



Outline for ACF's Sustainability Through Endowment Program (STEP)

Abbotsford Community Foundation is offering a cost-effective training and coaching program* to help local charitable organizations develop/enhance their endowment and planned giving programs. After completing the STEP workshop series, participants will be able to provide donors with more options to support their organizations in perpetuity. That's the power of endowment. Donors can create a legacy by making a permanent connection between your organization and their family, to continue to give even after they are gone.

*Special thanks to the Edmonton Community Foundation for allowing us access to their successful and long running Endowment Sustainability Program in the creation of our workshop series.

Week 1

Introduction to the Power of Endowments

Learning Objectives for the STEP series
Endowment 101 - Getting Buy In
Challenges in Building a Planned Giving Program
How Does a Planned Giving Program Fit into Fund Development

Week 2

The Power of Storytelling in Philanthropy

What Makes a Story Resonate with Donors
How to Craft Your Organization's Stories
Taking the Statistics & Making Them Visual
Crafting Key Messages Based on the Stories You Tell

Week 3

All About the Donors

Key Message Presentations by Organizations & Peer Feedback
Taking What Matters to Your Donor to Cultivate an Endowment Gift
What Donors Can I have Planned Giving Conversations With and How Do I Start?
How Do We Steward These Gifts?

Week 4

The Real Deal Around Tax Incentives

Why Tax Incentives Aren't the Key Motivator but Donors May Think They Are
What Donors Say vs What They Do - Reviewing the Data
Types of Gifts and Why
Critical Policies to Consider/Have in Place

Week 5

Bringing It All Together

Integrating Endowment Concept into your Fund Development Planning
Practicing Gratitude is Part of Stewardship
Follow up from Previous Sessions
Review Learning Objectives - If You Could Have a Part 2 of this Series

Contact Areni Kelleppan - arenik@abbotsfordcf.org or
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