

# OUTCOMES 2013 – OPERATIONAL REPORT FROM THE EXECUTIVE DIRECTOR

## April 2009

### ACHIEVEMENT OF OUTCOMES

- There are 3000 members.
- CAGP-ACPDPTM is rebranded as the leading gift planning organization in Canada.
- Gift planning is professionalized through competency-based standards of practice.
- There are four new educational offerings.
- 80% of members report excellence in networking opportunities.
- CAGP-ACPDPTM is instrumental in new legislation being passed: Charitable Remainder Trusts and gifts of real estate.
- There are at least four positive national media reports about gift planning per year.

The above Outcomes represent the Strategic direction provided by the CAGP Board. The Executive Director determines the means to reach those goals. With the assistance of four full-time staff and the countless hours of many volunteers, we are moving steadily towards these goals. The following is a summary for 2008-09:

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#### **OUTCOME: THERE ARE 3000 MEMBERS**

As of January 31, 2009 the CAGP-ACPDPTM has 1,297 members in good standing and 29 members operating under the grace period – for a total of **1,326** members. This represents a decrease of 13 members over this same time last year (down 1 percent). We are pleased to report that 97.8 percent of our members are in good standing. Last year, we had 94.5% in good standing (1310).

Membership History:

<b>Total Members 2008/09</b>	Total Members 2007/08	Total Members 2006/07	Total Members 2005/06
<b>1326</b>	1387	1367	1286

It's important to note that we have seen an increase in Advisor members in the past six months:

	<b>New members (past 6 months)</b>	<b>CAGP database</b>
<b>Gift Planners</b>	71.89%	82%
<b>Prof. Advisors</b>	28.11%	18%
<b>Total New Members</b>	22.83/month	

Membership Activities in 2009 included introducing a new partner to CAGP-ACPDPTM - *GEORGE'S TREE, The Story of a well planned gift* - an animated story of a well-planned gift. The book allows for input and discussion with donors/clients with examples - where calculations can be made directly in the book. CAGP-ACPDPTM members receive a 15% discount off the purchase of the book.

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#### **OUTCOME: CAGP-ACPDPTM IS REBRANDED AS THE LEADING GIFT PLANNING ORGANIZATION IN CANADA.**

For the purposes of branding, we focused our efforts this year on LEAVE A LEGACY™ - which is a brand that we have not used to its fullest capacity. This is our brand, it is easily identified and presents a strong opportunity for sponsorship – both locally and nationally. So we are exploring how we make use of this brand by incorporating it in all that we do – which means combining awareness and education in order to use the logo.

In April 2008, we received an increase in the original commitment from Great-West Life, London Life and Canada Life over the next three years to accommodate their offer to provide banners for all 21 LEAVE A LEGACY™ Committees across Canada for use at their events. This provides CAGP-ACPD™ with a commitment of \$140,000 per year for three years.

In September 2008 - LEAVE A LEGACY™ Brochure Distribution - Mail out to All Members. Why? To introduce a new member benefit of using the LEAVE A LEGACY™ logos and registered products, and also to promote distribution of the new LEAVE A LEGACY™ brochures. By granting CAGP-ACPD™ members permission to use the LEAVE A LEGACY™ logo and registered products within their organization and community, we expect to see the LEAVE A LEGACY™ message reaching new audiences – reinforcing the branding of LEAVE A LEGACY™ across Canada. BROCHURES, BOOKMARKS, THANK YOU CARDS ...



In November 2008, the [www.leavealegacy.ca](http://www.leavealegacy.ca) website was revamped – providing new and clear information for Canadians – along with the ability to search for a CAGP-ACPD™ Professional Advisor!

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**OUTCOME: GIFT PLANNING IS PROFESSIONALIZED THROUGH COMPETENCY-BASED STANDARDS OF PRACTICE.**

The Education Committee met several times this year. One of their first course of action was to compile a thorough list of educational offerings in gift planning in Canada. They decided to focus this year on researching ways to provide gift planning education to all members and at levels that are most meaningful to members.(ie Intro level) To that end, they are focusing on a few areas:

1. CAGP has plenty of educational material and speakers. To make the most of this strength, this committee is exploring new ways of providing this education – such as on-line learning. (see new educational offerings for more details)

2. There are two certification credits that are very relevant to CAGP Members – CFRE and ADVOCIS. CAGP is focusing on providing these credits whenever possible and are working with RTs to do the same. (example: CGA-Canada collaboration)
3. Exploring partnerships with current certifications. We chose to partner with the Canadian Academy of Senior Advisors – who provide a course and certification designation as a Certified Senior Advisor (CSA®). This certification is suited to ALL our members – both from charities and professional advisors. For this reason, they are hosting a one-day Fast-Start session as a pre-conference session at our Conference 2009. CSA’s learn about the physical, social and psychological aspects of aging, understand how grief and loss affect each of us, learn about financial and estate planning requirements, wellness, spirituality, and most importantly, the ethics of dealing with older clients.
4. The Education Committee has also developed a CAGP Target Group document and are working on a “Road Map” for Education. They have also been instrumental in developing the “Intro to Gift Planning – All in a Day” which is being introduced in April as a pre-conference event. The intent is to roll this one-day session across Canada throughout the year.

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**OUTCOME: THERE ARE FOUR NEW EDUCATIONAL OFFERINGS.**

Two new Educational Offerings were developed this year:

1. **Webcasts with CFRE and ADVOCIS credits.** In collaboration with CGA–Canada, CAGP-ACPD<sup>TM</sup> Members now have preferred access to CGA-Canada's PD Net - the premier online professional development resource for CGAs and the business community. CAGP-ACPD<sup>TM</sup> members receive:- **preferential pricing** when ordering CGA online learning products on the PD Net website, - **convenient access** to the PD Net library featuring courses, videos, webcasts, free articles, business tools, as well as an extensive selection of online learning product offers and discounts. The first three joint offerings were held on Oct.28,, Nov. 18<sup>th</sup> and Nov. 27<sup>th</sup>, 2008.
2. **Intro to Gift Planning - All in a Day! (April 21, 2009 – pre-conference event)** **This year we introduced this new one-day session for people who are** new to gift planning or perhaps would like a “refresher” - to review all the concepts and tools before attending the more detailed workshops at the Conference. Joined by two CAGP faculty members for a full day of pre-conference learning and networking, delegates will Canadian trends and tax issues, move right into a review of the most common gifts in Canada and conclude with marketing, stewardship and donor recognition. To complete the day, they will attend a small reception to compare notes and share even more new ideas. All in a day! It is our intent to create this signature educational offering and bring it across Canada.

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**OUTCOMES: 80% OF MEMBERS REPORT EXCELLENCE IN NETWORKING OPPORTUNITIES.**

In the recent September 2008 CAGP member survey, out of 293 member respondents - 171 rated networking as a **highly relevant** member benefit. And 91 rated networking as a **moderate relevant** benefit. 31 rated it as low. This means that 89% rated networking as **moderate to highly** relevant. To that end, several RoundTables have included a networking session in their calendar of events this year. And CAGP-ACPD<sup>TM</sup> National offerings have been reviewed to ensure opportunities are available for this informal learning.

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**OUTCOMES: THERE ARE AT LEAST FOUR POSITIVE NATIONAL MEDIA REPORTS ABOUT GIFT PLANNING PER YEAR.**

1. On December 29<sup>th</sup>, 2007, the Globe and Mail announced their choice of the Globe and Mail's Nation Builder for 2007. It was none other than our very own Don Johnson (Friend of CAGP). He was honoured for his 12 years of lobbying and his efforts were recognized as being very influential in the change in tax law that "has unleashed a flood of charitable giving from Canada's wealthy". What is even equally impressive is the Globe and Mail's understanding of the impact that gift planning has made in Canada. "Nation Builder" is indeed a wonderful concept for gift planning in Canada and for the man that never gave up!
2. In April 2008, an article in the Financial Post (national media) regarding the gifting of BCE shares included several quotes by the Executive Director of CAGP-ACPDP™
3. Also, for the first time, we inserted a LEAVE A LEGACY™ colored ¼ page ad in *Imagine Canada's* "Thanks and Giving Supplement" in the **October 6** issue of *Maclean's* Magazine. The issue hit newsstands on **September 25, 2008**. This is the first time CAGP-ACPDP™ has had the funds to submit an ad in a national publication.
4. On November 14<sup>th</sup>, 2008 –CAGP-ACPDP™ placed a coloured ¼ page ad in the Financial Post- Special Report to coincide with National Philanthropy. Again, this is our first time to submit this type of ad in a national publication. A special thank-you to Great-West Life, London Life and Canada Life for their support in enabling this national exposure to the LEAVE A LEGACY™ message.

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**OUTCOME: CAGP-ACPDP™ IS INSTRUMENTAL IN NEW LEGISLATION BEING PASSED.**

In March 2008, the new Federal Budget 2008 included new legislation on:

1. *Capital Gains Tax Relief in Respect of Donation Securities – Exchangeable Shares*
2. *Private Foundations: Excess Corporate Holdings*
3. *Donations of Medicines.*

CAGP-ACPDP™ was instrumental in advising the government on the first two items.

- May 2008, the Government Relations Committee (GRC) surveyed CAGP-ACPDP™ members in its' review of the recent *Consultation on proposed policy on fundraising by Registered Charities* posted on the CRA website. In August 2008, CAGP submitted our recommendations to CRA - along with the CAGP member survey. CRA felt our members input was relevance and asked CAGP permission to distribute the survey to various stakeholder groups for further consultation.
- August 2008, CAGP submitted a briefing to the Standing Committee on Finance and requested the opportunity to speak before the Committee in September. This year, we were asked to choose one issue only. We chose CRTs – which provides an opportunity to discuss in greater detail. Due to the election, the Standing Committee meetings did not take place.
- From time to time, the GRC gets involved in provincial legislation when it is deemed of importance. For instance, last year we wrote to the Quebec government to have the new federal budget legislation applied in their province. (It was passed). In June 2008, CAGP wrote the Ministry of Labour and Citizens Services in BC regarding the new British Columbia's Naming Privileges Policy. They have since replied that they are taking our concerns into consideration.

- Nov 2008 – CAGP participated in an Open letter to the Prime Minister, Minister of Finance, Leader of the Liberal Party, Le Chef du Bloc Quebecois and Leader of the New Democratic Party. Initiated by Imagine Canada – this letter went to the Calgary Herald, the Ottawa Citizen and La Presse
- Dec. 11, 2008 – CAGP Member stories were collected on the impact to charities – in cooperation with Imagine Canada for a meeting with the Minister of Finance.
- Jan 5<sup>th</sup>, 2009 - Participated again in the open letter to the PM (with Imagine Canada) in the Globe and Mail.
- Jan 5<sup>th</sup>, 2009 – With the assistance and coordination of Don Johnson, CAGP participated in a letter to the Prime Minister and the Finance Minister, with copies to the Leaders of the Liberal Party, the NDP, and the Bloc Quebecois. This letter appeared in the Globe and Mail, the National Post, the Hill Times, the Ottawa Citizen, the Montreal Gazette, the Winnipeg Free Press and the Calgary Herald.
- Jan 16, 2009 – CAGP wrote a letter to the Minister of Finance and the Prime Minister supporting the stimulus measures contained in the Brief submitted by Imagine Canada on January 15<sup>th</sup> – entitled “Helping Charities and Nonprofits to Help Canadians and Communities during the Economic Downturn”.

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I want to take a moment to thank the CAGP staff and contract staff for their hard work. I feel we have a solid, cohesive group in the National office excited about fulfilling the OUTCOMES as outlined about. We have had some staff changes this year – we welcome Jennifer Paradis (LEAVE A LEGACY™) back from maternity leave and we welcome Katie Villeneuve to the team – as our new Communications Coordinator. Congratulations go to Sharyon Smith for celebrating 1.5 years with CAGP and to Anne Williams on her 2.5 years with CAGP. I too, am celebrating my sixth year with CAGP – having started in April 2003. What a wonderful six years it has been!

Thank you as well to the countless volunteers, operational committee members, RoundTable volunteers and CAGP Board members who have stood behind me and provided me with the guidance and tools to make our operational plans happen. I could not do this without the strong volunteer support that continues to pave the road. Thank you everyone!

Diane MacDonald, Executive Director