

# Giving for Impact Level 1 Agenda 2026

## Level 1 Overview

Pre-Requisite before sessions begin:

JD Levy Associates training videos to be watched online  
(link will be sent to you once you are registered)

### Session 1 – Thursday, March 5, 2026 8:30 a.m.-12:30 p.m. CST - Onsite

#### **Part 1. Building the foundation of knowing who we are as donors in order to make a difference around us**

- Introductions and Connections
- What is philanthropy?
- What matters to you most as a donor – your passion, your values, your interests?
- Framing what you need as a donor to make better decisions

#### **Part 2. Equipping donors to make a real difference through giving and being an advocate**

- Defining managing needs versus outcomes and change
- How to create impact and the 3 Rs
- Build a model and Philosophy of your own Giving
- Ten Tradeoffs every donor makes in giving
- Understanding vision and strategies of those we fund
- Understanding overhead and does it matter?
- Indicators that our giving is making a true difference - Exploring what we should evaluate in those we support

### Session II 4/9/2026 - 8:30am – 12:30pm Central – Onsite

#### **Creating partnerships that change lives**

- Indicators that our giving is making a true difference
- Exploring what we should evaluate in those we support (*continued from session 1*)
- What does it mean to be in a real partnership with the not-for-profit we support?
- Having a meaningful relationship with your favorite organization
- Creating our own Dashboard for critical questions to narrow our focus – review and revise JDLA Tool

#### **Place:**

The training will take place in the Welborn Community Room located in the 5/3 Bank building in downtown Evansville at 20 N.W. Third Street. The Welborn Baptist Foundation is located on the 15<sup>th</sup> floor. Parking is available in the attached parking garage (2<sup>nd</sup> floor) or on the street.

**Registration deadline: Wednesday, February 25, 2026**