



# Major Gift Officer Immersion Training

Learn to adopt the innate characteristics and key competencies of top major gift performers to win donors and close gifts.

Using relationship science, you will remember and have fun!

**October 29 – November 1, 2010**

**MIT Endicott House, Dedham, MA**

- ✓ Premier faculty
- ✓ Advanced Rapport and EQ knowledge
- ✓ Learn key relationship-building skills for success using the science behind it
- ✓ Interactive, hands-on, problem-solving, fun
- ✓ Pre & Post Skills Evaluation
- ✓ Certificate for a high standard of performance
- ✓ Lifetime access to:
  - online professional information
  - course graduates
  - job postings via PLAN graduates
  - development blogs
- ✓ CFRE credit (24 credits)

*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**

*This was the single most relevant and useful conference/seminar I have ever attended. I was able to utilize information and strategies immediately and am planning to continue to incorporate what I learned to benefit my organization.* **Lisa Merrill-Burzak, Vice President of Development, New Hampshire Catholic Charities, NH**

This course was superbly helpful. Every minute taught me useful skills. Within a few days of the course I had used and benefited from several of the insights, which helped me close a contribution many times the size of the enrollment fee.  
**Robert Nichols, Development Manager, Blue Mountain Center of Meditation, Tomales, CA**

*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**

*PLAN-MGO was the best seminar/conference I've ever attended on any subject. The combination of real nuts and bolts information combined with the relationship skills and emotional intelligence was personally and professionally transformational. You brought together such a stellar group of professionals and a great group of attendees and organizations. I left feeling inspired and empowered about how I can be a change agent here at Advent as we approach our 50<sup>th</sup> anniversary.*  
**Suzanna Schell, Director of Development, Advent School, Boston, MA**

*This is a novel program because it focuses more on relationship skills than any training I've seen. The PLAN-MGO Certificate approach provides essential capacity building at a critical time for philanthropy.* **Allen Peckham, Chief Development Officer, Partners HealthCare System, MA**

In association with:



## Who Should Attend

Major Gift Officers  
 Aspiring MGOs  
 Chief Development Officers  
 Chief Executive Officers  
 Annual Giving Officers  
 Trustees, Key Volunteers

The Philanthropy Leadership Advancement Nexus (PLAN) is devoted to improving the quality and professionalism of Major Gift Officers. The Program is a response to the growing need for proven, results-oriented major gift professionals and the inadequate pool of proven performers.

PLAN incorporates Proven Learning Science Techniques in an interactive, hands-on, problem-solving experience. You will enjoy rapid skill acquisition and long-term retention of the key competencies for building relationships and winning gifts.

[www.planmgo.com](http://www.planmgo.com)

# Faculty



**DIANE BLUMENSON** is a Senior Associate at Copley Raff, Inc. and Principal of Human Productivity Solutions. Focused on high performance systems and human dynamics, she has a 20 year history of building and transforming philanthropy organizations with clients such as: Dana Farber Cancer Institute, Children's Hospital Trust, Boston Symphony Orchestra, Partners Healthcare, Northeastern University, Massachusetts General Hospital.



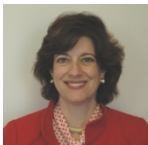
**LAURA FREDRICKS** is a consultant, motivational speaker, former V.P. of Development at Pace University, and the best-selling author of *The Ask: How to Ask Anyone for Any Amount for Any Purpose*, and *Developing Major Gifts: Turning Small Donors into Big Contributors*.



**SIMONE P. JOYAUX, ACFRE** is an internationally recognized consultant, speaker, former President of CFRE International, and author of two groundbreaking books, *Strategic Fund Development: Building Profitable Relationships That Last*, and *Keep Your Donors* (with Tom Ahern). She is the recipient of the 2003 Rhode Island Outstanding Philanthropic Citizen Award and the 1987 Fundraising Executive of the Year Award for Rhode Island.



**Rod Miller** leads the global expert services and advisory firm Executive Institutional Advancement Exchange Inc, which is dedicated to empower leadership vision. As a core faculty member of The Fund Raising School at Indiana University's Center on Philanthropy for many years, Rod taught and marketed The Fund Raising School's basic and advanced courses.



**Katelyn L. Quynn** is Executive Director of Development at Massachusetts General Hospital and is coauthor of *Planned Giving: A Guide To Fundraising and Philanthropy*. She is a past president of the Planned Giving Group of New England (PGGNE) and served as a board member of the National Committee on Planned Giving. She was named Planned Giving Professional of the Year in 1996, and in 2003 she received the David M. Donaldson Award for leadership in the field of planned giving from PGGNE.



**Larry G. Raff, MPH** is President of Copley Raff, Inc. and brings more than 26 years of accomplished leadership in healthcare, research, and human services, serving in positions including: President and CEO of the Emanuel Medical Center Foundation, Director of the Juvenile Diabetes Research Foundation's \$200 million campaign for the northeastern US, Founding President of the Autoimmune Disease Research Foundation, and is currently President of The Friday Forum a thought-leadership organization of senior development officers in Boston.



**TOM WILSON** is Vice President and Western Regional Manager of Campbell & Company, and the author of *Winning Gifts: Make Your Donors Feel Like Winners*. Tom provides dynamic fundraising training at conferences throughout North America and has served as Vice President of Development for the Oregon Graduate Institute of Science & Technology, as well as for the Phoenix Symphony.

## PLAN Advisory Board

- Diane Blumenson
- Laura Fredricks
- Simone P. Joyaux
- Rod Miller
- Katelyn Quynn
- Allen Peckham
- Larry G. Raff
- Tom Wilson

## MGO Immersion Training

### Day 1

- Mission Alignment
- Rapport and Connection
- Lunch Keynote: "A Major Challenge Resulting in a Major Gift"
- From Listening to Pacing and Leading—Using NLP for Success
- Cultivation Event

### Day 2

- Relationship Fundraising
- Lunch Keynote: Donors Tell "why I give".
- Panel Discussion: "The Psychology of Giving"
- Building Profitable Relationships That Last

### Day 3

- What Every Major Gift Officer Needs to Know About Gift Planning
- Emotional Intelligence Essentials for the Major Gift Officer
- Lunch Keynote: A very long journey—from introduction to Major Gift
- Understanding Personality Styles for Successful Communication
- What Every Major Gift Officer Needs to Know About Campaigns

### Day 4

- The Ask

## FEES

- \$2,695
- \$2,895
- \$2,695 each
- \$2,495 each
- \$2,300 each

## Invest In Your Success

- Early registration (see web site)
- Full registration
- 2-4 Participants
- 5-8 Participants
- 9+ Participants

Visit [www.planmgo.com](http://www.planmgo.com) for more information and registration or call 339-227-6481