Original Canadian Gift Planning Course

AGENDA

February 3-7, 2025

Niagara-on-the-Lake, Ontario

Monday, February 3	
1:00 – 1:30	**Register in the classroom**
1:30 – 2:15	**Welcome & Orientation** Getting the Most Out Of the Original Canadian Gift Planning Course
2:15 – 3:00	**Chapter 1: What is Strategic Gift Planning?** Topics/Concepts include: • Shifting fundraising focus from only cash to accepting donations of assets • Transactional fundraising Vs. Social Capital conversations • The landscape and narrative of the charitable sector in 2025
3:00 – 3:30	**Break**
3:30 – 6:00	**Chapter 2: Tax Aspects and Gifts of Cash** Introduction of basic taxation concepts in donations and the math involved in accepting gifts of assets and gift planning with donors/clients.
6:00 – 7:00	**Dinner**
7:00 – 8:30 p.m.	**Welcome Reception (Courtesy of CAGP)**

Tuesday, February 4	
7:00 – 8:30	**Breakfast**
8:30 – 8:45	**Chapter 2: Tax Aspects and Gifts of Cash** Review and overnight questions.
8:45 – 9:45	**Chapter 3: Gifts of Public Securities** Overview of the tax incentives when donating gifts of public securities. Strategies for marketing, administration, receipting and working with advisors and institutions.
9:45 – 10:00	**Break**
10:00-11:00	**Chapter 3: Gifts of Public Securities, continued**
11:00-11:45	**Group meets for Assignment #1 (Tax Aspects of Charitable Giving, Cash, Securities)**
11:45 – 12:00	**Group Photo (outside)**
12:00 – 1:00	**Lunch**
1:00 – 1:30	**Review of Assignment #1** (you will be provided with answers afterward)

1:30 – 3:00	**Chapter 4: Bequests** Planning and tax aspects of bequests, marketing, talking to donors, working with advisors, and other charities on bequest administration
3:00 – 3:15	**Break**
3:15 – 3:45	**Chapter 4: Gifts from registered funds (RRSPs & RRIFs)**
3:45 – 4:15	**Group meets for Assignment #2 (Bequests, RRIFs & RRSPs)**
4:15 – 4:45	**Review of Assignment #2**
4:45 – 5:45	**Chapter 5: Marketing: Trends and Tactics** Overview of the shift in marketing of fundraising to including planned giving vehicles in ALL asks, campaigns and materials that will add current and future dollars to all programs (annual, monthly, mid-level and major gifts). Not just bequests. **Please don't forget to bring your own gift planning material to share with peers.*
5:45 – 6:30	**Dinner**
6:30	**Free Time / Optional Social Activity – Sommelier Experience**

Wednesday, February 5	
7:00 – 8:30 a.m.	**Breakfast**
8:30 – 8:45	**Review of concepts: Gift of Securities, Bequests & Registered Funds, Marketing**
8:45 – 10:30	**Chapter 6: Gifts of Life Insurance** • Introduction to the different strategies of gifting life insurance • CAGP's new national guidelines for charities, advisors and donors • 2025: The new landscape of charitable insurance products in Canada
10:30 – 10:45	**Break**
10:45 – 12:00	**Chapter 7: Endowments, DAFs, and Working with Professional Advisors** Outline of modern endowment strategy; flexible options for creating endowments; endowment policy; and marketing endowment gifts. We will look at the different ways philanthropists use Foundations for their giving and explore the many types of Foundations, including Public, Private, Community, and Donor Advised. Gifts of assets require collaboration with advisors, how should charities of all sizes work with this gift planning partner? We will address common ethical concerns and share CAGP research on "the philanthropic conversation", the business of philanthropy (including the emergence of online wills) and new data from the Will Power campaign.
12:00 to 12:30	Working with professional advisors (tax, financial, estate, family wealth and gift planning) We will also share insights on the MFA-P; Master Financial Advisor in Philanthropy.
12:30 – 1:15	**Lunch**

1:15 – 2:00	**Free Time, optional "Walk & Talk" – What will you do with this knowledge?**
2:00– 3:45	**Chapter 8: Cultivation, Solicitation & Closure** Principles and techniques of cultivation and solicitation, as well as practical program and moves-management tools. A balance of theory as well as the practice of engagement – how to TALK to donors, clients, board members, charity leadership and the public about a new way to think about giving. We will discuss CRM/Databases and recording metrics and data.
3:45 – 4:00	**Break**
4:00 – 5:15	**Chapter 9: Recognition & Stewardship** Review and examine the rapidly evolving recognition trends and stewardship strategies – both individual and programmatic. Discuss and share current sector standards for crediting major, blended and bequest donations. Deeper discussion on the often-missed opportunities of gift growth through stewardship. Capital campaigns included.
5:15 - 6:00	**Group meets for Assignment #3 (Life insurance and Endowments)**
6:00 – 7:00	**Dinner**
7:00 – 8:30	**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. You will be encouraged to submit anonymous questions during the week. *This is a safe space.*

Thursday, February 6	
7:00 – 8:30	**Breakfast**
8:30 – 9:00	Review of Assignment #3
9:00 – 9:45	Role Play (in binder)
9:45 – 10:00	**Break**
10:00 – 11:00	**Groups work on Assignment #4 (Marketing)**
11:00 – 12:00	**Group presentations of Assignment #4**
12:00 – 1:00	**Lunch**
1:00 – 3:00	**Chapter 11: Managing a Gift Planning Program** A major review of the shift in fundraising landscape; donation receipting and administration, benchmarking and metrics for success, gift acceptance policies, working with finance on fiscal goals, reporting and performance metrics. Program design solutions for charities of all sizes, whether starting a program or reactivating a dormant one. A special focus will be on strategies to bring gift planning from the side of your desk to an "*integrated strategic giving*" calendar, schedule and strategy that you can take back and put to work right away. Not one size fits all, you will

	have the time to think about what your organization and team needs, and capacity/budget to make it real.
3:00 - 5:15	Groups convene to work on Assignment #5 (Culminating Case Studies)
5:20	**Meet in the lobby of Queen's Landing Hotel to walk to the off-site restaurant for dinner. Groups must leave by 5:25.**
5:45	**Off-site dinner at Pillar & Post**

Friday, February 7	
7:00 – 8:00	**Breakfast & check out** (Bring your luggage to the classroom or leave it with the front desk)
8:00 – 10:00	**Assignment #5: Culminating Case Study presentations**
10:00 – 11:00	**Parking Lot Topics, Closing Remarks and Completion Certificate Presentation**
11:00	**Boxed Lunches will be available**

**Note : The agenda is subject to change*