



CAGP 2016: Building Our Future

Strategic Plan 2016-18

Executive Summary

January 2016

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Established and incorporated in Ontario in 1993, the Canadian Association of Gift Planners (CAGP) is a federally registered, non-profit organization. CAGP does not have charitable status and is primarily funded by members' dues, as well as earned revenue from education, training courses, and an annual national conference.

The purpose of CAGP is to support philanthropy by fostering the development and growth of strategic charitable giving.

CAGP's members are leaders in Canada's charitable community, and provide donors/clients with new and innovative ways of achieving their philanthropic dreams.

Our members play key roles in expanding the fundraising options available to charitable organizations. Through our commitment to a stringent Code of Ethics, continual learning and networking, and a willingness to share, we help each other grow and develop as professionals in our respective fields.

Theme

Presently, CAGP's staff is working at capacity to manage the day-to-day affairs of the Association. As a result, undertaking additional programs or initiatives would necessitate cutting back in one or more areas. CAGP could do more to engage members and promote strategic charitable giving. However, in the absence of additional resources, and without sacrificing existing services and service levels, this will be virtually impossible.

Accordingly, the theme and overarching goal of *CAGP Strategy 2016* is

Building Our Future.

While staff continues to provide a full range of expected services, the initiatives outlined in this plan have been designed to secure the financial resources that will enable CAGP to stake out a defensible position as Canada's recognized authority on, and foremost supporter of, strategic charitable giving.

Strategic Initiatives

Our ability to build a meaningful future for CAGP and stake out a defensible position as Canada's recognized authority on *strategic charitable giving*, while delivering on our Mission and Value Proposition, depends on several factors including:

- A vibrant and supportive network of local Chapters;
- The resources to take advantage of opportunities;
- Educating our stakeholders on the benefits and mechanics of strategic charitable giving; and
- A well-informed, engaged and growing membership.

We believe the four major initiatives outlined in this plan, when executed together, will satisfy these needs. These initiatives are introduced below and framed in greater detail in this plan.

1. **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.
2. **Financial Capacity** – Enhance and expand revenue sources to better support CAGP’s Mission and operations.
3. **Education** – Continue to deliver the highest quality education that reinforces the competencies of gift planning professionals and is accessible to the broadest possible audience.
4. **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.

