



VERITUS GROUP
ACADEMY

Certification Course in Mid-Level Fundraising

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.

- ★ 8 modules
- ★ 36 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 | [859 212-6262](tel:8592126262)

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“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 organization. Your donors will feel like they’re improving the world, and your organization and those it serves will thrive.”

— **Beth Frear**, Manager of Sustaining and Legacy Gifts

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">1. Need to get your head and heart right;2. Make sure donors are your mission;3. Leadership must be on board;4. You must tell your story right;5. Everyone in the org must be involved;6. Needs must be expressed in real terms.
Understanding the Donor Pipeline	Understand the Donor Pipeline and the essential role of mid-level.

Module 2:

HOW TO HIRE AND RETAIN HIGH-PERFORMING MGOs

MAJOR TOPIC	CORE POINTS
The Permission-Based Asking™ Model	Overview of our new conversation model and how it will change your approach with donors. Learn how to effectively perform the roles of partner and facilitator. Understand how to address and prepare for various responses from donors.
Preparing Yourself for the Ask	Learn tools to manage your fears and resistance to asking. Get clear on the donor's right to say no or not now and not take their responses personally.
Creating the Right Offers	Learn how to create meaningful offers in mid-level. Understand the key components of a donor offer. Identify who you need to work with internally to develop offers.
Developing Your Own Language	Create your own language using permission-based asking. Identify open-ended questions and "pull" questions that will help you authentically and genuinely engage 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:

DATA SYSTEMS FOR A SUCCESSFUL MID-LEVEL PROGRAM

MAJOR TOPIC	CORE POINTS
The Mid-level Business Protocols	Overview of the business rules. Learn how to create your business rules in collaboration with key departments within your organization. Understand the importance of creating these protocols.
The Donor Engagement Plan™	Setting up the relationships and systems of support with program staff to ensure you have a flow of stories, pictures, and program needs for donor offers and touch points. Reframing the organization's finances with donor-friendly numbers.
The Right Metrics	Overview of our approach to metrics. Learn how our metrics differ from the traditional approach and why. Identify the metrics you need to be able to track in your database. Learn how to measure meaningful connections.
Understanding the Data	Overview of what you need to look at in the data. Learn how to clean-up the data file, what to look for, and where to find the right donors.

Module 5:

EFFECTIVELY MANAGING YOUR CASELOAD

MAJOR TOPIC	CORE POINTS
Objective of Mid-level Programs	Overview of the objective of mid-level and the impact this program can have on your overall fundraising strategy and retention of your donors.
Developing Your Caseload	Understand the pace of mid-level. Learn how to develop a caseload and identify the right donors.
Tiering Donors	How to tier qualified donors and use time accordingly.
Caseload Refreshes	Learn how and when to do caseload refreshes so you are moving donors off to make room for new donors.
Triggers for Moving Donors Out of Mid-level	Outside of regular caseload refreshes, there are strategic times to move donors out of the mid-level program. Learn the triggers for moving donors to major gifts or planned giving. Identify when and how to remove donors.

Module 6:

CREATING THE RIGHT MID-LEVEL DONOR STRATEGY

MAJOR TOPIC	CORE POINTS
The Management of Donor Strategy	Overview of how to properly document key information in your database. Learn what you need to document and why.
The Donor 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. Learn how to address donor disqualification and information updates.
The Donor Engagement Plan (formerly the Marketing Impact Chart)	Dive deeper into the DEP and how to use it in creating donor communication plans for each tier of your caseload.
Creating a Communication Plan	Learn how to create meaningful touch points for your caseload and personalize your communication pieces. Understand how to add personal touches outside of your plan. Identify how you will partner with other departments to create communication pieces.

Module 7:

HOW TO BE THE BEST MLO YOU CAN BE

MAJOR TOPIC	CORE POINTS
Qualities of Successful MLOs	Overview of the qualities that will help you to be successful. Learn how to identify areas of growth and develop those.
Understand the Impact of Your Personality	Learn how your personality ties into your skillset. Understand how your personality interacts with other personalities. Develop emotional intelligence, related to your personality.
Key Skillsets for an MLO	Overview of the key skillsets that are required for MLOs. Learn what is expected in email, phone, and organizational skills.
Building Internal Relationships	Part of being a successful MLO is creating strong internal relationships. Learn why this is so important and how to develop key relationships that will support your work with donors.

Module 8:

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.