



Practical Philanthropic Conversations

AGENDA October 2022

Day 1: October 4	8:00 a.m. – 12:00 p.m. PT
Day 2: October 18	9:00 a.m. – 1:00 p.m. MT
Day 3: October 25	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.**

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.

Day 1: The Donor Conversation

Tuesday, October 4

- 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 18

- Review homework from Day 1
- Counting and projections
- Program Management
- Internal marketing
- Ethics in fundraising
- Gift planning data in Canada
- 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 25

- 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