Philanthropic Values Workshop

Workshop Overview

The Philanthropic Values Team Workshop is the signature training offering from Rad Philanthropy. Custom versions of this training are available to meet the needs of specific audiences. At its core, this training helps people learn about the roots of philanthropy, supports individuals in setting personal giving intentions, and brings people together behind a shared purpose of impact. This training is recommended for the following groups:

- **Advancement staff.** In this version of the training, team members are invited to discover the many ways philanthropy manifests and get introspective about their connection to mission-driven work. The team will learn more about each other's fundamental values, will get key insights into working with donors, and will learn new perspectives about giving. One unique aspect of this training is that it is appropriate for all experience levels and all specialties of advancement work.
- **Non-profit boards or donor groups.** In this version of the training, participants are invited on much of the same introspective journey about their connection to philanthropy. In addition to learning new perspectives about giving, the audience will learn about giving tactics, such as which assets to give, finding the right amount to give, and implications of various types of gifts. They will also learn about how to work with non-profit partners, they will develop a set of giving strategies, and bring everything they have learned together into a comprehensive, personal giving plan. This training is particularly impactful for individuals who are beginning to spend more time and effort on their giving or are in a position to increase their giving substantially.
- **Financial Advisors.** In this variant of the workshop, participants will learn about the motivations for those that give and determine how to connect those impulses to specific gifts. This training is ideal for someone who helps clients make decisions about their finances and wants to offer those clients holistic advice about giving strategies that are informed by financial tactics as well as personal motivations around impact.

Your Workshop Details

These workshops can be tailored for your organization around the following details:

- **Audience.** Choose between advancement staff, board, donor group, or financial advisors.
- **Environment**. This session can be conducted in person or remotely. An in-person environment is recommended in most situations.
- **Number of participants**. This workshop can be facilitated for groups of 4 or more. In small groups of 4-7, everyone will participate together. In groups of 8 or more, the session will be

led to the entire group together, and participants will be broken out into smaller groups for some exercises.

- **Length of time.** These workshops take between 2 hours and a full work day. Depending on the length of the session, additional breaks and meal times are added into the agenda. A half day or full day workshop are recommended in most situations.
- **Cost.** Workshop cost is determined by the prior variables and institution size. We will discuss your needs and find the option that works best for you. Additional costs for space, meals, refreshments may be paid for directly by the client, or may be added to the total cost of the engagement, per planning conversations between Rad Philanthropy and the client.

Learn More

Ready to learn more or schedule your Philanthropic Values Workshop?
Contact Perry Radford (she/hers), Founder and Principal, Rad Philanthropy:
Email: perry@radphilanthropy.com
Website: radphilanthropy.com
Phone: 323.243.8111