



2019 WORKSHOP SERIES

Full Day: \$1.2 Billion Donated in 10 Years? Find Out How Some Can Be Yours Through Planned Giving!

An unveiling of "Leave 10 for Kitsap"

Friday March 29, 2019 | 8:30-4:00

Morning treats and coffee, lunch, and afternoon snacks provided

New Workshop Location: Harrison Medical Center, 1800 NW Myhre Rd, Silverdale, WA 98383

Wish you could have an awesome Planned Giving Program and a set of Legacy Donors to match? Maybe you have both, but want to take your planned giving game to the next level? One of the most important aspects of a well-rounded nonprofit income stream is a Planned Giving program - gifts that donors have bequeathed to nonprofits as part of their legacy. But how on earth do you start asking folks to think about what will happen with their assets once they pass away? Nobody wants to be like that one cousin that can always be counted on to make holidays uncomfortable...

Have no fear! We can help you get started - and this time, our plan is WAY bigger than just a one-day workshop. Since February 2018, leaders of several of Kitsap's non-profit organizations have met monthly to work on something very awesome - a program called *Leave 10 For Kitsap*. Leave 10 for Kitsap is a Kitsap peninsula-wide initiative to increase legacy giving to Kitsap area non-profits by encouraging people to leave 10% of their estates to charity. This program is modeled on a program that originated in Seattle, but we are making sure it works for Kitsap.

And guess what? We are going to tell YOU all about it at our day-long KCNE workshop. We aren't just going to tell you about it, we are going to give you tips, tricks, toolkits, and how-tos for creating your Planned Giving Program from start to finish.

Not only that, but we will be hosting a series of cohort-based Planned Giving workshops and you can sign up to join at this workshop.

Become a Leave 10 Member Nonprofit

As the Leave 10 for Kitsap movement rolls out over the next two years, special perks will be made available to local nonprofits who become Leave 10 Members. How do you become a Member? The easiest way is to attend this workshop! That's right; every nonprofit that attends this workshop will automatically become a Leave 10 Member. Your first Member perks will be a free Leave 10 Kitsap Planned Giving Toolkit and an invitation to take part in the 2019 planned giving cohort.

So please join us in this movement and this workshop. The more nonprofits that take part, the better it will be for all of us nonprofits and our community!

AGENDA

8:30 - 9:00 Check-in and Networking

9:00 - 9:15 Welcome and Introductions

Kol Medina, President & CEO, Kitsap Community Foundation

What is Leave 10 For Kitsap and how can it help you start, refine, and expand planned giving programs for your nonprofit?

9:15 - 10:15 Unveiling "Leave 10 For Kitsap": Explanation and Q&A

Kol Medina, President & CEO, Kitsap Community Foundation

Jim Hopper, Executive Director, Bainbridge Community Foundation

Delve into the toolkit for Leave 10 and learn how to use it to educate Board, Staff, and Donors about planned giving. Find out the nuts and bolts of how to create or refine your planned giving program, including where you can go for help.

10:15 - 10:30 Break

10:30 - 12:00 Building Your Planned Giving Program: Guided Walk-Through of Leave 10 For Kitsap Nonprofit Toolkit

Jim Hopper, Executive Director, Bainbridge Island Community Foundation

Who gives and why? Find out the best people to approach and the best way to approach them when creating your planned giving program.

12:00 - 12:45 Lunch and Networking

12:45 - 1:45 Typical Profiles and Attributes of Planned Giving Donors

Presented by Scott Claeys

Who gives and why? Find out the best people to approach and the best way to approach them when creating your planned giving program.

1:45 - 3:00 Inspired Engagement: Cultivating, Soliciting, and Stewarding Planned Gift Donors

Presented by Jan Jacobs

Discover the best practices for developing long-term relationships with legacy givers; and how to maintain a relationship after they have made a commitment to your organization.

3:00 - 3:15 Break

3:15 - 4:00 Panel Discussion with Donors Who are Leaving Charitable Bequests

Hear about planned giving from the donor's perspective. Here is your chance to ask them all about what makes them tick and why they say "yes" – and "no" to planned giving for charitable organizations.

- Jim Hopper, Executive Director, Bainbridge Island Community Foundation
- Kol Medina, JD, President & CEO, Kitsap Community Foundation
- Jan Jacobs, CAP, Vice President and Philanthropic Client Manager with U.S. Trust, Bank of America Private Wealth Management
- Scott Claeys, Director of gift planning for the Salvation Army

Half Day: Finances For Nonprofits

Tuesday June 18, 2019

8:30 - Noon

New Workshop Location: Harrison Medical Center, 1800 NW Myhre Rd, Silverdale, WA 98383

Half Day: Connecting With Donors Old & New Through Storytelling

Friday September 20, 2019

8:30 - Noon

New Workshop Location: Harrison Medical Center, 1800 NW Myhre Rd, Silverdale, WA 98383

Half Day: Approaching Clients From a Trauma-Informed Perspective

Wednesday November 20, 2019

8:30 - Noon

New Workshop Location: Harrison Medical Center, 1800 NW Myhre Rd, Silverdale, WA 98383