

Ottawa Roundtable Education Schedule 2010 – 2011

October 20, 2010 (7:00 am – 9:00 am) – Hampton Inn

Setting Up “Face-To-Face” Meeting with Donors and Prospects



*Marie Lizotte, CFRE & Sue Widyaratne, BBA, CFRE
Lizotte Widyaratne Philanthropic Consulting Services*



It has been proven time and again that nothing can replace face-to-face meetings to be successful at securing donations. This workshop will provide examples from personal experience on tips to setting up a face-to-face meeting, as well as suggestions on how to prepare for the meeting, interact with the prospect, and address concerns.

FEES

Members of CAGP-ACPDTM \$30.00 (Joint AFP Ottawa & CAGP Ottawa event)
Non-Members \$40.00

REGISTER ONLINE TODAY: http://www.regonline.com/Ottawa_Oct20

November 25, 2010 (8:00 am to 5:00 pm) – Chimo Hotel

“GIFT PLANNING – ALL IN A DAY”

Joshua Thorne

Manager, Philanthropic Advisory Services, Scotia Private Client Group



What is “Gift Planning - All in a Day”?

Do you want to be more confident in discussing gift planning with your donors and prospects?
Do you want to be more informed about the latest gift planning concepts and tools?

Perhaps you have Board members, Gift Planning/Planned Giving Committee Volunteers, or Senior Development staff with a responsibility for gift planning/planned giving programs who also need to learn more?

Then why not join a CAGP-ACPDTM faculty member for a full day of learning, including:

- Current philanthropic trends and tax issues
- Most common types of planned gifts in Canada
- Initiating and Managing a Gift Planning program
- Successful Gift Planning Marketing and Stewardship strategies
- How to introduce and discuss planned gifts with your donors ...and more.

REGISTER ONLINE TODAY:

<https://www.regonline.com/builder/site/Default.aspx?EventID=889030>

Cost: The cost of the full educational day is \$190 per member and \$240 per non-member (plus 13%h.s.t.) This fee includes all materials including a binder, handouts, breakfast, lunch and two coffee breaks.

January 26, 2011 (7:00 am to 9:00 am) – Chimo Hotel
Endowments – Bird in the Hand or Two in the Bush?



Michelle Osborne, CFRE, University of Toronto

In today's charities, cash is king. How do you market future revenue when the need for cash is today? What are the best practices for setting up, investing, stewarding and growing an endowment program? What are the risks? Is an endowment program right for every charity? Michelle will share her knowledge and experience with some

FEES

Members of CAGP-ACPD TM	\$30.00
Non-Members	\$40.00

February 23, 2011 (Two Sessions to choose from) – Chimo Hotel



*Dewayne Osborn, CGA, CFP
General Manager, Compliance Officer, Lawton Partners*

Session 1: Planned Giving and Your Practice: Seize the Opportunities! (7:00 am to 9:00 am)

For years you have heard about planned giving, and perhaps now your clientele is asking for information on this growing trend in philanthropy. If so, then great. If not now, they will! Do you know what to tell them? Are you aware of the opportunities for your practice that have emerged thanks to Budget 2010! Come to this session and we will discuss actual gifts that have transpired across Canada that you can use in your practice to add true value to your valuable relationships.

Session 2: Planned Gifts Taxation Boot Camp (11:30 am to 1:30 pm)

Does the mere mention of the word tax send a cold chill up your spine? Well, as a development/planned gifts officer, it shouldn't. You need to have a "tax vocabulary" to work in this unique and powerful area of philanthropy. The purpose of this session is to give you that vocabulary, provide helpful suggestions that will allow you to properly illustrate the tax consequences of most planned gifts, help you build your own tax resource library, and to give you sufficient understanding to remain active in the meeting with financial advisors when the discussion turns to tax. Samples and suggestions will be presented and your questions will be answered!

FEES

Members of CAGP-ACPD TM	\$30.00 or \$50 for both sessions
Non-Members	\$40.00 or \$70 for both sessions

A Must-Attend Session of the Year!!

April 27, 2011 (8:00 am to 11:30 am) – Venue TBD



*Lorna Somers
Vice-President & Senior Campaign Director,
McMaster University Foundation*

"SuperHero Six Pack for Success" - channel your inner superhero to achieve your personal best and bring out the best in colleagues, prospects and donors.

(More information on the session to come shortly)

(Joint AFP Ottawa & CAGP Ottawa event)

FEES

Members of CAGP-ACPD TM	\$60.00
Non-Members	\$80.00

May TBD (12:00 pm – 1:30 pm) – Venue TBD

Brown Bag Lunch –Multi Channel Marketing for Planned Giving and Monthly Giving.



The Ottawa Humane Society communicates with donors through many channels, but one of the most successful has been its annual “My Donor Wishes” survey. The annual survey has been included in their spring direct mail for many years. In 2010 this survey was done online through a regular e-mail to 20,000 of its supporters. The information gathered from this survey has brought new bequest confirmations, enrolled new donors in their monthly giving program and provided very useful demographical information and comments from their supporters

Rob McCulloch, Director of Development and Monique Archambault, Manager of Legacy Giving at the Ottawa Humane Society will share their experiences with you and give some tools to help you develop an integrated communication plan.

FEES

Members of CAGP-ACPD TM	\$10.00
Non-Members	\$20.00



For more information please e-mail: cagp.ottawa@gmail.com