

CAGP · ACPDP™

CANADIAN ASSOCIATION OF GIFT PLANNERS

ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONNS PLANIFIÉS



Canadian Association of Gift Planners Annual Member Survey

Executive Summary

November 30, 2010

Confidential



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The goal of the survey is to provide CAGP-ACPDPTM and the CAGP-ACPDPTM Board with a report that will help them understand wants and needs for all members and, more specifically, for Chapters, organization or advisor, size of charity and sector type.

Of the 1,257 emails sent out, 418 questionnaires were filled out for an overall completion rate of 33.2% This is consistent with a margin of error of 4%, 19 times out of 20.

Educational Programs

The results show a wide variation in attendance, from 11% of respondents for the National Advanced Canadian Gift Planning Course to 78% for Local Roundtable Educational Seminars and Workshops. However, when those who attended were asked to rate their satisfaction, all educational offerings received very high ratings.

Programs to Support Members and Recognize their Achievements

The results indicate a wide variation awareness of the programs, from 61% for "Other Continuing Education Credits" to 86% for the "Members-only resource section of the national website." Of those who could make a rating, three-quarters were "satisfied" or "very satisfied" with the members-only resource section of the national website; half gave the same ratings to CFRE credits – Certified Fund Raising Executive Program, the CAGP Bursary Program and other continuing education credits. Virtually all of the other respondents gave a rating of "neither satisfied nor dissatisfied."

Educational Sessions - Topics

Nine of ten respondents rated new tax legislation/implications as "relevant" or "very relevant." Eight of ten gave the same rating for client/donor relations, marketing your planned giving program, making the ask, prospecting, integrating major, planned and annual gifts, managing your planned giving program, working with your advisors; seven of ten for Gift Reporting/Tracking and six of ten for planned giving overview and working with volunteers in gift planning.

Educational Sessions – Future Attendance

Of the respondents who have not attended the sessions, plans to attend are reported by 41% of respondents (N=82) for the Original Canadian Gift Planning course and 33% (N=109) for the Gift Planning – All in a Day Session.

In addition, 204 respondents plan to attend the CAGP-ACPDPTM annual national conference in 2011 in Toronto; 196, the 2012 conference in Victoria; 155, the 2013 conference in Hull.

New or Alternative Educational Programs

Eight of ten respondents "agree" or "strongly agree" that CAGP-ACPDPTM should follow up on E-learning and online courses; seven of ten would like CAGP-ACPDPTM to consider offering a Gift Planning Powerpoint package to present to Boards and other stakeholders and monthly webinars; six of ten, on-line self-learning tool – GP – All in a Day; five of ten, on-line self-learning tool for Professional Advisors with Advocis credits, tailored seminar for Professional Advisors = half day with Advocis credits.

Benefits

The results show significant variation between respondents on their awareness of benefits. For example, 90% felt comfortable rating their satisfaction with the CAGP-ACPDPTM PLANNER newsletter; half felt the same level of comfort for the CGA-Canada PD Net webcasts or the CAGP-ACPDPTM Linked-In Group.

Of those who did make a rating, eight of ten respondents were "satisfied" or "very satisfied" with the complimentary New 2010 - Planned Giving for Canadians e-book, networking at national events and at local events, the complimentary on-line resource "A Charitable Guide To Planned Giving," the Code of Ethics, educational offerings, the CAGP-ACPDPTM PLANNER newsletter, Round Tables offerings (mentoring, idea sharing, networking, education, seminars and workshops) and Government Relations News

Seven of ten gave the same rating for the complimentary online resource, "PLANFORGIFTS.COM," the Job Posting service, the "Did You Know" e-blasts, the Job Posting e-blasts (73% and the "Stories and Stats" e-blasts; six of ten for the Canadian Donor's Guide, "Ask an Advisor" Feature, LEAVE A LEGACY™ local involvement; five of ten for "GEORGE'S TREE, The story of a well planned gift"; four of ten for the CAGP-ACPDPTM Linked-In Group and CGA-Canada PD Net webcasts.

New or Alternative Benefits

Nine of ten respondents "agree" or "strongly agree" that recent statistics on Gift Planning in Canada is a benefit on which CAGP-ACPDPTM should follow up. Seven of ten gave the same rating for "your organization listed on leavealegacy.ca; six of ten for Gold Associates List - CAGP-ACPDPTM members will have access to a list of over 600 advisors who have incorporated philanthropy in their practice; four of ten for donation and donor management software at special price for CAGP-ACPDPTM Members and Canadian Free Wills Network – a new service with special pricing for CAGP-ACPDPTM members; 21% for Home/car insurance at a special rate for CAGP-ACPDPTM members.

Web Site

Eight of ten report that they are "satisfied" or "very satisfied" with the education component, What's New, About Us, In the News and information on round tables; seven of ten gave the same rating for Leavealegacy.ca, the Annual Report, the Annual General Meeting Information and the Board of Directors Information.

Events in 2010 and 2011

The 2011 Annual National Conference and the GP All in a Day sessions are projected to be the most frequently attended events.

Reasons for Joining CAGP-ACPDPTM and Maintaining the Membership

Eight of ten respondents "agree" or "strongly agree" that they joined CAGP-ACPDPTM because of "the access I have to the educational services offered by CAGP" and "the access I have to information provided by CAGP-ACPDPTM." Seven of ten gave the same rating for "the networking I am able to do as a result of my CAGP-ACPDPTM membership;" six of ten for "CAGP-ACPDPTM's lobbying efforts with the government on legislation and regulations," "the access I have to benefits provided by CAGP-ACPDPTM;" five of ten for "the sense of camaraderie I feel as a result of my membership in CAGP-ACPDPTM, "the reduced fees I pay for educational services offered by CAGP-ACPDPTM" and "the way in which CAGP-ACPDPTM has helped the development of my career."

Access to educational services and information are the two most important reasons for maintaining the membership.

Ninety-two percent of respondents intend to renew their membership; 7% are "not sure."

Perceptions of CAGP-ACPDPTM

Nine of ten respondents confirm as "true" or "very true" the statements: CAGP-ACPDPTM advocates on behalf of its members to seek better legislation in gift planning, CAGP-ACPDPTM advocates on behalf of Canadians, the sector and its members in seeking better legislation in gift planning; eight of ten make the same confirmation for CAGP-ACPDPTM is the pre-eminent educator of gift planning in Canada, CAGP-ACPDPTM provides services primarily for those who work in gift planning, CAGP-ACPDPTM educates the public through the LEAVE A LEGACYTM Program and CAGP-ACPDPTM provides services primarily to encourage gift planning in Canada; seven of ten give the same rating for CAGP-ACPDPTM is focused on both current and deferred gifts, the LEAVE A LEGACYTM program is very important for the work of CAGP-ACPDPTM, Gift Planning in my organization includes planned gifts for today, i.e. Gifts of securities; five of ten for Gift Planning in my organization is considered deferred giving, i.e. bequests; two of ten for "CAGP-ACPDPTM is mostly focused on deferred gifts."

The report is completed by respondent profile and comments, survey instruments and a detailed presented of the results for each question.