

PHILANTHROPY 101:

Introduction into the “Business of Philanthropy”



Over the past few years, we have received multiple questions, concerns and thoughts from clients around various topics influencing the philanthropy and legacy conversation. In response, we have created a seven-part course stemming from those questions. Held bi-weekly, participants will join via Zoom for an interactive 90-minute session.

WHO SHOULD ATTEND:

- Individuals or families who are considering setting up a foundation or establishing an account in a Donor Advised Fund or Community Foundation
- Families that are on-boarding the next generation of foundation leaders or board members
- Foundations that are exploring new funding opportunities or re-thinking their strategic priorities

PARTICIPANTS WILL ALSO RECEIVE:

- Philanthropic Journey™ workbook
- Copy of Seth Godin's Book, "What to do When it's Your Turn"
- Contact info of this exclusive learning cohort so that family foundations can collaborate offline
- Articles & Resources for each module; anticipated about 60min of pre-work to be assigned for each session
- One hour of bespoke philanthropy advising services with a member of the K&C team

SESSIONS:

- 1. Landscape** To understand the charitable sector and the business of philanthropy in Canada
- 2. Funder Persona** Different types of funders; Individual and collective identity
- 3. Types of Giving** Learn about how money flows into organizations and drives change (or doesn't)
- 4. Geography & Demographics** An overview of what most needs doing in different regions of Canada
- 5. Governance** Articulate different ways that family foundations can govern themselves and communicate their decisions
- 6. Failures & Successes** Learn what works well and what not to do
- 7. Evaluations** Understanding the different ways of conducting strategic evaluations

OUTCOMES:

- A clearer understanding of where and how best to gain more bang for your "social buck"
- Understand the funder table dynamics. Identify your foundation's blind-spots and how to manage them
- How to affect the change you want to see beyond your cheque-book
- A clearer understanding of the issues facing the different regions in Canada
- Develop skills and tools for on-boarding the Next Generation and strengthen your legacy
- How to identify pitfalls and avoid blind spots
- Gain skills in the area of grantee evaluations and funding opportunity assessments

INVESTMENT:

\$1900 + GST/person;

Family discount (up to three members):

\$1400 + GST/person

Want to book this session for all members of your Foundation? We'd be happy to discuss a customized private program for your members. Call us to discuss a series for you.

To register or for more information please email edu@karmaandcents.com