Creative Council Programming:
A Sample Twelve Month Education Calendar

January

Topic: Plan a topic of interest to CEOs, VPs of Development, Executive Directors, and other key organizational decision makers.

Suggested topics:
- How valuable are planned gifts?
- What's the cost to raise a planned gift dollar?
- A donor's perspective on the possibilities of "blended" giving (combining current and deferred gifts)
- Hiring and evaluating gift planning staff
- Counting and Reporting Gifts in (Annual or Multi-year) Campaigns (use the NCPG *Guidelines for Reporting and Counting Charitable Gifts* as a basis)

Notes: These are the folks who decide whether an organization supports staff membership in your council. Show them that you are worth it. Encourage members to bring a key organizational leader to the meeting as a free guest. Give members written or electronic information about the program that can be shared in advance. Check the leadership track at the National Conference on Planned Giving for program topic ideas.

Hint: Check materials from the Leadership Track at NCPG's 2007 National Conference on Planned Giving

Fundamentals Topic:
Panel Presentation: How to make the Case for Planned Giving in Your Organization

Host NCPG Virtual Seminar

February

Topic: Ethics in Action: Real Life Case Studies

Notes: Choose three case studies that might be applicable to both fundraisers and financial advisors. Have a moderator present each case study and have two panelists "argue" each side of the issue.

OR

Give three or four case studies to tables, assign a facilitator to each. Have the tables discuss and report back.

Hints: Ask council members to submit case studies in advance for consideration. Give attendees a list of resources for ethical decision-making.

Choose gray situations that have legitimate areas of disagreement. Choose situations that attendees can relate to (not too far-fetched).

Make sure that panelists have the cases in advance and discuss who will present each side of the issues (they don't have to agree with what they are presenting).

Brown Bag Topic: Donor Visits

March

Topic: How Does "Planned Giving" Become "Charitable Gift Planning"?

Notes: Hold this as a joint meeting with the local AFP chapter. This is a good opportunity for a panel to discuss successful collaborations or how to move a planned gift prospect to a major current gift or visa versa.

Host NCPG Virtual Seminar

April

Topic: Charitable Deduction Rules for Gift Planners

Notes: April 15 is on everyone's minds. Choose a topic that concentrates on deduction rules:
- qualified appraisals
- carryover rules
- tax benefits of charitable trusts:
    - Income tax
    - Capital Gains
    - AMT
    - Gift and estate tax

Fundamentals topics: Methods of Delivery and Date of the Gift

Brown Bag Topic: Performance Measurements for Charitable Gift Planners

May

Topic: Intro to Planning Giving mini-conference.

Notes: Introduction to techniques in the morning; lunch panel on how to introduce planned giving into donor calls and conversation; afternoon on steps to getting started.

Hint: Do a mass mailing or fax to all of the nonprofits in the area. Give a discounted price for the entire day and offer each segment separately. Make sure to have the council's annual program calendar and membership information in each attendee packet.

Host NCPG Virtual Seminar

June

Topic: Hold joint meeting with the local Estate Planning Council. Plan far enough in advance to get CE credit.

Suggested topics:
- Charitable Planning for the Small Business Owner
- Maximizing Charitable Giving Through Wealth Replacement
- Charitable Lead Trusts

Notes: To learn more about certifying your programs for CE credit...
For CFPs: www.cfp.net
For attorneys: www.abanet.org

Hint: If you can afford it, bring in a national speaker for this one--someone with credentials the EPC will respect. Check NCPG's on-line Speakers Bureau for ideas.

Brown Bag Topic: Q & A with one or two top financial planning professionals

July

Topic: What Advisors Really Want from the Charity Relationship

Notes: Have a panel of advisors discuss how they work with charitable motivated clients; why and how they bring charities into gift discussions, or why they don't; what services they can provide to charities:; and, how they best like to work with/get to know charities.

Fundamentals topic: How to Develop and Work with an Advisory Committee

Virtual Seminar

August

Topic: When Should You Say "No" to a Gift?

Notes: This can be presented as a panel each giving an example of a gift that should have been/was turned away.

Fundamentals topic: Gift Acceptance Policy Basics

Brown Bag Topic: Charitable Estate Planning Techniques

September

Topic: Here's the time to bring in a top national speaker, a very well known charity CEO, or big donor that lots of folks will want to hear. This is also an excellent time to bring in an NCPG Board member who can talk about national professional issues.

Notes: Use this meeting as your annual new member recruitment meeting.

Hint: Provide some incentive(s) for bringing guests--free or discounted meal, prize for the most guests, etc. Plan to introduce all guests. Have membership information available. Distribute next year's program calendar

Virtual Seminar

October

Topic: Year-end Charitable Tax Planning

Fundamentals topic: Year-end Charitable Tax Planning: Marketing

Brown Bag Topic: Q & A with one of two top nonprofit charitable gift planners

November

Topic: LEAVE A LEGACY®: How the Rising Tide Lifts All Boats

Notes: Introduce the LEAVE A LEGACY mission and program. Show examples of how individual charities and advisors are promoting the message through their use of the campaign materials. Open the program by showing the LEAVE A LEGACY public service announcement.

Hint: Co-sponsor Philanthropy Day activities. Include a LEAVE A LEGACY® award as a part of National Philanthropy Day.

Fundamentals topic: Do a half-day workshop on: Keys to a Successful Bequest Program

NCPG Virtual Seminar

December

Topic: Celebrate Giving: A Year of Stewardship Activities

Notes: Solicit great stewardship ideas from members throughout the year. Compile and present a calendar or top-ten list.

Fundamentals topic: The Triple Ask

Brown Bag Topic: Ideas for promoting LEAVE A LEGACY in your charity or firm's materials.

Bonus Topics:

Gifts of Tangible Personal Property
Half-day seminar: The Basics of Charitable Gift Annuities
NCPG's Charitable Life Insurance Evaluation Guidelines

Other Formats:

Book Club: Have members submit brief descriptions of books, web sites, articles, and other resources that they are currently using or have found especially helpful. Offer a program that is built on four or five of these folks presenting "reviews" of their recommended resource. Include the complete list as a meeting take-away.

A Funny Thing Happened on the Way……….
Recruit members in advance who will share humorous stories of donor visit, gifts gone awry, etc. Build a whole program around these or have one story told at each meeting.

Role-Playing: Ask members to prepare a role-playing skit. Topics might include:
- donor objections
- the first visit
- bringing up the charitable question with your client