

## ***Professional Education Series (PES)***

### **A Virtual and Distance Learning Experience**

Inspire a powerful connection between your organization and the philanthropic passions of your supporters. Infuse your important work with deeper meaning—for both you and your donors—as you explore the facets of a donor-centric approach to philanthropy. Do this and more by implementing research-based processes and principles found in the *Professional Education Series*.

A global leader in professional development education, Advancement Resources has designed this innovative workshop series to maximize the time you spend inside and outside the workshop's virtual classroom **and** the impact on your career. During the live working sessions, you will collaborate with your development peers as you apply the concepts to donors in your portfolio. Between sessions, you will gain valuable support from one of our certified coaches as you overcome real-life challenges in practicing a donor-centric approach to major gifts fundraising.

Experience this dynamic, highly interactive virtual training from the comfort of your own home or the privacy of your office. Walk away with a toolkit filled with essential process concepts in development. The knowledge shared by our accomplished facilitators, the strategic advice from our experienced coaches, and the invigorating conversations with your fellow participants will prime you for success in major gifts fundraising.

#### **Who Should Attend?**

- Major gifts professionals
- Development leaders
- Planned giving officers
- Other development professionals interested in expanding their major gifts mindset

#### **What Will I Gain?**

After this workshop, you will be able to:

- Use the *Donor Commitment Continuum* and the *Donor Development Chart* to identify and grow the level of commitment donors have to your organization's priorities, projects, and programs.
- Describe and implement the seven steps of the donor-centered *Process for Facilitating Donor Development*.
- Recognize the two primary motivators for contributions most meaningful to donors.
- Move donors beyond loyalty giving to drive larger and more meaningful, passion-based philanthropic investments (meaningful major gifts).
- Prioritize your donor portfolios based on the *Priority Grid* to determine who you should spend your time with, what to do with that time, and what questions to ask.

- Utilize a variety of methods to secure meetings with donors and potential major donors, including using value propositions, leveraging referrals/introductions, and responding to objections.
- Describe a five-phase donor meeting process that leads to action.
- Craft and deliver an Organizational Update within a donor meeting that leads naturally to a philanthropic conversation.
- Conduct the *Process for Locating Philanthropic Passion™* with donors to uncover deep-seated philanthropic passions related to the organization's priorities, projects, and programs.
- Prepare for and invite financial commitment using a six-point outline.
- Recognize the three components of meaningful return on philanthropic investment from the donor's perspective.
- Learn and apply the Nine Navigation Points in building effective and resilient donor strategies.
- Utilize a variety of strategies to build trust-based working relationships with organizational partners.
- Design comprehensive donor engagement strategies to advance donor relationships with the organization.

### **What Can I Expect?**

Designed to accommodate your schedule, this program is divided into **nine 3.5-hour workshop sessions** over a twelve-week period and **five one-hour coaching sessions** on mutually agreeable dates.

The workshop sessions are unlike other virtual trainings, as these are not pre-recorded webinars that you simply watch on-demand. Instead, our facilitators will actively engage you from start to finish through lively large- and small-group discussions, video case studies, activities based on scenarios commonly encountered by development professionals, and opportunities to plan strategy for achieving success in your important work. Our streamlined pre- and post-session assignments will maximize your learning and set you up for success.

The coaching sessions amplify the content you learn during the workshop sessions. Your coach—an experienced development professional—is specifically chosen for you, based on your professional area. Together, you will apply the process concepts learned to address the real-life issues you face, leveraging and bolstering your skills in the donor-centric approach.

Our workshops are best experienced using the most recent Zoom™ app on a strong, consistent internet connection. Because of the interactive nature of the training, please plan to use a headset or earbuds with a microphone and/or speakers and a keyboard.

### **Are There Any Perks?**

Participation in the *Professional Education Series* includes a subscription to **myAR Plus**—our premium online platform that provides on-demand resources for practicing and applying the concepts you will learn in the workshop. During the first year of your subscription, you will receive regular communications exploring **myAR Plus** topics and resources that are specifically designed for major gift professionals.

### **Can I Earn CFRE Credits?**

Completion of the *Professional Education Series* is applicable for 30 CFRE points. Additional points are available by requesting and completing a personalized program on the **myAR Plus** platform.