PLANNED GIVING DEVELOPMENT WORKSHOP

UNLOCKING EXTRAORDINARY GIFTS FROM ORDINARY DONORS

WHO IS IT FOR?

MANY CHARITY LEADERS FEEL OVERWHELMED IN THE AREA OF PLANNED GIVING BECAUSE OF THEIR LACK OF KNOWLEDGE IN THE FIELD WHICH IS FILLED WITH COMPETENT PROFESSIONALS. THIS WORKSHOP IS DESIGNED FOR YOU! WE TALK ABOUT PARTNERSHIP WITH GIFT PLANNING PROFESSIONALS AND/OR FINANCIAL PLANNERS AND HOW YOU SHAPE YOUR MESSAGE FOR MAXIMUM IMPACT. WHO SHOULD ATTEND? EXECUTIVE DIRECTORS / DEVELOPMENT STAFF / FUNDRAISERS / BOARD MEMBERS / VOLUNTEERS. THE FOCUS IS FOR SMALL AND MEDIUM SIZE CHARITIES WHO DO NOT HAVE A DEVELOPMENT DEPARTMENT OR STAFF. YOU WILL WALK AWAY WITH A PLAN TO ESTABLISH A FULL PLANNED GIVING PROGRAM BY ENGAGING KEY VOLUNTEERS. (1/2 DAY WORKSHOP)

OVERVIEW

THIS IS HALF-DAY WORKSHOP THAT COVERS THE FOLLOWING AREAS:
THE OPPORTUNITIES THROUGH YOUR CURRENT DONOR BASE
WHO SHOULD YOU FOCUS ON?
WHAT SHOULD BE YOUR MESSAGE?
IMPACT VS. PROCESS
USE OF VOLUNTEERS
MATERIAL OVERVIEW
HOW TO PROMOTE?
WHO ARE YOUR COMMUNITY PARTNERS WITH EXPERTISE?
HOW IS THE BOARD INVOLVED?
WARNINGS? WHAT TO BE CAREFUL ABOUT?

WALK AWAY

YOU WILL WALK AWAY CONFIDENT WITH THE KNOWLEDGE AND SKILLS TO DEVELOP AND IMPLEMENT YOUR OWN PLANNED GIFT STRATEGY FOR YOUR CHARITY.

BONUS / AN APPROVED PROVIDER FOR CONTINUING EDUCATION CREDITS FOR PLANNED GIVING WORKSHOP. CFRE EDUCATION CREDITS INITIAL CERTIFICATION AND/OR RECERTIFICATION. CERTIFIED FUND RAISING EXECUTIVE (CFRE) / 3.0 POINTS PER COMPLETED WORKSHOP.

PRESENTER – GARY MACDONALD

Gary is no stranger to the non-profit sector. 40 years in serving in leadership at the local, regional and national level. He gets it!
He has been successfully working with clients across Canada in developing fundraising strategies that work with small and medium size charities through major gifts and planned giving initiatives.
Currently he is a facilitator for the Loyalist College Training & Knowledge Centre in Belleville.

WHO IS IT FOR?

Non-Profit Charities
• Executive Directors
• Volunteers
• Board Members
• Fundraising Staff

TYPES OF NON-PROFITS?

• National Charities
• Small Local Charities
• Camps
• Hospital Foundations
• Churches
• Faith Based Groups
• Private Schools
• Health Networks
• College & University

COST

• $75 (plus HST) Advance
• $95 (Plus HST) Door
• Coffee/Tea Include

REGISTER

• Online – LINK HERE
• If paying by cheque in advance, it must be received in our office by March 31 to receive the Advance rate. Payable to “Clearview Consulting” / 286 Clearview Rd. Stirling, Ontario, KOK 3E0

Questions?

Contact Gary MacDonald
Clearview Consulting
1.888.494.1027 Ext 3
gmacdonald@clearviewcc.ca
www.clearviewcc.ca

Date & Location
April 8, 2015
Ottawa / Ottawa Police Association 141 Catherine St. / 1:30 - 4:30 MAP

Cost
$75 in Advance + 9.75 HST = $84.75 up to March 31
After March 31 - $95 at Door + 12.35 HST = $107.35
OTHER

EFFECTIVE WORKSHOPS

WHO WE ARE
Clearview is earning a reputation for being the trainer of choice for non-profits. All facilitators have previous non-profit leadership experience. We understand and want to provide professional training & consulting that’s affordable.

WHAT WE DO
Services include workshops, coaching & consulting. Can host groups at their equine learning center.

Learn More
1.888.494.1027 Ext 3
www.clearviewcc.ca
info@clearviewcc.ca

HELPING NON-PROFITS SUCCEED

FUNDRAISING
- Major Gift Development
- Planned Giving
- Developing a comprehensive fundraising strategy

BOARDS & HR
- Non-Profit Board Excellence Model
- Online Board Assessments
- Human Resource Practices and Strategies

LEADERSHIP
- High Performance Team Coaching Skills
- Maximizing Your Delegation Skills

WELLNESS
- When helping hurts (for professional care-givers)
- One day retreats for teams utilizing equine assisted experiential learning

Other
Available for in-house workshops, conferences and consulting services.