

# 2005 CAGP-ACPD<sup>TM</sup> MEMBERS SURVEY

A SUMMARY



**CAGP • ACPD<sup>TM</sup>**  
CANADIAN ASSOCIATION OF GIFT PLANNERS  
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONS PLANIFIÉS

## Module One - Members' Characteristics

We asked 11 simple introductory questions of our valued Member's during our October 2005 Member survey in order to gather more *character* information on the 353 people respondents.

The largest number of respondents was from Toronto representing 14 percent. This was followed by Vancouver and Montreal with nine percent and five percent respectively. Our Provincial breakdown was consistent with the information in the CAGP♦ACDPD™ database. The largest provincial representation was from Ontario with 45 percent. Our current database has 41 percent of its members working in gift planning in Ontario. British Columbia had the second largest representation with 20 percent responding to the survey. Our database registers 21 percent of our members as working in British Columbia. The following breakdown shows you the full survey responses in comparison to the information in our database:

PROVINCE	SURVEY RESULTS %	DATABASE %
Ontario	45	41
BC	20	21
Alberta	10	11
Quebec	9	10
Manitoba	5	5
Saskatchewan	4	4
Nova Scotia	4	4
New Brunswick	2	2
Prince Edward Island	0	0
Newfoundland	0	1
Outside of Canada	0	0

Clearly our membership survey results for provincial breakdown were in alignment with our member database.

This survey gave us the chance to ask our members their age in an anonymous setting. This is only of interest to us because it makes us understand more about who our members are and the life experiences they may have had prior to entering gift planning. This is not information we carry in our database, nor do we intend to carry it. The results breakdown is as follows

AGE SPECTRUM	PERCENTAGE OF MEMBER RESPONDENTS WHO FALL INTO THIS SPECTRUM
20 – 29	5
30 – 39	19
40 – 49 years of age	35
50 – 59	28
60 – 69	11
70 +	2

We can clearly see an increase in gift planning tasks for those respondents over 40. It is interesting to note there are some people involved in their 20s, but more people become involved later in their lives. Many people retire on their 60s, but there are still active members in their 70s.

Sixty-five percent of our survey respondents were women. Again, this information is fairly consistent with our member database where 60 percent are women.

The education levels of our members is very interesting. Fifty-one percent of the respondents have a university degrees; 12 percent hold a college diplomas; 18 percent have masters degrees; ten percent have a doctorate, a PhD, some university or an LL. B. This accounts for 91 percent of our respondents! We can honestly say that our members are enormously educated.

We had an enormous turn out of respondents who indicated French as their preferred form of communicating – an amazing 12 percent! Our database only accounts for nine percent of our membres as having French as their primary language. We must congratulate our French-speaking members for taking the initiative and responding to this survey.

Our question regarding work time spent on gift planning produced some interesting results. Forty-six percent of our members spend under one fourth of their time in gift planning. This category has the largest number of respondents. The next largest representation was 18 percent of our members who spend all of their time in gift planning. These are two extremes. As the voice of the Canadian gift planners it is good for us to be reminded that not all our members spend all their time in planned giving and that many are responsible for other activities within their organizations - philanthropic and otherwise.

Thirty-one percent of our members have only been working in gift planning for 1 to 3 years – the largest representation from our surveyed members. The next largest category was 4 – 6 years with 27 percent of our respondents. Clearly there has been a surge in gift planning as a job title or activity over the past 10 years which can account for our numbers. You can see this increase in the numbers below:

NUMBER OF YEARS IN GIFT PLANNING	PERCENTAGE OF MEMBER RESPONDENTS WHO FALL INTO THIS SPECTRUM
Less than 1	1
1 – 3	31
4 – 6	27
7 – 10	16
Over 10	15
None	3

We cannot account for three percent of our members who spend none of their time in gift planning.

We asked our survey respondents to define themselves as either Planned Giving professionals who work with a charity or as a professional advisor in a variety of fields. Some of our members responded that they were both of these – which some people may be. This survey question prompted CAGP to redefine our member categories. We have now added and changed our member categories to reflect the following three options and the reworked sub-sections:

**Gift Planning Professional**

- Arts/culture
- Community
- Education/research
- Environment
- Health
- International Services
- Religion
- Social services
- Sports/Recreation
- Other

**Professional Advisor**

- Accounting
- Legal
- Insurance
- Financial
- Other

**Consultant**

Our last question in this module was *How many years have you been a member of the CAGP♦ACPDPTM?* The responses from our members were not wholly consistent with the information in our database:

NUMBER OF YEARS AS CAGP♦ACPDPTM MEMBERS	PERCENTAGE OF MEMBER RESPONDENTS WHO FALL INTO THIS SPECTRUM	PERCENTAGE ACCORDING TO OUR DATABASE
Less than one	10	21
One	10	16
Two	15	10
Three	15	10
Four	8	7
Five	11	6
Six	7	7
Seven	3	5
Eight	4	5
More than eight	13	12

Clearly from the collected information, more members in their second and third year of membership responded to the survey. Our member database shows us, correctly, that we have a very large number of new members – within the one year and less spectrum. But, not as many of our new members responded to the survey.

The next module, *Membership Services*, profiled in next months Planner, will provide valuable information for the National Office and the RoundTable Executives to plan their activities around what members have told us. We look forward to sharing this information with our members in the New Year and hope that you will take the time to advise us of any additional comments you may have that can be passed on to our Executive Director and our Board Members to ensure we are providing our valued Members with the best possible services.

## Module Two – Membership Services

We asked nine questions regarding Membership Services to better understand what current services are most used by our members and what other services our members would like the opportunity to use. Though we had a total 353 respondents to the entire survey, the following section was not mandatory to answer, thus the number of responses varies.

Our question regarding what our members most valued about the CAGP-ACPD<sup>TM</sup> Membership garnered 326 responses. The reoccurring answers included: Networking; RoundTables; Information/Resources (Education/Professional Development); Annual Conference; Government Relations activities; the Planner; the Gift Planning Course and Job Postings.

We provided a list of 10 items from which members were asked to determine the relevance level for their membership:

- ◆ *Links/Resources*
- ◆ *Local RoundTable Information on National website*
- ◆ *Information on Gift Planning Program evaluation*
- ◆ *Connections with Professional Advisors*
- ◆ *Connections with Colleagues in Charitable organizations*
- ◆ *Best Practices*
- ◆ *Checklists and templates for a Gift Planning Office*
- ◆ *Valuing gift intentions*
- ◆ *Networking*
- ◆ *Government tax information*

Respondents could rate them as high, moderate or low.

The item of most relevance, according to our 334 respondents, was *Best Practices* with 73 percent of the surveyed members rating it as highly relevant. This is followed by *Connections with colleagues in charitable organizations* with 72 percent high relevance; *Networking* with 70 percent high relevance; and *Government tax*

*information* with 69 percent high relevance. The least relevant item was *Local RoundTable Information on the National website* with 23 percent feeling it was of low relevance. But, 28 percent of the respondents felt this was still highly relevant, thus making this item deadlocked.

These same respondents were then asked how often they made use of these 10 Membership benefits. The most used was *Connections with Colleagues in Charitable organizations* with 53 percent of respondents using it "a lot." This is followed by 50 percent using *Government tax information* "a lot"; 49 percent using *Networking* "a lot" ; and 72 percent using *Links/Resources* "some" of the time. The least used was *Valuing gift intentions* with 45 percent of the respondents never using this benefit.

Additional membership benefits that were of interest to members both on a membership and a career level were certification and mentorship. Currently, we are aware of one RoundTable running a mentorship program, but it is an idea that the National office is interested in eventually implementing nation-wide. In terms of Certification, there is a national Certification Sub-committee that is exploring the feasibility of CAGP playing a role in developing a certification model. They are only in preliminary stages at this time.

We then asked our members how relevant the following items were to their CAGP-ACPD<sup>TM</sup> Membership:

- ◆ Opportunities to volunteer
- ◆ Certification/continuing education credits
- ◆ Information on the Profession of Gift Planning – Canadian salaries and benefits (if they were available)
- ◆ Job Postings

Respondents were able to indicate high, moderate and low relevance.

Of our 331 responses *Certification/continuing education credit* was the highly relevant to 45 percent of our respondents. This was followed by *Information on the Profession of Gift Planning – Canadian salaries and benefits* and *Job Postings* both with 41 percent high relevance. The least relevant item was *Opportunities to volunteer* with 46 percent of our members feeling it was of low importance.

Many of the above-listed current member benefits were not greatly used by our survey respondents. But 51 percent indicated *Information on the Profession of Gift Planning – Canadian salaries and benefits* as being used some of the time; 46 percent use the *Job Postings* sometimes; and 44 percent use " *Certification/continuing education credits*" some of the time. Again, the majority of the respondents did not use opportunities to volunteer at all.

When we asked our members why they joined the CAGP-ACPD<sup>TM</sup> 325 of the 353 respondents gave us an answer. They varied from educational opportunities, to networking and general professional development. One member stated they joined because they were a Gift Planner. Clearly, we are recognized as the association that represents the profession of Gift Planning and we strive to be the leader in defining that

profession. This became clear to the Board when they reviewed this module in November at the Board Retreat. Most members continue their membership because of networking opportunities; their “newness” to the profession; and because they believe in the work we do and what we represent.

Ninety-five percent of our 331 responses are intending to renew their membership with the CAGPACDPD™. The main re-occurring reason for non-renewal is the cost of membership. The cost is not too high for a professional association but rather the budget of many organizations is small and limited to only a select number of memberships with professional development.

The next module, *Communications*, profiled in next month’s Planner, will provide valuable information for the National Office and the RoundTable Executives regarding the importance of learning opportunities – those that exist and those that are yet to exist.

## Module Three – Communication

We asked five questions regarding Communication between the national office, local RoundTables and our valued members to give us an idea of what learning opportunities are important to our membership. Three hundred and twenty-three members responded to these questions.

We provided a list of eight learning opportunities from which members were asked to determine the importance to them personally. They were:

- ◆ *Monthly RoundTable meetings*
- ◆ *Local RoundTable educational seminars and workshops*
- ◆ *Annual National Conference*
- ◆ *Monthly newsletter*
- ◆ *National CAGP website*
- ◆ *National CAGP staff*
- ◆ *Members-Only section of national website*
- ◆ *Both Official languages*

Respondents could rate these opportunities as high, moderate or low.

The item of most relevance, according to our respondents, was *Local RoundTable educational seminars and workshops* with 60 percent of the surveyed members rating it as highly relevant. This is followed by the *Monthly newsletter* with 46 percent high relevance; the *Annual National Conference* with 43 percent high relevance; and *Monthly RoundTable meetings* with 39 percent high relevance. Moderate relevance was applied to the *Members-Only section of the national website* with 53 percent; and both the *National CAGP staff* and *website* with 48 percent moderate relevance. The least relevant item was *both official languages* with 66 percent indicating it as low in relevance. It is important to note only 12 percent of our respondents indicated French as their primary language.

These same respondents were then asked how often they made use of these eight learning opportunities, or would they use them if they were available. The most used was *Local RoundTable educational seminars and workshops* with 54 percent of respondents using it "a lot." This is followed by 48 percent using the *Monthly newsletter* "a lot"; and 42 percent using *Monthly RoundTable meetings* "a lot". Sixty-two percent used the National CAGP website "some" of the time; 58 percent use the Members-only section of the national website "some" of the time; and 49 percent use the National CAGP staff 49 percent "some" of the time. Again, the least used item was *Both official languages* with 75 percent who did not or would not take advantage of this opportunity.

We then asked our members what topics for learning sessions were relevant to them. Provided topics were:

- ◆ *Starting up a Planned Giving program*
- ◆ *Gift Planning vehicles*
- ◆ *New tax legislations*
- ◆ *Tax implications*
- ◆ *Marketing your Planned Giving program*
- ◆ *Managing your Planned Giving program*
- ◆ *Statistics on Planned Giving in Canada*
- ◆ *Working with your advisors*
- ◆ *Client/donor relations*

Again, respondents were able to indicate high, moderate and low relevance.

*New tax legislation* was the most highly relevant to 79 percent of our respondents. This was followed by *Tax implications* with 76 percent high relevance; *Client/donor relations* with 73 percent high relevance; *Marketing your Planned Giving Program* with 66 percent high relevance; *Managing your Planned Giving Program* with 63 percent high relevance; *Gift Planning vehicles* with 62 percent high relevance; *Statistics on Planned Giving in Canada* with 59 percent high relevance; *Working with your Advisors* with 54 percent high relevance. The least relevant item was *Starting up a Planned Giving Program* with 40 percent of our members indicating it was of low importance.

All of the above-listed learning sessions were used by our members or would be used by our members if they were available at their local level or at our Annual conference. *New tax legislation* and *tax implications* tied with 70 percent indicating they use or would use it "a lot"; *Client/donor relations* with 64 percent of consistent use; *Marketing your Planned Giving Program* with 63 percent steady use; *Managing your Planned Giving Program* and *Gift Planning vehicles* tied with 58 percent regular use; *Statistics on Planned Giving in Canada* with 54 percent consistent; and *Working with your advisors* with 50 percent regular. Again, *Starting up a Planned Giving program* amounted to 37 percent of none-use.

When asked what relevant educational topics, other than our list of nine, would be of interest to our responding members the themes of Ethics and tax-based sessions

reoccurred most often. Other topic ideas included: advanced workshop in Estate/Bequest management; the how-to of cold-calling; communicating tools; dealing with cultural diversity; emerging trends in philanthropy; frank presentations involving the sharing of seasoned practitioners' experiences; opportunities to partner Planned Giving professional and Advisors; one person shops and Planned Giving in their development plans; and using your board and volunteer networks to enhance your Planned Giving Program.

The next module of the CAGP-ACPDPTM Membership Survey, *Education via the National Office* profiled in next month's Planner, will provide valuable information for the National Office and the RoundTable Executives regarding the importance of further educational opportunities – both those that exist and those that have yet to exist.

## Module Four – Education via the National Office

We asked 11 questions regarding Education via the National Office to our valued members in order to garner an understanding of what national learning opportunities are important to our members. Three hundred and twenty-two members responded to these questions.

Currently we have three main national learning opportunities. They are the:

- CAGP-ACPDPTM Course in Planned Giving
- National Annual CAGP-ACPDPTM Conference
- CAGP-ACPDPTM Advanced Symposium (held every second year in Ottawa)

We inquired if our responding members had ever attended the CAGP-ACPDPTM Course in Planned Giving. Fifty-four percent of our respondents indicated "yes" they had. Of the 46 percent who had not attended the course, 45 percent indicated they intended to attend in the future.

We then asked our respondents if they had attended the national Annual CAGP-ACPDPTM Conference. Sixty-five percent indicated "yes" they had. Of those who responded "no," reasons for not doing so included "cost" and "not enough time."

When asking our members if they had ever attended the CAGP-ACPDPTM Advanced Symposium, 8 percent indicated "yes" they had. Of those who had not, 37 percent indicated they intended to in the future. Those who would not be attending the symposium indicated "cost" and "no time" as reasons for not being able to do so.

There is no current professional certification provided by the CAGP-ACPDPTM, so we asked our members if they held another affiliation or professional certification. Fifty-seven percent of our respondents indicated they did "not have an affiliation"; 5 percent have CFP designation; 20 percent have other designations like AFP, LLB, CLU, CMI and TEP; 17 percent have their CFRE and one percent are CGAs or CAs.

We asked our members if they were currently pursuing some form of affiliation or a professional certification. Seventy-six percent of our members are not currently doing

so. Sixteen percent are seeking their CFRE affiliation; 6 percent are seeking "other" affiliations such as EPC and MBAs; and 2 percent are seeking their CFP designation.

Thirty-three percent of our respondents are "very" interested in the creation of a professional designation for gift planning (Certified Gift Planner or CGP); 40 percent are "somewhat" interested and 27 percent are "not so much" interested. Forty-eight percent feel "very" strongly that the CAGP-ACPDPTM should be providing the leadership in developing a nationally recognized professional certification in gift planning; 33 percent feel "somewhat" strongly and 19 percent "not so much" strongly.

Our last module of the CAGP-ACPDPTM Membership Survey, LEAVE A LEGACYTM, profiled in next month's PLANNER, will provide valuable information for the National Office and the RoundTable Executives regarding the importance of the LEAVE A LEGACYTM program to our members.

## **Module Five – LEAVE A LEGACY™**

As you may know, LEAVE A LEGACY™ is a public awareness program that encourages people from all walks of life to make gifts through a will or other gift planning instrument to the charity or non-profit organization of their choice. LEAVE A LEGACY™ does not solicit gifts for any particular organization. The program is a donor-oriented education campaign to encourage charitable gifts and to raise awareness of the importance of including a charitable gift in the estate planning process.

We asked two very simple questions to our valued members regarding the LEAVE A LEGACY™ Program in order to ascertain the importance and scope of influence of LEAVE A LEGACY™ for and on our members. Three hundred and twenty-two members responded to both these questions.

We first asked "how important is your local LEAVE A LEGACY™ Program to you?" Forty-two percent of respondents indicated it was "somewhat" important; 30 percent "very" important; and 28 percent "not so much" importance.

We then asked "how much has the LEAVE A LEGACY™ Program influenced your decision to join and/or maintain your membership with CAGP-ACPDPTM?" Sixty-eight percent indicated "not so much" influence; 23 percent "somewhat" influenced; and 12 percent "very" influenced.

This is our last module of the CAGP-ACPDPTM Membership Survey. The survey results are of great use to the National Office and local RoundTables to learn more about our valued members. We have greatly enjoyed sharing this information with our members - as they are the reason we exist! Feel free to access all our coverage of the survey modules in previous editions of the Planner, found in the Members Only section of our website: