



2018 Annual Report

Our mission is to financially support the development and promotion of excellence in strategic, charitable gift planning in Canada.

Building on our Success

In 2016 CAGP was at a crossroads. The demand for development at the local level, educational offerings and government relations work had continued to rise, without the growth in resources to match it. The CAGP Foundation was created to address this need. The strength of support we received in 2017, our first year of existence, sent a clear message that this was a cause whose time had come. 2018 was a year to take root and grow.

Investing in Capacity

In today's world, non-profits are often challenged to present a case for investing donor dollars in building their own capacity. At the CAGP Foundation we are fortunate to have many supporters who understand that investing in capacity means greater accomplishment in the programs and initiatives we deliver. The \$500,000 pledge made in 2017 by Donald K. Johnson bore testimony to that and, together with the support of all our donors, has allowed us to scale up and have a greater impact.

In 2018 we engaged with CAGP to deliver an education program which will grow our best-in-class offerings exponentially. This enabled CAGP to hire a Vice President, Education & Development in June to focus on expanding the education market and curriculum to deliver in more communities, to more organizations and with new stakeholder audiences. We also received generous pledges for specific funding to allow us to contract the services of a part-time Development Director in October, ensuring that the Foundation continues its upward trajectory.

Developing Knowledge and Providing Education

Mid-way through 2018 a strategic decision was made for the CAGP Foundation to assume leadership on education. Our early success enabled us to embrace this part of our mission, while working with CAGP to leverage its networks and take the lead in knowledge dissemination. While this shift was largely seamless for participants, the CAGP Foundation's support for educational programming has enabled CAGP to direct more resources towards its other strategic activities, including strengthening CAGP's local Chapters so that they can build capacity in their communities, and placing a greater focus on government relations activities.

Sandra Dow, VP, Philanthropic Giving, Arthritis Society



Supporting education and research on legacy giving through the CAGP Foundation gives me a role in enabling more Canadians to dream of the future they'd like to create through philanthropy.

Spreading Gift Planning Knowledge in Canada

There was an almost 20% growth in the number of professionals accessing courses and webinars in 2018. Free webinars available to CAGP members and non-members have proven to be a successful way to share expertise, and the bi-annual Advanced Gift Planning Symposium provided a high-level learning opportunity on the current issues and trends impacting strategic charitable gift planning.

With the added capacity of the new staff faculty, the CAGP Foundation was able to offer the signature one-day Gift Planning Fundamentals course to the public as well as deliver a significant number of in-house, customized sessions.

CAGP staff delivered over 20 presentations or keynotes on strategic charitable gift planning to charitable organizations and associations, Estate Planning Councils and regional advisor groups, including CPA and Advocis, accounting firm charity education days, and to academic institutions.

Webinars on strategic charitable gift planning with charity partners like Community Foundations of Canada and advisor partners like CPA Canada were also provided.

Over 2018 we had almost 3,000 registrations for national courses and events, including the renowned Original Canadian Gift Planning course, Strategic Gift Planning Bootcamp, Advanced Canadian Gift Planning Symposium, Gift Planning Fundamentals, the increasingly popular Webinar Wednesdays Series, and two free webinars with mass appeal content.

The Fundraising Results

In 2018 we raised over \$377,000 in outright gifts and pledges. Significant gifts included a \$75,000 pledge from the Benefaction Foundation, and one of \$30,000 from Board member and tireless volunteer Keith Thomson and The Donor Motivation Program. Our actual revenue for 2018 was just over \$205,000, and our endowment at The Winnipeg Foundation was increased by \$7,056 bringing it to a total of \$16,359. We also raised \$79,500 through the engagement of a number of community foundation and corporate supporters.

For more details, please see our [financial statements](#) on page 17 of CAGP's Annual Report.

The focus of our fundraising attention and efforts in 2018 was on sustainability. We are delighted to report that 46% of our donors chose to support us in the form of a pledge. We are also deeply grateful for the many generous outright gifts we received this year from brand new supporters as well as many of our Founding Donors. And there is the ultimate gift – the one that stands at the core of what we believe in as advocates of strategic philanthropy. Five visionary individuals have done us the great honour of making us a part of their legacy.

**Nicola Elkins, CEO & Founder
Benefaction Foundation**



With such close alignment in our mission and values, it was a simple decision to offer our financial support to the CAGP Foundation. Focusing on education to reinforce the competencies of gift planning professionals promotes the growth and development of effective charitable giving in Canada, something which matters a great deal to our Board. Our wish is to support the capacity of the CAGP Foundation, to enable a strong, sustainable future for CAGP.

Planning for the future

In 2018 we asked our members and champions to consider making multi-year pledges to uphold a strategic, long-term, viable program, and many answered the call. We will continue to reach out for support from individuals and organisations whose values align with ours, those who believe that strategic philanthropy enables more Canadians to give more to the communities and causes they care deeply about.

As CAGP embarks on the next strategic plan, the success of the CAGP Foundation means that it will be built on a foundation of greater strength and capacity. We will be one step closer to reaching CAGP's and the CAGP Foundation's shared vision of *a better world through strategic charitable giving.*

Powered by Volunteers

In 2018, a team of dedicated volunteers from all over the country worked hard to maintain our momentum and to build on our success.

CAGP Foundation Board

Darren Pries-Klassen - Chair
Andrew Valentine - Secretary
Ross Young - Treasurer
Greg Lichti
Keith Thomson
Beth Proven
Joan Blight

Additional Volunteers

Lorraine Decock Charles O'Neil
DeWayne Osborn Michelle Osborne
Marilyn Monson Sara Neely
Jill Nelson

Beth Proven, VP Development, Winnipeg Symphony Orchestra



I made a planned gift through my RRSP to the CAGP Foundation because I've spent my entire career seeing how legacy gifts make an extraordinary difference to the fabric of our society, and it was learnings through CAGP that gave me the knowledge and expertise I needed to be able to work in this rewarding field.

We're eternally grateful to our [2018 Donors and Supporters](#) and our [Founding Donors](#) for demonstrating their belief in the vision we share with CAGP of a better world through strategic charitable giving.

You can reach us at cagpfoundation@cagp-acpdp.org

[Web page](#)