Practical Philanthropic Conversations

AGENDA
October 2021

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
- Group Work: 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
- Group Work:
  - 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
- Group Work:
  - 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