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Practical Philanthropic Conversations

AGENDA
October 2021

Day 1: October 5
Day 2: October 19
Day 3: October 26

8:00 a.m. – 12:00 p.m. PT
9:00 a.m. – 1:00 p.m. MT
10:00 a.m. – 2:00 p.m. CT
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.

<u>Timing</u>

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