



## Strategic Gift Planning Bootcamp

### QUESTIONS & ANSWERS

#### **Why is CAGP offering this course?**

Over the last few years we've had numerous requests for a course specifically designed for major gift professionals who are interested in the practical aspects of incorporating charitable gift planning into their work – as opposed to the administrative/technical aspects of complex giving options.

As Canada's foremost educators in charitable gift planning, CAGP responded to the challenge and, in collaboration with some of **Canada's leading gift planning experts**, created **this intensive 3-day course targeted specifically for major gift professionals**.

#### **What will be covered in the Bootcamp?**

The bottom line is to create a learning experience that provides a basic level of technical information on various current and deferred charitable giving options (*the 'what'*) – but the focus is on the humanistic aspects of building donor-centred, long-term relationships by **focusing on teaching 'why, when and how' to introduce and explain these gift planning options**. This course will:

- equip participants with practical skills and knowledge regarding charitable gift options (and gift planning) from a donor-centred perspective;
- sharpen their 'antenna' in knowing how to maximize service to their donors while maximizing revenue for their organizations;
- provide opportunities to apply the learning through a variety of individual and group-based learning activities.

Charitable gifts that will be covered include bequests, registered funds, life insurance and annuities, gifts-in-kind, and public securities. In addition to the basic overview of financial and tax considerations for each gift, **we will introduce them from a 360 degree viewpoint**. This will include delving into: the ideal donor profile, timing issues, how to describe the gift *in plain English*, valuation and receipting requirements, marketing tips, recommended paperwork and policies, real-life case studies, potential pitfalls, and much more.

In a nutshell, **it's about how to engage in productive, focused conversations that help donors realize their philanthropic goals**.



### **Why offer this now?**

Quite simply, we believe a course like this is needed in today's fundraising world to address a number of factors, for instance:

- Integration across fundraising programs (i.e. the merging of major, planned and annual giving disciplines) continues to gain popularity, requiring major gift professionals to expand their skills and knowledge and offer donors a more comprehensive charitable gift planning service.
- Donors are becoming more sophisticated and savvy about charitable giving options and they expect, and deserve, major gift professionals to respond to these expanding needs.
- As the regulatory and legal framework for charitable giving continues to evolve, there is a need to stay updated on the latest changes and opportunities.
- More professional advisors are raising (or wish to raise) the topic of philanthropy with their clients and may approach charities to learn more. Therefore, it is useful if fundraising professionals know how to develop meaningful relationships with advisors.

### **Who should attend?**

This course is designed for:

- **fundraising professionals who have been actively seeking and securing major gifts from individuals for at least two years, and**
- **seasoned fundraisers looking for a 'refresher' course on GP options...** from a donor-centred, conversational perspective.

In following adult learning principles, the course encourages participants to take an active rather than passive role in learning and teaching one another. Therefore, students are expected to have a solid understanding of the fundraising cycle (cultivation through stewardship) along with practical knowledge and a track record of building and sustaining relationships with donors.

### **How does this course compare to CAGP Foundation's Original Canadian Gift Planning Course (OCGP)?**

**This is not meant to replace CAGP Foundation's OCGP course** (which delves deeper into the administrative, technical and management aspects of a gift planning program) – **but to complement it** by focusing on the practical aspects of incorporating gift planning into conversations with prospects and donors.



Graduates of CAGP Foundation's OCGP course who spend the majority of their time engaged with prospects and donors may also find this course very useful. While they may already be familiar with the technical aspects of GP tools (so the technical part would be a refresher), this course is designed to build an added level of comfort and confidence in **identifying which tool to suggest – and when and how to do so –** with prospects, donors and/or professional advisors.

**So, if you want to spend 3 days diving into incredible and challenging case studies and stories within a team of fundraising professionals and surface with new found solutions, skills and knowledge... then why not register today for CAGP's Bootcamp!**

*"If you are offered the opportunity to attend the CAGP Strategic Gift Planning Bootcamp - seize it! You will build a level of comfort and confidence and network of like-minded individuals, who are committed to helping today's generations shape the communities and institutions of tomorrow."*

- Bootcamp attendee (2018)

#### **What are the learning objectives?**

(In other words – if you attend this course, here's what you can expect.)

- Expand and deepen your knowledge of giving options (for gifts now or later).
- Be able to understand and explain (in conversations with donors) the basic concepts of social capital, tax and estate planning, and timing issues relating to tax savings.
- Acquire an increased level of comfort and confidence in raising and discussing various gift options with donors, professional advisors or other charity colleagues and volunteers.
- Explore your relationship with philanthropy and your organization and learn how to include this when 'telling the story' of its impact when talking to donors.
- Participate in creating a stimulating, challenging and informative learning experience
- Increase your network of fundraising professionals.
- Leave with a binder full of practical resources including templates, tools, tips along with a personal action plan.

**We purposely limit the number of Bootcamp participants in each course**, so faculty can deliver personalized service and to ensure everyone is able to participate in classroom discussions – to gain the greatest results. **So, don't be disappointed by registering early!**



**Who will be teaching the course?**

Bootcamp faculty members are senior fundraising professionals who have taught CAGP Gift Planning courses and have direct experience as major gift professionals. The faculty for this year’s Strategic Gift Planning Bootcamp will be Michelle Osborne, CFRE and Sara Neely, CFRE. [Please visit the website](#) to see their bios.

**How much does the course cost?**

Prices below are the Early Bird prices, available until August 23, 2019.

Please see the website for regular pricing, available August 14-September 23, 2019.

Tuition prices are tax exempt. Accommodation & Meal prices below include taxes & service charges.

	Early Bird Tuition	Accommodation & Meals	Total Estimated Cost
<b>CAGP Member</b>	\$1150	\$1017.06	<b>\$2167.06</b> (including all taxes & service charges)
<b>Non-Member</b>	\$1565	\$1017.06	<b>\$2582.06</b> (including taxes & service charges)

**Total cost** includes 3 nights’ accommodation (Tuesday, Wednesday and Thursday), all meals beginning with Tuesday’s dinner and ending with a boxed lunch on Friday, coffee breaks, course tuition, course materials and all applicable taxes, gratuities and fees. Tuition is paid to CAGP upon registration and the Accommodation & Meal plan is paid directly to the hotel upon checkout.

**What are the extra costs?**

Outside of the costs outlined above, you are responsible for your transportation to and from the course, any drinks you may have while at the course and all incidentals.

**Where will it be held?**

The next Bootcamp will take place at the beautiful Fairmont Château Montebello in Montebello, Québec. Please check our [website](#) for more details.

**Will I receive CFRE credits for this course?**

Yes, the course will offer up to 17 CFRE credits.

**How can I get more information or register?**

Visit our [Strategic Gift Planning Bootcamp webpage!](#)

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