

CANADIAN ASSOCIATION OF GIFT PLANNERS VANCOUVER ISLAND CHAPTER

LUNCH & LEARN AND MORE!

2019 – 2020

The CAGP Vancouver Island *Lunch & Learn* sessions provide high-quality presentations and networking opportunities for CAGP members, non-members and professional advisors. Sessions are eligible for CFRE credits.

Monday, September 9, 2019
CAGP's Annual Mix & Mingle

**MIX AND
MINGLE**

Pacific Opera Victoria's Baumann Center

925 Balmoral Road - 4:00 pm – 6:00 pm

Please join us to mix and mingle and celebrate the new 2019/2020 CAGP VI program season.

TWO DIFFERENT DATES AND LOCATIONS

Wednesday, September 18, 2019 - NANAIMO

3:00 pm – 6:00 pm (registration at 2:45 pm)

Wednesday, September 25, 2019 - VICTORIA

12:00 pm – 1:30 pm (registration at 11:45 am)

Untapped Potential: Tools for Building Your Planning Giving Program

Sara Neely & Natasha Benn, Victoria Foundation

In this session, you will learn how to develop, manage and build your legacy program. Sara and Natasha will discuss how to receive and administer bequests, donor stewardship and recognition, tracking and reporting activities and expectancies, and marketing a planned giving program. They will also touch on policy areas that are important to address in today's fundraising environment and practical applications of gift acceptance policies.

Original Canadian Gift Planning Course



September 23 - 27, 2019

Saskatoon, Saskatchewan

Faculty: Jill Nelson & Paul Nazareth

Wednesday, October 23, 2019

12:00 pm – 1:30 pm (registration at 11:45 am)

The Donor's Perspective

Moderator: Jennifer Jasechko

As advisors and charity representatives, we all have ways of communicating with donors about their strategic charitable giving intentions. But are we always on the right track? Flexibility, innovation, and empathy can help. Join us for a lively panel discussion and hear from four local philanthropists to find out what motivates their giving and what makes them say 'yes' to your funding requests.

Strategic Gift Planning Bootcamp



October 29 – November 1, 2019

Montebello, Quebec

Faculty: Michelle Osborne & Sara Neely

National Philanthropy Day

Wednesday, November 13, 2019

Hosted by the Association of Fundraising Professionals

For details visit: afpvancoverisland.afpnet.org



Monday, November 18, 2019

12:00 pm – 1:30 pm (registration at 11:45 am)

Who to Name as Your Executor

Gurpreet K. Randhawa, Sitka Law Group

This session will explore the duties and responsibilities of an executor, the potential options with respect to who to name as your executor and the differences between the various options. This session will also explore how to structure charitable gifts in the will and how naming a charitable organization in your will may impact your executor.

Wednesday, January 29, 2020

12:00 pm – 1:30 pm (registration at 11:45 am)

We're Leaving a Legacy: Like it or Not

Lyndsay Green, Author, *The Well-Lived Life*

Using findings from her latest book, Lyndsay will discuss challenges facing us, both as participants in the philanthropic sector and as caring citizens. Lyndsay will explore strategies for change from the donor perspective. Author Susan Selecky encourages people to read *The Well-Lived Life* 'when you're ready to stop taking your life for granted'.

Presentation series events are held at the Union Club of BC, 805 Gordon Street, Victoria Pricing (*all applicable taxes included*) Unless otherwise noted, the cost for each session is: Members \$35 | Non-Members \$50 Each session held over the lunch hour includes a buffet lunch. Online reservation available at: www.cagp-acpdp.org/en/events/upcoming

Wednesday, February 12, 2020

12:00 pm – 1:30 pm (registration at 11:45 am)

A Narrative Approach to the Philanthropic Conversation

Norma Cameron, The Narrative Company

While many organizations have wonderful stories, often what's missing is the knowledge of how to choose, craft and tell stories **strategically** to educate prospects and donors about the mission of your organization and clearly articulate the crucial role they can play now (and in the future). Norma will share how by tapping into the power of a strategically chosen line-up of stories and discovery questions – you can create more meaningful conversations which can lead to more funds raised.

Tuesday, March 10, 2020

12:00 pm – 1:30 pm (registration at 11:45 am)

Joint meeting with the Victoria Estate Planning Council

The Future of the Charity, Not-for-profit and Volunteer Sectors in Canada

Grant Monck, LLB, Consultant

In June 2019, the Special Senate Committee on the Charitable Sector tabled its report entitled *Catalyst for Change: A Roadmap to a Stronger Charitable Sector*. CAGP played a vital role in submissions to the Committee. Leading these discussions was the National Government Relations Committee (GRC) of CAGP. GRC Committee Chair Grant Monck will give an overview of the Senate Report. The report's recommendations present an action plan on how charities, donors and their professional advisors can play a vital role to advocate for strategies and regulatory reforms needed to maximize the impact of our sector in communities across Canada and around the world.

27th Annual CAGP National Conference on Strategic Philanthropy



April 22 – 24, 2020

Regina, Saskatchewan

TWO DIFFERENT DATES AND LOCATIONS

Wednesday, April 22, 2020 - NANAIMO

3:00 pm – 6:00 pm (registration at 2:45 pm)

Wednesday, April 29, 2020 - VICTORIA

12:00 pm – 1:30 pm (registration at 11:45 am)

How to Talk to your Donors about Planned Giving Successfully

John Davies, Global Philanthropic

Successful planned giving programs should be at the vital core of all fundraising. In this session, JD will describe successful daily strategies for long-term success, including role-playing, strategic planning, creating the vision and, most importantly, how to construct the great conversations that lead to transformational gifts.

May LEAVE A LEGACY™ Event

May 2020 *Details to follow*



Wednesday, May 13, 2020

12:00 pm – 1:30 pm (registration at 11:45 am)

Communications that Support Relationship Building

Vanessa Chase Lockshin, Consultant

Asking is just one part of a successful fundraising program. The other part – the big part – is the relationship building that happens through cultivation and stewardship. If you work with annual level donors, much of this relationship building happens through the content and communications you send to your donors. But the question to asking is – is that content actually doing its job to help build relationships?

Wednesday, June 24, 2020

4:00 pm – 6:00 pm (registration at 3:45 pm)

Cocktail Reception

Millennials and Giving

Annual General Meeting

Shachi Kurl, Angus Reid Institute

In a four-part independent study, the Angus Reid Institute and CHIMP explored the state of giving in Canada and, in particular, millennials and giving. Shachi Kurl will share the in-depth study which uncovered some of the ways younger Canadians prefer to engage with charities, illuminating the role of social media and other online channels.

This year's program is being generously sponsored by:



THE DONOR
MOTIVATION
PROGRAM[®]
We Motivate Planned Giving!

HOW TO JOIN CAGP

CAGP HAS A NEW MEMBERSHIP STRUCTURE TO MEET YOUR NEEDS. FOR MORE INFORMATION:

www.cagp-acpdp.org

BY PHONE: 1.888.430.9494

FOR MORE INFORMATION ON CHAPTER MEMBERSHIP

Hilary Abbott, Membership Chair

cagpvimemberchair@gmail.com

FOR MORE INFORMATION ON THE PROGRAM

Natasha Benn, Program Chair

nbenn@victoriafoundation.bc.ca



For other upcoming events, webinars, and educational opportunities sponsored by CAGP National: www.cagp-acpdp.org