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A NOTE FROM THE EXECUTIVE DIRECTOR

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Happy New Year!

I thought I would start off the New Year by discussing our most recently released Canadian statistics. As you may have noticed in your research, there is very little Canadian statistics on gift planning in Canada. And amongst the small surveys that are out there, rarely do we see a sampling of more than 1,000 Canadians.

So when Statistics Canada released its' annual statistics on Financial Data and Charitable Donations on November 16, 2009, we got a little excited. For the 2008 tax year, 24 million Canadians or 71.6% filed tax returns (T1 forms). This is indeed a large sampling of Canadians! What did we learn this year?

We learned that the median donation was \$250.00 in 2008 - meaning that half of the donors gave more than \$250 and half less. Among donors in 2007 and 2006, the median donation was also \$250. – So no change in the past three years.

However, we saw that Canadians donated 8.19 billion to charities in 2008, a 5.3% drop from 2007. It seems the recession may have affected the level of giving in Canada.

Other interesting facts included:

- Although Nunavut had the lowest rate of donors overall – 10% - yet their median donation was the highest at \$500.00.
- Manitoba had the highest rate of donors – 27% of their total tax filers gave to charity. Their median donation was \$330.
- Men and women are almost equal when it comes the amount of donors, (54% are men, and 46% are women), but men tend to give a little more than women. The median donation amount for men is \$280.00, while for women it is \$230.00.

For more information on these statistics, visit:

<http://www.statcan.gc.ca/daily-quotidien/091116/dq091116b-eng.htm>

Let's hope we see an increase in giving in Canada in next years Statistics! CAGP-ACPD™ is here to help you.

Diane MacDonald
 Executive Director, CAGP-ACPD™



QUOTE OF THE MONTH

The future belongs to those that believe in the beauty of their dreams.

Eleanor Roosevelt

CRA NEWS

January 2010

- [Registered Charities Newsletter No. 33](#)
- [The Charities Directorate welcomes your feedback on its existing policies and guidance](#)

CAGP-ACPDPTM NATIONAL EDUCATION UPDATE

2010 Educational Opportunities at a Glance!

CAGP-ACPDPTM has an exciting line up of educational opportunities for 2010. They are:

1. Original Gift Planning Course scheduled for March 23 – 28, 2010 Banff, AB
2. All in a Day scheduled for May 11, 2010 – prior to the Annual Conference
3. Annual Conference scheduled for May 12 – 14, 2010 – Edmonton, AB
4. Original Gift Planning Course scheduled for October 19 – 24, 2010 – Banff, AB

And let us not forget our newest addition - the **All in a Day Series**. The interest for this one day session has been overwhelming. To date we have received intent to hold this event in the following areas:

London - April 16th

Waterloo - May 6th

Toronto – June 15th.

2010 CAGP·ACPDPTM Friends Award – Deadline February 12, 2010

Do you know someone who should be recognized for their contribution and dedication to the vision of CAGP·ACPDPTM and Planned Giving? Please take a few minutes now to nominate that rewarding person.

Each year, the CAGP-ACPDPTM Board of Directors recognizes individuals who, and organizations which, exemplify the spirit and vision of CAGP-ACPDPTM. Those who receive this honor and recognition are presented with the “Friend of CAGP • Ami(e) de l’ACPDPTM” award at the Annual National Conference.

To nominate someone who you feel deserves this award, please click [here](#) for full details and to download a Nomination Form.

Bursaries Available for the Annual Conference

Is your budget a bit strained this year? Have you been a member of CAGP-ACPDPTM for a minimum of 3 months and are in good standing? Do not miss the opportunity to [apply for a bursary](#) to pay for your early bird registration fees at the Annual Conference! Deadline for receipt of application is **March 10, 2010**.



We have been very fortunate to receive a record number of bursary opportunities this year. At time of printing, they are as follows:

Southern Alberta RoundTable Bursary Sponsor

One registration in the Southern Alberta area
One registration in any area of Canada where most needed

Greater Toronto RoundTable Bursary Sponsor

One registration in the Greater Toronto area
One registration in any area of Canada where most needed

Metropolitain Montreal RoundTable Bursary Sponsor

One registration in the Montreal area (plus \$100 in expenses)
One registration in any area of Canada where most needed (plus \$100 in expenses)

North Saskatchewan RoundTable Bursary Sponsor

One registration in the North Saskatchewan area
One registration in any area of Canada where most needed

Manitoba RoundTable Bursary Sponsor

Two registrations in Manitoba
One registration in any area of Canada where most needed

London RoundTable Bursary Sponsor

One registration in the London area

Niagara / Golden Horseshoe RoundTable Bursary Sponsor

One registration in the Niagara/Golden Horseshoe area
One registration in any area of Canada where most needed

Alberta North RoundTable Bursary Sponsor

Three registrations in the Alberta North area
One registration in any area of Canada, with preference to a member in Alberta North or Southern Alberta.

Windsor-Essex RoundTable Bursary Sponsor

One registration in the Windsor-Essex area

South Saskatchewan RoundTable Bursary Sponsor

One registration in the South Saskatchewan area
One registration in any area of Canada where most needed

Nova Scotia RoundTable Bursary Sponsor

One registration in Nova Scotia

Greater Vancouver RoundTable Bursary Sponsor

Two registration in the Greater Vancouver area (plus \$350 in expenses)
One registration in any area of Canada where most needed (plus \$350 in expenses)



A MESSAGE FROM OUR BOARD OF DIRECTORS

CAGP-ACPDP™ 2010 and Beyond: Your responses to questions asked by the Board of Directors in the Member Survey.

This year the Board included four questions in the member survey aimed at getting a better understanding of how much time members spend on gift planning and whether you feel that CAGP-ACPDP™ is providing you with the tools you need to be successful in gift planning. It was also an opportunity for us to better understand whether there is a change in your expectations of what the Association should provide.

Of those who responded it was felt that our mission: “**Advancing the work of professionals in gift planning**” and our vision: “**Inspired giving through enlightened planning**” are relevant, although a few people felt that donors should be included in the mission statement.

Most of the respondents did feel that the current CAGP-ACPDP™ definition of gift planning: **Gift Planning is the donor-centered process of planning charitable gifts, whether current or future gifts, that meet philanthropic goals and balances personal, family, and tax considerations.** - is accurate and applies to their work.

Once again we heard that only 23% of respondents do gift planning as a full time job. For almost 60% it is a part time activity along with other responsibilities. This answer raised even more questions, such as whether the people who responded to this survey are the more senior and long time gift planners and hence only a small portion of their portfolio relates to gift planning? Or for a variety of reasons, has gift planning become an activity that most charitable organizations only assign as part of an individual's responsibility? For our professional advisor members by the nature of their work, it is a part but not all of what they do.

As to how CAGP-ACPDP™ can assist you in your gift planning work, there were a variety of responses. Suggestions such as more RoundTable and local events, downloadable “how to's” and stewardship and recognition ideas were given. Some respondents commented on the price of membership as being too high for small charity budgets to sustain. In addition there were many positive comments on what CAGP-ACPDP™ is currently providing as member benefits to assist members in their work.

At our November Retreat the Board discussed these responses in detail and discovered that it raised a significant question for us: Is CAGP-ACPDP™ about advancing the work of individuals who are involved in gift planning, or is it about advancing gift planning, as a general concept, throughout Canada? If it is the latter, then certainly the wider umbrella can include donors, professional advisors, gift planners in charitable organizations and everyone involved in gift planning.

The Board is very interested in hearing your views about this, and strongly encourages your involvement and attendance at the final session of the Conference in Edmonton May 12-14, 2010 to continue the discussion on the direction of CAGP-ACPDP™ beyond 2010.

Submitted by:
Charlotte Lawson
CAGP-ACPDP™ Board Director.

CAGP-ACPDTM Conference 2010



The 17th Annual National CAGP-ACPDTM Conference will be held in Edmonton, Alberta from May 12th-14th. This year's conference will be held at the [Westin Edmonton](#).

Conference Preliminary Program is now available!



[Register Now!](#)

LEAVE A LEGACYTM

A New Year with Great NEW LEAVE A LEGACYTM Initiatives to Come!

2009 was a momentous year for LEAVE A LEGACYTM. Not only were we promoted in a number of publications; including Grandparent Magazine (93,000 copies), Charity Times magazine (30,000 copies), Globe and Mail - *Your Guide to Giving Back* (300,000 copies) – just to name a few - but we also created and developed our first-ever television and radio PSA that aired on numerous networks across Canada during the month of May!

Our 22 Committees, made up of over 50 CAGP-ACPDTM volunteers, worked hard throughout the year and our success is definitely a symbol of their hard work. LEAVE A LEGACYTM would not have been able to accomplish what we did without the dedication of our Committee Chairs and volunteers. THANK YOU!

None of this would be at all possible without the financial and in-kind support from our National Development Sponsor, Great-West Life, London Life and Canada Life. Their dedicated support to LEAVE A LEGACYTM has provided a substantial increase in our LEAVE A LEGACYTM outreach. Without their assistance, our annual granting cycle to local programs would not be possible.



In 2010, we will continue to build on our success and take strides to ensure that all Canadians become familiar with LEAVE A LEGACY™ and *Make a Difference in the Lives that Follow.*

For more information on LEAVE A LEGACY™, please contact Jennifer Paradis, National Coordinator, leavelegacy@cagp-acpdp.org or 1-888-430-9494 x 3.



CAREER CORNER

Visit www.cagp-acpdp.org for job postings. For rates and services, click on [Post a Job](#).

CAGP-ACPDPTM UPCOMING EVENTS

<p>1/14/2010</p> <p>View more information</p>	<p>Greater Vancouver RoundTable Event</p> <p>Quantum Development: Using Your Brain for Fundraising Gain</p> <p>Thursday, January 14, 2010</p> <p>Arbutus Club, 2001 Nanton Avenue, Vancouver</p>
<p>1/19/2010</p> <p>View more information</p>	<p>Manitoba RoundTable Event</p> <p>Proactive Donor Stewardship</p> <p>Tuesday January 19th, 2010</p> <p>The Fort Garry Hotel, La Verendrye Room</p>
<p>1/21/2010</p> <p>View more information</p>	<p>Southern Alberta RoundTable event</p> <p>Charitable Gifts with Life Insurance</p> <p>Thursday, January 21, 2010</p> <p>JOW Gallery, Fort Calgary, 750-9th Ave SE (free parking)</p>



<p>1/21/2010</p> <p>View more information</p>	<p>Waterloo-Wellington and Area RoundTable Event</p> <p>Thursday, January 21, 2010 11:30 am – 1:30 pm</p> <p>Kitchener Public Library</p>
<p>1/21/2010</p> <p>View more information</p>	<p>Vancouver Island RoundTable Event Planned Giving 101- Legacy Building</p> <p>Thursday, January 21, 2010</p> <p>8:30a.m. - 12:30p.m. (Lunch and light refreshments provided)</p> <p>University Club, University of Victoria</p>
<p>1/21/2010</p> <p>View more information</p>	<p>Greater Toronto RoundTable Event Why Gift Planning Programs Fail to Thrive</p> <p>Thursday, January 21, 2010</p> <p>Speaker: Malcolm Burrows, Head, Philanthropic Advisory Services, Scotia Private Client Group</p>
<p>1/26/2010</p> <p>View more information</p>	<p>Greater Vancouver Island LEAVE A LEGACY Library Series</p> <p>LEAVE A LEGACY™ Library Series</p> <p>Tax Planning & YOUR Wishes - Make it Work for Everyone</p> <p>Tuesday, January 26 from 1:30p.m. - 3:00p.m.</p>

Please visit www.cagp-acpdp.org for more information on upcoming events in your area.