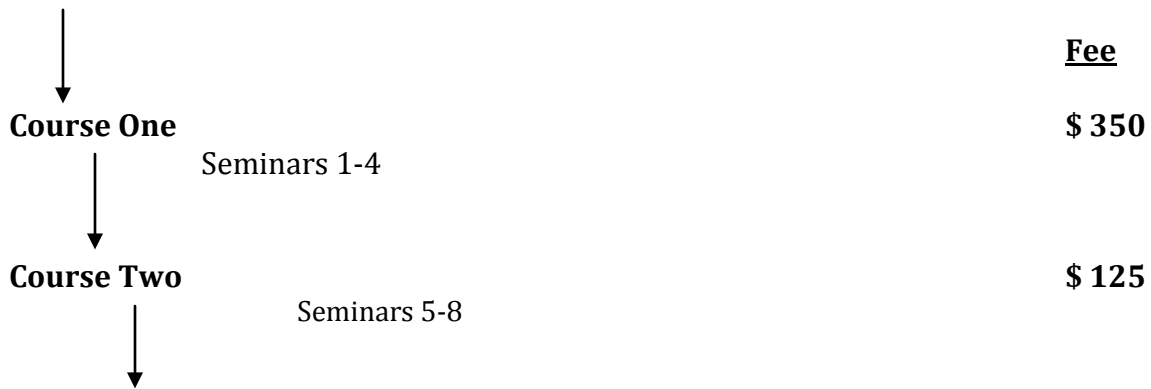




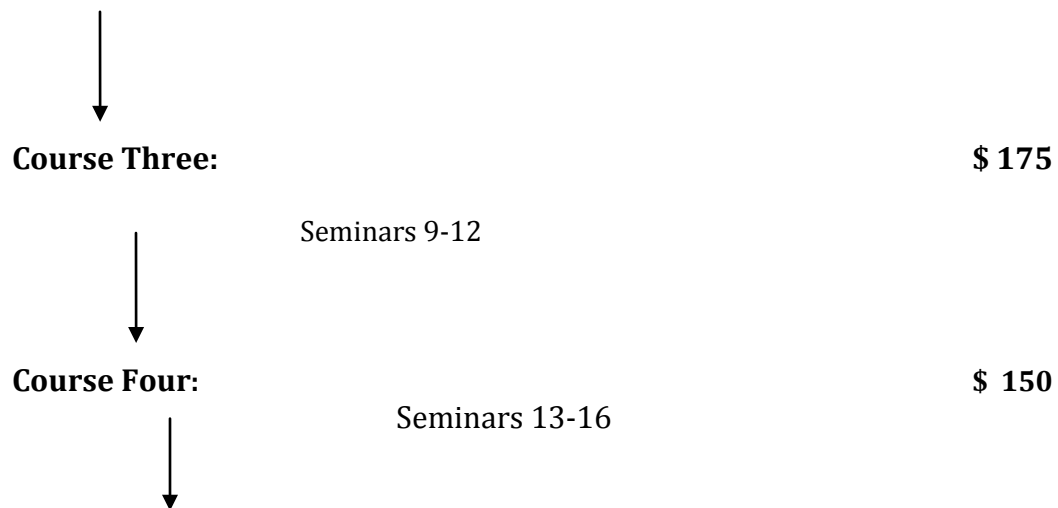
Learning Objectives for the “Lifetime Plan for Giving” Seminar Series

The Road To Get Equipped For Your Mission Follows This Path:



Christian Stewardship Associate (CSA) Certificate

Completion of Courses 1&2 & Guided Practicum



Christian Gift Planner (CGP) Certificate

Completion of Courses 1, 2, 3, & 4 plus a Skills Test and Mentored Field Experience



Christian Development Executive (CDE) Certification

Completion of all Courses plus Guided Field Experience and an Oral Interview

Register at <http://lcmsfoundation.org/New/trainregistration.asp>



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Mega Outcome:

Attendees will be equipped with an understanding of Biblical stewardship as 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 of mission,
- b) develop confidence in leadership and strategic intentionality to fund the mission and endow vision, and
- c) engage every Christian through a Lifetime Plan for Giving™-today, tomorrow and forever.

What are students saying? *“I found it to be exemplary, rigorous and worth every minute.”* Rev. Paul Kienker, LCMS Joint Seminary Fund

Learning Objectives for each Course and Seminar

Course One: Funding the Mission 2 Days

Because of this Course and Seminars, learners will:

Seminar 1: Discover the Joy of Giving

1. Form a law-gospel balance in constructing a Biblical framework for the grace of giving based on the core truth of creation in the Image of Christ, sin and baptismal restoration and how for the disciple, “Christ’s Heart and ours Beat as One”.
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 decisions 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 – Determine and Develop 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.

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12. Determine how to communicate the Promise and relate this to a developmental “Case for Support”.
13. Identify elements of effective direct response communications including a donor gift invitation or request.

Seminar 3: Nurturing Gift Development Systematically

14. Overview the historical progression 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.
17. Apply a strategic method to profile an ideal scenario and utilize this to engage people in development.
18. Identify the functional 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 and methods to identify prospective donors.
20. Recognize 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 gifts and financial 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 mission and vision of the LCMS Foundation can help your ministry reach its ministry funding goals.
30. Identify LCMS Foundation staff and functions.
31. Explain the value of “Linkage” for congregational/organizational vision and relate 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 and discovery 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 for gift planning.
37. Practice “Case Studies” and role-play for application of learned material.



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Course Two: Stewarding Trust & Consecration.....1 Day

Because of this Course and Seminars, learners will:

Seminar 5: Encouraging Generosity in Biblical “First 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 help stewards grow in their understanding of Biblical stewardship as disciples of Christ.
4. Determine guidelines for gift gathering in the church and how this applies to gift development as a part of ministry landscape.
5. Integrate a developmental approach to stewardship activity.
6. Determine how encouraging generosity and asking for gifts is appropriate within Biblical mission and ministry.
7. Construct an understanding of the contrasts and distinctions of Biblical nurture for gift gathering and the contemporary methods used in philanthropic work in our society.

Seminar 6: Developing Strategic and Vision Planning

8. Identify organizational factors that are essential requirements for success in gift development.
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 how strategic planning and development planning blend for nonprofit ministry.
13. Define how benchmarking is important and related to organizational strategy decisions.
14. Connect one’s organizational “vision” with a measurable trajectory for mission accomplished.
15. Discover a strategic planning model that integrates developmental principles built around the spiritual framework of The Lord’s Prayer.
16. Determine audience survey and 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 how to construct a Case for your organization.
20. Identify Personality Styles and discern how to work with and communicate effectively with different styles.

Seminar 8: Fit Fiduciaries: Financial Pro Forma Forecasting and Planning

21. Articulate a vision for the organization as mission accomplished over time and describe the role of leadership in quantifying the strategic trajectory in accomplishing a mission



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22. Identify the financial planning factors that strengthen an organization and how this can be used in forecasting and planning.
23. State how governance and management policies relate to the mission, goals, and objectives of the organization.
24. Determine the important aspects of executive leadership in management.
25. Describe what it means to lead as a fit fiduciary and define implications for management and governance leadership.
26. Describe the importance of the Form 990 and how to construct an annual report around these factors.
27. Identify the procedures and ethical implications of “best practice” in accountability for a nonprofit ministry organization.
28. Relate the chain to collaboration and how this creates mutual benefits.
29. Identify emotional systems that are at work in an organization and relate these to focusing and motivating personnel and resources.
30. Practice the implementation of Financial Planning within a development strategies and program components consistent with Biblical stewardship in a guided Practicum experience.



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Course Three: Transfer the Blessing of Inheritance 1 Day

Because of this Course and Seminars, learners will:

Seminar 9: Planning 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 department.

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 illustrations, 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 LCMS Foundation 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 Ministry 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 constructing a gift planning program built on volunteers.

Seminar 12: Encouraging Generosity: Creating Awareness and Vision

19. Identify the web resources available from the LCMS 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.



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24. Differentiate between the types and purposes of nurture activities that are audience specific.

Course Four: 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 and 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 gift instruments or custodial arrangements.

Seminar 15: Endowment Policies, Procedures and 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 an 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.



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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.

Course Five: Gifts Today, Tomorrow and Forever.....3 Days

Because of this Course and Seminars, learners will:

Seminar 17: Quantifying the Science of Gift Development

1. Analyze how many donors are required in four different giving categories to attain annual, capital and endowed potential for your organization.
2. Learn how to assess the science of gift development and manage the seven leading developmental indicators.
3. Identify how a pro forma financial forecasting model to integrates gift development initiative planning with income and expense planning and uses cash forecasts to position the development plan to meet short and long-term financial requirements.

Seminar 18: Gifts Today: Annual Core Donor Programs

4. Discover elements and issues that are essential to annual core donor giving initiatives and the relationship of unrestricted giving to designated giving in developing the core base.
5. Identify the key elements of building a core donor base and the role of the annual fund.
6. Determine how annual gifts coordinate with and interrelate to “first fruits,” tithes and offerings in biblical giving.
7. Recognize the connection between core giving and estate giving and ways to optimize results from this connection.
8. Identify fundamental elements of direct mail and its application in communicating and developing funds.

Seminar 19: Gifts Today and 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 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.



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17. Apply learning concepts by practice of “asking” using Case Studies and role-plays.

Seminar 20: Gifts Forever: Estate and 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 nurturing methods in case situations.
22. Evaluate protocols and policies of The LCMS Foundation gift processing department.
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.

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Course Six: Administrative Sustaining Support and Grants...2 Days

Because of this Course and Seminars, learners will:

Seminar 21 Integrity and Ethics: What does it mean 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 and 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 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 and 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 gift acceptance and gift processing policy and system.
20. Identify tools and techniques for prospect and donor research.



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21. Become familiar with The LCMS Foundation consulting assessments and their purpose including giving style research and development-testing surveys.
22. Construct a profile for the Mission and key result areas of an organization.

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.