

# Professional Development Roadmap



SUPPORTING THE COMPETENCIES OF CHARITY-BASED GIFT PLANNERS

## Become a CAGP Member

Join CAGP to unlock exclusive benefits and resources designed to support your professional growth and maximize your impact.

### PRODUCTS:



- Planned Giving for Canadians
- Canadian Donor's Guide
- Empowering Philanthropy: An Overview of Donor-Advised Funds
- Charitable Donations of Life Insurance

### BENEFITS:



- Ask An Advisor
- National Network of CAGP Members
- Mentorship Program\*
- Discounts on education, webinars, and conference

\*Available through participating Chapters

### Number of years of Charity-based Gift Planners

1-3 years    3-5 years    5+ years

#### PROFESSIONAL DEVELOPMENT / NETWORKING

Present at local Chapter Educational Events	•	•	•
Attend Webinar Wednesdays & other CAGP Webinars	•	•	•
Attend & volunteer at the CAGP National Conference	•	•	•
Engage in mentoring program involvement as a learner	•	•	•
Volunteer at a local Chapter level		•	•
Present a Webinar for CAGP		•	•
Publish gift planning articles or blogs		•	•
Present & volunteer at the CAGP National Conference		•	•
Express interest to volunteer on a National committee			•
Mentoring program involvement as a mentor			•
Express interest to engage in the National Conference on a planning committee			•

#### NATIONAL EDUCATION

CAGP National Webinar Wednesdays	•	•	•
Gift Planning Fundamentals	•	•	•
Strategic Gift Planning Bootcamp for Major Gift Professionals	•	•	•
Bequest Administration Essentials	•	•	•
Original Canadian Gift Planning Course		•	•
Advanced Canadian Gift Planning Summit			•

Courses are designed to address the skills and attributes outlined in the Competency Framework for Charity-based Gift Planners.

# COMPETENCY FRAMEWORK FOR CHARITY-BASED GIFT PLANNERS

## PROFESSIONAL GIFT PLANNERS REQUIRE A COMPREHENSIVE ARRAY OF SKILLS AND ATTRIBUTES (COMPETENCIES) TO PERFORM EFFECTIVELY, SUCCESSFULLY AND WITH EXCELLENCE.

CAGP has developed the following list of the skills and knowledge necessary for a Gift Planner to excel in this profession. They fall into two basic categories of competencies within the overall framework: enabling and technical, reflecting the major pillars within the gift planning profession. Why not take a few moments to review CAGP's Competency Framework and, using the checklist, identify the areas you wish to focus on for personal and professional development.

### ENABLING COMPETENCIES

#### RELATIONSHIP BUILDING:

- Develop trusted relationships that achieve a donor's vision for philanthropy, desire for a legacy and personal needs
- Active listening
- Comfort in asking for money
- Empathy, understanding and comfort with end-of-life discussions
- Translate complex technical, legal and tax language/concepts into plain language
- Work with donors as their needs determine
- Work effectively with donors' families and advisors
- Commitment to stewardship activities that reflect donors' wishes
- Connect the charity's mission to the donor's vision
- Cultivate networks with trusted legal, tax, financial advisors
- Develop trusted relationships with charity colleagues to access resources and support

#### ETHICS & JUDGEMENT:

- Adhere to the CAGP Code of Ethics
- Balance alignment of a donor's needs and desired legacy with competence, financial viability, family commitments, etc.
- Ability to understand and retain information, recognizing and respecting lines of confidentiality
- Recognize when to redirect a donor to a more appropriate giving vehicle and in the donor's best interests
- Identify and avoid conflicts of interest
- Understand the concept of 'no gift before its time'

### TECHNICAL COMPETENCIES

#### KNOWLEDGE OF GIFT PLANNING VEHICLES:

- Securities, registered funds, insurance, annuities, gifts in kind, for current and deferred giving
- Advantage of corporate vs. personal giving
- Explain opportunities and impact of each option for the donor
- How to determine fair market value of a charitable gift and know what information to include on charitable receipts
- Know when to refer a donor to a professional advisor

#### KNOWLEDGE OF LEGAL CONTEXT OF GIFT PLANNING & THE CHARITABLE SECTOR:

- Legal implications of gift planning from the first conversation to appropriate stewardship
- Understand terminology, e.g. will clauses, gift agreements, etc.
- Management of estate gifts and estate administration
- Know when to seek legal advice and when to encourage donors to do so
- Familiarity with Canada's charitable sector and the legal framework of charities

#### KNOWLEDGE OF YOUR CHARITY:

- Familiarity with supporting data systems
- Understand and implement gift planning and gift receipting policies and procedures with diligence
- Understand management and governance
- Familiarity with vision, mission, values and strategic direction

#### KNOWLEDGE OF MARKETING & COMMUNICATIONS:

- Understanding of emerging philanthropic and sector issues and trends
- Planning and marketing techniques related to fundraising
- Understanding of the best outreach vehicles for donors
- Familiarity with donor prospecting approaches
- Ability to undertake applicable market research

Now that you've completed the checklist, use the Roadmap and decide your next steps on your journey to becoming a more successful charitable gift planner.