

Mid-Iowa Planned Giving Council 2016 - 2017 Monthly Meeting Schedule

Regular monthly meetings of the MIPGC are held at Iowa Lutheran Hospital at the corner of East University and Penn Avenue in Des Moines. Meetings are held on Level B, Conference Room A, adjacent to the hospital cafeteria, and provide for attendees to pick up breakfast items from the cafeteria and indicate being with MIPGC on checkout starting at 8:00 a.m., with the program beginning at 8:30 a.m. and concluding by 9:30 a.m.

September 27, 2016 - Speaker: Mike Deege, Wilson Deege Despotovich Riemenschneider & Rittgers, PLC, “Cyber Security in the Digital Age” This topic will cover ethical issues facing attorneys/ financial sector, available tools to protect information and examples of compromised security.

October 25, 2016 - Annual Conference / FFA Enrichment Center in Ankeny, Iowa

November 22, 2016 - Speaker: Nathan Stelter, The Stelter Company, “Data to Design: Using Research to Drive the Creative Process” This presentation will provide a multi-dimensional view from the new 2016 U.S. Healthy Aging Database® study and how its findings may impact charitable giving marketing communications. We'll look at how donors prefer to learn about organizations and the vehicles best suited to communicate by nonprofit sector. In the presentation we'll also provide data from the study that will drive strategic direction and demonstrate how some simple changes that any organization can make to their marketing communications materials can improve the chance of resonating with donors. The presentation will show real examples of how data was applied in the creation of print, digital and social medial planned giving marketing materials.

January 24, 2017 – Speaker: Alex Brovey, “Black Belt Gift Planning: Ten Stages to Becoming a Master” As masters of karate know, even the most complex task or form involves knowing the basics and building on them over time. Gift planning veterans similarly know that each time they prepare for a gift conversation, design a marketing piece, strategize with a colleague about gift options or plan a training; they are building on a foundation of prior experiences. We will also explore both “hard” and “soft” skills that epitomize the character of a master gift planner.

Learning Objectives:

- Explore the various stages in a typical gift planner’s career path that lead to success individually and at your charitable organization.

- Discuss lessons learned, gift scenarios, training ideas and donor stories at each stage.

Interact with fellow attendees to discuss both the art and science of gift planning, including metrics versus goals, blended gift scenarios and other current topics.

Black Belt Gift Planning (1/24/17) CFRE International APPROVED 1 PT

February 28, 2017 Speaker: Sheryl G. Morrison, “On the Menu – Charitable Alphabet Soup: Developing a Discerning Palate for CGAs, CRTs and CLTs” This session will cover the basic technical requirements for Charitable Gift Annuities (CGAs), Charitable Remainder Trusts

(CRTs) and Charitable Lead Trusts (CLTs) and when a donor might be interested in each of these planned giving techniques.

On The Menu (2/28/17) CFRE International APPROVED 1 PT

March 28, 2017 – Speaker: Melanie Norton, DePauw University, “Qualifying Planned and Major Gift Donors in One Easy Visit” Want to quickly get to know the capacity and interests of your prospective donors? This session will focus on employing the structured interview process to efficiently determine who may be a major gift prospect for your organization. Learn how to use this intentional question format to get your foot in the door with a new prospect, capture information about what prospects like or dislike about your organization, uncover issues that may affect giving decisions and identify the pertinent donor information fundraisers need to know.

Qualifying Planned and Major Gift Donors in One Easy Visit (3/28/17) CFRE International APPROVED 1 PT

April 25, 2017 Speaker: Wade Den Hartog on Community Foundation of Greater Des Moines.

May 23, 2017 – Speaker: Cathy Sheffield, Baylor All Saints Health Foundation, “Easy Peasy Ways to Incorporate Gift Planning into your Development Shop” In this presentation Cathy will discuss the importance of gift planning within an overall development shop and why it should be considered as part of an overall fundraising strategy.

In this presentation, we will:

- Review organization readiness and infrastructure preparedness
- Ways to promote gift vehicles, even on a shoe string budget
- How to identify and cultivate prospects; and

Managing your program, moving forward.

Easy Peasy Ways (5/23/17) CFRE International APPROVED 1 PT