what fundraising is trying to do. And, 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.
	Creating 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.

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MODULE 5		
Caseload Principles Managing The Right Donors Setting Goals	The Importance of a Qualified Caseload	The importance of only working with donors who are qualified. An MGO only has so much time and must be a steward of their labor.
	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.
	The Economic Destination of a Caseload	Think about the economics of major gift fundraising. It costs money to manage a donor. Each caseload donor must yield NET revenue. A MGO needs to walk away from a donor that doesn't contribute NET revenue.
	Credit for Caseload Donor Gifts - Who Gets It?	The often contentious subject of credit for gifts. When does the MGO get credit for a gift from a caseload donor? The answer gives a rationale for giving credit in all types of situations.
	How Caseload Value Grows Over Time	Value the long-term in major gifts. The quality of a caseload increases over time. Some donors will leave the caseload due to no giving and be replaced. Many donors will stay and increase. A few will give substantially.
	Spotting the Few in Any Caseload	Tiering and prioritizing a caseload. Understand the difference between liking a donor and understanding her economic potential. Get to know all donors to discern who can contribute substantially. Develop a plan to cultivate and ask.
	Caseload Principles: 2 Objectives	One is donor centered - relational. The other is organization centered - the revenue.
	Caseload Principles: 2 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.
	Handling the 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.
	Ideal Composition of a Caseload	Three tiers of qualified donors where more time is spent on the top tier. The top tier uses more personal and strategic touches and delivers the largest gifts. How the tiers work together.
	Creating a Caseload Pool	Select from active donor file using 5 criteria: Recency, Gift Amount, Capacity, Relationship, Frequency.
MODULE 5 (Cont)	The 7 Steps To Qualifying	Seven critical steps of qualifying a donor out of a caseload pool.

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Caseload Principles Managing The Right Donors Setting Goals	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.
	Refreshing The Caseload	Identifying and removing donors who have gone silent or gone away. Passing donors whose life change affects their current giving level to someone else. Replacing those donors with new ones, using the qualification process. Adjusting tiers to account for new donors.
MODULE 6		
Creating Donor Strategy: Minding the Front and Back End of Major Gifts	The Essence of Moves	Matching the interests and passions of a donor to the needs of people and/or the planet as served by the organization.
	Identifying Donor Passions & Interests	The steps and techniques for identifying the passions and interests of donors on a qualified caseload.
	5 Ways to Take the Donor to the Need	It is important, through storytelling and pictures to take a caseload donor to the need. How to personally get in touch with need, and the steps needed to take to bring donors to it.
	Meaningful Connections vs. Activity	Most major gift programs measure activity not meaningful connections. What constitutes a meaningful connection. How to focus on what's really important.
	Cycles of Donor Strategy	The two cycles of donor strategy - one for stewardship the other for setting up the ask. Also, the four steps of moves management.
	Elements of Good Strategy	The critical elements of a good donor strategy: the 7 types of touch points, developing strategies that connect with and cultivate donors, and passing donors between major giving, midlevel and planned giving.
	Effectively Thanking The Donor	Value attrition is a symptom of not thanking. Two reasons: 1 - Leader who does not value donors. 2 - A system that does not value donors. Eleven ways to thank.
	The Important Function of Reporting Back	Investing in systems to report back. Evaluating everything an organization does in program...is there impact? Reporting back frequently. Using social media. Surprising donors with information.
	Telling Donors They Made a Difference	How to address the major reason donors go away - they did not know their gift made a difference.

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MODULE 7		
Making the Ask & Dealing with Objections	Why Asking is Important	Ultimate form of serving the donor. 4 reasons it's not done: 1 - The MGO is hung up on money. 2 - The MGO lacks confidence. 3 - The MGO has not embraced what fundraising is. 4 - The MGO hasn't figured out that asking is serving the donor.
	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 the Ask	Knowing donor's passions, interests and communication preference. Knowing program and matching the donor to the program. Understanding cost and impact.
	Getting Appointments	Practical steps to getting an audience with a donor.
	Making the Ask	The art and steps to making the ask.
	Handling Objections	Nine typical objections and how to handle them.
	Dealing with Your Fears Around Asking	Four reasons for fear. Then, five ways to overcome fear. Also, the donor has the right to say no and that rejection is not personal.
	MODULE 8	
Staying In Control Through Ongoing Planning & Analysis	Critical Times for Planning & Analysis	Step by step planning process with worksheets to support Summer and New Year analysis and planning.
	Staying Focused	Creating and implementing your MGA Integration Plan.
	Completing MGA	Finalizing proposal & MIC to support your integration plan.