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CAGP-ACPD™ DEFINITION OF GIFT PLANNING:

Gift Planning is the donor-centered process of planning charitable gifts, whether current or future gifts, that meets philanthropic goals and balances personal, family, and tax considerations.

A NOTE FROM THE EXECUTIVE DIRECTOR July 2009

I thought I would dedicate this month's report to a very important study for our sector - the new CSGVP survey results released last month by Statistics Canada. What is CSGVP? The Canada Survey on Giving, Volunteering and Participating. This study is funded by the federal government and takes place every three years. The most recent results released last month are based on 2007 data - which is considered very recent data in the world of statistics.

Why is this study so important to CAGP-ACPD™?

- It represents one of the largest samplings of Canadians - 21,827 were surveyed in 2007
- It examines three prosocial behaviours: donating, volunteering and helping people directly.
- It tells us how many Canadians made a financial donation to a charitable organization in a 12 month period (23 million Canadians or 84% of the population)
- It tells us how many dollars were donated in that period (\$10 billion in 2007)
- It tells us which organizations were the biggest beneficiaries (religious at 46%)
- It tells us the average annual donation (\$437.00)

Other highlights

- The top 25% of donors (who contributed \$364 or more annually) accounted for 82% of the total value of donations.
- The top 10% of donors (who contributed \$1,002 or more annually) accounted for 62% of the total value.

Requests:

Canadians make donations most frequently in response to a request through the mail, when asked in a public place (mall) or in response to door-to-door canvassing.



However, 42% of the total value of donations is collected in places of worship while 16% is donated in response to requests through the mail.

Why they do not give:

- Could not afford to give
- They were happy with what they gave
- They give directly to people they know in need

Many donors also indicated:

- They did not like the way in which requests for donations were made
- They did not think the money would be used efficiently
- They were not asked to make a financial donation

Planning gifts:

We learned that donors who planned their donations in advance and supported the same organizations repeatedly over time give significantly more than those who do not!

Prosocial behaviours:

The three prosocial behaviours measured were:

1. Donating money and in-kind gifts to charitable and nonprofit organizations
2. Volunteer time to charitable and nonprofit organizations
3. Provide direct help to others

Why are these behaviours important to CAGP-ACPDTM Members?

We learned that 37% of Canadians engaged in all three behaviours, while 41% engaged in 2 behaviours. The intensity of participation in any given behaviour increases as the number of them undertaken increases. For instance, the average amount donated increases with the number of pro social behaviours that people perform.

Most interesting:

The top quarter of donors (who gave \$364 or more) – who also volunteered at least one hour during 2007 – accounted for just 14% of the Canadian population. But they contributed 59% of total donations and 40% of total volunteer hours.

For more information:

I strongly suggest that CAGP-ACPDTM members take a look at this most recent survey. It's 94 pages of interesting findings- including tables on donor economic and personal characteristics, giving by province and territory etc. Visit: <http://www.givingandvolunteering.ca/> and enjoy!

Diane MacDonald
Executive Director, CAGP-ACPDTM



QUOTE OF THE MONTH

Abraham Lincoln once said, "When I do good, I feel good; when I do bad, I feel bad. That's my religion."

CRA NEWS

July, 2009

[Toolbox for directors, officers and volunteers](#)

[Fundraising by registered charities](#)

[Consultation on the Proposed Guidance on Activities Outside of Canada for Canadian Registered Charities](#)

CAGP-ACPDTM NATIONAL EDUCATION UPDATE

NEXT Original Canadian Gift Planning Course
October 20 – 25, 2009
Banff Conference Centre, Banff, Alberta

Faculty: Brian Shea and Joshua Thorne

Don't miss out! This is the last Original Gift Planning Course CAGP is offering in 2009!
Registration is now open!

[Click here to register now](#)

ADVANCED Canadian Gift Planning Course
September 22 – 27, 2009
Whistler Village Delta Suites Hotel, British Columbia

Faculty: Malcolm Burrows and Susan Manwaring

This course is starting to fill up! If you have been waiting or delaying registration I would encourage you to do it NOW! [Click here to register NOW!](#)

This course has been pre approved for both Advocis and CFRE continuing education units and is one not to be missed. Approach 2010 with the latest information on:



- Tax Aspects of Gift Planning in Canada • Charitable Bequests & Endowments
- CRT's & Publicly Listed Securities • Charitable Gift Annuities
- Cultivation of Prospects • Gifts of Life Insurance • Advanced Planned Giving Topics
- Recognition of Donors • Stewardship • Marketing
- Starting a Gift Planning Program • Dealing with the Subject of Death
- Ethical & Liability Issues • Group Case Studies

INTRODUCING – Gift Planning - All in a Day!

The one day Gift Planning 101 session was offered prior to the annual conference and was very well received. So much so, we are going to be offering it at locations across Canada. If you need a one day refresher – or are brand new to gift planning – this is the course for you! Watch here for further details.

REPORT FROM THE BOARD OF DIRECTORS

Best Practices and Encouraging a Diversity of Opinion

Last year, I had the privilege of attending a management training program at the Rotman School of Business at the University of Toronto. One of the resounding themes was that strong organizations encourage a diversity of opinion among their employees or members. By encouraging a range of opinion and perspectives, groups can develop and implement stronger, more robust plans to move their organization forward.

The CAGP-ACPDTM board fully embraces this philosophy, believing that best practices emerge when we encourage dialogue that includes a diversity of opinion. We want to nurture differences and promote the advancement of all people who contribute to CAGP-ACPDTM. Coupled with this, we want to encourage leadership, ensuring excellence, innovation and continuous improvement in all that we do.

In terms of the work of the national board, this has a number of implications. One, we welcome your feedback at all times, especially related to the seven Outcomes that the board has established to guide the organization's work. While we seek the views of our diverse members annually through our member survey, we welcome your affirmations and challenges throughout the year. Please feel free to initiate conversation with us about big picture, strategic issues. Second, we want to ensure that we are always considering the variety in our membership – the range of professional advisors, gift planners who work for small charities and those who work for large charities, etc.

In terms of CAGP-ACPDTM's programs, our Executive Director Diane MacDonald and Roundtables seek to encourage a diversity of viewpoints in terms of our educational offerings. By sharing a wide variety of perspectives and expertise at our national conferences/courses and at the Roundtable level, we hope that our members are continuously learning, questioning old ways and developing best practices. It is clear that there are a variety of



ways to approach gift planning, depending on the situation of the charity, the needs of the donor or client or the nature of a professional advisor's practice.

One area where a diversity of viewpoints exists is related to the marketing of planned gifts. We all recognize the importance of promoting bequests and other forms of planned gifts, as we know that more people would arrange these charitable gifts if they were asked. There are a variety of best practices in this area including mail/phone campaigns, LEAVE A LEGACY™ campaigns, bequest-focused direct mail pieces, donor visits with target prospects, check-off boxes on direct mail, advisor conversations with clients, the inclusion of bequest information in receipt mailings, ads in publications, etc. CAGP-ACPD™ recognizes the validity of all these methods and seeks to provide a full range of education so that charities can develop the best mix of marketing techniques for their charity. We want to encourage both a healthy debate on what is most effective and respect for diverse opinions.

The most important point is that we all practice ethically and effectively in order to maximize the number of planned gifts for the benefit of society.

If you have any thoughts about this article or CAGP-ACPD™'s strategic direction, please feel free to contact me at greg.lichti@pmhf.ca.

Greg Lichti
Chair, National Board

CFRE Board



Your expressions of interest to serve are invited.

The CFRE Board of Directors has invited CAGP-ACPD™ to submit the name of a candidate, who is also a CFRE, to submit their expression of interest to serve on the CFRE Board, to their CFRE Committee on Directorship for consideration as a Board member.

For more details and to download nomination forms, please go to:
<http://www.cfre.org/CallForBoardNominations.htm>

Should you be interested and require more information after you have looked at the website, you can contact Morgean Hirt, President and CEO at mhirt@cfre.org. If you wish to submit your application, please do so directly to CFRE.

Their deadline for submission of the forms and background documents is **August 14, 2009**.



LEAVE A LEGACY™

Is your organization a LEAVE A LEGACY™ Partner?

Did you know that your organization could be receiving additional benefits, aside from what your individual CAGP-ACDPD™ membership already includes?

Why should your organization become a LEAVE A LEGACY™ Partner?

By partnering with your local LEAVE A LEGACY™ program, your organization can help raise awareness about the importance of making a gift from an estate to charity. The ultimate outcome is an increase in estate gifts that support the work of charities, the work that enriches all our lives in all of our communities. Your support of the program also lets Canadians know that your organization includes charitable gift planning as part of their practice.

Benefits of Partnering

In addition to the LEAVE A LEGACY™ benefits included with your individual CAGP-ACDPD™ membership (use of the LEAVE A LEGACY™ name, logo and materials), and in exchange for a nominal fee, LEAVE A LEGACY™ partners are offered various additional benefits ranging from advertisement to mentorship.

Here are few examples of the benefits that some local LEAVE A LEGACY™ Committees provide partner groups:

- Organization’s name and hot link published on local LEAVE A LEGACY™ website;
- Organization’s name published in local LEAVE A LEGACY™ newsletter and promotions;
- Opportunity for organization’s name to be included on local radio and television advertisements;

How to become a LEAVE A LEGACY™ Partner

If your organization is interested in becoming a LEAVE A LEGACY™ partner, please contact your local LEAVE A LEGACY™ Chair for Partnership Packages. You can locate your LEAVE A LEGACY™ Chair by using the following link:

www.leavealegacy.ca/program/help/locate-a-program or by contacting Jennifer Paradis, National LEAVE A LEGACY™ Coordinator at leavealegacy@cagp-acpdp.org or by calling 1-888-430-9494 x 3.

If your organization is not located near a RoundTable, or your RoundTable does not have an active LEAVE A LEGACY™ Program, please contact the National LEAVE A LEGACY™ Coordinator to discuss your options. Perhaps you may be interested in spearheading one? There are over 500 LEAVE A LEGACY™ partners across Canada. Is your organization one of them?



STRONGER COMMUNITIES TOGETHER™

CAREER CORNER

 <p>Canadian Red Cross Croix-Rouge canadienne</p> <p>Fund Development Coordinators</p> <p>For more information, click here.</p>	<p>Posted: 06/03/2009 End: 07/03/2009 Location: Vancouver & Victoria, British Columbia</p>
 <p>Canadian Red Cross Croix-Rouge canadienne</p> <p>Manager, Gift Planning</p> <p>For more information, click here.</p>	<p>Posted: 06/18/2009 End: 07/08/2009 Location: Winnipeg, MB</p>
 <p>BC Cancer Foundation Supporting research & care at BC Cancer Agency</p> <p>Development Officer, Planned Giving</p> <p>For more information, click here.</p>	<p>Posted: 06/25/2009 End: 07/13/2009 Location: Lower Mainland and Fraser Valley, BC</p>

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

Doing Well By Doing Good Conference- MindPath

The CAGP-ACPDPTM was a Conference partner at the recent MindPath Conference - **Doing Well By Doing Good Conference - Growing Your Financial Advisory Practice Through Philanthropy** – held June 17th in Mississauga, Ontario. Not only was there a strong turnout – over 80 advisors – but many were hearing about gift planning and the CAGP-ACPDPTM for the first time! The CAGP-ACPDPTM believes that this Conference was an effective way to reach out to a number of financial advisors whose values are in line with those of our members. Our booth, hosted by volunteer and CAGP-ACPDPTM member, Paul Nazareth, was popular during the conference and many prospective members were given membership kits and information regarding the CAGP-ACPDPTM. (Please see photos below)



Attendees at this year's conference learned that an estimated 50% of Canadians have wills, and as the population ages, this number will soon surpass 70%. Since philanthropic gifts are commonly incorporated into estates, the rise in the number of Canadians considering their wills will likely inspire a more prominent role for charitable giving in financial planning. This year's conference was designed so advisors could take away useful, relevant and practical information in the field of philanthropic giving to help them explore new avenues of growth for their practices. It was encouraging to see a number of CAGP-ACDP™ members speaking at this conference – including **Joan Blight**; *Senior Consultant of Strategic Philanthropy* who spoke on 'The Importance of Philanthropy in your Financial Advisory Practice', **Keith Thomson**; *Managing Director of Stonegate Private Counsel*, **Brad Offman**; *Vice-President, Strategic Philanthropy of Mackenzie Financial Corporation* whose presentation was on 'Tax Aspects of Charitable Giving in Canada' and **Joshua Thorne** who spoke about 'Using Life Insurance to Fund Philanthropy and Profiles of Charitable Donors'. **Ian Fraser**, Senior Counsel, PlanGiv Consulting Services, gave an 'Overview of Donor Advised Funds and **Tony Lee**, Director of Planned Giving for the Canadian Cancer Society, spoke about 'Consumer Behaviour and Major Gifts'. All in all it was a successful event and we look forward to partnering with MindPath at other events throughout the year.



(Paul Nazareth at the CAGP-ACDP™ booth)



A WARM WELCOME TO THE FOLLOWING MEMBERS WHO ARE NEW TO CAGP-ACDPD™ OR HAVE RETURNED FROM A BRIEF PERIOD AWAY

First Name	Last Name	Business Organization	RoundTable
Kim	Wilson	Habitat for Humanity Winnipeg	Manitoba
Jennifer	Hall	United Way of Guelph & Wellington	Waterloo-Wellington
Mélanie	Bourgeois	Logilys Inc.	Greater Montreal
Keith	Donoghue	Assante Capital Management	Greater Montreal
Michael	Blatchford	Bull, Houser & Tupper	Greater Vancouver
Belinda	Field	Trinity Stewardship Corporation	Southern Alberta
Edie	Copland	Silver Threads Service	Vancouver Island
Shawn	Pankow	Pankow Financial Solutions Ltd.	Ottawa
Crystal	Rainbird	Covenant House Vancouver	Greater Vancouver
Betty	Sze	Mon Sheong Foundation	Greater Toronto
Deborah	Straw	WinSport Canada	Southern Alberta
Joanne	Lewis		Greater Toronto
Bruce	Hill	Canadian Medical Foundation	Ottawa
Marla	Nasello	United Way of St. Catharines & District	Niagara/Golden Horseshoe
Marie	Archambault	Musée d'art coontemporain de Montréal	Greater Montreal
Christine	Boult	Winnipeg Humane Society	Manitoba
Debbie	Kesheshian	Collingwood General & Marine Hospital Foundation	Greater Toronto
James	Bratton	Shaw Festival	Niagara/Golden Horseshoe



CAGP-ACPDTM UPCOMING EVENTS

<p>09/11/2009 View more information</p>	<p>Now more than Ever: Legacy Giving in Extraordinary Times</p> <p>September 11th, 2009, 11:45pm-1:30pm Windermere Manor, London ON</p> <p>Join us as we explore how donors, professional advisors and charity based gift planners can collaborate to develop and implement comprehensive gift plans that achieve donor's philanthropic aspirations. Even in challenging times, legacies can be created that make a difference in the lives that follow. <i>With featured guest: Joshua Thorne, Charitable Gift Planner</i></p> <p>Registration opens July 31st, 2009</p>
<p>09/16/2009 View more information</p>	<p>The Winnipeg Foundation and the Faculty of Law are holding a half-day luncheon symposium on September 16th at the Hotel Fort Garry called</p> <p>Law, Philanthropy and New Economic Challenges: Changing the Rules of Engagement.</p> <p>Topics include: Charity Management and Fiduciary Responsibility Funding Challenges Facing Charities and Non-profits CRA Round table: Regulation in Challenging Times</p>
<p>09/22/2009 View more information</p>	<p>CAGP-ACPDTM ADVANCED Gift Planning Course</p> <p>CAGP-ACPDTM is pleased to repeat one of its newest addition to their Educational offerings – The ADVANCED Canadian Gift Planning course. The ADVANCED Canadian Gift Planning course is aimed toward suiting the needs of both professional advisors and seasoned gift planners. Interactive and in-depth, the course provides a unique opportunity to explore the issues with experienced gift planners.</p>
<p>10/20/2009 View more information</p>	<p>CAGP-ACPDTM ORIGINAL Gift Planning Course</p> <p>The Canadian Gift Planning course, CAGP-ACPDTM's week-long course, is the longest running and most respected course on Canadian philanthropy. Founded in 1990, this demanding comprehensive course provides in-depth education on the full range of gift planning issues: from detailed information on the tax aspects of gift planning to topics such as working with donors, program marketing, stewardship, and ethics.</p> <p>The course provides an unrivalled educational experience, balancing formal classroom learning, in-depth discussions, group work, and case studies.</p>

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