

**2008 NCPG Leadership Assembly  
Creative Council Programming  
Northern California Planned Giving Council**

June 19, 2008

<u>Program</u>	<u>Begun</u>	<u># / Year</u>	<u># Attend</u>	<u>Level</u>	<u>Notes</u>
Luncheons	~1985	5	90	I to A	
Conference	1991	1	375	B to A	includes a fundamentals track
Primer Program	~1994	5	40	B to I	started @ 2/year
Masters Program	~1997	2	40	A	
Basics Course	~1998	1	40	B to I	6 weeks @ 3 hours each
Joint Luncheons	~1999	2+	90	I to A	w/ Financial Planning Association, Estate Planning Council, others?

Points to Consider

Lunch program is core. Launch of beginner programs allowed for luncheons to focus on intermediate and advanced. Primer Program, Basic's Course, and Fundamentals Track at conference need to coordinate speakers. Board representative needed to chair program. Leadership succession is key at the board level. Non-board members can participate in leadership of program and can be a good source for future board members.