



IMPACT REPORT

2020



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leadership reflection

Despite the challenges 2020 brought, in reflecting on the year to compose this message, it was easy to see successes and causes for celebration, too.

Charities and nonprofits need to be able to clearly show the impact they are having and that is a strong underpinning in this report as we share the story of the difference we are making for professionals and donors when, together, they realize philanthropic aims and transform our communities. Gratitude is also at the core of the annual report, and nowhere is that more true than in the message from the CAGP Foundation, as our vital partner in all things strategic charitable gift planning.

This impact is perhaps most exemplified by the 2020 launch of the Will Power campaign. Benchmarking research on the state of legacy giving in Canada provided the basis for campaign goals, and an enormously successful pilot campaign launch in Ontario's Niagara-Golden Horseshoe has us well on our way. The pilot also resulted in unanticipated momentum leading to an accelerated roll-out of a Pan-Canadian and fully bilingual campaign in 2021.

The Education program was truly turned on its head in 2020. "Pivot" has become a rather tiresome term, but its over-use is perhaps because it's so tremendously apropos. We did just that in meeting our goals this year and we saw some enormous successes doing so in an online setting – in fact, hastening a tactic identified in our 2019–2023 strategic plan – with Summer

School, the *virtual* Gift Planning Fundamentals, and the Advanced Philanthropy Series.

The cancellation of the Annual Conference on Strategic Philanthropy may have been an historical 'downer' for us, but also perhaps our most compelling narrative of impact and greatest message of gratitude. Delegates, sponsors, Chapters, and donors stepped up in droves offering their support to help us weather that financial storm, which for CAGP could have had implications of an El Nino scale. We expressed our immense appreciation with our **#CAGP21Heroes** social media campaign.

When this all began, few would have imagined that a year later we would still be living the COVID-19 pandemic, and it continues to be an extraordinarily uncertain and difficult time for many charities, communities, and individuals. We remain mindful of that, but also recognize the innovation, adaptation, resilience, kindness, and reciprocity that has also emerged as a result. Perhaps something to be most grateful for...

Thank you and stay well,

Michelle & Ruth



Michelle Osborne
Chair of the Board
of Directors



Ruth MacKenzie
President & CEO

With thanks to the CAGP Board

Michelle Osborne, CFRE – **Chair**

Heather Powers – **Vice Chair**

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Geoff Graham, CFRE – **Secretary**

Yolanda Benoit

Michael Blatchford

Janice Feuer

Jill Nelson, CFRE

Beth Proven

Conor Tapp

Keith Thomson



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2020 in review

Explore some of the many highlights of 2020:

education

2020 saw the shutdown of all our in-person education offerings in late February **and** the cancellation of the national conference in March. Despite the challenges of the early months of COVID-19, we pulled together and delivered **two** brand-new online offerings, Summer School and the Advanced Philanthropy Series, plus we adapted our popular one-day Gift Planning Fundamentals to a virtual program delivered in two half-day sessions. Webinar Wednesdays continued through 2020, with over 2,200 people attending the various sessions offered, up from 1,500 in 2019.



Total engagements with CAGP Education in 2020
3,778

I greatly appreciate that CAGP has been a leading organization in maintaining professional development for the philanthropy professional through a very trying and difficult time. CAGP has and continues to provide an excellent return on investment of dollars and time. The value of Planned Giving to our institution is greatly advanced by CAGP's commitment to its members.

– Susan Reid, Director, Bequests and Planned Gifts, McGill University

membership

Membership stayed strong in 2020 despite the global pandemic, with **1145** active members as of Dec 31, 2020. That's an increase of 5% from the previous year. In times of challenge, CAGP is here for our community.

5% increase

WILL POWER

During a global pandemic, we forged ahead with the pilot of the **new public-facing legacy giving campaign**, which would come to be known as Will Power, in the Niagara-Golden Horseshoe region of Ontario. The pilot ran in September, and in just one month, amazing results were achieved, prompting us to move forward with planning the pan-Canadian launch in 2021.

18.2m impressions of the campaign

47,180 visits to willpower.ca

1744 actions taken on the website

15 local news stories

53k engagements with the campaign





our thanks

CAGP's success relies heavily on the 20 Chapters across Canada that are led by **155 passionate professionals** in gift planning who volunteer their time and expertise to represent CAGP in their regions. We can't thank them enough for their dedication and hard work!

Vancouver Island

Michelle Johnson - Chair
Hilary Abbott
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Saskatchewan South

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Jeff Norwig
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Rena Molinari
Patrick O'Connor
Beth Proven
Lynda Ruban
Stephen Webb

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Sandra Presland
Kim Willis
Peggy Winch

Sarnia-Lambton

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Margery Muharrem
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Trish Gergich
Sue Hardy
Vicki Hayter
Sarah Morkin

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Rubin Kataki

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Joanne Harris-Bedford
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Carol Rame
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Tanya Rumble

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Co-chair
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Jack Bergmans
Mikhael Bornstein
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Abdesh Furmah
Tammy Garcia
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Ann Gorwill
Serena Hak
Daniel Kachani
Richard Lefebvre

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Antonietta Nicolo -
Co-chair
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Kim Cavener
Jos e Darche
Gina Di Filippo
Lucille Grimard
Jeremy Hampson
Natalia Kistruga
Nancy Lepage
Kim Nguyen

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Nova Scotia

Liz Finney - Chair
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Doris Cameron
Toni Croft
Siobhan Doherty
Alyssa Feir
Geoff Graham
John MacDonald
Lori Scott
Arleen Stevens

Newfoundland & Labrador

Mike Kidney - Chair



friends of CAGP 2020

In 2020, Terrance Carter, Elena Hoffstein and Peggy Killeen have been recognized for their contribution and dedication to the mission of CAGP.



Terrance Carter



Elena Hoffstein



Peggy Killeen



In addition to our Chapters, CAGP's work is supported by numerous committees that offer their expertise in support of the many aspects of our work nationally. We extend our deepest thanks to the following professionals:

Conference Program Committee

Denise Fernandes - Chair
Ryan Fraser
Aneil Gokhale
Lisa Green
Erin Kuhns
Ruth MacKenzie
Melissa Mann
Alen Okanovic
Charles O'Neil
Lydia Potocnik
Heather Powers
Marcella Zanella

National Education Committee

Jill Nelson - Chair
Claude Drouin
Ryan Fraser

Erin Kuhns
Ruth MacKenzie
Janice Loomer Margolis
DeWayne Osborn
Michelle Osborne
Paul Nazareth
Sara Neely

Government Relations Committee

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Rick Braun-Janzen
Malcolm Burrows
Terrance Carter
Nicole D'Aoust
Mark Goldbloom
Elena Hoffstein
Robert Kleinman
Brenda Lee-Kennedy
Ruth MacKenzie

Susan Manwaring
Janice Loomer Margolis
Margaret Mason
Brenda McEachern
Grant Monck
Elizabeth Moxham
Jill Nelson
Bradley Offman
Michelle Osborne
Lailly Pirbhai
Jo-Anne Ryan
Slivia Ugolini
Ross Young

Membership Committee

Conor Tapp - Chair
Yolanda Benoit
Khalil Guliwala
Lara Kinnear
Clare Levy
Jen Pederson
Paul Nazareth
Tanya Rumble



We would also like to recognize and thank these funders and sponsors for their support in 2020.

Abundance Canada
Blackbaud Canada
Blakely
BMO
CI Assante
DLA Piper
The Donor Motivation Program™
DonorPerfect
Environics Analytics
Link Charity
Miller Thomson
PearTree Canada
Private Giving Foundation at TD
Raymond James
South Saskatchewan Community Foundation
WCPD Foundation

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gratitude report from the CAGP Foundation

What a year 2020 was! Like everybody in our sector, we've had to find new ways to accomplish our goals and serve our mission.



Extraordinary people in extraordinary times

We are so grateful to our remarkable donors and supporters, our volunteers and leaders, who have been with us all the way as we rose to the challenge. Their commitment and support has been crucial at this time and have allowed us to maintain stability at this difficult time. They believe in us. They share our vision of long-term impact on philanthropy in Canada.

By the numbers

Thanks to dedicated work by our volunteers around the country we were able to **raise \$353,327** in gifts and pledges. Our actual revenue for the year was \$322,776. Our **donor retention rate remains 20% higher** than the sector average and we are sustained by the multi-year pledges that the majority of our donors have made. We enjoy 100% support from both the CAGP and the Foundation Boards. Our endowment at The Winnipeg Foundation now stands at \$32,992.

The message is loud and clear

We believe that the events of 2020 have delivered an important message. Our objectives – education, research, advocacy and raising public awareness around strategic charitable giving – are crucial to building resilience in our sector. At a time like this we provide a clear focus on the importance of planned giving programs to sustain our organisations and our communities. It's our moment to educate, to collaborate and to lead.

There's still much to do to build on the spirit of generosity in this country, and going forward we'll continue to need your support and engagement more than ever. Thank you for your confidence in us.

We could not have done it without you.

CAGP Foundation Board

Beth Proven – Chair
Darren Pries-Klassen –
Past Chair
Ross Young – Treasurer
Andrew Valentine –
Secretary
Jill Nelson
Brad Offman
Ricky Piedrahita
Andrea Robertson
Marcella Zanella

Additional Volunteers

Joan Blight
Nicola Elkins
Cary Gaymond
Geoff Graham
Roger Lee
Greg Lichti
Chelsea McIntyre
Charles O'Neil
Doug Puffer
Keith Thomson

our 2020 donors and supporters

We're immensely grateful to our family of donors for their loyalty and generosity. In this listing we are also recognizing the heroes who rose to meet the challenge of our conference cancellation through financial support of CAGP.

\$500,000 +

Donald K. Johnson

\$50,000 +

Benefaction Foundation
Rideau Hall Foundation
The Donor Motivation Program™

\$25,000 +

CAGP Alberta South Chapter

\$10,000 +

Lawson Foundation
Susan Manwaring

\$5,000 +

CAGP Greater Toronto Area Chapter
Carters Law Firm
Sandra Dow
Jeremy Hampson
Elena Hoffstein
Peggy Killeen
Ruth MacKenzie
Margaret Mason

Darren & Monika Pries-Klassen
Scotia Wealth Management
Robert Strachan
Ross B. & Alison Young

\$2,500 +

Rod Abbott
Yolanda Benoit
Cardinal Capital Management
Kim Cavener
Joan Cosby
Leah Eustace
Calvin Fong
Geoff C. Graham & James B. Tee
Tony Lee
Greg Lichti & Garth Norbraten
Sara Neely
Jill Nelson
Blackwood Family Enterprise Services
Michelle M.B. Osborne
Beth Proven
Gregory Snider
Amanda Stacey
Jasmine Sweatman
Andrew Valentine

\$1,000 +

Joan Blight
CAGP Alberta North Chapter
CAGP Greater Vancouver Chapter
Calgary Foundation
Lars A. Callieou
Florence Carey
Ian Fraser
Doug & Carla Funk
Serena Hak
KBF Canada
Clare Levy
Paul & Chastity Nazareth
Charles O'Neil
PGgrowth
Ricky Piedrahita
Heather Powers
Doug Puffer
Ralph & Gay Young Family Capital Fund
Raymond James Canada Foundation
Lorna Somers
Jay Stark
Conor Tapp
Anne Thibodeau
Silvia Ugolini
Janice Williams
Marcella Zanella



\$500 +

Michael Blatchford
Rick & Colleen Braun - Janzen
Malcolm Burrows
CAGP Saskatchewan
North Chapter
Doris Cameron
Betty-Anne Howard
Randy Liedtke
Janice Loomer Margolis
Frank Minton
Grant Monck
Marilyn Monson
Brad Offman
Jen Pederson
Jo-Anne Ryan
Mark Stefan
Tina Tehranchian
Brad Willems

\$250 +

Abundance Canada
AFP Central Ontario Chapter
Malcolm Berry
Ninette Bishay
Eli Clarke
Paola Coronado Hass
Janice Feuer
Leila Fiouzi
Ryan Fraser
Kathryne R. Gibson
Phil Levson & Sherry Dahl
David Love

Maritime Conference
of the Seventh-Day
Adventist Church
Jackie & Kurt Markstrom
Chelsea McIntyre
Jenny Mitchell
Ligia Peña
Andrea Robertson
Becki Willoughby

\$100 +

Christine Beaumont
Yolanda Bronstein
CAGP South Saskatchewan
Chapter
Barbara Chambers
Jacqueline Cooper
Colleen DeJager
Claude Drouin
ELFEC
Liza Fernandes
Diane Laundry
Frank Lockington
Meredith Meads
Sheelagh Mercier
Elizabeth Moxham
Maurice Prevost
Thomas G. Riglar
Sue Rosenblat
Lori Scott
University of Toronto
Jennifer Walsom
Leona Yez
YPI Canada
June Ziola

Up to \$100

Kathy Arney
Marisa Barlas
Brittany Beatty
Katharine Berrington
Candace Boersma
CAGP Manitoba Chapter
CAGP Ottawa Chapter
Kathryne Cardwell &
Charles McDougall
Mark Climie-Elliott
Simona Dobransky
Epilogue Wills
Tara George
Delaney Jackson
Lara Kinnear
Erin Kuhns
Alen Okanovic
Jessica Thirgood
Sharon Torley
Natasha van Bentum

Legacy Donors

Michelle Johnson
Ruth MacKenzie
Chelsea McIntyre
Paul C.S.C. Nazareth
Beth Proven
Keith Thomson



5 financials

For the Year Ended December 31, 2020



	National Office	Chapters	CAGP Foundation	TOTAL 2020	TOTAL 2019
REVENUE					
Will Power campaign contributions	\$ -	\$ -	\$ 350,675	\$ 350,675	\$ 56,661
Membership fees	286,846	-	-	286,846	299,890
Education courses & designation program	20,167	-	214,016	234,183	272,658
Donations	-	-	228,129	228,129	205,212
Leave a Legacy sponsorships	-	190,887	-	190,887	274,403
Conference	143,417	-	-	143,417	520,181
Government assistance	100,235	-	-	100,235	-
Chapter Events	-	31,641	-	31,641	79,973
Job postings	22,100	-	-	22,100	33,000
Sponsorships	-	5,250	-	5,250	17,375
Interst & other	20,724	909	-	21,633	39,827
	593,489	228,687	792,820	1,614,996	1,799,180
EXPENSES					
Personnel	318,319	-	237,913	556,232	519,392
Will Power campaign	-	-	343,197	343,197	56,661
Leave a Legacy	-	172,641	-	172,641	256,415
Conference	147,071	-	-	147,071	425,573
Administration	55,409	31,048	20,009	106,466	124,459
Fundraising	-	-	46,039	46,039	50,919
Professional fees	32,473	-	11,835	44,308	74,768
Chapter events	-	43,619	-	43,619	100,511
Meals, travel & accommodation	1,218	-	37,612	38,830	130,549
Rent	22,112	-	15,165	37,277	38,213
Memberships & honorariums	6,310	-	13,842	20,152	34,708
	582,912	247,308	725,612	1,555,832	1,812,168
NET REVENUE (EXPENSES) BEFORE INTER-FUND REVENUE AND EXPENSES					
	10,577	(18,621)	67,208	59,164	(12,988)
Contribution from Chapter to National Office	30,000	(30,000)	-	-	-
Chapter grants	(30,330)	30,330	-	-	-
Management fee	91,478	-	(91,478)	-	-
Sponsorship	15,000	-	(15,000)	-	-
NET REVENUE (EXPENSES) FOR THE YEAR	\$ 116,725	\$ (18,291)	\$ (39,270)	\$ 59,164	\$ (12,988)

about us

[Join us](#) in making the world a better place through strategic charitable giving!

Our Team

LAURIE FOX

Director, National Legacy Campaign

DELANEY JACKSON

Executive Assistant & Office Coordinator

PEGGY KILLEEN

Development Director, CAGP Foundation

LARA KINNEAR

Membership Coordinator

ERIN KUHNS

Manager, Education & Training

CLARE LEVY

Communications & Stakeholder Relations Specialist

RUTH MACKENZIE

President & CEO, CAGP / Executive Director, CAGP Foundation

PAUL NAZARETH

Vice-President, Education & Development

SHARON TORLEY

Finance Manager



IMPACT REPORT 2020

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