



Diversity, Equity, and Inclusion Action Plan

2026–2029

 ACTION PLAN

Introduction

The Canadian Association of Gift Planners (CAGP) is committed to advancing diversity, equity, and inclusion (DEI) as core to our mission, our values, and our role as a national leader in the charitable sector. We believe that a more just and generous society is only possible when barriers to participation are identified, challenged, and reduced, and when diverse voices, lived experiences, and perspectives are meaningfully included in shaping our work.

This four-year DEI Action Plan (2026–2029) articulates CAGP's commitments and priorities for embedding DEI across our governance, programs, operations, and relationships. It reflects our responsibility to be accountable to our members, partners, and the communities ultimately served by charitable gift planning. This plan is not intended to stand apart from our core work; rather, it is an expression of how we will pursue our mission in ways that are equitable, inclusive, and grounded in belonging.

CAGP recognizes that DEI is not a destination, but an ongoing practice that requires learning, humility, and sustained effort.

While meaningful progress has been made to date, we also acknowledge that systemic inequities persist within our sector and society more broadly. This Action Plan is intentionally aspirational, as CAGP seeks to demonstrate leadership within the charitable sector by setting a clear, values-driven direction for advancing equity, diversity, and inclusion. At the same time, this plan is grounded in a realistic assessment of where we are today. We are committed to being transparent about our progress, clear about where further work is needed, and accountable for moving forward in ways that are thoughtful, strategic, and sustainable. Our aim is to balance ambition with responsibility, advancing meaningful change while building the capacity, relationships, and learning required to do this work well.

Purpose and Scope of the Action Plan

This Action Plan provides a roadmap to guide CAGP's DEI efforts from 2026 to 2029. It is designed to:

- Augment CAGP's Strategic Plan 2025-2029, to examine and integrate DEI priorities and initiatives across all Strategic Directions in that plan
- Translate CAGP's vision, mission, and values into concrete DEI commitments and actions
- Clarify roles and responsibilities for advancing DEI at the Board, staff, and Chapter levels
- Support accountability through measurable actions, timelines, and ongoing learning.

It is intended to be a living document that will be reviewed regularly and adapted as our understanding deepens, circumstances evolve, and new opportunities or challenges emerge.

In this Action Plan, “equity-deserving” and “under-represented” refer to individuals and communities who experience systemic barriers to participation and leadership within the charitable and philanthropic sectors. This includes, but is not limited to, Indigenous, Black, and other racialized communities; people living with disabilities; members of the 2SLGBTQIA+ community; and individuals from diverse socio-economic, cultural, and faith backgrounds.

CAGP also recognizes the importance of intergenerational inclusion, particularly in the context of evolving trends in charitable giving. Emerging research and sector experience point to differences in how younger generations engage with philanthropy, including expectations around transparency, social impact, and equity. Addressing these dynamics is essential to ensuring the long-term relevance and accessibility of gift planning.

What We've Done to Date

CAGP's DEI efforts build on a foundation of work already underway across the organization. In recent years, the Board and staff have taken intentional steps to centre DEI as a shared responsibility and organizational priority. These efforts include:

- Establishing a DEI Standing Committee of the Board, supported by clear terms of reference
- Participating in DEI-focused training for Board members and staff, and leadership with CAGP Chapters
- Embedding DEI as a core priority within CAGP's new Strategic Plan
- Integrating DEI resources into onboarding processes for all new staff and Board directors
- Explicitly articulating CAGP's commitment to DEI in Board recruitment and staff hiring processes to ensure values alignment
- Incorporating multiple accessibility and inclusion measures into the CAGP Conference and other events, including physical or other accommodations, safer spaces, speaker selection and compensation, and bursaries for equity-deserving participants
- Encouraging ongoing reflection among staff on manifestations of historically-dominant culture and their influence on organizational norms and ways of working
- Recognizing the National Day for Truth and Reconciliation (September 30) as a statutory holiday at CAGP, with encouragement for staff to engage in learning, reflection, or community-based activities
- Integrating land acknowledgements into meetings and events, with intentional attention to ensuring these acknowledgements are meaningful and action-oriented rather than performative.

These actions and others are seen as an important start to the commitments outlined in this Action Plan and underscore CAGP's intention to move beyond statements of principle toward sustained, accountable practice.

Key Themes Guiding This Action Plan

The actions and priorities outlined in this DEI Action Plan are grounded in several core themes that reflect CAGP's understanding of its role, responsibilities, and areas of influence. These themes guide decision-making across the four-year period and are intended to support consistency, focus, and accountability.

- **DEI as an Enabler of Mission and Impact** — DEI is integral to CAGP's ability to increase equitable access to charitable gift planning and to strengthen trust, relevance, and legitimacy across the sector. Advancing DEI is essential to fulfilling CAGP's mission and achieving long-term impact.
- **Belonging as a Practice, Not a Statement** — CAGP is committed to fostering environments—within governance, staff teams, Chapters, programs, and events—where people feel respected, valued, and able to participate fully. Belonging requires intentional design, ongoing reflection, and a willingness to change established practices.
- **Reducing Barriers to Participation and Leadership** — This Action Plan prioritizes identifying and addressing structural, financial, cultural, and informational barriers that limit participation by equity-deserving groups, particularly in membership, education, governance, and leadership pathways.
- **Shared Responsibility and Accountability** — Advancing DEI is a collective responsibility across the Board, staff, Chapters, and members. Clear roles, transparent communication, and meaningful measurement are essential to sustaining progress over time.
- **Intention, Learning, Humility, and Continuous Improvement** — CAGP recognizes that DEI work is iterative and requires openness to learning, feedback, and course correction when we, inevitably, make mistakes. This plan emphasizes reflection, evidence-informed decision-making, and adaptability as conditions for meaningful change. We are committed to fostering a culture that encourages respectful dialogue, acknowledges harm when it occurs, supports accountability and repair, and creates space for people to learn and continue participating in the work together.
- **Engagement and Co-Creation** — CAGP is committed to advancing this work in partnership with the communities it seeks to serve. Implementation of this Action Plan will be informed by ongoing dialogue, consultation, and relationship-building with equity-deserving groups, members, partners, and sector leaders.

While the CAGP Board and staff are responsible for leading this work, we recognize that meaningful progress requires listening to and learning from those with lived experience. We are guided by the principle of nothing about us without us, and will seek to ensure that diverse perspectives inform decision-making, program design, and evaluation throughout the life of this plan.

Relationship to CAGP's Strategic Plan

This DEI Action Plan is directly aligned with CAGP's Strategic Plan and is intended to embed DEI considerations throughout the Plan, and support and strengthen progress across all Strategic Directions of the Plan. The intent is to reflect the understanding that equity, inclusion, and belonging are foundational to organizational effectiveness and sector leadership.

The Strategic Plan sets out CAGP's renewed vision, mission, and values:

Vision

A more generous and just society.

Mission

To expand resources for causes and communities by educating, advocating, and increasing equitable access to charitable gift planning.

Values

Belonging

We provide a respectful, welcoming, and engaging community that celebrates diversity and fosters a sense of belonging for all, including amplifying the voices and perspectives of historically underrepresented groups.

Generosity

We recognize and celebrate the many ways diverse people, communities, and cultures contribute to the greater good, and we strive to inspire generosity in forms that are meaningful and accessible.

Equity

We work to share expertise, reduce barriers to participation, and collaborate with others to advance justice, equity, and belonging across the charitable sector.

Leadership

We take responsibility for the impact of our actions, challenge the status quo where necessary, and ground our work in integrity, transparency, and evidence.

The DEI goals and actions that follow are organized under the Strategic Directions of the CAGP Strategic Plan 2025-2029, reinforcing DEI as an integrated and enabling dimension of CAGP's overall strategy rather than a standalone initiative.

Expand the gift planning community by building awareness and strengthening our voice

DEI Goals

Under this strategic direction, CAGP will ensure that growth in awareness, membership, and engagement reflects the diversity of the charitable sector and the communities it serves. Over the 2026–2029 period, CAGP will:

1

Broaden awareness of gift planning and of CAGP's role in ways that are inclusive, accessible, and relevant across diverse organizational, regional, and professional contexts.

2

Strengthen engagement and grow membership among equity-deserving and under-represented communities within the charitable and professional advisory sectors.

3

Support Chapters and national initiatives in fostering inclusive, connected communities and increasing visibility in regions and communities that have been historically under-served.

DEI Actions

To advance these goals, CAGP will undertake the following actions across communications, membership, and community engagement:

Inclusive Communications and Visibility

- Integrate recognition of significant equity-related days and months into member and public-facing communications in ways that are meaningful, respectful, and aligned with CAGP's values.
- Increase transparency and accountability for DEI work by introducing a dedicated section on equity, diversity, and inclusion in Giving Matters.
- Review and refine CAGP communications to ensure they reflect diverse voices, lived experiences, organization sizes, and regional realities.

Membership Growth and Engagement

- Continue to collect and review baseline demographic data through the biennial CAGP member survey (2026 and 2028), using ethical, voluntary, and transparent data practices.
- Analyze member survey data through a DEI lens to inform membership strategies, programming priorities, and engagement approaches.
- Develop and implement targeted recruitment and engagement strategies to reduce barriers to membership for equity-deserving and under-represented communities.
- Intentionally highlight members from small and mid-sized charities, new fundraisers, and under-represented groups through communications and social media channels, where appropriate, to broaden visibility and sector engagement.

Community, Chapters, and Connection

- Support CAGP Chapters by providing tools and resources to increase visibility and inclusion of under-represented members through local partnerships, alliances, and outreach initiatives.
- Build strategic relationships with aligned organizations to strengthen trust, expand outreach, and support relationship-based engagement across diverse communities.
- Explore the interest and value of establishing affinity groups to create spaces for peer connection, dialogue, and shared learning among those with shared identities or experiences.
- Identify and secure sponsors and partners to support equitable access to membership and participation for individuals from marginalized communities.

Raise public awareness of the impact of charitable gifts in wills

Under this strategic direction, CAGP will ensure that efforts to increase charitable bequest giving are inclusive, culturally relevant, and do not reinforce existing inequities within philanthropy. Over the 2026–2029 period, CAGP will:

1

Increase the cultural relevance and inclusivity of Will Power as a public-facing legacy giving campaigns.

2

Strengthen relationships with Indigenous, Black, and other equity-deserving communities to better understand and address barriers to legacy giving.

3

Generate and apply evidence-informed insights on inequities in charitable bequest giving to inform campaign design, partnerships, and policy advocacy.

DEI Actions

To advance these goals, CAGP will undertake the following actions, with a particular focus on the Will Power campaign:

Inclusive Campaign Design and Representation

- Diversify public-facing Will Power campaign materials, including advertising and digital content, to reflect a wide range of cultural backgrounds, family structures, and lived experiences.
- Review and refine campaign messaging to ensure it is accessible, culturally relevant, and responsive to different values, traditions, and perspectives on legacy and wealth.
- Include messaging and partnerships that reflect diversity by highlighting a broad range of charities and collaborating with partners on blogs and content published through the Will Power website.

Community Engagement and Partnerships

- Engage with organizations serving or led by Indigenous, Black, and other equity-deserving groups through targeted outreach to better understand barriers to legacy giving and participation in national campaigns.
- Support equity-deserving organizations as campaign partners by identifying and addressing challenges they face in legacy giving marketing where possible.
- Continue and deepen the partnership with The Circle on Philanthropy, extending the collaboration to a seven-year relationship.

Indigenous-led Guidance and Reconciliation Commitments

- Increase organizational understanding of the Indigenous context of bequests and legacy giving.
- Engage Indigenous partners to provide guidance and review content related to charitable giving, including the charity section of the Will Power website, to ensure accuracy, respect, and cultural responsiveness.

Research, Data, and Policy Insight

- Conduct research on the current state of charitable bequest giving through a cultural lens, including perspectives from diaspora, Black, and faith-based communities, with a report released in 2026.
- Prioritize data collection and analysis on racial and socio-economic disparities in philanthropy to inform campaign strategy, policy advocacy, and public dialogue.
- Apply research findings to ensure that charitable giving models and public awareness efforts do not inadvertently reinforce existing inequities.

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STRATEGIC DIRECTION 3

Increase recognition of CAGP as the trusted and connected educational thought leader on gift planning within the philanthropic sector and public policy spaces.

DEI Goals

Under this strategic direction, CAGP will ensure that its education, research, and professional development offerings are accessible, inclusive, and responsive to diverse lived experiences and professional contexts. Over the 2026–2029 period, CAGP will:

1

Reduce barriers to participation in CAGP and CAGP Foundation education and professional development offerings for equity-deserving groups.

2

Strengthen representation and inclusion within educational content, faculty, and learning environments.

3

Integrate DEI, reconciliation, and systemic equity perspectives into gift planning education in ways that are practical, evidence-informed, and sector-relevant.

DEI Actions

To advance these goals, CAGP will undertake the following actions across its education, research, and convening activities:

Inclusive and Accessible Learning Environments

- Apply an ongoing DEI and accessibility lens to the design and delivery of the CAGP Conference, with the goal of increasing access, inclusion, and a sense of belonging for all delegates and speakers.
- Continue to expand access to speaking opportunities by offering speaker fees and financial support for travel and accommodation where financial barriers exist.
- Increase the availability of bursaries for equity-deserving groups to participate in the CAGP Conference and other educational offerings.
- Secure dedicated sponsorships to sustain equity-access bursaries across all courses and education programs, beyond the annual Conference.

Representation in Education and Faculty

- Review and update the Terms of Reference of the National Education Committee to include a representation matrix for committee membership and course faculty, supporting intentional diversity of perspectives and lived experience.
- Examine opportunities to engage under-represented groups in CAGP education, including addressing barriers to engagement and inclusion, including but not limited to cultural representation, gender, disability and learning needs.

Content Development and Curriculum Review

- Explore the need for culturally responsive gift planning training for fundraisers and professional advisors.
- Expand education and training content that examines systemic barriers to gift planning and estate giving and promotes inclusive and ethical fundraising approaches.
- Where course curriculum explores charitable gifts of land, consider including concepts of “land back”, in collaboration with Indigenous partners where appropriate.
- Review Planned Giving for Canadians and other core educational materials through a DEI lens, and consider integrating content related to reconciliation, decolonization, and systemic inequities where appropriate.

Research and Sector Leadership

- Develop and resource a research strategy that supports evidence-informed education and positions CAGP as a thought leader on equity-related dimensions of gift planning.
- Build relationships with organizations and groups that bring specific identity-based or community perspectives to inform education, research priorities, and curriculum development.

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STRATEGIC DIRECTION 4

Ensure long-term sustainability and capacity to deliver on our mission well into the future

DEI Goals

Under this strategic direction, CAGP will strengthen governance, organizational practices, and Chapter capacity to ensure that DEI is embedded in decision-making, risk management, and long-term sustainability. Over the 2026–2029 period, CAGP will:

1

Integrate DEI into governance structures, policies, and leadership practices.

2

Strengthen organizational capacity, skills, and accountability for advancing DEI across staff, Board, and Chapters.

3

Embed DEI considerations into planning, performance measurement, and organizational sustainability efforts.

DEI Actions

To advance these goals, CAGP will undertake the following actions related to governance, operations, and organizational capacity:

Governance and Board Leadership

- Apply a DEI lens to Board decision-making, including ongoing risk management, assessment, monitoring, and mitigation activities.
- Develop a DEI Governance Framework to articulate the Board's governance scope, clarifies its sphere of influence, and outlines how diversity, equity, and inclusion are to be embedded in Board leadership and decision-making.
- Conduct an equity audit of Board composition and leadership pipelines to assess alignment with CAGP's DEI commitments and identify opportunities to reduce barriers to governance participation.
- Review and update CAGP's Diversity & Inclusion Policy as part of the governance policy manual to ensure clarity, relevance, and accountability.
- Ensure ongoing DEI learning and training for Board members, tailored to governance responsibilities and sector context.

Organizational Capacity and Staff Development

- Develop and implement a staff DEI training plan that supports shared understanding, skill-building, and practical application across roles.
- Ensure ongoing communication between Board and staff regarding DEI priorities, initiatives, and progress.
- Continue to prioritize and phase DEI activities across the full timeframe of this Action Plan, balancing ambition with organizational capacity.

Chapter Engagement and Support

- Add DEI as a standing agenda item at quarterly Chapter Peer-to-Peer gatherings to support ongoing dialogue, shared learning, and alignment.
- Encourage Chapters to host events or learning opportunities connected to key dates (e.g., National Indigenous Peoples Day, Pride Month), with appropriate guidance and resources.
- Create a dedicated DEI section within the Chapter Executive Hub as a central repository for tools, resources, and promising practices.
- Include a comprehensive DEI section in the Chapter Operations Manual and ensure it is incorporated into onboarding discussions with new Chapter leadership.

Measurement and Integration

- Identify and integrate DEI-specific KPIs across communications, education, membership, and public engagement efforts, including ethical and voluntary collection of demographic information, to inform program design and decision-making.
- Embed practices for collecting optional demographic information for events and programs, in ways that are ethical, transparent, and respectful.
- Strengthen integration of DEI considerations across all strategic directions, ensuring DEI informs CAGP's programs, operations, and long-term planning.

Priority Areas for 2026–2027

While this Action Plan outlines a multi-year roadmap, CAGP will prioritize the following areas in the first year of implementation:



Building a baseline for accountability

Establish consistent approaches to collecting and analyzing demographic and participation data across membership, education, and engagement activities, to better understand gaps and inform action.



Reducing barriers to participation

Expand access to CAGP programs and community through targeted outreach, bursaries, and inclusive program design, with a focus on increasing engagement from under-represented groups.

These priorities are intended to build a strong foundation for longer-term, systemic change across all areas of the organization.

Gauging Progress and Accountability

CAGP is committed to advancing diversity, equity, and inclusion in ways that are intentional, measurable, and responsive. While recognizing that not all aspects of DEI progress can be captured through quantitative metrics alone, this Action Plan emphasizes a balanced approach that combines data, reflection, and learning over the 2026–2029 period.

Guiding Principles for Measurement

CAGP's approach to measuring DEI progress will be guided by the following principles:

- **Balance:** Measurement approaches will be appropriate to CAGP's size, capacity, and role within the charitable sector.
- **Transparency:** Progress, challenges, and lessons learned will be communicated openly to Chapters, and members.
- **Ethical Data Practices:** All demographic data collection will be voluntary, respectful, and clearly communicated, with attention to privacy and appropriate use.
- **Humility & Listening:** We approach measurement with openness to challenge and genuine respect for the lived experiences and perspectives of all communities we serve.
- **Authentic Engagement:** We listen with empathy and cultural humility, recognizing that equity work requires understanding diverse contexts and lived realities beyond data alone.

Key Areas of Measurement

Progress on this Action Plan will be assessed across several interconnected domains, and consider both qualitative and quantitative metrics:

Governance and Leadership

Board composition and leadership pipeline trends, informed by periodic equity audits. Evidence of DEI considerations embedded in Board decision-making, policy review, and risk management processes. Participation of Board members in DEI learning and training activities.

Membership, Engagement, and Public Awareness

Reach and engagement of public-facing campaigns and educational initiatives across diverse audiences. Growth and participation patterns among members and partners from equity-deserving communities, where data is available. Evidence of culturally responsive approaches in campaigns, partnerships, and communications.

Education and Professional Development

Participation rates in CAGP education programs, including Conference and courses, with attention to access supports such as bursaries and accommodations. Representation and diversity of speakers, faculty, and contributors to educational content. Integration of DEI, reconciliation, and systemic equity content within core education offerings.

Organizational Capacity and Chapter Engagement

Completion of planned DEI training and capacity-building activities for staff, Board, and Chapter leadership. Integration of DEI resources and guidance into Chapter operations, onboarding, and programming. Ongoing dialogue and knowledge-sharing through Chapter Chairs meetings and national forums.

Tools and Processes

To support accountability and consistency, CAGP will:

- Identify and track a set of DEI-related key performance indicators (KPIs) aligned with the Strategic Plan.
- Incorporate DEI progress updates into regular Board reporting and planning cycles.
- Conduct periodic reviews of this Action Plan to assess progress, identify gaps, and adjust priorities as needed.
- Use qualitative feedback, including member and partner input, to complement quantitative indicators and deepen understanding of impact.

Review and Adaptation

This DEI Action Plan is intended to be a living document. CAGP will review progress at least annually and will adapt actions and measures in response to learning, emerging needs, and evolving sector context. Where targets are not met, CAGP will focus on understanding barriers and adjusting approaches, reinforcing a culture of accountability grounded in learning and improvement.

Accountability

The CAGP Board and CEO commit to ongoing reporting to Chapters and members of progress, challenges, and adjustments to this Action Plan.

Acknowledgement

This action plan was developed with the leadership and guidance of CAGP's DEI Committee of the Board of Directors, and a working group comprised of the members of the CAGP staff team.

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