



AGENDA
Original Canadian Gift Planning Course
February 6-10, 2017

Monday, February 6	
3:00 – 3:45	Welcome & Orientation – Meet in classroom to register, Introductions Orientation: Tips on Getting the Most Out Of the Original Gift Planning Course
3:45 – 4:45	Chapter 1: What is Strategic Gift Planning? Topics/Concepts include: Moving Beyond Cash Gifts, Social Capital
4:45 – 6:00	Chapter 2: Tax Aspects and Gifts of Cash Introduction of basic taxation concepts and the tax consequences of donating different classes of property.
6:00 – 7:00	Dinner
7:00 – 8:30 p.m.	Welcome Reception (Courtesy of CAGP) Preparation exercise
Tuesday, February 7	
7:00 – 8:30	Breakfast
8:30 – 8:45	Chapter 2: Tax Aspects and Gifts of Cash Quick review
8:45 – 9:45	Chapter 3: Gifts of Publicly-Traded Securities Technical overview of donations of cash for charitable purposes and the tax incentives available when donating gifts of publicly-traded securities.
9:45 – 10:00	Break
10:00-11:00	Chapter 3: Gifts of Publicly-Traded Securities, continued
11:00-11:45	Group meets for Assignment #1 (Tax Aspects of Charitable Giving, Cash, Securities)
11:45 – 12:00	Group Photo
12:00 – 1:00	Lunch
1:00 – 1:30	Review of Assignment #1
1:30 – 3:00	Chapter 4: Bequests, RRSPs & RRIFs Learn about the tax aspects of bequests, legalities of bequests, the process of estate administration
3:00 – 3:15	Break
3:15 – 4:00	Chapter 4 (continued)

4:00 – 4:30	Group meets for Assignment #2 (Bequests, RRIFs & RRSPs)
4:30 – 5:00	Review of Assignment #2
5:00 – 6:00	Chapter 5: Marketing
6:00 – 6:45	Buffet Dinner
6:45	Free Time / Evening Ice Walk Activity

Wednesday, February 8	
7:00 – 8:30 a.m.	Breakfast
8:30 – 10:30	<p>Chapter 6: A Gift Using Life Insurance and Annuities Introduction of some of the basic types of life insurance and some of the standard ways of giving with life insurance as well as back-to-back insurance plans. It also addresses the question whether charities should engage in soliciting life insurance through a focused program.</p>
10:30 – 10:45	Break
10:45 – 12:15	<p>Chapter 7: Endowments Different types of charitable funds, the basics of endowments, including what charities should have endowments, named endowments, disbursement quota rules, and the fundamentals of investing endowments.</p>
12:15 – 1:00	Class Photo & Lunch
1:00 – 2:00	Free Time
2:00– 4:00	<p>Chapter 8: Cultivation, Solicitation & Closure Principles and techniques of cultivation and solicitation, as well as practical program management tools. A balance of theory as well as the practice of engaging donors. The Human side, discussing end of life with donors.</p>
4:00 – 5:15	<p>Chapter 9: Recognition & Stewardship Overview of standard methods to recognize and involve donors. One of the key learning objectives is to examine the different recognition and engagement tools – both individual and programmatic. The module also addresses industry standards for crediting planned gifts.</p>
5:15 - 6:00	Group meets for Assignment #3
6:00 – 7:30	Dinner
7:30 – 9:30	<p>Fireside Chat Chapter 10: Ethical and Liability Issues Examine the role that ethics plays in gift planning through ethically challenging gift-planning scenarios and the CAGP Code of Ethics.</p>

Thursday, February 9	
7:00 – 8:30	Breakfast
8:30 – 9:00	Review of Assignment #3
9:00 – 9:45	Role Play
9:45 – 10:00	Break
10:00 – 11:00	Groups work on Assignment #4
11:00 – 12:00	Group presentations of Assignment #4
12:00 – 1:00	Lunch
1:00 – 2:45	Chapter 11: Starting and Administering a Gift Planning Program Learn about the challenges of starting and/or administering a gift planning program, which charities are ready for gift planning, what the criteria and benchmarks for success are, how to count gifts, and how to evaluate success. Also learn about alternative program design models for smaller charities. Integrating Gift Planning with other Fundraising Programs
2:45-3:15	Meet with group to review and discuss Assignment #5
3:15-5:30	Walk up Tunnel Mountain / Free time
5:30	Meet to leave for dinner
6:00 – 7:30	Off-Site Dinner at Park Distillery
7:30	Free Time / Work on assignment #5 culminating Case Studies with your group

Friday, February 10	
7:00 – 9:00	Breakfast & check out
9:00 – 11:00	Assignment #5: Culminating Case Study presentations
11:00 – 12:00	Parking Lot Topics, Closing Remarks and Presentation
12:00	Lunch