

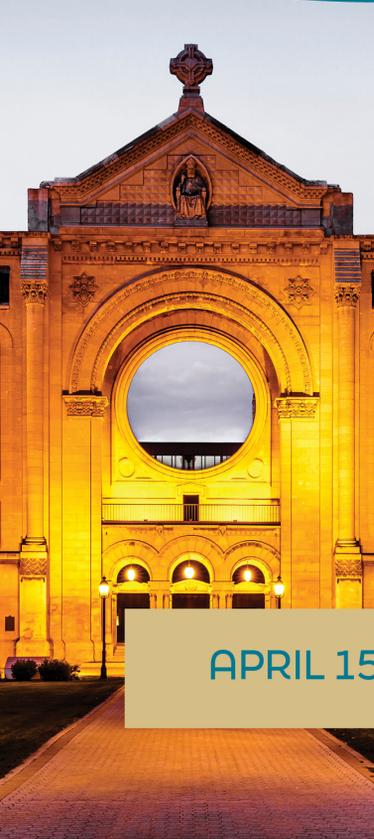
FROM  
**THE HEART**  
FOR THE FUTURE



DU  
**CŒUR**  
POUR L'AVENIR

CAGP'S 32<sup>nd</sup> NATIONAL CONFERENCE  
ON STRATEGIC PHILANTHROPY

LE 32<sup>e</sup> CONGRÈS NATIONAL DE L'ACPD  
SUR LA PHILANTHROPIE STRATÉGIQUE



# CALL FOR PROPOSALS

& INFORMATION FOR PRESENTERS

# APPEL À PROPOSITIONS

ET INFORMATIONS POUR LES PRÉSENTATEURS

APRIL 15-17 | DU 15 AU 17 AVRIL | WINNIPEG | 2026

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The National Program Committee invites you to participate in CAGP's 32<sup>nd</sup> National Conference on Strategic Philanthropy.

### 1. Conference Overview

CAGP's 32<sup>nd</sup> Annual National Conference will take place April 15-17, 2026, in Winnipeg, Manitoba. We anticipate engaging 450+ delegates from across the country.

**The Conference Theme is:** From the Heart, For the Future

CAGP members are leaders in Canada's charitable community and provide donors/clients with new and innovative ways of achieving their philanthropic dreams and impacting Canada's philanthropic landscape in meaningful ways. Members also include professional advisors – lawyers, insurance brokers, accountants, financial planners etc. who advise clients at all ages and stages on the management and disposition of their wealth, integrating philanthropy in their practice.

Through a commitment to a stringent Code of Ethics, continual learning and networking and a willingness to share, our members are committed to growth and development as professionals in their respective fields.

**Conference objectives are:**

- Offer leadership and learning on strategic gift planning
- Explore and discuss the evolving landscape of charitable giving in Canada

- Strengthen the networks of gift planning professionals
- Centre philanthropy's role in a more inclusive, equitable and just future

## 2. Call for Proposals

The Conference Program Committee is seeking proposals for sessions to contribute to an overall program that will:

- Attract and serve a rich, diverse audience
- Bring the conference theme and objectives to life
- Be relevant and engaging for attendees at all levels of experience and across the professional spectrum of gift planners.
- Address traditional topics of gift planning, as well as the changing face of philanthropy and broader professional issues or trends;
- Clearly demonstrate how an understanding of gift planning wisdom can help organizations, communities and donors achieve their philanthropic dreams
- Engage delegates through creativity and interaction, a variety of approaches, concepts and applications

*In our ongoing efforts to offer the CAGP National Conference as an inclusive and diverse event, we welcome and encourage proposals for sessions which limit participation to individuals with shared intersectional identities, in order to create spaces for nuanced conversation and learning connected to experiences borne-out of those identities.*

**The deadline for submissions is Friday June 27<sup>th</sup>, 2025.**

## 3. Topic Streams & Session Examples

Topic Streams are set to be congruent with [CAGP's Competency Framework](#). Speakers are encouraged to consider the following Topic Streams and examples in developing their proposal, as well as submit additional topics of interest/relevance to our delegates.

### A. Building Relationships

Sessions that explore the art of being truly donor/client-centered, as experienced professionals share strategies and tactics for building an authentic rapport with donors and clients that will evolve relationships from the transactional to transformational.

- Working with people who are bereaved or facing mortality
- Donor visits; Working with donors with dementia; Tough donor conversations
- Diversity and inclusion; Building cultural competency
- Recognition and stewardship practices
- Managing a gift planning portfolio; Identifying gift planning prospects; closing a gift
- Working with executors and trust companies
- Building and cultivating relationships with donor's families and professional advisors
- Assessing the effectiveness and impact relationships

## **B. Gift Planning Vehicles**

Bequests are the cornerstone, but why stop there? These sessions will serve to increase knowledge and understanding of the variety of current and deferred gift vehicles, such as securities, registered funds, insurance, gifts-in-kind, as well as the opportunities and impact they have for donors.

- Testamentary gifts, insurance, registered funds, blended gifts, and strategies; Problematic or innovative gifts and receipting case studies; Strategic giving case studies
- Advanced gift vehicles, e.g. gifts of options, dividends, flow-through shares, real estate, CRT's
- Donor-advised Funds; Working with high net worth donors

## **C. Legal Issues & Ethics**

These sessions will help professionals hone their technical knowledge and sharpen their expertise, tackle unique challenges and opportunities of gift planning, and manage gift planning programs with excellence.

- Understanding tax planning and advantages; Common law and Quebec Civil Code issues; legal obligations for charities
- Non-profit accounting, gift processing and receipting
- Legal, regulatory and financial aspects of gift planning; New Trust laws and impact on estate administration
- Transitioning into retirement
- Boundaries in gift planners' relationships with donors;
- Scandals around charity/philanthropy and the impact on citizen trust

## **D. Know Your Charity**

Philanthropists are becoming increasingly involved and savvy, and estates are becoming more complex, making a sound understanding of governance and financial matters integral to success. These sessions reach beyond gift and estate planning to the broader spectrum of charity management and oversight.

- Digital tools for gift planning; Data
- Leadership development; Organizational culture
- Hiring/Motivation/Evaluation/Training; Workplace issues, e.g. toxicity, harassment
- Integrated gift planning; Breaking down silos
- Sub-sector issues: education, health, faith-based, community foundations, arts/cultural sectors
- Gift planning in a small shop
- Creating a gift planning case for support for your Board; Goal setting and measurements for senior staff and Board reporting
- Policies & procedures

## **E. Marketing & Communications**

These sessions introduce delegates to the newest and greatest ideas to develop and distribute targeted gift planning marketing and communications collateral across multi-media platforms and channels.

- Demographics
- Multicultural perspectives on death, dying, estate giving, etc.
- Benchmarks and metrics; research on giving and analytics
- Marketing methods, e.g. advertising, direct marketing, face-to-face, social media, websites, etc.

- Messaging in an age of information; Competing for attention in a multi-fractured information space
- Social Media
- Branding

#### F. Not About Gift Planning

We know there's more to learn and share than the technical stuff, and we love new ideas, so don't let the above limit you. If you have a concept to share, a difficult situation to discuss, a challenge you've learned from, an inspiring approach to reveal, consider submitting a proposal. Our delegates have also told us they're interested in:

- Leadership skills and career development
- Personal growth and wellness
- Curiosity and critical thinking
- The evolving philanthropic landscape, giving trends and challenges
- Social change, inclusion, equity

### 4. Session Format

We are seeking proposals for sessions of either 60 or 90 minutes in length, in the following formats:

- Workshop Presentations:* Workshops should be a combination of presentation and dialogue with participants
- Panel Discussions:* Panels should reflect diverse views and experiences on a specific topic or issue. A maximum of three (3) panelists with a moderator is recommended.
- Other:* Please describe your session vision to the program selection committee.

### 5. Education Levels

Please tailor your session to address one of the following educational levels:

**INTRODUCTORY:** Best suited to those with less than 2 years in their role and/or related to gift planning experience. This includes professional advisors and those fundraisers currently working in major, annual or campaign positions who wish to learn more about gift planning, or charity staff / board members considering establishing a gift planning program at their organization.

**INTERMEDIATE:** Advances or improves an active gift planning program. For audiences with *more than 2* years of experience in their role and/or related to areas of gift planning. E.g. gift planning officers, staff/board members who work on major giving, annual campaign, donor relations, policy, financial transactions and/or administration. Also suitable for professional advisors with an interest in improving their technical knowledge and basic skills in gift planning.

**ADVANCED:** For audiences with a minimum of 5 years of experience in their role and/or related to gift planning. Sessions should include more detailed technical, regulatory and legal aspects of gift planning and dealing with donors/clients who are looking for expert advice on complex, transformational gifts.

**GENERAL:** Educational sessions that would be of interest to all conference attendees. Topics can be relevant to gift planners, professional advisors or charity staff, volunteers or board members with any level of gift planning experience and an interest in the Canadian philanthropic sector

## 6. Expectations of Presenters

Presenters are expected to:

- Be open to discussing changes to the proposed presentation as recommended by the Program Committee.
- Ensure the session description provides clear learning objectives and accurately describes what the actual presentation will deliver.
- Not deviate from content, process, names or numbers of presenters outlined in the proposal without prior approval of the Program Committee.
- Provide a complete presentation in electronic format **by March 2, 2026**. This is a tentative date and will be confirmed in the new year.
- Conference delegates will be able to access the presentation on the CAGP website. Access will be password protected and available to registered delegates only.
- Provide copies of any supporting session handouts and/or resources for participants
- Agree to have the session audio and video recorded (if appropriate) and the presentation captured electronically for possible broadcast by CAGP following the conference. All presentation content remains the intellectual property of the presenter.
- **Understand that sessions are not to be a marketing opportunity for products or services, and the content should provide learning and actionable ideas for participants.** If you wish a speaking opportunity to market services or products, please speak to CAGP about sponsored-content opportunities.

## 7. Compensation

CAGP does not traditionally compensate its speakers, recognizing that the open sharing of knowledge and expertise related to philanthropy and strategic charitable gift planning is core to CAGP purpose and values.

CAGP is enormously grateful to all who so generously give their time and talent lift up its community and strengthen gift planning in Canada.

In efforts to support goals to build greater equity and access for all, CAGP is proud to continue to support an initiative which was successfully launched in 2025.

To help ensure our delegates can benefit from the widest array of speakers and expertise, CAGP is pleased to offer

- an *optional* speaker fee of \$250 to those who wish to present at the CAGP Conference

- a *limited* budget available to assist with travel and accommodation of up to \$750 per person.

CAGP thanks those who are supported by their employer, or who otherwise have financial means to attend and speak at the CAGP Conference. Continuing that support allows flexibility to offer greater support to those who have traditionally been unable to attend.

Please note that all requests for a speaker fee and/or financial assistance for travel and accommodation will be kept strictly confidential. This information will not be shared with the Conference Program Committee and will not be considered as part of the review and selection process for speakers.

## 8. Proposal Selection Criteria

We seek diversity in methodology, topics and sector focus, size of shop, experience level and demographics of presenters. We also try to balance regional representation by showcasing the experience and knowledge of presenters in the city where the conference is held.

The Conference Program Committee evaluates all proposals using an established review process based on the following criteria:

- Clear session purpose, description and intended results
- Presentation of ideas, experience and learning that reflects new thinking and/or improves the field of gift planning
- Level of audience engagement
- Draws on documented theory and/or practice
- A clear relationship between the session content and the conference theme and any or all of the conference objectives
- Demonstrates a commitment to areas related to leadership, personal & professional development, equity, belonging & inclusion.

An individual may submit more than one proposal. Please note that we seek to have a diversity of topics and speakers and thus prefer not to have speakers present more than one session, or have more than two presenters from any one organization, unless otherwise decided by the Program Committee.

Language: Proposals to present either bilingually (English/French) or entirely in French are welcome; please note this in your submission.

## 9. Submission Information

To submit your proposal, please visit the online submission form here: [2026 CAGP Call for Proposals Submission Link](#)

**The deadline for submissions is Friday June 27, 2025.**

The primary presenter on the Session Proposal form will be notified of acceptance in October 2025.

In the online submission form you will be asked to complete these questions to submit a session proposal:

- a) Session title
- b) Provide a 100 word abstract of your proposal
- c) Provide a more descriptive abstract of the session (250 words)

- d) Provide 3 learning objectives for your session
- e) Choose the length of your session
- f) Choose the topic stream for your session
- g) What is the education level of your session
- h) Primary presenter name & contact information
- i) Additional presenters with contact information
- j) Day/time conflicts
- k) Speaker biographies (100 words each)
- l) Speaker photo (jpeg or png, 72-92 dpi, 1000-2000 pixels on the long side)
- r) If you have given a virtual presentation, please provide the url

## **10. For Further Information**

If you have any questions, please contact:

Caralen Law

Conference & Event Planner, CAGP

Tel: 416-706-8652 or 1-888-430-9494 x227

Email: [claw@cagp-acpdp.org](mailto:claw@cagp-acpdp.org)