

# Announcing the 2012 Session of PLAN-MGO: Master Gift Officer Immersion Event

PLAN-MGO is a four-day immersion experience that rapidly equips advancement professionals and leaders with master skill sets to revolutionize donor relationships, execute comfortable and effective asks, and ensure sweeping enhancements to fundraising outcomes.

**April 27<sup>th</sup> – 30<sup>th</sup>, 2012**  
**MIT Endicott House, Dedham, MA**

## Philanthropy Leadership Advancement Nexus

PLAN-MGO is designed for executive directors, board members, and advancement officers in the not for profit world. Our approach is designed to identify and eliminate old paradigms and assumptions which limit fundraising success, while unleashing the inherent brilliance of each participant.

Through interactive sessions, hands-on exercises, and engaging presentations, participants learn and embody new, mind-shifting strategies and gain immediately actionable skills. Importantly, these include the ability to establish both instant rapport and sustained relationships with just about anyone.

PLAN-MGO participants return to their organizations fully confident and ready to “move the needle” in ways not considered possible before.

Visit [www.planmgo.com](http://www.planmgo.com) to sign up for this revolutionary program today!

### Benefits at a Glance:

Guaranteed ROI results  
Advanced rapport and EQ knowledge  
Key relationship-building skills  
Certificate for a high standard of performance  
24 CFRE credits

**In  
association  
with:**



**PLAN-MGO is led by a nationally recognized team of advancement and behavioral thought leaders. They guide participants through a spectrum of emotional intelligence, mission alignment, rapport building, and donor engagement exercise and techniques all proven to lead to exceptional gift outcomes.**



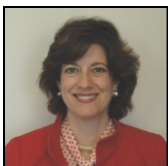
**Diane Blumenson** is a Senior Associate at Copley Raff, Inc. and Principal of Human Productivity Solutions. Diane focuses on high performance systems and human dynamics.

**Laura Fredricks** is a consultant, motivational speaker, and the best-selling author of *The Ask: How to Ask Anyone for Any Amount for Any Purpose*, and *Developing Major Gifts: Turning Small Donors into Big Contributors*.



**Beth Graham** is an ordained minister who helps people put their values into action through philanthropy. She is inspired and motivated by the relationship and community-building aspects of fundraising and development.

**Rod Miller** leads the global expert services and advisory firm Executive Institutional Advancement Exchange, which is dedicated to empowering leadership vision.



**Katelyn L. Quynn** is VP Development at Hebrew Senior Life and is coauthor of *Planned Giving: A Guide To Fundraising and Philanthropy*. She served as a board member of the National Committee on Planned Giving.

**Larry G. Raff, MPH** is President of Copley Raff, Inc., a consulting firm bringing focus, accountability, and creativity, to NPOs. Larry authors *GivingTake* ([copleyraff.blogspot.com](http://copleyraff.blogspot.com)) and is a regular contributor to *Fundraising Success Magazine*.



**Carol Weisman, MSW, CSP**, the author of 9 books, specializes in volunteerism, fund raising, and governance. She has worked with a wide range of clients from Sing Omaha to the National Council of Voluntary Organization in London, England to the Bermuda Health Care Foundation.

## PLAN-MGO Daily Event Agenda

### Day 1

- Emotional Metrics
- Peak Learning
- Asking and Giving: A Paradigm Shift
- Mission Alignment
- Lunch Keynote
- Personal Mission
- Rapport and Connection
- Cultivation Event

### Day 2

- Essential Leadership Skills Workshop
- Lunch: Stories From the Field
- Understanding Behavioral Styles
- Positive Postures: Using NLP for Greatness

### Day 3

- What Every Master Gift Officer Needs to Know About Campaigns
- How Money Works for High Net Worth Donors
- Emotional Intelligence Essentials for the Master Gift Officer
- Lunch Keynote: A Very Long Journey—from Introduction to Major Gift
- What Every Master Gift Officer Needs to Know About Gift Planning
- Putting Relationship Science to Work for Philanthropy

### Day 4

- The Ask
- Preparing to Talk About Money
- Elements of the Ask / Exercises

### ***Just don't take our word for it...***

*I want you to know what a wonderful experience I had at the training. You are both consummate professionals and your guest speakers also knocked it out of the park. I came back energized and highly motivated and told our Vice President of Development that we should send all our staff to the training. It was fun, challenging, enlightening, exhausting and a game changer. Thank you for making me a better Executive Director. **Tom McNaught, Executive Director, John F. Kennedy Library Foundation, Boston, MA***

*It was an amazing conference and entirely transformational for me. There was tremendous depth to the materials and I look forward to reading the handouts again.*

**Barnaby Evans, Artistic and Executive Director, WaterFire Providence, RI**

*PLAN-MGO without a doubt needs to become a must do for all development professionals. Within the first week since the training we have already created our top five to do's. This training will change the way fundraisers look at their relationship with themselves and their donors, and the people who maybe predisposed to their organizations.*

**Ann Tubbs, MS, Executive Director, Vera French Foundation, Davenport, IA**

*It was an amazing and intensive four days. Looking forward to applying my new knowledge on Rapport, Reciprocity, and Relationship immediately. **Anne Haney, Major Gifts Officer, Spaulding Rehabilitation Hospital Cape Cod, MA***

*I have been to many conferences in my career but this has been by far the best professional development experience I have ever had. Thanks! **Leisha Lecouvie, Director, Parent and Affinity Programs, McGill University, Quebec, Canada***

*This is by far the most useful conference I have attended in the fundraising industry. I have applied skills learned and referenced material provided, both in the office and on the road, everyday since attending the PLAN-MGO. **Ann Lamond, Leadership and Planning Officer, Elderhostel, Inc., Boston, MA***

*PLAN-MGO is an incredibly empowering and transformative experience. If you are interested in a retreat of self-awareness and being inspired and energized to perform at the highest level of productivity and success, this is the course for you. **Emily Quinn, Manager, Development Special Events, Lifespan, Providence, RI***

### **INVEST IN YOUR SUCCESS**

#### **Enrollment**

\$2,095	Registration before 1/31/12
\$2,395	Registration after 1/31/12
\$2,095 each	2-4 Participants
\$1,895 each	5-8 Participants

Includes: breakfast, lunch, one dinner, all materials, and access to PLAN-MGO online community. *Does not include hotel accommodations.*

Maximum enrollment is 35 participants.

**For questions or help with registration, please contact:**

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Copley Raff, Inc.**

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