

## 2017 Catholic Foundations Forum

*Pre-Conference Event designed specifically for Catholic Community Foundations*

September 16-17

Hyatt Regency Atlanta

Atlanta, Georgia

All Catholic Community Foundation directors, officers and board members are invited to a pre-conference gathering in Atlanta before the 55<sup>th</sup> annual conference of the International Catholic Stewardship Council (ICSC)! The Forum is based on feedback from the last two events, and promises to be even more lively and interactive.

The Forum begins at 1:45 pm on Saturday, September 16 and ends at noon on Sunday, September 17, before the annual ICSC conference begins. The conference includes a separate track of eight workshops, also specifically designed for Catholic Foundation professionals.

Saturday	September 16, 2017
1:00 – 1:45 pm	Pre-conference Registration
1:45 – 2:00 pm	Welcome Remarks
2:00 – 3:45 pm	Session 1 – Getting to Know You - Foundation “Speed-dating”
3:45 – 4:00 pm	Break (Sponsored)
4:00 – 5:45 pm	Session 2- Lessons Learned the Hard Way – Endowment Accounting and Foundation Audits
6:00 pm	Dinner (Sponsored by Christian Brothers Investment and Fund Evaluation Group, LLC)
Sunday	September 17, 2017
7:00 am	Mass
7:30 – 8:30 am	Continental Breakfast & Networking (Sponsored)
8:30 – 10:00 am	Planned Giving Toolboxes
10:00 – 10:15 am	Break
10:15 – 12:00 noon	Board Engagement and Giving

Each pre-conference session is one and a half, to two hours in length in order to generate thought-provoking yet facilitated discussion on relevant and current topics chosen by a panel of foundation officers from across the country. Facilitators will use a variety of techniques to direct the conversations, guarantee all attendees stay on topic, and solicit input from everyone involved.

The goals of each session are two-fold:

1. Share information and resources with colleagues to learn from each other's experiences
2. Create a concrete "take away" to use in your everyday work

Topic	Details	"What is the Take Away?"
1. Foundation Speed-dating	Attendees will have time at the beginning of the session to compile specific questions they want to ask their colleagues. The session is into 5-minute "dates" where pairs will question and get to know each other. Purpose is to get to know who is in the room, who has similar goals.	List of attendees, notes about who you want to spend more time talking with, list of ideas, resources, contacts to help in strategic planning for the next year.
2. Lessons Learned The Hard Way: Endowment Accounting and Foundation Audits	You may not know you have a financial reporting issue until it is too late. This session aims to help Foundation Executives learn what areas to pay attention to when managing endowments in order to avoid issues at audit time, and to ensure compliance with the Uniform Prudent Management of Institutional Funds Act.	Check list for items to watch out for in endowment management and accounting.
3. Planned Giving Toolboxes	Not every audience is the same when you are presenting facts about planned gifts. How do you give pastors, principals, and others the tools to implement their own planned giving programs? What materials do you develop for each specific audience?	Planned Giving Toolboxes tailored for different audiences.

<p>4. Board Engagement and Giving</p>	<p>Discussion will focus on how to engage board members in furthering the mission of the Foundation, advocating and involving others in the Catholic Community, as well as encouraging their personal financial support.</p>	<p>Attendees create individualized plans for engaging board members; Concrete examples of what has worked or not worked for others and why.</p>
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**What Should Attendees Bring?**

- Policies (gift acceptance, investment, endowment, grants, etc.)
- Best/worst ideas, problems, challenges and joys of past year
- New initiatives within the past year – examples, anecdotes, budgets
- Marketing materials, website information, firms hired/retained
- Energy and enthusiasm
- Questions and ideas

**Cost and Registration**

With ICSC Conference Registration           \$95 per person  
 If attending pre-conference forum only       \$150 per person

To register for this preconference, [click here](#).