



This summary document offers an overview of the key pieces of CAGP's strategic vision for 2019-2023. To learn more about our plans and aspirations, please visit www.cagp-acpdp.org/en/strategic-plan to review our full strategic plan.

- Develop/deliver/customize competency focussed curriculum for gift planning professionals and stakeholders.
- Identify new strategic curriculum needs and education opportunities.
- Work with CAGP Chapters to enhance local education.
- Conduct/participate in research on trends in strategic philanthropy.

Create Connections

- Continue to promote The Philanthropic Conversation resources and messages.
- Explore new technology to advance member engagement.
- Participate in cross-sectoral dialogues and discussions.
- Be a convener on strategic charitable giving in Canada.
- Collaborate with other organizations where affinities exist.

Build & Disseminate Knowledge

**Intended Impact:** 

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

Promote Charitable Gift Planning

- Introduce a renewed legacy giving campaign
- Conduct research on the state of legacy giving in Canada.
- Collaborate with CAGP Chapters to renew and relaunch the campaign locally.

 Tell the story of CAGP's government relations history and impact.

- Cultivate key relationships with government officials and influencers.
- Cultivate new sector partnerships to build our policy voice.
- Consider new ways to engage members and CAGP Chapters in our GR work.
- Gather key data on giving vehicles and tax incentives for charitable giving.
- Participate in sector discussions on policy matters.

Influence

**Policy** 

Strengthen Our
Organization

- Build capacity of CAGP Chapters.
- Establish a risk management framework.
- Continue to evaluate and adjust membership program.
- Support local member recruitment and retention.
- Promote purpose and value of the CAGP Foundation with CAGP Chapters.
- Develop a Francophone strategy
- Develop a strategy for diversity, equity and inclusion.
- Fundraise for current initiatives or new projects.