



Making the most of conferences

From inspiration to informed giving

If you're seeking to build connections and gain insights about charitable giving, conferences, retreats, and other events can be powerful sources of knowledge and inspiration. This guide helps donors to approach these gatherings with openness and curiosity. It offers simple ideas for what you can do before, during, and after an event so your time and energy translate into real impact. You don't need to do a lot of work—you just need to be intentional about what matters most to you.

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Preparing to attend a conference

Preparing thoughtfully before you arrive at an event helps you make stronger connections and align your time with your goals. Even a small amount of intention-setting in advance can dramatically change what you take away from an event. Think of this stage as grounding yourself—not as scripting every moment.



Define your objectives for attending

Set 2–3 objectives that will guide your time and energy. Examples may include:

- **People-focused objectives.** Build relationships, meet peer funders, connect with nonprofit practitioners.
- **Learning-focused objectives.** Explore a new cause area, deepen your understanding of an issue, stay current on rapidly evolving issues, learn how others approach similar challenges.
- **Grantmaking-focused objectives.** Identify potential grantees, gather information for future funding decisions, explore collaboration or co-funding opportunities.



Design your ideal agenda

- Review the agenda and speakers to identify sessions that most interest you.

Tip: Download the conference app in advance, if available, and build your custom agenda from there.

- Prioritize sessions that align with your interests or spark your curiosity.
- Reserve space for serendipity. Impromptu conversations with fellow attendees can complement what you learn in sessions.



Prepare to network

- If the attendee list for the event is available ahead of time, identify 3–5 people you'd like to connect with.

Tip: Consider messaging people you'd like to meet in advance via the conference app, if available. Planning ahead can help you spend your time discussing topics relevant to your current objectives and connecting with peers who share your interests.

- Prepare 1–2 conversation starters that can remove the pressure of coming up with small talk—e.g., “What brought you here?” “What are you most curious about right now?” “What has stood out to you so far about this event?”
- Decide how you'll exchange your contact information—e.g., business cards, LinkedIn, conference app, or email.



Tap into your support system

For extra support, consider attending with others, such as a family member involved in giving, a trusted advisor, or a staff member. Meet with them beforehand to align your goals and next steps.

Key considerations during the conference

As you move through the conference, a few simple practices can help you stay energized, focused, and open to new opportunities. Navigating a gathering is as much about thoughtful pacing as it is about meaningful engagement. Keeping both your personal objectives and your own well-being in mind will help you make the most of every session and conversation.

“Some of my most rewarding experiences at philanthropy workshops have been my hallway conversations with other attendees. Talking with people who are facing similar philanthropic challenges has energized my giving, seeded creative approaches and new ideas, connected me to potential collaborators, and helped me to surround myself with a community of like-minded philanthropic givers.”

—Dr. Laura Peracchio
Emeritus Professor and Private Donor Group Donor



Give yourself space— but stay open

- Build in small 10- to 15-minute breaks to recharge and avoid information overload. A walk outside can help if your attention starts to drift.
- Leave space in your schedule for spontaneous, meaningful conversations with peers and partners.
- Adjust your schedule in real time based on what you learn and who you meet throughout the day.
- Consider blocking out your calendar during the conference to protect your attention and fully immerse yourself in the experience.



Stay grounded in your objectives

- Check in with yourself periodically to ensure that the sessions you're attending, the conversations you're having, and the commitments you're making align with your objectives for the conference.
- As you network, make space for different perspectives. Remember, this is an opportunity to broaden your viewpoint rather than spending all of your time with familiar faces.



Capture what stands out

- Throughout the event, jot down simple notes—main takeaways, resources mentioned, or ideas sparked in the moment—that you can revisit afterward.

Purposeful conference follow-up

The post-event window is an opportunity to build on your energy and insights. This is a valuable moment to reflect on your discoveries, reconnect with other attendees, and organize the information that stood out to you. Thoughtful follow-up enables you to carry the momentum from the event forward in your philanthropic journey.



Debrief and consider your next steps

Within a week of returning from the conference, review your notes while they're still fresh—including key takeaways, standout organizations, and conversations that sparked ideas.

Debrief with someone. Talking about your experience can help you identify what stood out most to you.

Identify follow-up steps that feel actionable, for example:

- Researching organizations you learned about;
- Following up with people you met; or
- Joining a network that aligns with your interests, like a donor collaborative.



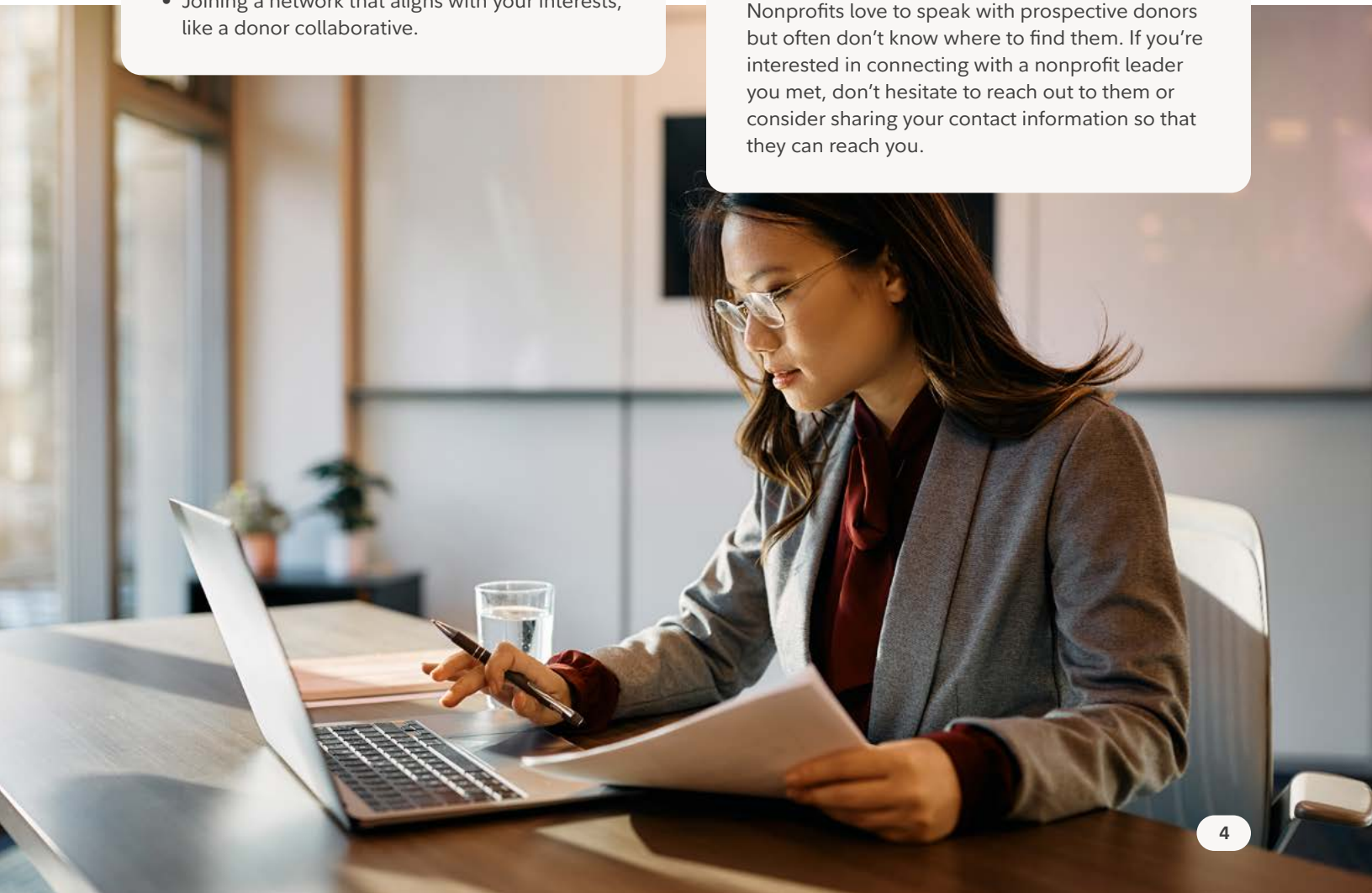
Follow up thoughtfully with new connections

Aim to reach out within a month to keep connections warm. Consider:

- Sending out a brief thank you email;
- Connecting to other attendees on LinkedIn;
- Joining a nonprofit's mailing list; and
- Sharing relevant articles, tools, or resources with peers you met at the event.

Keep in mind that even a short, in-the-moment message sent soon after meeting someone can keep you on their radar and help strengthen a new relationship.

Nonprofits love to speak with prospective donors but often don't know where to find them. If you're interested in connecting with a nonprofit leader you met, don't hesitate to reach out to them or consider sharing your contact information so that they can reach you.





Continue your philanthropic journey

We hope this guide helps you navigate conferences with confidence, intention, and curiosity. The steps you take before, during, and after an event can help turn new connections and learnings into meaningful action that strengthens the impact of your philanthropic giving.

Your Fidelity Charitable® Philanthropic Strategist can help you identify events and conferences that are right for you and that will support you in taking the next steps to help you reach your goals.

Fidelity Charitable® resources for further exploration

[Learning Communities for Philanthropists – guide](#)

[Discovering your philanthropic identity – quiz and guide](#)

[Charting for impact – report and discussion guide](#)

[Research charities – guide](#)

Worksheet to follow on next pages ►

Making the most of conferences worksheet

Before the event

1. Define your objectives for attending the event

Reflect on the question “What’s bringing me to this event?” Then set 2–3 objectives that will guide your time and energy throughout the event. These can be people-focused, learning-focused, or grantmaking-focused objectives. Consider the examples below and check off those that apply.

PEOPLE-FOCUSED OBJECTIVES

Build or deepen relationships

Meet peer funders

Connect with practitioners or experts

Get to know specific nonprofits or leaders

LEARNING-FOCUSED OBJECTIVES

Explore a new issue area

Deepen my understanding of a current focus area

Stay up to date on rapidly evolving issues

Learn how others approach similar challenges

GRANTMAKING-FOCUSED OBJECTIVES

Identify potential grantees

Gather information for future funding decisions

Explore collaboration or co-funding opportunities

Other objectives for this event:

- 1.
- 2.
- 3.

2. Design your ideal agenda

Review the event agenda and speakers to identify sessions you want to attend. Prioritize what aligns with your interests or sparks curiosity.

Must-attend/most interested

Would be nice to attend/optional

3. Clarify your philanthropic role

Consider your philanthropic identity and role and how you want to show up at the event. Prepare a short, natural way of introducing yourself, describing who you are, what you care about, and what brings you to the event.

CONSIDER THE QUESTIONS:

“How do I want to show up at this event? How will I represent myself?” (Check all that apply)

As a donor

As a board member of

As a member of

As someone exploring the issue of

Other

PREPARE A SHORT INTRODUCTION THAT YOU’RE COMFORTABLE USING IN CONVERSATION:

“Hi, I’m _____ . I’m focused on _____ ,
and I’m here because _____ .”

Tip: Consider preparing a clear, courteous explanation of your funding focus to be ready for conversations with organizations that may not align with your priorities—for example: “Thank you so much for sharing about your organization. My current funding is limited to the three priority areas of _____.”

4. Prepare to network

If the attendee list for the event is available ahead of time, identify 3–5 people you’d like to connect with and the reason(s) why.

NAME	ORGANIZATION	WHY I WANT TO CONNECT
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5. Tap into your support system

Don’t forget to check in with a trusted advisor like your Fidelity Charitable® Philanthropic Strategist before attending the event to discuss your goals and next steps.

After the event

The post-event window is an opportunity to reflect on your discoveries, reconnect with other attendees, and organize the information that stood out to you. Map out your next steps to carry the momentum forward in your philanthropic journey.

6. Debrief and plan your next steps

Write down quick reflections, such as key takeaways, standout organizations, and conversations that sparked ideas.

Identify 3 follow-up steps that feel actionable—e.g., researching organizations that stood out to you, reaching out to people you met, making a gift to a nonprofit, reading a book you discovered during the event, or joining a network aligned with your interests. Aim to reach out to people you met within a month to keep connections warm.

- 1.
- 2.
- 3.