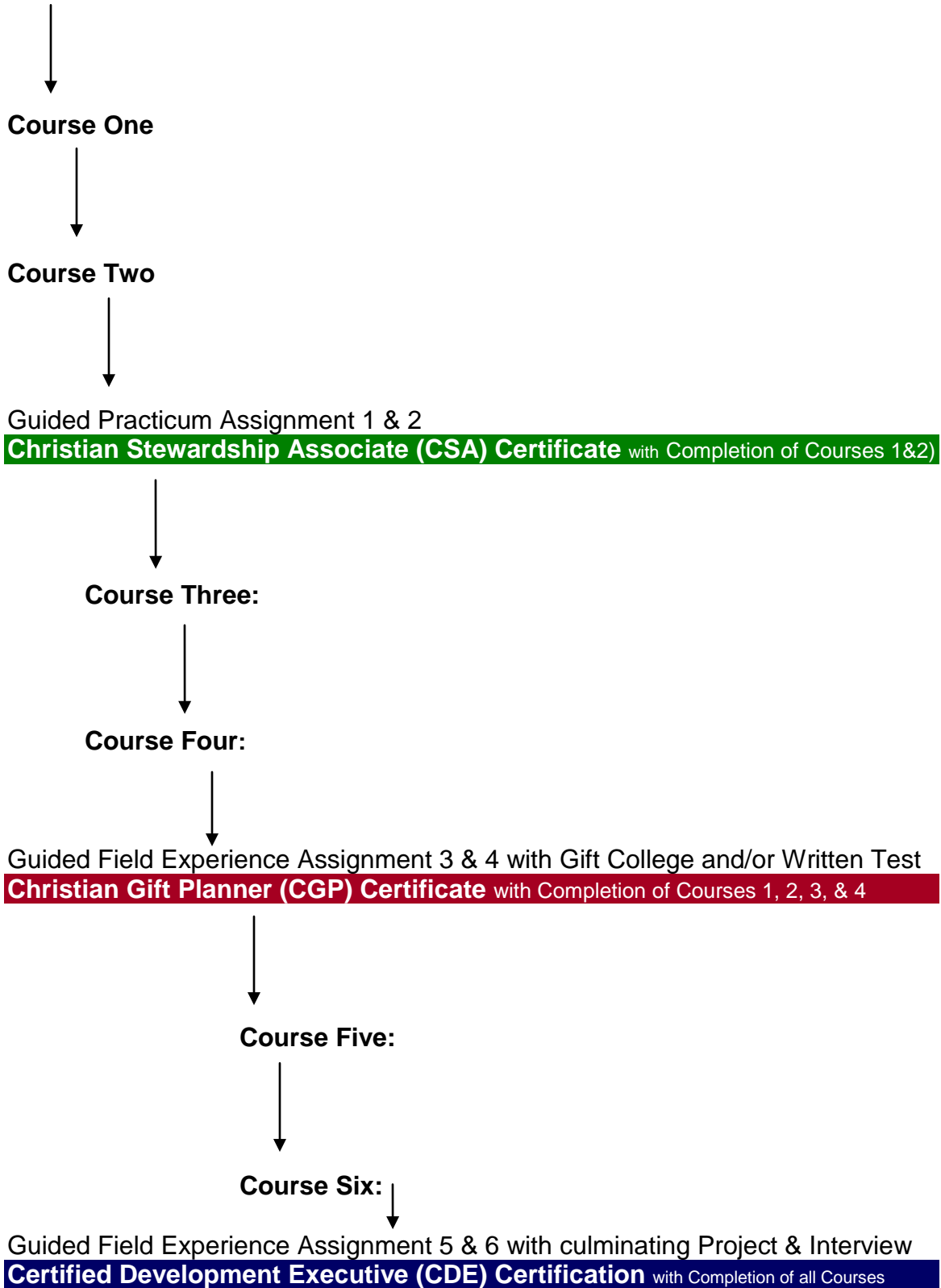


The road to get equipped follows this map:





Learning Objectives for the “Lifetime Plan for Giving” Seminar Series

Mega Outcome:

Attendees will be equipped with an understanding of Biblical discipleship to discern how God’s gift of generosity flows from the encouragement of the Gospel. They will demonstrate the ability to implement stewardship endeavors in gift planning and gift development that:

- a) build trust in relationships through the promise,
- b) develop confidence in leadership to fund the mission and endow vision, and
- c) engage every Christian through a Lifetime Plan for Giving, -today, tomorrow and forever.

Learning Objectives

Course 1 Funding the Mission 2 Days

Because of this Course and Seminars, learners will:

Seminar 1 Discover the Joy of Giving

1. Identify a core truth that “Christ’s Heart and ours Beat as One” to form a law-gospel balance in constructing a framework for the grace of giving
2. Identify the discipleship principles at work in gift development
3. Articulate the Biblical construct of inheritance and relate this to the opportunity to transfer the blessings.
4. Articulate how a family blessing is documented.
5. Explain the Christian imperative for a gift planning philosophy in gift development and relate this to why gift planning is critical to gift development.
6. Assess the impact of worldview on daily decisions and relate this to the Christian steward
7. Identify the attitudes that drive giving styles and implications for communications.
8. Determine how organizational values and leadership affect donor confidence and identify the resolve needed to sustain developmental stewardship in the church.

Seminar 2 Uncover Your Promise – Determining the Case for Support

9. Discover the meaning of Promise and its power for relationships
10. Identify how to Uncover an organization’s Promise and how this relates the mission and strategic plans for a ministry organization.
11. Identify the trigger benefit principle and how to construct communications from the perspective of the audience.
12. Determine how to communicate the Promise and relates this to a developmental “Case For Support”
13. Identify elements of effective direct communications including a donor gift request.

Seminar 3 Nurturing Gift Development Systematically

14. Overview the history of agapethy and philanthropy in developmental processes
15. Identify the scope and sequence of gift development
16. Discover ten systematic models and functions in organizing a strategic development approach.

Learning Objectives for the “Lifetime Plan for Giving” Seminar Series

17. Apply a strategic method to profile an ideal scenario and utilize this to engage people in development.
18. Identify the elements of stewarding and developing relationship growth linked to the mission of the organization.
19. Establish a way to identify a market universe and key members for each audience as a way to identify prospective donors.
20. Identify methods to identify and link donors to the mission with or without an existing database.
21. Identify the procedures of inviting and bridging relationship in linkage to the mission.
22. Determine an organizational pattern to engage people in a developmental process.
23. Determine how to organize a prospect or donor initiative while measuring the effectiveness of those initiatives.
24. Determine and experience fundamentals of asking for support.
25. Identify mistakes made with donors.
26. Appreciate how to integrate annual, major and deferred gift planning strategies into a blended approach.
27. Practice building a comprehensive development program including engagement in a guided practicum or field experience using a 31 Week Planning Calendar.

Seminar 4 Developing Lifetime Plans for Giving

28. Discover the meaning of a “Lifetime Plan for Giving-today, tomorrow and forever”
29. Understand how the vision of the LCMS Foundation can help your ministry reach its ministry goals.
30. Identify LCMS Foundation Staff and Functions
31. Explain the value of “*Linking*” for congregational/organizational vision and related this to raising people as disciples for the benefit of donors and ministry,
32. Discover the tax basis of charitable planning
33. Identify the building blocks of gift planning
34. Describe, compare and contrast the different types of planned gifts;
35. Consider important issues related to effective inquiry to guide and direct the passion to give to family and ministry
36. Determine ways to promote awareness for gift planning and how a case for support can be communicated in gift planning
37. Practice “Case Studies” and role-play for application of learned material.



Learning Objectives for the “Lifetime Plan for Giving” Seminar Series

Course 2 Stewarding Trust & Consecration..... 1 Day

Because of this Course and Seminars, learners will:

Seminar 5 Encouraging Generosity in Biblical “1st Fruit” Stewards

1. Review and discuss the LCMS Biblical Stewardship Principles
2. Construct a personal understanding of Christian stewardship consistent with the church’s teachings
3. Discover the keys to helping stewards grow in their understanding of Biblical stewardship
4. Determine guidelines for gift gathering in the church and how this applies to gift development as a part of the ministry landscape
5. Integrate a developmental approach to stewardship activity
6. Identify how encouraging generosity and asking for gifts is appropriate within mission and ministry
7. Construct a parallel understanding of Biblical nurture for gift gathering and the contemporary methods used in the church and society

Seminar 6 Developing Strategic and Visionary Plans

8. Identify the requirements and organizational factors for successful development work.
9. Discern change theory and what causes resistance to change
10. Identify an appreciative inquiry approach to positive change in strategic planning.
11. Determine how to put development eyes on strategic planning.
12. Relate strategic planning and development planning for the nonprofit ministry
13. Identify the importance of benchmarking and relate this to organizational decision making
14. Connect one’s organizational “vision” with a quantified plan of action
15. Discover a strategic planning model that integrates developmental principles built around the Lord’s Prayer.
16. Determine audience assessment tools and apply their use for gift development

Seminar 7 Communicating and Strengthening Your Promise

17. Discover the keys to communicating the promise of your mission
18. Develop an audience decision tree and communication plan.
19. Identify elements of an effective Case for Support and construct a case for your organization.
20. Identify Communication Styles and define how to work effectively with different styles.

Seminar 8 Fiduciary Fitness: Financial Pro Forma Planning

21. Articulate a vision for the organization and describe the role of leadership in quantifying the trajectory of a mission
22. State how governance and management policies relate to the mission, goals, and objectives of the organization
23. Determine the important aspects of executive leadership in management
24. Describe what it means to lead as a fit fiduciary and define implications for management and governance leadership
25. Describe the importance of the Form 990 and how to construct an annual report around these factors



Learning Objectives for the “Lifetime Plan for Giving” Seminar Series

26. Identify the ethical implications of “best practice” in accountability for a nonprofit ministry organization
27. Practice the implementation of Development Strategies and Program components consistent with Biblical stewardship in a supervised Practicum
28. Identify the financial planning factors that strengthen an organization and how this can be used in forward planning
29. Relate the chain to collaboration and how this creates mutual benefits
30. Discover the emotional systems at work in an organization



Learning Objectives for the “Lifetime Plan for Giving” Seminar Series

Course 3 Transfer the Blessing of Inheritance 1 Day

Because of this Course and Seminars, learners will:

Seminar 9 Gifts Techniques and Transactions

1. Construct a way to communicate the Biblical teachings on Inheritance to encourage gift planning
2. Identify benefits of an effective gift planning services program
3. Explain the role of “qualification” in the gift planning cycle;
4. Understand how the plans of giving match case scenarios
5. Discover protocols and policies of the LCMS Foundation gift processing

Seminar 10 Developing a Personal Gift Plan

6. Determine the Lifetime Plan for Giving process and materials
7. Work with the Lifetime Plan for Giving system to construct a case scenario
8. Review sample illustration, charitable deductions and tax savings for the Gift Annuity and charitable remainder Unitrust and other planned gifts;
9. Demonstrate proficiency in the knowledge, skills, and dispositional characteristics of gift planning;
10. Identify and utilize applicable LCMSF resources and expertise relevant to gift planning
11. Construct a donor summary and at-a-glance design and identify the steps to move the gift planning process toward completion
12. Complete a skills testing procedure for a working technical knowledge

Seminar 11 Building a Mentor Ministries and Team

13. Discover a stewardship mentor ministries approach to congregational life
14. Develop mentor strategies for financial education and care
15. Explain the role of encouragement in promoting a gift planning program;
16. Develop a donor driven approach where organizational stewardship goals are clarified and quantified;
17. Define the task of “asking” in the paradigm of Christian gift planning;
18. Work cooperatively with a diverse group to collaborate on a plan for a constructing a gift planning program built on volunteers

Seminar 12 Encouraging Generosity: Creating Awareness & Vision

19. Identify the web resources available from the LCMS Foundation and develop a plan to link them to your work in gift development
20. Determine ten ways to communicate gift planning
21. Apply knowledge and understanding of communication strategies to construct an audience specific awareness program
22. Consider how to conduct a helping Interview with active listening and exploration
23. Evaluate effective ways to construct and promote an endowment and gift planning recognition society
24. Differentiate between the types and purposes of nurture activities that are audience specific



Learning Objectives for the “Lifetime Plan for Giving” Seminar Series

Course 4 Endowing the Vision 1 Day

Because of this Course and Seminars, learners will:

Seminar 13 Biblical Endowment Plans and Practices

1. Relate the benefit of endowment planning to the financial crisis predicted by church trend studies in the twentieth century.
2. List the corporate and individual stewardship principles found in the Bible
3. Relate the biblical endowment examples from the Old and New Testaments to contemporary situations.
4. Construct a balance philosophy for endowments in the funding of ministry

Seminar 14 Trust, Investment & Custodial Services

5. Identify the comprehensive custodial services of The LCMS Foundation’s Trust, Investment arm
6. Discover the Investment Objectives and Philosophy used by the Foundation and make application for charitable split-interest agreements and custodial accounts
7. Clarify the Investment Oversight used by The LCMS Foundation
8. Explain the Investment Management Options available in the LCMS Foundation and relate how these meet the objective requirements for charitable fiduciary support.
9. Identify how to access updated trust and investment information on the LCMS Foundation Website
10. Review a custodial account agreement and articulate how to establish an account related to the different gifts instruments or custodial arrangements

Seminar 15 Endowment Policies, Procedures & Supporting Organizations

11. Review a framework to review and establish an endowment policy to fund the vision of an organization
12. Explain an endowment’s role in ministry
13. Identify the tax and legal implications of establishing endowments and foundations
14. Review a checklist of endowment planning steps
15. Construct at-a-glance designs for Endowment Funds
16. Identify key structural and management decisions related to endowments
17. Determine ways to promote endowment funds to communicate awareness
18. Construct a plan to grow and endowment
19. Identify how to apply prudent endowment management policies and procedures and limitations
20. Discover the fiduciary responsibilities that hold the public trust
21. Relate the importance of policies for conflict of interest, compliance, gift acceptance, gift counting and accounting, distribution and uses (Spending)
22. Identify the support personnel needed for organizational endowments

Seminar 16 Networking with Advisors and Influencers

23. Define advisors involved in the gift planning process and the role of each
24. Demonstrate an understanding of the risks and ethics that advisors face
25. Describe the optimal positioning of the charitable advisor on the advisor team and effective steps to establish a trust relationship with other advisors



Learning Objectives for the “Lifetime Plan for Giving” Seminar Series

Course 5 Gifts Today, Tomorrow and Forever..... 3 Days

Because of this Course and Seminars, learners will:

Seminar 17 Quantifying the Science of Gift Development

1. Articulate an understanding of the science of gift development for the organization in quantifiable means;
2. Analyze how many donors are required for attaining annual, capital and endowed potential
3. Learn how to assess the Science of Gift Development around seven leading developmental indicators
4. Identify a pro forma financial model to integrate gift development initiative planning with income and expense planning and cash forecasts to meet short and long-term needs.

Seminar 18 Gifts Today: Annual Core Donor Initiatives

5. Discover elements and issues that are essential to annual core donor, giving initiatives
6. Identify the key elements of building a core donor base
7. Determine how “offerings” and gifts coordinate with and interrelate to “first fruits” & tithes in biblical stewardship.
8. Identify fundamental elements of direct mail and its application in communicating and developing funds.

Seminar 19 Gift Tomorrow: Capital/Principle/Impact Gifts

9. Discover relationship styles and versatility that enhances relationships and interaction.
10. Identify Communication styles to work effectively with people of different styles and steward expectations.
11. Discover common elements of Campaigns and learn what makes them successful.
12. Distinguish the distinct features of a capital and endowment campaign.
13. Identify mistakes often made with donors and the steps necessary to avoid them.
14. Understand how major gift development and donor care initiatives provide success in gift development.
15. Blend cultivation and nurture of major gifts to form a donor service approach with key audiences such as the Board and high capacity donors.
16. Identify and experience fundamentals of “asking” for major and impact gifts and engaging people in the planning of their gifts.
17. Apply learning concepts by practice of “Asking” using “Case Studies” and role-plays.

Seminar 20 Gifts Forever: Estate & Financial Gift Planning

18. List and define the key terms and concepts in the areas of income tax, estate, and retirement planning
19. Understand techniques and plans of giving
20. Determine how to apply gift planning opportunities from a transactional and relational perspective
21. Match effective nurture methods in case situations.
22. Evaluate protocols and policies of the LCMS Foundation gift processing



Learning Objectives for the “Lifetime Plan for Giving” Seminar Series

23. Develop a donor audience decision tree
24. Learn how to prepare effective gift planning proposals and presentations
25. Blend cultivation and nurture gift-planning strategies to form a donor service approach with key audiences such as the Board and high capacity donors.
26. Develop a plan to Communicate and strengthen the Case for Support



Learning Objectives for the “Lifetime Plan for Giving” Seminar Series

Course 6 Administrative Sustaining Support and Grants..... 2 Days

Because of this Course and Seminars, learners will:

Seminar 21 Integrity & Ethics: What it means to be “Above Reproach”

1. Identify the Integrity and Ethics principles that guide the gift development and gift planning profession
2. Review the ALDE Code of Conduct, Donor Bill of Rights, Association of Fundraising Professionals, Code of Conduct and the Model Standards of the Partnership for Philanthropic Planning (formally NCGP) to construct a framework for ethics to define integrity in working with donors and donations
3. Consider recent and emerging ethical issues to frame a reference point in following current events and issues in ethics

Seminar 22 Organize, Involve and Link Volunteer Partners

4. Determine the important keys that help recruit servant leaders and volunteers for involvement in the mission
5. Identify group dynamics and individual characteristics that must be considered when engaging others
6. Develop a plan to jump start a volunteer program and build dedication
7. Describe where organizational volunteers can be found and how they can be organized and encouraged
8. Discover ways to assess church volunteerism and participation

Seminar 23 Information Systems & Data Management

9. Identify critical components of information systems related to data management
10. Review a relational database example to construct an understanding of contact relationship management
11. Identify the key interfaces of financial and relationship management
12. Review current technology networking tools and apply their use to developmental relational strategies.
13. Contrast a conservative, moderate, and liberal guidelines for counting deferred gifts in a campaign;
14. Trace an ideal response to a received gift;

Seminar 24 Development Support, Research & Assessments

15. Relate key considerations for selecting and utilization of technology and communications.
16. Identify key considerations for staffing, budget, technology, and materials.
17. Define how support systems relate to sustaining stewardship of systems and relationships
18. Review performance benchmarks for gift planning and correlate these to balance between accountability and support
19. Identify elements of a gift acceptance and gift processing policy and system
20. Identify tools and techniques for prospect and donor research
21. Become familiar with LCMS Foundation consulting assessments and their purpose including giving style research, development-testing surveys.
22. Construct a profile for the Mission and key result areas of an organization.



Learning Objectives for the “Lifetime Plan for Giving” Seminar Series

Seminar 25 Grants and Grantors

23. Identify the scope and sequence of gift development and how to identify grantors
24. Define various grants and grantors differentiating their objectives
25. Identify a framework to assess grantor strategic interests and how to determine important information from Grantors
26. List critical elements of a typical grant proposal
27. Fulfill field assignment criteria, construct a developmental project and complete an oral interview