# PHILANTHROPY 101:
## *Introduction into the "Business of Philanthropy"*

karma & cents

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:

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| **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 a group of clients? We'd be happy to discuss a customized, white labeled program for your firm. Call us to design a series for you.*

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