



**Strategic Plan
2019-2023**

Preamble

Celebrating its 25th anniversary in 2018, the Canadian Association of Gift Planners (CAGP) was established in 1993 by a group of dedicated individuals who recognized an opportunity to impact philanthropy in Canada through a more strategic approach to charitable giving.

An organization was created that would convene and connect professionals with unique expertise in this new approach to philanthropy, provide knowledge and education on the technical aspects of strategic charitable gift planning otherwise unavailable, and which would be an influential voice on policy matters related strengthening philanthropy from a tax and legislative point of view. Over its 25-year history the organization has established a solid reputation in all aspects.

With a new strategic plan and a new chief executive in place in 2013, CAGP was poised to address some key challenges, including diminishing financial resources, lack of recognition on the charitable landscape, declining membership and uncondusive model of governance. While significant progress had been made with regard to fiscal health, the organization's brand proposition, its leadership voice on philanthropy in Canada, and board and volunteer engagement, CAGP entered a 2015 planning cycle with a backdrop of a chronic human and financial resource deficiency that presented a barrier to its stability and growth, its ability to capitalize on many opportunities presenting themselves, and to recruiting and retaining a qualified staff team.

Occasionally, we gift planners get a little glimpse of something huge. We get a glimpse of the future. This future has the potential to redirect vast amounts of additional revenue to further charitable causes within Canadian society. We get excited and stirred into action.

There is much work to do. CAGP, with you, is poised to make this future happen!

--Ken Ramsay
Inaugural Chair
CAGP

From the Chair's report at the first Annual General Meeting of CAGP.

Strategic Plan 2016-2018: Building Our Future

The strategic plan 2016-2018 was aptly entitled *Building Our Future* and was framed around with four themes intended to create a platform that will enable charity fundraisers and professional advisors to champion unparalleled change in all communities across Canada through strategic charitable giving. The pillars of that plan were:

- *Chapter Support* – Strengthen the ability of CAGP Chapters to champion the growth and development of strategic charitable gift planning in Canada by developing Chapter leadership, supporting Chapter administration and enhancing bilateral communication and connection between Chapters and the National Office.
- *Financial Capacity* – Enhance and expand revenue sources to better support CAGP's Mission and operations.
- *Education* – Continue to deliver the highest quality education that reinforces the competencies of gift planning professionals and is accessible to the broadest possible audience.
- *Stakeholder Engagement* – Enhance communications and outreach to stakeholder networks (members, prospective members, multi-sectoral alliances) to ensure dissemination of strategic information and highlight CAGP's value proposition.

With significant progress seen in the first two years of the strategic plan, for 2018 as the final year of the plan, the CAGP national board had made a tactical decision in 2018 to invest in the organization, planning for a fiscal deficit to enhance CAGP's ability to undertake certain opportunities at play. Following are some of CAGP's key achievements from 2016-2018:

- Comprehensive procedures, tools and processes were established to support the administrative oversight of CAGP's local Chapters.
- Chapters have been fully integrated in the organization's annual audit process. A qualified audit was issued in 2016 and 2017, which was lifted in 2018 subsequently to sufficient monitoring procedures being implemented.
- The CAGP Foundation was established, 2016 and charitable status was confirmed in 2017, with the Foundation securing a significant major gift in its first year.
- The staff team was expanded by 20%, with particular note of the hire of the Vice President, Education & Development
- CAGP's education program has seen significant growth of approximately 20% from 2017 to 2018, particularly with the one-day Gift Planning Fundamentals being offered in more communities and to more targeted audiences.
- Leadership on education in strategic charitable gift planning was transitioned to the CAGP Foundation, with CAGP being engaged through an Agency Agreement in the critical role of knowledge dissemination.
- CAGP's annual conference was re-branded as the National Conference on Strategic Philanthropy. A new multi-year Premier Sponsorship was secured with Assante Private Client. The conference has sold out three years in a row, and the thought-leadership plenary FRANK events were launched.
- A first-ever national Chapter Chairs' Symposium was held, convening 19 of 20 Chapters for two-days to explore leadership, the future and their needs.
- The CAGP Board and Government Relations Committee met in person for the first time ever to discuss our strategy for the future.
- CAGP's engagement with the professional advisor community has significantly expanded. In follow up to the 2014 study, *The Philanthropic Conversation*, in 2016 we released the Guide for Professional Financial Advisors, and in 2018 released Doing Good for Business: The inclusion of philanthropy in the Canadian professional advisor's business practice.
- CAGP, in partnership with Knowledge Bureau and Spire Philanthropy, launched a new on-line education program on philanthropy for professional advisors, resulting in the Master Financial Advisor in Philanthropy (MFA-P) designation.

While continued fiscal observance and prudence are key to CAGP's future operations, the timeframe of the 2016-18 strategic plan wrapped up with a significantly strengthened and well-positioned organization. As the CAGP Board of Directors contemplated its next strategic planning discussions a new context of organizational strength was in play.

The Process

In considering its next strategic planning exercise, the CAGP Board and CEO felt there was a significant opportunity to use strategic planning as a way to strengthen the connection between CAGP as a national body and the local CAGP Chapters. The local expertise of issues and trends at the community level, blended with national leadership and understanding from the CAGP Board would, it was felt, create a more robust plan that would be not only the plan for the national office, but a plan for the national association as a whole; a national plan which local Chapter could use as a basis for their own annual planning discussions.

As CAGP Chapter Chairs were convened for the Chairs' Symposium in Toronto in September 2018, a half day facilitated "Strategic Foresight" session was held; a session that was later repeated with the National Board, with the Chair of the Government Relations Committee, the CAGP Foundation's Development Director, and the Chair of the GTA Chapters as invited participants to bring additional

perspective. Strategic Foresight is a process which examines current issues and trends that may impact the established context – in this case, “the future of philanthropy in Canada in 2030” – and identifies strategic implications help us consider how our actions today may shape the future, or what we can be doing now to be ready for these future possibilities.

“Our task is not to predict the future; our task is to design a future for a sustainable and acceptable world, and then to devote our efforts to bringing that future about.”

--Herb Simon
Political Scientist & Economist

The following emerged from both these sessions – with Chapter Chairs, and with the Board and guests – as key themes that CAGP may wish to consider as we embark on our process of planning for the future:

Engage the public in new ways of philanthropy – As Canadian society continues to evolve, the definition of philanthropy is bound to change and adapt. CAGP can influence what philanthropy looks like in the future. By educating the general public about philanthropy, CAGP can equip people to think in different ways about how philanthropy can manifest. This can be done using the latest in technology and media to give a fresh face to philanthropy, thereby opening up new avenues for giving.

Enable and leverage strategic partnerships and involvement – CAGP is extensively connected to different organizations across Canada, and to build better resilience for different futures, CAGP can think about its partnerships in more strategic ways. This could mean facilitating wider networks among charitable organizations, engaging with professional advisors and their networks, or advising high net worth donors in new ways.

Become a force for advocacy – Governments at different levels will affect the world of philanthropy. In order to adapt to the potential shifts in how government operates, CAGP can build its fortitude by developing its relationships with government. By stepping into a role that can advise provincial and federal governments and at the same time not be directly ruled by it, CAGP can leverage government knowledge, resources, and trust to create meaningful and impactful philanthropy in Canada.

Build the capacity of CAGP through diverse expertise – Moving through uncertainty requires creativity and innovation. In CAGP’s case, building meaningful diversity throughout the association, means solutions will incorporate wider perspectives. Although predicting problems years into the future is near impossible, building diverse expertise improves the likelihood of developing good, responsive solutions.

From Strategic Foresight participants:

- *“I’ll take back with me that we need to be prepared. We can’t just be thinking about the here and now. We can’t just go back to our daily work.”*
- *“I can’t think of one issue around here that one of our members wouldn’t be addressing. We need to be more aware of these issues and think differently. This helped us to do so.”*
- *“The idea of human nature is to go to the worst possible extreme. It’s okay to go there— there’s also an opportunity to go the other way. Fear has its place, but abundance has its place too.”*

Strategic Priorities – and an Updated Mission

In the process of creating a practical vision, deep passion was evident for the idea of modelling and supporting leadership, and for our role as a convener of strategic philanthropy—that this will help CAGP to grow and move forward. Education remains a cornerstone for CAGP, and with the emerging role of the CAGP Foundation with regard to education, CAGP's role becomes more focused on leveraging our networks and ensuring the core competencies of gift planning area addressed.

In considering new ways of encouraging philanthropy, Leave a Legacy is one of the most difficult goals to accomplish, but also recognized as core to CAGP and something which is the most easily poised to have tremendous impact on Canada's charities.

While Canada has one of the most generous tax systems in the world in support of charitable giving, CAGP's role in government relations in evolving to be one with greater focus on evidence and impact, as well as better engaging with our pan-Canadian network which adds weight and credibility to our voice.

As clear strategic priorities emerged, the Board reflected on the mission of CAGP:

To champion the growth and development of strategic charitable gift planning in Canada by:

- *Developing knowledge and providing education*
- *Building awareness and promoting philanthropy*
- *Creating connections and facilitating partnerships*
- *Engaging in national dialogues and influencing public policy*

When embarking on the strategic planning process, the Board considered the need or opportunity to revisit CAGP's Vision and Mission. The decision was made that the renewed Vision and Mission, drafted and approved in 2016 remained a relevant and clear articulation of the “why and how” of CAGP's purpose. However, while there remained significant congruence with the emerging strategic priorities and the tactics integrated in the organization's mission, the CAGP Board considered the granularity of the mission statement and has made the decision to amend its Mission as follows: “*To champion the growth and development of strategic charitable gift planning in Canada.*”, and for the four tactics to become the stated strategic priorities of CAGP's new strategic plan, with an additional priority continuing to focus on strengthening our organization, as follows:

Strategic Priority: Promote Gift Planning

Strategic Priority: Build & Disseminate Knowledge

Strategic Priority: Influence Policy

Strategic Priority: Create Connections

Strategic Priority: Strengthen our Organization

With an intended impact of:

A vibrant network and donor community embracing and advancing strategic charitable giving in Canada.

Strategic Framework – 2019-2023



Strategic Priority – Promote Charitable Gift Planning

CAGP will promote gift planning by:

- Re-introducing a Leave A Legacy program/campaign, as a broad-based marketing and public education initiative with an aim of leaving a legacy to charity becoming a Canadian social norm.
- Conducting research on the state of legacy giving in Canada, as a benchmarking exercise.
- Working with CAGP Chapters and their LAL programs to renew and relaunch the program.

Short-term Outcomes (1-3 years):

- A new legacy giving promotional campaign has been developed and market tested.
- A benchmark has been established as to the current state of legacy giving in Canada.
- Members, partners and the Canadian public are aware of current data regarding bequest giving in Canada.

Longer-term Outcomes (3-5 years)

- CAGP Chapters are collaborating on the national marketing campaign.
- A partnership has been established to expand community reach on Leave A Legacy program.
- Awareness of legacy giving has increased and more Canadians are leaving a gift to a charity in their will.

Strategic Priority – Build & Disseminate Knowledge

CAGP will build and disseminate knowledge by:

- Developing and delivering curriculum, independently and/or through agency agreements, that will continue to reinforce the competencies of gift planning professionals and the needs of stakeholders.

- Identifying, through its work with stakeholders, new strategic philanthropy curriculum and education opportunities to meet stakeholder needs.
- Working with CAGP Chapters to provide resources that will enhance their education offerings to stakeholders at the local level, e.g. speakers, topic suggestions.
- Leading or participating in research on topics that advance our knowledge on philanthropic trends and strategic charitable giving.
- Continuing to identify partnerships with others, such as Knowledge Bureau, community foundations, for curriculum and customised educational offerings while ensuring that our current classroom courses are maintained.

Short-term outcomes (1-3 years):

- Stakeholders have greater access to education and learning opportunities through CAGP.

Longer-term outcomes (3-5 years):

- CAGP is viewed as the top knowledge destination of strategic philanthropy in Canada by continuing to build on its reputation as the go-to for education, research and policy work in the field.
- Charitable gift planners and professional advisors are better equipped to meet donors needs related to strategic charitable giving.
- More Canadian data, knowledge and information on strategic charitable giving is available.

Strategic Priority – Influence Policy

CAGP will influence policy by:

- Creating a ‘case for support’ that articulates CAGP’s history and impact in government relations, and on tax policy and charitable giving, to be used as a platform for discussions with government representatives and elected officials.
- Identifying and cultivating key relationships with government officials and influencers.
- Identifying and cultivating new partnerships with others in the sector to build and refine its voice on policy issues that affect the sector and philanthropy in Canada.
- Engaging CAGP members and Chapters in submissions to government and the identification of relevant policy issues.
- Developing a research agenda to generate key data centered around diverse giving vehicles and/or tax incentives.
- Participating in sector discussions on policy matters.

Short-term Outcomes (1-3 years):

- CAGP has cultivated relationships with key elected officials and government departments.
- CAGP is seen within the sector as an important voice in public policy dialogue related to strategic philanthropy and tax policy that strengthens charitable giving in Canada.

Longer-term Outcomes (3-5 years):

- CAGP members and stakeholders recognize the value proposition of CAGP as a national voice on strategic philanthropy in Canada.
- Data and stories in support of an array of planned giving instruments are available.

Strategic Priority – Create Connections

CAGP will create connections in the following ways:

- Leveraging The Philanthropic Conversation suite of resources to enhance the professional advisor narrative and as a platform for outreach to professional advisor audiences and associations, such as Advocis, FPSC, CALU, estate planning councils.
- Evaluating and implementing impactful technology to advance and improve member and non-member engagement.
- Participation in cross-sectoral dialogues and discussions sharing the vital perspective of strategic philanthropy.
- Acting as a convener on the subject of strategic charitable giving in Canada by developing key partnerships, and through member and non-member engagement.
- Collaborating with other organizations with particular affinity with CAGP, in particular Philanthropic Foundations of Canada, Community Foundations of Canada, Imagine Canada, The Circle on Philanthropy and Aboriginal Peoples.

Short-term Outcomes (1-3 years):

- Engagement with members and non-members is increasing.
- New partnerships are developed to expand CAGP's reach

Longer-term Outcomes (3-5 years):

- CAGP will be recognized as the hub for strategic philanthropic information and discussions, locally and nationally

Strategic Priority – Strengthen our Organization

CAGP will strengthen our organization by:

- Building Chapter leadership with effective onboarding and ongoing support to strengthen Chapters' capacity to achieve local strategic priorities.
- Supporting Chapters in developing annual workplans and budgets, and to ensure appropriate reserve funds are in place.
- Establishing a risk management framework, including a national reserves policy and a plan to achieve identified targets, in order to ensure fiscal and organizational health.
- Continuing to review, evaluate and adjust CAGP's membership program to ensure a value-add benefit package and a strong narrative of CAGP's value proposition as foundational to member recruitment.
- Supporting CAGP Chapters with member recruitment and retention at the local level.
- Developing a plan to enhance CAGP's organizational capacity through the development of a Francophone strategy, as well as consideration of issues related to diversity, equity and inclusion.
- Identifying current initiatives or new project ideas that support CAGP's mission and priorities and are of potential interest to prospective partners and funders.
- Working with CAGP Chapters to enhance understanding of the value proposition of the CAGP Foundation for CAGP, its network and its mission.

Short-term outcomes (1-3 years):

- Chapters and Chapter Executives feel supported and connected.
- Chapters are maintaining an appropriate level of financial reserves.

Longer-term outcomes (3-5 years):

- Chapter leadership succession is robust and effective.
- CAGP has sufficient human and financial resources to manage success and strategic growth.

This from Practical Visioning participants:

"I love the way we talked about modelling and supporting leadership—being it and cultivating it in others."

"Strategic growth is very exciting. That's why we are here—to make the world a better place."

"Clarity of purpose has a domino effect on the other things we continue to circle around. If we figured this out it would really help with prioritization."

"Whatever our next step is, we'll want to refer to what we came up with here. We know we can't do it all. We need to determine what we can do and should do."