

# CAGP-ACPD Greater Vancouver RoundTable Report

## *Accomplishments for the Year 2009/2010*

### **Programming:**

- Held over 7 meetings, some jointly with other organizations, covering topics encompassing technical training (“Passel of Passing Problems”)(“Wills Variation and Impact on Charities”)(“Wills, Estates and Succession Act – Bill 4”) (“Tax Eliminator Clauses in Your Will”); as well as motivational speakers for Planned Giving,(Fraser Green: “The Ten Best Practices of Passionate Philanthropy”)(Cheryl Gurin: “Quantum Development – Using your Brain for Fund Raising Gain”).
- All sessions well attended and enjoyed by membership.
- In order to differentiate ourselves from other organizations, our programming tries to focus on topics of interest to the Planned Giver, rather than the Fund Raiser, in our non-joint sessions.

### **Greater Vancouver RoundTable Mentorship Program:**

- Original Pairings of 13 mentors and learning partners established in early 2008, and continued to June 2009.
- Re-launched in September, 2009 with 10 pairings of mentors and learning partners, through a social event, including a discussion on what mentoring is, what the commitment would be, the role of each person and their responsibilities, suggestions for the first meeting, and a cheat sheet of suggested topics for discussion.
- This intake will end in June, 2011, and is coordinated by 2 committee members, who make periodic check-ins with participants to ensure meetings are held, and addressing challenges if any.

### **Leave a Legacy Undertakings/Achievements:**

- Two estate planning seminars on Some Benefits to Charitable Giving in Surrey and Vancouver held, using the funding from Great West Life and other sponsors. Total of 7 professionals presenting as well as having well known media/investment personality MC (Chris Carter of ScotiaPrivate Client Group).
- Purpose to get the message about the need for wills and the benefits of charitable giving out in the community.
- Leave a Legacy Supplement produced with the assistance of local community newspapers. A 28 page supplement advocating charitable giving through legacies, sponsored by advertisements, contribution from the publisher and our Leave a Legacy Partners, who have increased to 84 this year.
- Read cover to cover by local residents of the community.
- For the 2010/2011 year, holding 3 seminars in May to celebrate Leave a Legacy Month. (Surrey, Vancouver and the North Shore)
- Producing special supplement in the Vancouver Sun, using the Leave a Legacy Marketing material (Soccer theme in honour of the World’s Cup). Paid for by the newspaper soliciting advertising, with Greater Vancouver RoundTable members and friends providing editorial, and promotion of the upcoming May seminars.

- Working on a media campaign to bring awareness to the community through spots and interviews, planned to come together in the fall
- Production of another supplement in the fall for our Leave a Legacy Partners.

### **Resource Committee:**

- New Executor's Guide produced for use by charities and executors outlining the duties and responsibilities of the executor when administering an estate, with a particular focus of the role when a charity has received a gift under a will in British Columbia.
- Complimentary copies distributed to members and Leave a Legacy Partners as part of the benefit of membership.
- Additional copies available at a nominal fee.

### **Membership Committee:**

- Actively followed up with departing members, or members who did not renew this year as to why.
- Offered free meeting coupons as incentive to attend meetings, and become a member.
- Coordinated the attendance lists and membership lists for each function
- Actively seeks out members for participation in the executive and other endeavors, projects undertaken by the RoundTable.
- Continuing challenge to increase membership in an increasingly tight economic environment.

### **Bursary Committee:**

- Provided 2 \$1,000. Bursaries to members of the Greater Vancouver RoundTable for use to offset travel and registration costs to the Annual National Meeting being held in Edmonton, Alberta in May 2010.
- Provided 1 \$1,000. Bursary to the CAGP membership at large to offset travel and registration costs to the Annual National Meeting. (Awarded to a member in Nova Scotia)
- This was accomplished through conference calls and applications submitted to the National RoundTable.

### **New Initiative for 2010:**

- Brown Bag Lunch Series:
  - "Effective Legacy Marketing"
    - Presented by Simon Trevelyan
- Location: YWCA, 55 Hornby Street, Vancouver
- Time: 12 – 1 pm
- Dates: Sept 14, 28; Oct 12, 26; Nov 9 and 23<sup>rd</sup>.
- Cost: Free to Members \$100.00 for Non-members
- Topics to be Covered: Getting a Legacy Program Started; Getting the Message Out: Legacy Marketing; Developing a Brand for your Legacy Program; The Art of Conversation: How to bring up the Topic of a Legacy Gift; How to Improve Your Program: The Legacy Audit; and Future Directions: The Legacy Campaign.
- Note Lunch is NOT provided... you bring your own.
- Pre-Registration is required.

## **Executive Committee:**

- Currently 12 members, (3 allied professionals, 9 working with charities directly)
- Membership changes over in September of each year.
- Membership term is usually 4 years.
- Meets at least 9 times annually.

April 7<sup>th</sup>, 2010