

plan MGO

Announcing Our 9th Annual Master Gift Officer Immersion Event

MARCH 31 – APRIL 3, 2017

MIT ENDICOTT HOUSE, DEDHAM, MA

planMGO is a four-day immersion experience that rapidly equips advancement professionals and leaders with master skill sets to revolutionize donor relationships, execute comfortable and effective asks, and ensure sweeping enhancements to fundraising outcomes.

Designed for executive directors, board members, and advancement officers in the not for profit world, our approach identifies and eliminates old paradigms and assumptions which limit fundraising success, while unleashing the inherent brilliance of each participant. Through interactive sessions, hands-on exercises, and engaging presentations, participants learn and embody new, mind-shifting strategies and gain immediately actionable skills. Importantly, these include the ability to establish both instant rapport and sustained relationships with just about anyone.

planMGO participants return to their organizations fully confident and ready to "move the needle" in ways not considered possible before.

BENEFITS AT A GLANCE:

- Guaranteed ROI results
- Advanced rapport and EQ knowledge
- Key relationship-building skills
- Certificate for a high standard of performance
- 24 CFRE credits

FACULTY

Led by a nationally recognized team of advancement and behavioral thought leaders, participants are guided through a spectrum of emotional intelligence, mission alignment, rapport building, and donor engagement exercises and techniques all proven to lead to exceptional gift outcomes.



Diane Blumenson is a Senior Associate at Copley Raff, Inc. and Principal of Human Productivity Solutions. Diane focuses on high performance systems and human dynamics.



Larry G. Raff, MPH is President of Copley Raff, Inc. a national, comprehensive fundraising and management consultancy to the nonprofit community, distinguished by extraordinary results for clients, exclusive Master Gift Officer™ educational programs and thought leadership.



Laura Fredricks is a multi-million dollar ASK-maker who, as Founder & CEO of THE ASK©, teaches nonprofits and philanthropic professionals how to confidently, willingly and successfully ask for charitable dollars. Fredricks is today's leading authority on "How to ASK© for Money – and More of It!".



Katelyn L. Quynn is VP Development at Hebrew Senior Life and is coauthor of *Planned Giving: A Guide To Fundraising and Philanthropy*. She served as a board member of the National Committee on Planned Giving.



Beth Graham is an ordained minister who helps people put their values into action through philanthropy. She is inspired and motivated by the relationship and community building aspects of fundraising and development.



Izzy Gesell, MS Ed, CSP, is a master of Applied Improv and is among the first to bring practices from the theatre world into the business community.

IN ASSOCIATION WITH:



To register for this revolutionary program visit copleyraff.com/planmgo-registration/



DAILY EVENT AGENDA

MARCH 31 – APRIL 3, 2017

DAY 1 (8:30 am)

- Peak Learning
- Paradigm Shift
- Mission Alignment
- Lunch
- Personal Mission
- Rapport and Connection
- Advanced Listening
- Pacing and Leading
- Dinner

DAY 2

- Donor Relationship Management
- Calculating the Ask
- Essential Leadership Skills
- Lunch
- Demystifying Planned Giving
- Applied Improv for Thriving Donor Relations

DAY 3

- Postures for Success / Exercises
- Ask Preparation for Fearless Fundraising
- Lunch Keynote
- Gift Planning Essentials
- Putting Relationship Science to Work

DAY 4

- Quick-Ask
- The Ask
- Lunch
- Preparing to Talk About Money
- Elements of the Ask

ENDS 4 pm

INVEST IN YOUR SUCCESS

ENROLLMENT

\$2,195	Registration before 1/15/17
\$2,595	Registration after 1/15/17
\$2,295 each	2-4 Participants
\$2,095 each	5-8 Participants

Includes: breakfast, lunch, one dinner, all materials, and access to planMGO online community. Does not include hotel accommodations.

Maximum enrollment is 35 participants.

Don't just take our word for it ...

Thank you to Diane, Larry, Izzy, Katelyn, and Laura for an amazing immersion into the fine art of frontline fundraising! The days though long were effective and masterful. The presentations revealed new concepts and also confirmed my understanding of best practices. It was the best professional development opportunity I have experienced, and I am a better employee/person because of what I learned. I will take the tools assembled from the sessions and apply them to all areas of my profession. A million thanks!

— **Christine Dahlheimer, Director Annual Giving**
Thayer Academy, MA – 2016

If you have a budget for continuing professional education, you are going to want to spend 100% of it on planMGO. If you don't have a budget for continuing professional education, planMGO would inspire you to negotiate one – tomorrow. planMGO is just that valuable. From exquisitely gifted and deeply knowledgeable faculty to an evidence-based curriculum, don't miss this opportunity – for you, your team or your staff.

— **Susan Buchanan, Major and Planned Gifts Officer**
Concord Hospital Trust, NH – 2015

The conference exceeded my expectations. I appreciate that it incorporated information about personality and demeanor in addition to helpful strategy about building relationships that will lead to meaningful gifts. I have already recommended the conference to several colleagues.

— **Andrea Diehl, Philanthropy Officer**
Hazelden Foundation, MN – 2014

I want you to know what a wonderful experience I had at the training. You are both consummate professionals and your guest speakers also knocked it out of the park. I came back energized and highly motivated and told our Vice President of Development that we should send all our staff to the training. It was fun, challenging, enlightening, exhausting and a game changer. Thank you for making me a better Executive Director.

— **Tom McNaught, Executive Director**
John F. Kennedy Library Foundation, Boston, MA – 2013

The planMGO Conference was unlike any other conference I have ever attended. The focus on nuts and bolts fundraising skills combined with the emphasis placed on personality types/thought process left me feeling energized and with a long list of lessons learned. I was able to successfully apply the skills I learned on prospect visits less than a week after the conference. I would highly recommend the planMGO conference to anyone interested in honing their development skills and looking for a conference that provides essential information to become a Master Gift Officer.

— **Andrew Horgan, Major Gift Officer, Brown University, RI - 2012**

FOR QUESTIONS OR HELP WITH REGISTRATION, PLEASE CONTACT:

Larry G. Raff MPH
President, Copley Raff, Inc.

PHONE: 617-454-1110

EMAIL: lraff@copleyraff.com

www.copleyraff.com

Visit copleyraff.com/planmgo-registration/ to sign up for this revolutionary program today!