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Practical Philanthropic Conversations

AGENDA  
October 2021

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|  |  | 8:00 a.m. – 12:00 p.m. PT |
| Day 1: October 5 |  | 9:00 a.m. – 1:00 p.m. MT |
| Day 2: October 19 |  | 10:00 a.m. – 2:00 p.m. CT |
| Day 3: October 26 |  | 11:00 a.m. – 3:00 p.m. ET |
|  |  | 12:00 p.m. – 4:00 p.m. AT |

**You are welcome to hang around at the end of each day.  
We will keep the Zoom room open for half an hour for questions & discussion.**

**Timing**

**Pacific Time: 8:00 a.m. – 12:00 p.m.**

*8:00 – 8:50 a.m. | 20-min. break | 9:10 – 10:00 a.m. | 20-min. break | 10:20 – 11:10 a.m. | 20-min. break | 11:30 – 12:00 p.m.*

**Mountain Time: 9:00 a.m. – 1:00 p.m.**   
*9:00 – 9:50 a.m. | 20-min. break | 10:10 – 11:00 a.m. | 20-min. break | 11:20 – 12:10 p.m. | 20-min. break | 12:30 – 1:00 p.m.*

**Central Time: 10:00 a.m. – 2:00 p.m.**   
*10:00 – 10:50 a.m. | 20-min. break | 11:10 – 12:00 p.m. | 20-min. break | 12:20 – 1:10 p.m. | 20-min. break | 1:30 – 2:00 p.m.*

**Eastern Time: 11:00 a.m. – 3:00 p.m.**   
*11:00 – 11:50 a.m. | 20-min. break | 12:10 – 1:00 p.m. | 20-min. break | 1:20 – 2:10 p.m. | 20-min. break | 2:30 – 3:00 p.m.*

**Atlantic Time: 12:00 p.m. – 4:00 p.m.**   
*12:00 – 12:50 p.m. | 20-min. break | 1:10 – 2:00 p.m. | 20-min. break | 2:20 – 3:10 p.m. | 20-min. break | 3:30 – 4:00 p.m.*

**Optional:** Purchase four Gift Planning 101 webinar recordings\* (45 minutes each) to watch before attending this course for $100:

* Talking to donors about gift planning
* Basics of estate administration
* Common types of gift vehicles
* Basics of Planned Giving marketing

*\*These recordings can be purchased when you register for this course.*

**Day 1: The Donor Conversation**Tuesday, October 5

* Introductions
  + What is Strategic Gift Planning?
  + Strategic Gift Planning and the donor-centred approach
* Core competencies of a charity-based gift planner
* Personal Action Plan
* Roleplay: A guided personal study of attitudes towards money, fundraising, asking and philanthropy
* Homework: Talking about gift planning with donors. A guided discussion to have with someone in your family or network.

**Day 2: Organizational Conversations**Tuesday, October 19

* Review homework from Day 1
* Counting and projections
* Program Management
* Internal marketing
* Ethics in fundraising
* Gift planning data in Canada: The CAGP Legacy Report
* Roleplay:
  + Making the case to staff leadership
  + Making the case to board
  + Talking to fundraising peers about gift planning
  + Talking to charity staff peers about culture of philanthropy
* Homework: Working on a launch/re-launch planned giving annual workplan

**Day 3: Community Conversations**Tuesday, October 26

* Review homework from Day 2
* Working with Advisors
* New insurance guidelines from CAGP
* Talking about giving options with your community
* External marketing strategy
* Roleplay:
  + Telling your charity’s story
  + Having community conversations about legacy
  + Using Will Power as a case study
* Revisit Personal Action Plan
* Next steps in your gift planning journey