

CAGP-ACPDP™ 2008 Membership Survey Results

First of all, many thanks to everyone who answered our survey (there were some 270 of you)! We achieved a 20% response rate!

Your National Board of Directors met in Ottawa at the beginning of November and one of our tasks was to review this survey in detail so we can make sure CAGP is serving it's members.

As we've said before we are a Governance Board and as such we evaluate our Executive Director, Diane MacDonald on seven outcomes. We listed these outcomes in our Member Survey and asked our members to rate and comment on each in terms of being relevant to them.

The preponderance of survey respondents listed all the outcomes as top priorities. The exception was Outcome #1 (We have a membership of 3,000 members by 2013). That is, the preponderance of survey respondents listed Outcome #1 as a 2 on a priority scale of 5.

Outcome #1

We have a membership of 3,000 members by 2013

Trend and challenges that our members thought would affect this outcome:

- 22 responses felt more charities are becoming members of CAGP
- 14 said demographics (aging population) would demand more information on estate planning and CAGP had a role in that education
- 10 felt our membership benefits are a driver for increased membership
- 7 felt that gift planners needed to be more aware of tax incentives
- 13 people thought this target was too ambitious
 - how many gift planners do we need anyway?
- Some felt the cost of membership is prohibitive for small charities

Board Reflections:

We should offer more educational offerings and continue to forge new organizational partnerships.

Round Tables should continue to be involved with regional growth

Outcome #2

CAGP-ACPDP™ is rebranded as the leading gift planning organization in Canada

Trend and challenges that our members thought would affect this outcome:

- Most responses were very positive
- Most commented we do have a niche in the fundraising world
 - Leave a Legacy is our brand

- We are different that AFP and need to articulate our unique strengths
- We need to focus on what we do well
- We have a great reputation and we should be marketing more
- We should be seeking more partnerships with other organizations
- A few didn't like the word rebranding

Board Reflections:

We will spend a significant amount of time at our June 2009 retreat considering the needs of our various stakeholder groups and how our Outcomes and branding relate to these groups.

Outcome #3

Gift planning is professionalized through competency-based standards of practice

Trend and challenges that our members thought would affect this outcome:

- Most of our members who responded felt this was important
- There was some confusion between certification and accreditation
- There are a number of designations in the industry –
 - how would we begin to harmonize or develop these options ?

Board Reflections:

It is clear that CAGP plays a significant role in enhancing the education of people engaged in the gift planning profession.

We want CAGP to continue to develop and implement the best model for gift planning education.

Outcome #4

There are four new educational offerings

Trend and challenges that our members thought would affect this outcome:

- The comments were sincere and concerned
- Educational sessions are very much appreciated and fill a need
- CAGP could explore how to partner with community colleges and other organizations on the Canadian Gift Planning Course, etc.
- A portion of the course could be offered on line
 - lower costs for the participants
- The Advanced Gift Planning Course is a good idea and necessary
 - there were some concerns of the costs, location and course content

Board Reflections:

We want to promote quality and excellence in Planned Giving education

Outcome #5

80% of our members report excellence in networking opportunities

Trend and challenges that our members thought would affect this outcome:

- people need and want networking
- more people are entering the field and these new people need this networking
- networking is most effective when it builds on our existing programs

- Some of our challenges are: travel costs, poor local organization, quality of sessions, too busy to attend

Board Reflections:

We see the value of offering significant networking opportunities at our events

Outcome #6

CAGP-ACDP™ is instrumental in new legislation being passed

- **concerning Charitable Remainder Trusts and gifts of real estate**

Trend and challenges that our members thought would affect this outcome:

- Education on CRT's is an issue
 - people do not know what role CAGP plays
- Should we be pushing the CRT's?
- Are they a useful or a proper focus?
- Education vs. advocacy?
 - what is our role?

Board Reflections:

We will continue to play a prominent role.

Outcome #7

There are at least four positive national media reports about gift planning per year

Trend and challenges that our members thought would affect this outcome:

- There is greater interest in philanthropy in general and this is reflected in greater media focus on gift planning.
- Leave a Legacy publications have been a significant part of our success.

Board Reflections:

Diane and CAGP volunteers have done very well in getting us in the national media in the last several years.

Summary Comments:

Profile of our membership that is engaged in planned giving:

- Small and large charities,
- Full-time and part-time
- Very diverse roles
- Financial advisors

Profession of gift planners or people engaged in gift planning

-who are our stakeholders? The board will be focusing increasingly on the stakeholders of CAGP, their needs and how the organization's goals should align to the various groups.

Some of the stakeholder groups identified included the following:

- Fundraisers with major focus on gift planning

- Fundraisers with portion of time spent on gift planning
- Fundraisers with a managerial and/or supervisor capacity
 - who don't necessarily see themselves as gift planners
- Professional advisors with focus on gift planning
- Educators
- General public
- Media
- CRA

Thanks again to the respondents.

Next year, when we send out our new survey, please take a few minutes.

Remember, we are your Board of Directors and we are listening!

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