

Master Gift Officer Immersion Event

PLAN-MGO is an immersive, four-day training event that transforms development professionals into Master Gift Officers by reengineering the nature of their relationships with donors, goals, asks, and stewardship.

Philanthropy
Leadership
Advancement
Nexus

October 29th – November 1, 2011

MIT Endicott House, Dedham, MA

PLAN-MGO is an outstanding investment for development shops of all sizes wanting to optimize the performance of their most important donor-facing stakeholders.

Upon completing the program, all graduates receive:

- ✓ a PLAN-MGO certificate
- ✓ 24 CFRE credits
- ✓ lifetime access to program content and blogs
- ✓ colleague contact information and job postings from other grads
- ✓ course repeat at minimal charge at any time, space permitting

What others are saying about PLAN-MGO...

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 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.

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 50th 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

PLAN-MGO is designed for staff, trustees, board members, and others engaged in not-for-profit fundraising.

It offers coaching and tools designed to identify and eliminate old, unconscious paradigms and assumptions which limit fundraising success, as well as to bring out the inherent brilliance of each participant.

Through interactive sessions, hands-on exercises, and engaging presentations, these negative factors are replaced with new, fundamentally life enriching strategies, immediately actionable skills, and a circumspect sensitivity of the gift cycle from the gift officer and donor perspectives.

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

In association with:



www.planmgo.com

PLAN-MGO is led by a nationally recognized team of advancement and behavioral experts. Using a variety of techniques, they guide participants through an exploration of emotional intelligence and metrics, mission alignment, rapport building, and cultivation through the lens of enhancing relationships, stewardship, and gift outcomes.

For full faculty bios, see www.planmgo.com



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 top tier clients in the healthcare, arts, academic, and human services industries.



Laura Fredricks is a consultant, motivational speaker, former VP 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*.



Beth Graham is an ordained minister who helps people put their values into action through philanthropy. She is the CDO at Pathways for Children, the largest social service agency on Cape Ann. Beth is inspired and motivated by the relationship- and community-building aspects of fundraising and development.



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).



Rod Miller leads the global expert services and advisory firm Executive Institutional Advancement Exchange, which is dedicated to empower leadership vision. He is a former core faculty member of The Fund Raising School at Indiana University's Center on Philanthropy.



Katelyn L. Quynn is VP Development at Hebrew Senior Life 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.



Larry G. Raff, MPH is President of Copley Raff. He has three decades of leadership in healthcare, research, and human services, serving as President and CEO of the Emanuel Medical Center Foundation and Director of the Juvenile Diabetes Research Foundation's \$200mm campaign for the northeastern US, among others. He is President of The Friday Forum an organization of senior development officers in Boston.

PLAN-MGO Daily Training Agenda

Day 1

- Emotional Metrics
- Peak Learning
- Mission Alignment
- Lunch Keynote
- Mentor Stories
- Personal Mission
- Rapport and Connection
- Cultivation Event

Day 2

- Relationship Fundraising
- Lunch Keynote: Donors Tell "why I give"
- Donor Relationship Strategies
- Behavioral Styles that Increase Rapport

Day 3

- What Every Master Gift Officer Needs to Know About Gift Planning
- 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 Campaigns
- Putting Relationship Science to Work for Philanthropy

Day 4

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

FEES	Invest Your Success
\$2,420	Registration before 5/15
\$2,695	Registration before 6/15
\$2,895	Registration after 6/15
\$2,695 each	2-4 Participants
\$2,495 each	5-8 Participants
\$2,300 each	9+ Participants

For questions or help with registration, please contact:

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