

Colorado Planned Giving Roundtable (CPGR) Outreach Program

Goal: To deliver CPGR's educational programs to individuals throughout the state of Colorado and Wyoming.

Over the past 18 months, our Council has implemented an 'Outreach Program' to make our programs, which are presented in the Denver metropolitan area, available to our members throughout Colorado as well as Wyoming.

We use an internet based service to make the presenter's PowerPoint presentation available to the remote site, and two-way audio is provided via audio conferencing. Attendees at the remote site can attend the presentation 'live' and are able to ask questions via the conferencing system.

We are now making all of our Luncheon Programs, Brown Bags, and Technical Series (approximately 15 programs) available to these outlying areas through the Outreach Program. The only program we do not offer through Outreach is our annual day and ½ Summer Symposium.

A key component of the program has been collaboration with organizations located in the outlying areas. In several of the sites, the collaboration has been with the local community foundation; other areas it has been a small group of gift planning professionals coming together in order to provide the programs. It has been critical to find a local 'champion' to make the outreach a reality and successful. We have been holding quarterly conference calls for these champions to discuss what they have done in their local community, how it has worked and to share best practices (marketing, logistics, follow up, etc) with one another.

We average 3 remote sites per program and have had as many as 5 at one time. We know that we have been able to reach many new gift planning professionals through the outreach programs. At one of our remote sites alone, half of the attendees are 'brand new' to our Council – they have never before attended a program nor even in our database. Feedback from attendees has been terrific as they are so grateful to be able to 'attend' the programs without having to drive to Denver as well as at no cost.

Key Points

- The program works best in locations where our host is an active CPGR member
- We use a company called Genesys Conferencing <http://www.genesys.com>
- Cost is 12¢ per site/per minute for both audio & video

Issues

- Technical problems
- Speakers repeating the questions