



# Becoming a Trusted Philanthropic Advisor

## AUDIENCE

Development/fundraising officers, and others responsible for creating and sustaining philanthropic donor relationships

"I have to admit that I came into the session with some skepticism about its utility, since I've been a fundraiser for 20 years. I found the concepts eye-opening and practical, and I am convinced I will do my job better by implementing these techniques."

*Associate Director of Planned Giving*

"I only wish I had been through the training 25 years ago!"

*Director of Principal Gifts, Hospital Development*

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Develop mutually gratifying relationships with donors

## Program Benefits

In today's highly volatile philanthropic environment, it is critical for development/fundraising officers to build trusted relationships with donors. *Becoming a Trusted Philanthropic Advisor* helps fundraisers understand how their donors and prospects think, better assess their philanthropic disposition, and determine what motivates donors to make significant gifts. It then builds the skills to get in sync with that thinking, add value, and increase each donor's engagement and commitment to your organization. After completing this program, development/fundraising officers are better able to:

- Quickly build trust and credibility with donors/prospects
- Create a donor development strategy that achieves key gifting objectives
- Build successful philanthropic partnerships that generate gratifying philanthropic experiences for donors, and positive results for your organization

## Program Description

*Becoming a Trusted Philanthropic Advisor's* experiential, action-learning design allows participants to develop personal insights, discover knowledge, and build skills relevant to their specific needs. Development/fundraising officers are able to engage with peers and apply learning directly to their donor situations and challenges. During the program, participants:

- Learn how donors/prospects think about philanthropy in relation to your organization
- Identify where donors are in the Giving Cycle
- Learn how to quickly establish and build credibility with donors/prospects
- Develop the high-impact questions to understand and determine donors' philanthropic needs and desires
- Create a donor development strategy that generates mutually satisfying philanthropic experiences
- Learn how to communicate effectively with each donor's unique style and desires
- Develop the skills to strengthen relationships, build philanthropic partnerships, and generate gifting experiences that are gratifying for both donors and your organization

At the conclusion of the program, development/fundraising officers build a strategic action plan for one of their prospects.

## Implementation/Customization

*Becoming a Trusted Philanthropic Advisor* is implemented over two days and is appropriate for 12 to 24 participants per facilitator. Materials and activities are customized to your organization's critical issues, tactical and strategic goals, and objectives. A *Train the Trainer* program is also available.