



The Symposium 20

PRESENTED BY
the FOCUSgroup 23

BREAKOUT SESSION

Developing New Professionals: How to Hire and Train Up a New Major Gift Officer

Dr. Jay Barber, Executive Consultant

Dr. Scott Rodin, Chief Strategy Officer & Senior Consultant

What we will cover today:

- *Key Qualities to Look For in Candidates*
- *Preparing for Your New Hire*
- *Ways to Test Relational Skills*
- *Ongoing Professional (and Personal!) Development*
- *Open Discussion/Q&A*
- *Summary*

Key Qualities to Look for in Candidates

The Person Assigned to Secure Major Gifts

- Natural “relational” personality
- A good mission fit for your organization
- Excellent written and oral communication skills
- Is a good team member
- Recognizes that major gift fundraising is “data driven”
- Commits to “follow up” with major donors
- Fundraiser who is comfortable with making an “ask” or “invitation”

Preparing for Your New Hire

How to prepare for success

- What kind of onboarding would you want to receive if you were an outsider joining your organization?
- How do you communicate clear expectations of performance in terms of contacts made and funds raised?
- Do you have a portfolio and fundraising goal ready for this new hire?
- Do you have a 60-day or 90-day review regarding progress on the assigned donor prospects and learning the culture of the organization?
- What support are you prepared to offer the new MGO toward achieving those agreed upon goals and objectives?

Ways to Test Relational Skills

Good questions to ask

How do you respond when the donor's answer is no?

On your first meeting with a major donor, what do you hope to accomplish?

What would you do if a major donor has ignored your texts, phone calls, and written notes, what would you do to regain connection with this important donor?

How important is recognition for success to you as a major gift officer?

Ongoing Professional and Personal Development

Staying relational and strategic

- Casual conversation
- Tour
- Invitation
- Follow up

Five Key Elements

Case, Leadership, Prospects, Strategy and Plan

Open Discussion/Q & A

Thank you for attending
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