



# Certification Course in Mid-Level Fundraising

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## COURSE OVERVIEW

The **Certification Course in Mid-Level Fundraising** is designed to provide a comprehensive training for Mid-Level Officers. Discover how to create meaningful relationships with donors, properly move donors in and out of mid-level, and drive increased net revenue for your organization.

- ★ 7 modules
- ★ 25 CFRE Credits
- ★ Ideal for Mid-Level Officers, those aspiring to be a Mid-Level Officer, and Mid-Level Program Team Leads

## WHY SHOULD YOU TAKE THIS COURSE?

Your mid-level program is a critical way for you to strengthen your donor pipeline to move more donors to major gifts, better retain your donors, and increase net revenue to support your mission. This course provides a comprehensive training with all the resources needed to create or reset your mid-level program.

## CONNECT WITH US

If you have any questions about this and other courses, contact our Community Experience Team: [academy@veritusgroup.com](mailto:academy@veritusgroup.com) | [859 212-6262](tel:8592126262)

# CONTENTS

## **Overview | Key Takeaways | Learning Modules:**

1. [Setting Your Program Up for Success](#)
2. [Using Permission-Based Asking with Mid-level Donors](#)
3. [Creating Meaningful Donor Relationships](#)
4. [Managing Your Mid-Level Donor Strategy](#)
5. [Creating the Right Mid-Level Donor Strategy](#)
6. [Your Donor Engagement Plan: Strategy in Action](#)
7. [Where Do You Go from Here?](#)

“When you complete Veritus’ **Mid-Level Fundraising** course, you walk away with everything you need to implement the program. I’ve worked in development for 10+ years, and I really appreciate having a process in place that has been proven to be successful. Managing a portfolio makes the work seem possible and not overwhelming. If you are considering the course, do it! You’ll walk away with a process, materials, and a concrete plan to match your donors’ interests and passions with your

## KEY OUTCOMES

- ✓ Meaningful connections with donors, and how to measure them
- ✓ Use and adjust the Business Protocols
- ✓ Important data clean-up steps that need to happen before you get started
- ✓ The right caseload of donors
- ✓ Tiering your caseload for effective outreach and engagement
- ✓ The introduction cycle
- ✓ Annual communication plans and personalized communication pieces
- ✓ How to confidently ask for gifts using permission-based asking
- ✓ Mid-level offers
- ✓ Gaining support internally
- ✓ The importance of the donor pipeline and the role mid-level plays in a healthy one
- ✓ Identifying donor attrition and value attrition, why we believe donors leave, and how a mid-level program can impact this trend
- ✓ The right structure and performance metrics for a mid-level program
- ✓ Boundary setting
- ✓ A culture of philanthropy that is focused on creating a system where donors can give to their capacity
- ✓ The skill sets that are most successful in MLOs and how to develop yours
- ✓ Identify donor passions and interests using open-ended questions
- ✓ Build or re-establish trust with a donor
- ✓ Increased donor revenue
- ✓ Career enhancement opportunities

## Module 1:

### SETTING YOUR PROGRAM UP FOR SUCCESS

MAJOR TOPIC	CORE POINTS
The Veritus Philosophy of Mid-level	Overview of why we put such an emphasis on mid-level. How to set-up your program in a way that will have the greatest impact.
Understanding the Problem & the Opportunity	Overview of what non-profits often get wrong when they think about the impact and role of mid-level. Dealing with donor attrition and value lost. The opportunity to retain donors and recapture revenue.
The Veritus Way™	Learn our philosophy around mid-level, which will ensure you can grow a successful mid-level program.
Creating a Culture of Philanthropy	How to create a donor-focused culture. To develop a culture of philanthropy, you: <ol style="list-style-type: none"><li>1. Need to get your head and heart right;</li><li>2. Make sure donors are your mission;</li><li>3. Leadership must be on board;</li><li>4. You must tell your story right;</li><li>5. Everyone in the org must be involved;</li><li>6. Needs must be expressed in real terms.</li></ol>
Understanding the Donor Pipeline	Understand the Donor Pipeline and the essential role of mid-level.

## Module 2:

### USING PERMISSION-BASED ASKING WITH DONORS

MAJOR TOPIC	CORE POINTS
What Gets in the Way of Meaningful Conversations	Learn the barriers that can cause you to not connect in an authentic way with your donors.
Understanding the Permission-Based Asking™ Model	Overview of how to use permission-based asking in any donor conversation. Learn how the model works, the roles you play, and how to use transition questions to check in with your donors.
Using Permission-Based Asking in Any Conversation	Hear examples and role playing for how to use permission based asking in a variety of donor interactions including learning a donor's passions and interests, making an ask, the qualification intro call, and more.
Building Authentic Relationships with Donors	Learn how to discover a donor's passions and interests in a genuine way and how to approach building long-lasting relationships.
Making the Ask and Addressing Common Responses	Learn how to use Permission-Based Asking to ask for a gift and how to address common responses (including getting a "No") in a way that strengthens your relationship with the donor.

## Module 3:

### CREATING MEANINGFUL DONOR RELATIONSHIPS

MAJOR TOPIC	CORE POINTS
Discovering Your Donor's Passions & Interests	How to identify donor passions and interests. Money is the result, not the objective. Your donors want to know they made a difference. Managing a healthy donor relationship. Learn how to use permission-based asking to learn your donor's interests.
Meaningful Connections	Learn what a meaningful connection is and how to measure them.
Building Trust with Donors	Learn why building trust is so critical in meaningful donor relationships. Understand how to build trust and how to address past situations when trust may have been broken.

## Module 4:

### MANAGING YOUR MID-LEVEL CASELOAD

MAJOR TOPIC	CORE POINTS
Listen for triggers	Identify and interpret the “triggers” that tell you when a donor may be ready to move out of mid-level – either up to major gifts or back to direct response.
Develop your mid-level caseload	Learn how to develop and tier your mid-level caseload so you can focus on the right donors at the right time. You’ll also explore how to refresh your caseload to keep it dynamic and aligned with your program’s goals.
Moving donors out of mid-level	Learn how to create clear processes for moving donors out of mid-level, whether that means transitioning them to major gifts or returning them to direct response. You’ll see how collaboration across teams ensures donors always land in the right place, with the right care.

## Module 5:

### CREATING THE RIGHT MID-LEVEL DONOR STRATEGY

MAJOR TOPIC	CORE POINTS
Communication Plan Template	Overview of how to organize your touch points for each tier of your caseload.
Mid-Level Introduction Series	Understand how the introduction series works and how to manage it throughout the year. Learn the key components and proven strategies for connecting with and engaging donors.
Creating Meaningful Donor Communication	Learn how to create thoughtful, donor-centered communications that speak to what your donors care about most.

## Module 6:

### YOUR DONOR ENGAGEMENT PLAN: STRATEGY IN ACTION

MAJOR TOPIC	CORE POINTS
Understanding the DEP	Discover how the Donor Engagement Plan™ (DEP) transforms your fundraising. Shift from reacting to donors to proactively managing relationships using clear structure and data.
Building the DEP	Understand how to set up and customize your DEP to match your portfolio and strategy, creating a focused, goal-driven plan that helps you prioritize time, track progress, and stay aligned with each donor.
Ongoing Use as an Accountability Tool	Dive deeper into the DEP and how to use the DEP as your daily accountability system: track touchpoints, monitor giving, update plans after interactions, and stay organized and proactive through year-end.
Updating the DEP	Learn how to keep your DEP accurate and up to date: maintain donor data, add or remove records, reset for a new fiscal year, and catch up when things slip.

# Module 7:

## WHERE DO YOU GO FROM HERE?

MAJOR TOPIC	CORE POINTS
Critical Times for Planning & Analysis	Step by step planning process with worksheets to support key times in the year for analysis and planning.
Staying Focused	Creating and implementing your Integration Plan.
The Importance of Accountability	Identifying your accountability support. Decide how to proceed with staying accountable and incorporating it into regular coaching with your manager.