



A CASE FOR SUPPORT...



...FOR TRANSFORMATION

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STRATEGIC CHARITABLE GIVING - CONTEXT

Canadians are known to be a caring society; it's part of our identity. And from the standpoint of geographic reach, sheer size and a relatively small population, we have accomplished great things from coast to coast. Many of those achievements, such as the donor stories in Appendix C, are a result of citizens with a desire to give back, and matching their philanthropic goals with those of an organization that ultimately benefits people. It creates a synergy that results in IMPACT.

SO HOW DO WE CREATE EVEN GREATER IMPACT?

It's about connecting donors with their passion and desire to make a difference. The Canadian Association of Gift Planners (CAGP) is an important part of this scenario. CAGP's training and education of gift planning professionals across the country produces highly knowledgeable, competent and committed professionals, who, are passionate about their profession. For many, it's their calling. An important part of the equation is the education of professional advisors who assist donors with their decision-making, be it from a tax and legal perspective or through a financial planning and wealth management lens. CAGP, through its Government Relations work, also helps ensure that the tax and legislative environment is favourable to charitable giving.

Passion and Joy

Psychologists Netta Weinstein and Richard Ryan demonstrate that giving has an energizing effect on us providing givers with a sense of fulfillment and empowerment – only done with passion and joy. Conversely, when giving was done out of duty or obligation, it had no positive impact on our energy levels or well-being.

PHILANTHROPY:

- Is the desire to promote the welfare of others, expressed especially by the generous donation of money to good causes¹.
- Is the practice of giving money and time to help make life better for other people².

Fund Development³

- “Fundraising is the servant of philanthropy”
- “Fundraising is the gentle art of teaching people the joy of giving”
- Fundraising “is justified when it is used as a responsible invitation guiding contributors to make the kind of gift that will meet their own special needs and add greater meaning to their lives.”
- “Today, more than ever, fundraisers need a philosophy of fundraising. The call for accountability, the need to inspire trust, the leadership of volunteers, the involvement of donors in their philanthropy, and the new approaches to philanthropy all call for fundraisers to be reflective practitioners who can centre themselves with a philosophy of fundraising.”

¹ Source: Internet

² Source: Merriam Webster

³ Hank Rosso's Achieving Excellence in Fundraising

Passion and Joy: Source Netta Weinstein and Richard M. Ryan, “When Helping Helps: Autonomous Motivation for Prosocial Behavior and its Influence on Well-being for the Helper and Recipient”, Journal of Personality and Social Psychology 98 (2010)

- “Indeed, fundraising is never an end in itself; it is purposive. It draws both its meaning and its essence from the ends that are served; caring, helping, healing, nurturing, guiding, uplifting, teaching, creating, preventing, advancing a cause, preserving values, and so forth. Fundraising is values based; values must guide the process. Fundraising should never be undertaken simply to raise funds; it must serve the larger cause.”

STRATEGIC CHARITABLE GIVING

Strategic charitable giving is a focused and financially strategic approach to philanthropy that results in maximum benefits for both the charity and individual donor.

Strategic charitable gift planning is a donor-centred process of planning current and future charitable gifts in a way that meets the donor’s philanthropic goals and balances personal, family and tax considerations.

Excellence in the profession requires much more than passion. Along with a commitment to philanthropy, it requires the knowledge, skills and know how to assist increasingly more sophisticated donors who are seeking to make a difference. Similarly, professional advisors who are engaged in assisting their clients facilitate their giving, are likely those considered to be “trusted advisors”.⁴

CAGP’S UNIQUENESS - PROFESSIONALS’ PERSPECTIVES

CAGP’s uniqueness lies in bringing together gift planning fundraising professionals and professional advisors, i.e. experts who are leaders in Canada’s charitable community to provide donors/clients with new and innovative ways of achieving their philanthropic dreams. This select group of people are those who benefit from CAGP’s programs and initiatives which in turn benefits the donor community and the broader society.

Here is how CAGP has contributed to two highly successful professionals in the field.



Sara Neely
 Director of Philanthropic Services
 Victoria Foundation

My career in gift planning began about the same time as the founding of the Canadian Association of Gift Planners. I was working at a law firm in Vancouver acting as one of the counsel for BC Children’s Hospital Foundation. I managed the files in which the Foundation was a beneficiary of estate gifts. It was very rewarding work - so much so that I accepted an offer to start the then “planned giving program” at the Foundation.

CAGP and I were, in essence, nascent together. So fresh that Frank and

⁴ The Trusted Advisor by David H. Maister, Charles H. Green & Robert M. Galford “An Invaluable road map to all those who seek to develop truly special relationships with their clients.” Carl Stern, former CEO and Board Chair, Boston Consulting Group

Lorna's book had not yet been written! The legal work gave me a taste of the charitable sector. Little did I know what would eventually be offered to enjoy, and the people I would meet, as we gathered around the table that would become my second career.

Beyond the knowledge I brought from my law practice, the learning started on a drive to Banff for the original gift planning course. The driver was Frank Minton. At the end of that week, I knew this was where I wanted to be. And the learning has continued with every conference, local chapter workshop, newsletter, and conversation with colleagues, donors and their advisors. At the core are the vision, mission and values of CAGP and the resources, support and credibility it brings to the work that we do.

I have been fortunate to be “on the ground” in the planning of national conferences, starting a chapter, and developing programs and community initiatives, both locally and across the country. I have met and collaborated with remarkable colleagues in what can only be described as a “sharing caring” environment. To be able to pick up the phone or send an email to a colleague, down the street or in another province, and talk about an issue or find a solution is a tremendous benefit of belonging to this national network.



Both professionally and personally, the donors and the beneficiaries of their generosity I have been privileged to serve, and my CAGP colleagues, have added to my life in ways that I could not have imagined almost 25 years ago. CAGP has been there along the way and I am forever grateful to the people that have nurtured it, and its members, from those early days.

Ryan Fraser
Owner, Quiet Legacy Planning Group
London, ON

It is exceptionally difficult to put into words what an incredible impact CAGP has had on me both personally and professionally. I have, in fact, built my company around the tenets of CAGP – we largely only work with clients for whom strategic philanthropy is a core tenet of their financial and estate plans.

I became involved with CAGP in 2003, at the urging of a colleague who was then Chair of our local chapter. Little did I know at the time that I would become involved first as Education Chair, and then as the Chapter Chair of our association. Eventually I became involved at the national level on committees, and as a faculty member for CAGP's educational offerings.

For me, the big “ah-ha” moment was attending my first national conference in Toronto in 2011, as chair of the London chapter. I don't think it is fully possible to grasp the full importance and value of the national organization. Those four days in Toronto changed my life in a fundamental way – I realized that there was a national community of incredible people whose values and missions in life aligned with my own. It remains the only place I can recall being in my life where you could strike up a conversation with random strangers at a table, and develop instant rapport. I have joked for years that I am too for-profit for the non-profit world and too non-profit for the for-profit world. CAGP was the first place I truly felt I had a home.

Over the last few years, that community has introduced me to key business partners, wonderful friends, and colleagues who are walking encyclopedias of knowledge, to whom I turn to on a regular basis for insight, confirmation and ideas while working with clients and donors.

Personally, and professionally, my association with CAGP has enriched my life and enabled me to achieve phenomenal success. I can't think of any other organization to which I have belonged which has had such an impact on who I am as a person, and brought such meaning to the work I do every day.

ABOUT THE CANADIAN ASSOCIATION OF GIFT PLANNERS

The Canadian Association of Gift Planners is a national association that inspires and educates the people involved in strategic charitable gift planning. CAGP is the only professional association in Canada that brings together charitable fundraisers and professional advisors, creating a networking environment with like-minded professionals and experts who are leaders in Canada's charitable community and provide donors/clients with new and innovative ways of achieving their philanthropic dreams. Through CAGP's 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. We inspire and educate the people involved in strategic charitable gift planning.

CAGP's stakeholders are depicted in this chart:



VISION

A better world through strategic charitable giving.

MISSION

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

- Developing knowledge and providing education
- Building awareness and promoting philanthropy, locally and nationally
- Creating connections and facilitating partnerships
- Engaging in national dialogues and public policy discussions.

THE ORGANIZATION

Founded in the early 1990s to help address a gap in professionals' knowledge and expertise, the organization has grown from being entirely managed by volunteers to one with a national CEO and a small staff team, and strong leadership of a 10-person, pan-Canadian board of directors. Volunteerism is a core value, demonstrated in its governance and by its 19 volunteer-run local chapters. Its individual members number over 1100 across the country and it enjoys the partnership⁵ of more than 43 corporate allies/supporters and financial or in-kind support.

⁵ Use of this term to be discussed going forward

CAGP'S ACCOMPLISHMENTS ...

CAGP embarked on a renewed journey in 2013 with the hiring of a new chief executive officer. A great deal has been accomplished and ambitious goals have been established going forward.

From an organizational perspective, there is an evolved governance model and deeper board engagement. (CAGP's list of board members is in Appendix A.) CAGP's brand platform, vision, mission, value proposition, and corporate image have been refreshed. A new website was created that is much more user friendly and the customer relationship management (CRM) software was upgraded. The membership model was renewed and many new partnerships have been engaged.

One of those partnerships was with BMO Private Banking, the GIV3 Foundation and Philanthropic Foundations of Canada. Through this partnership CAGP undertook a research project, *The Philanthropic Conversation: Understanding the Professional Advisor Approach and the High Net Worth Individual Perspective*, to examine the current state of this important relationship in Canada. The findings serve as a useful basis to present a business case for philanthropy to professional advisors who are in a position to dramatically impact charitable giving.

CAGP has engaged more intentionally in national dialogues, topical discussions at the local level and collaborative conversations, including membership in Imagine Canada's Sector Champions, partnering in the Doing Well by Doing Good conference for professional advisors and participating in sector-wide public policy strategizing. It has leveraged connections and initiated new relationships, increasing its profile and expanding its reach.

In 2014, the syllabus experts on the Education Committee developed core competencies for gift planners (see Appendix B) and analyzed the curriculum to ensure quality and consistency in course content for a credentialing program. In 2015, CAGP's one-day Gift Planning Fundamentals course was successfully accredited by The Institute for Advanced Financial Education to attract financial advisors to professional development on philanthropy and strategic gift planning.

CAGP has repositioned itself not only with its members but also within the sector, with other allied partners and funders. Its profile has been enhanced and its CEO is highly visible and well known and respected by colleagues. The breadth and depth of activities with which CAGP is engaged to advance philanthropy in this country includes the following highlights, among others:

- Having CAGP's one-day Gift Planning Fundamentals accredited by The Institute for Advanced Financial Education (Certification evolved from CAGP considering creating its own certification to pursuing partnerships with other organizations that already offer it.)
- Delivering Gift Planning Fundamentals in French for the first time
- A strategy to raise awareness on the new estate administration rules and ensure its members could prepare for these changes through a special webinar for the entire sector as well as in a special edition of *Gift Planning in Canada*
- Extensive work in Government Relations
- New organizational branding, a new website and customer relationship management software
- Continued, highly sought after education, for members and advisors
- Raising the profile of CAGP through partnerships, participation at conferences
- Delivering presentations of the research study *The Philanthropic Conversation*

CAGP'S FINANCIAL POSITION

A five-year summary of CAGP's revenue and expenses are presented on page 8. The calendar year end 2015 marks a change in reporting, required by Industry Canada, to include the chapters' revenue and expenses as part of the organization's reporting.

OBSERVATIONS:

CAGP operates with a revenue and expense budget of just over \$900K.

In the past four years:

- Overall revenue increased by 11.2% over 4 years while expenses decreased by 12.3% during that same time period.
- Over 80% of the revenue is generated from membership fees, conference fees and education courses; in 2016 this revenue reflected 93% of the total income.
- Grants represent 7.4% of the revenue; sponsorships 3.5%.
- Salaries average 36.1% of the expenses⁶ and the conference averages 26.5%. They are the two largest expense categories and account for ~ 62% of the budget.
- Professional, partner and management fees is the next highest expense category; they represent 11.8% of the expenditures, followed closely by administrative costs at 11.4% of the total expenditures.
- The conference has netted \$89,000 in the past four years, excluding staff time allocated to the conference.
- The fiscal year ended January 31, 2015 saw a balanced budget, the first in several years.
- Grant expenses in 2013, 14 and 15 were funds paid to chapters from membership revenue, based on the number of members. Also included were some grants for Leave-A-Legacy.
 - 2015 saw a restatement of financial revenue and expenditures to reflect a December 31st year end and one that included the local chapters' revenue for the first time. The local chapters are not independent legal entities and while the funds have been generated at the local level, they are part of the national organization's assets.
- Education and honorariums has increased by 111.5% in 4 years (growing from \$17,763 in 2013 to \$37,572 in 2016).
- The number of staff has stayed constant at 5 plus a conference coordinator over the past 5 years. A list of CAGP staff members is included in Appendix A.
- There were research expenses in one of four years.
- Seed funding of \$5,000 was provided to the CAGP Foundation in 2016, its year of formation.

CAGP has an operating reserve of \$94,279 as at December 31, 2016, ~10.5% of the operating budget. These numbers are not included on the chart; they are included in the 2016 financial statements.

A List of CAGP's sponsors, funders and partners is in Appendix E.

⁶ This is low for this type of not-for-profit organization. Salary costs are often closer to 50% of the budget in professional membership associations.

Other data not included on the chart is:

- Standard membership fees are \$375; fees for individuals who are employed by charities is \$325; and the fee is further reduced if an organization has 4 or more or 10 or more members.
- The Conference fees for members are: \$800 for early bird registration and \$900 regular.
- The Conference fees for non-members are \$1050 for early bird registration and \$1200 regular.

CONCLUSIONS:

- 1. CAGP has been struggling to balance its revenue and expenditures over the past few years but has demonstrated fiscal responsibility to balance the books. However, it has come at a cost and the risk is still high. The staff complement of 5 is small and the fact that overall salaries and benefits do not match market rates has implications for staff retention.**
- 2. The current budget has little flexibility. Therefore, to provide new and/or additional programs or services to members, for educational offerings or for government relations, additional financial resources are required to develop and deliver them.**

CAGP'S REVENUE AND EXPENDITURES

Revenue	Jan31.13 FYE	Jan 31.14 FYE	Jan 31.15 (Restated)	Dec 31.15 (11 mos)	Dec.31.16 *
Conference Fees	320,266	331,432	343,959	334,940	349,158
Membership Fees	303,826	274,784	285,261	283,470	309,023
Education Courses	117,197	130,866	183,365	172,643	252,812
Grants	73,921	97,726	95,000	75,000	-
Job Postings	36,425	22,275	19,000	18,390	31,188
Sponsorships	14,799	11,500	57,009	54,741	26,050
Interest & Other	13,112	6,185	12,438	16,339	9,939
Total	879,546	874,768	996,032	955,523	978,170
Expenses					
Salaries and wages	406,304	293,009	292,239	318,554	367,899
Conference	237,238	248,853	259,721	231,095	253,932
Grants paid to local chapters	30,581	82,204	-	-	-
Professional, Partners & Management Fees	139,176	126,108	138,231	86,081	61,403
Rent, Admin, Website & Computer, Telephone & Fax, Printing, Translation	112,040	100,520	104,208	123,518	89,283
Travel, Accommodation Meals, Meeting Facilities	77,005	73,246	63,655	69,680	85,553
Education and Honorariums	17,763	19,505	28,466	32,404	37,572
Research project	-	-	22,500	-	-
Amortization & Miscellaneous	7,327	3,109	3,230	2,859	
CAGP Foundation seed funding					5,000
Total	1,027,434	946,554	912,250	864,191	900,642
Net Revenue (Expenses) National C	- 147,888	- 71,786	83,782	91,332	77,528
Chapter Revenue			466,419	225,175	303,156
Chapter Expenses			452,170	385,425	374,564
			14,249	- 160,250	71,408
Net Revenue (Expenses) for the year			98,031	- 68,918	6,120
# of board members (national)	10	10	10	10	10
Guestmated # of local volunteers	300	300	300	300	300
# of staff (+ 1 conference coord.)	5	5	5	5	5
* to be approved					

CAGP'S EDUCATIONAL PROGRAM METRICS

Participants	Jan31.13 FYE	Jan 31.14 FYE	Jan 31.15 Restated	Dec 31.15 (11 mos)	Dec 31.16 FYE
# members	1056	998	1054	1106	1133
# conference attendees	378	370	411	305	259
# attendees Gift Planning Fundamentals	n/a	155	94	273	300
# attendees original Canadian gift planning course	40	80	40	40	42
# attendees strategic gift planning boot camp for major gifts professionals	30	30	30	30	30
# webinars delivered	9	9	12	9	9
# participants in webinars	n/a	621	522	937	446
Note: these numbers reflect "apples and oranges". Some participants may participate in several webinars. 2016 data does not include free webinars unlike the previous years.					

OBSERVATIONS:

- The number of members was around 1,000 in the first 3 years (2013 – 2015) and has grown in both 2015 and 2016 to 1133 last year.
- 2016 saw the lowest number of conference participants in 5 years, at 259, whereas in other years, attendance was 300 or higher.
- Attendance at the Strategic Gift Planning Bootcamp and the original Canadian gift planning course is capped. In 2014, there was a second original Canadian gift planning course delivered based on demand. Both course have always been fully subscribed.
- There has been significant growth in the Gift Planning Fundamentals course.
- Observations re participants in webinars will not be made as the data is not comparable from year to year.

CONCLUSIONS:

1. **The demand for educational offerings through CAGP as well membership numbers have risen over the past 4 years at the same time staff resources have remained static. The CAGP office is under resourced to handle increased demands, be it related to members' services, educational programs or its government relations program.**

CAGP's uniqueness lies in bringing together gift planning fundraising professionals and professional advisors, expert leaders in assisting donors and clients achieve their philanthropic dreams.

KEY ISSUES

In CAGP's efforts to reposition itself, it needs to communicate more strategically its value proposition – both internally to its members and externally to its partners and other stakeholders. CAGP seeks to build its reputation as the go-to resource for information and education on donor-centered, strategic charitable giving. CAGP's uniqueness lies in bringing together the professionals, experts who are leaders in Canada's charitable community to provide donors/clients with new and innovative ways of achieving their philanthropic dreams. This select group of people are those who benefit from CAGP's programs and initiatives which in turn benefits the donor community and the broader society.

Having greatly strengthened the national office's corporate position in the past four years, fiscally and in relation to its allied partners, CAGP now must focus to a greater degree on expanding its educational offerings and on its the local chapters and their members. In some cases, the local chapters are performing very well and in other cases, they lack the leadership required to function effectively. There is need to develop and implement a strategic communications plan to build awareness of CAGP and the many benefits of membership as well as keeping members up-to-date on CAGP's achievements. Beyond that however, CAGP needs to be more hands-on in the support it provides to the local chapters to help them attract new members, and build CAGP's reputation at a grassroots level. CAGP aims to create a vibrant network of local chapters through:

- Increasing CAGP's capacity to provide more educational offerings
- Helping strengthen chapter leadership, strategically and tactically
 - Encouraging greater member participation on committees and volunteer engagement at the local chapter level
 - Assisting with on-boarding of new members
 - Ensuring there is more frequent interaction among the chapter executives, the CEO and national Board members
- Developing strategic partnerships, which also contributes to increasing CAGP's visibility in the community
- Generating increased revenues through grants and sponsorships to help achieve its mission and vision.



GOALS FOR THE NEXT 3 YEARS ...

The Canadian Association of Gift Planners has an ambitious agenda in its drive to educate more professionals to increase their reach working with donors in cities and communities across the country. Being a purveyor of best-in-class education that elevates professionalism and proficiency in our field is foundational for CAGP and something the charitable sector and professional advisors have come to count on.

CAGP also seeks to foster a well-informed, engaged and growing network of members, partners and stakeholders. A recent survey indicated that what members value most among CAGP's various offerings is professional development and education. The organization seeks to achieve this goal through a variety of strategies that includes:

- Modularizing education course content so it can be customized to specific audiences
- Expanding the base of trained faculty to ensure capacity to meet demand
- A membership development plan to increase the rate of retention and to attract new members, from both the fundraising profession and among professional advisors
- Aligning the national office and local chapters' goals
- Continuing to engage partnerships, working collaboratively with them
- Secure increased financial resources, grants and sponsorships, to support programs and events
- Reconciling CAGP and Leave-A-Legacy brands
- Educating our stakeholders on the benefits of the gift vehicles used in strategic charitable gift planning
- Working to ensure CAGP's long term fiscal health

These goals can only be achieved by enhancing the organization's capacity through increased human and financial resources. This means better handling both the day-to-day demands of the association to undertake new initiatives or opportunities that will enhance the value of membership, attract new members and build the CAGP's reputation as the go-to resource for strategic charitable giving.

CAGP's work in the realm of government relations and advocacy remains an important pillar of its purpose and an action area often cited as a key facet of interest and benefit to members. CAGP collaborates with other national voluntary sector leadership organizations to engage in dialogue with the federal government and advocate for key policy issues that would support the sector and position the sector as a strong partner in building healthy, vibrant communities. CAGP's Government Relations Committee is comprised of the most recognized experts on tax and legislative matters that strengthen philanthropy. The Committee works to ensure the voice and perspective of CAGP is heard in government deliberations related to taxation and charitable giving. As a result, CAGP is widely seen as an organization speaking on behalf of Canada's charities and nonprofits regarding tax and legislative matters that impact philanthropy.

FOUR STRATEGIC INITIATIVES WERE DEVELOPED TO ACHIEVE THE GOALS:

1 – EDUCATION

OBJECTIVE: Continue to deliver the highest quality education that reinforces the competencies of gift planning professionals and make it accessible to the broadest possible audience.

STRATEGY/TACTICS:

- Focus on gift planning fundamentals as CAGP’s key offering to promote strategic charitable gift planning.
- Maintain a best-in-class education program with a commitment to continual reviewing, updating, adapting.
- Develop and promote the roadmap for learning for gift planners and professional advisors.
- Target financial advisors by adapted core competencies and course content.
- Expand the base of trained faculty to ensure capacity to meet demand.

2 – CHAPTER SUPPORT

OBJECTIVE: 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.

STRATEGY/TACTICS:

- Provide information and tools to support chapter management; develop tools to support chapter communications locally.
- Invest in leadership development at the chapter level to strengthen their ability to make a difference.
- Increase the frequency and value of contact between chapters, chapter leaders, board members and national office staff.
- Facilitate effective and efficient financial recordkeeping and management to ensure sufficient information sharing and fiduciary oversight.
- Maintain a pan-Canadian connection to local Leave-A-Legacy activities and evaluate the opportunity for re-envisioning and potentially re-investing.

3 – STAKEHOLDER ENGAGEMENT

OBJECTIVE: Enhance communications and outreach to stakeholder networks (members, prospective members, and multi-sectoral alliances) to ensure dissemination of strategic information and to highlight CAGP’s value proposition.

STRATEGY/TACTICS:

- Establish / ensure communications platforms that effectively share information on CAGP programs / assets and issues relevant to the field.

- Communicate more effectively the value of strategic charitable giving and CAGP to prospective members (through current members and chapters).
- Share CAGP's story and accomplishments with chapters/members on a regular basis.
- Review and renew the membership package to provide information on member benefits and value proposition of membership in CAGP.
- Increase the frequency of chapter visits by national office staff and board member(s).
- Connect with professional advisors through Advocis.

4 – FINANCIAL CAPACITY

OBJECTIVE: Enhance and expand revenue sources to better support CAGP's mission.

STRATEGY/TACTICS:

- Establish the CAGP Foundation; build our case for support; identify funding opportunities and develop a fund development plan, including prospective donors and funders.
- Implement the plan; report progress to the stakeholders.
- Explore other partnership opportunities to expand outreach and generate revenue, e.g. explore and test online learning.



A QUANTUM LEAP - INVESTMENT OPPORTUNITIES

To realize its vision and achieve its mission, CAGP requires staff stability which is predicated on retention of qualified, hugely competent and highly motivated staff, working in a best-of-class workplace. An investment in its people is required to achieve this. CAGP's national office must increase its capacity. CAGP needs to take a quantum leap and invest in itself. Expenditures need to be viewed as an investment in the organization.

"What percentage of my donation goes to the cause versus overhead?" There are a lot of problems with this question. I'm going to just focus on two.

First, it makes us think that overhead is a negative, that it is somehow not part of the cause. But it absolutely is, especially if it's being used for growth.

Now, this idea that overhead is somehow an enemy of the cause creates this second, much larger problem, which is, it forces organizations to go without the overhead things they really need to grow, in the interest of keeping overhead low."

***Dan Pallotta - The Way We Think About Charity is Dead Wrong
TED Talk filmed March 2013***

To maintain its leadership position in providing relevant education related to strategic philanthropic giving in Canada and to expand its education outreach to meet market demand, CAGP requires seed funding to make an investment in its educational offerings and to move to self-sufficiency in this area.

To promote further volunteer involvement and engagement at the local level, development and support of leadership is required, along with financial assistance for selected members.

To continue to represent the philanthropic sector related to charitable giving to government and to have an impact on key public policy issues, CAGP seeks to develop a comprehensive government relations / public policy strategy.

The investment opportunities support each of these aims. The estimated annual cost is \$365,000, or approximately 40% more than the current budget. In addition, there is a one-time expense of up to \$100,000. Securing the needed funding would undoubtedly transform the organization.

**CAGP's is a bold and
ambitious vision!**

SUMMARY OF INVESTMENT OPPORTUNITIES

Summary	Impact	Annual Investment Required
Support employee retention with market salaries and best-in-class working conditions	Employee recruitment and retention is strengthened, improving morale and productivity	\$40,000
Expand CAGP's national office capacity by augmentation of core staff complement	Staff resources and skills are more effectively used, increasing effectiveness and efficiency	\$80,000
Expand CAGP's education outreach with the addition of a new education and development faculty position (VP, Learning and Development)**	CAGP is better able to meet market demand related to training and education and to strengthen its marketing	\$120,000
Enhance and expand education and professional development	Maintain leadership position related to strategic gift planning education through ongoing adaptation and customization of CAGP's courses	*one-time investment of \$50,000-\$100,000
Invest in and support chapter leadership and development	Strengthen and support leadership and programming at the local level and create closer working relations with the national office	\$50,000
Assist ~ 10 - 15 CAGP members and/or prospective members in accessing CAGP education offerings and the CAGP Annual National Conference	A broader spectrum of CAGP members and prospective members are able to access CAGP education events and conferences	\$25,000
Invest in government relations / public policy to increase activity and capacity	Development of a comprehensive government relations / public policy strategy for CAGP enhances its value proposition to members and its position nationally as a leader in the strategic charitable giving field.	\$50,000
Total Investment		\$365,000

Plus a one-time investment of up to \$100,000

**** It is anticipated that this position will be self-sustaining in 3 years.**

CAGP FOUNDATION

CAGP is a not-for-profit membership, organization serving professionals in the field of philanthropy but it is not a registered charity. Therefore, until now, the majority of the revenue it has generated to carry out its mission has been from fees – for membership and/or for education (including the annual conference). To address its challenges, enhancing its financial capacity, strategic initiative # 4, was the starting point.

Emanating from its 2016 – 18 strategic plan and the identification of the pressing need for additional resources, CAGP incorporated the CAGP Foundation (the foundation) that will raise funds to help it meet its mission and vision. By-laws were established in March 2016 and the Foundation was granted charitable status by the Canada Revenue Agency in March 2017. The foundation’s charitable purposes and activities is included in Appendix D.

The inaugural board was recruited and has one member who is also a director of CAGP. The CAGP Foundation board list is in Appendix A. Like CAGP’s board, which is comprised of professionals in the field, so too is the CAGP Foundation board. Staff support is provided by CAGP’s CEO, Ruth MacKenzie.

The Foundation has established its vision, mission and values, which are as follows:

OUR VISION

A better world through strategic charitable giving

OUR MISSION

To financially support the development and promotion of excellence in strategic, charitable gift planning in Canada

OUR VALUES

Commitment to the vision and mission

Openness, honesty and transparency in conduct

Accountability for decisions and use of funds

Integrity in dealing with all donors, funders and other stakeholders

Excellence in striving to be and to do the very best

Collaborative in working with others to achieve goals

Results-oriented

The foundation is dedicated to helping CAGP increase its capacity and will lead the fund development efforts on its behalf. It was agreed that the fund development plan would be developed for a three-year period, start in January 2017. The board also felt that while the foundation would be open to receiving funds to build an endowment, the focus would be on raising expendable money.

The first approach will be to CAGP’s boards, staff, and Friends of CAGP.

APPENDICES

CAGP BOARD MEMBERS

Amanda Stacey – Chair
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National Director, The Donor Motivation Program in Canada

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Faculty of Fine Arts, Concordia University

Keith Thomson, FCSI®, CFP®, CIM® - CAGP Board Rep *
Stonegate Private Counsel
National Director, The Donor Motivation Program in Canada

Ross Young *
Financial Advisor
Secure Capital Management Inc.

APPENDIX A

Andrew Valentine *
Partner
Miller Thomson

(*Effective June 2017)



Competency Framework for Charitable Gift Planners

In consultation with gift planners, CAGP has developed a list of necessary skills and knowledge (competencies) a Gift Planner needs in order to accomplish the following identified tasks successfully:

1. **Ability to read/understand financial statements, do calculations, etc.**
2. **A basic understanding of the financial/economic environment.**
3. **Comfort and ease in interpreting legal concepts/language.**
4. **Ability to translate complex concepts and structures into simple, plain English language both in writing and speech.**
5. **Effective listener – ability to ‘listen to understand versus to respond’, and ability to retain and interpret what’s being said.**
6. **Possess an ethical compass.**
7. **Comfort in asking for money; understanding personal relationship/response to money/wealth.**
8. **Empathy for others (dealing with such private matters as wealth/death, loss, etc.).**

ENABLING COMPETENCIES

RELATIONSHIP BUILDING

With the donor. The ability to:

- Develop long-term, trust-based relationships with potential donors that support the donor’s vision for philanthropic giving, the desire for a legacy and the donor’s personal needs;
- Actively listen and retain what is being said;
- Be comfortable in asking for money;
- Demonstrate empathy, understanding and comfort around end of life discussions;
- Translate sometimes complex technical, legal and tax-related language and concepts, where necessary, into plain English to aid in the donor’s comprehension;
- Work with donors on a one-to-one basis over extended periods of time, as *their* needs determine;
- Demonstrate commitment to stewardship as per the wishes of the donor;
- Maintain relationships essential to effective acknowledgement, recognition and stewardship of donors; and

- Connect the mission of the charity with the philanthropic vision of the donor.

With stakeholders. The ability to:

- Build mutually beneficial networks of trusted legal, tax, financial and insurance advisors;
- Work effectively with family members and/or the donor's advisors;
- Build relationships with internal charity personnel and volunteers to enhance and take advantage of resources such as accounting, programming, public affairs, marketing, research, etc.

ETHICS AND JUDGEMENT

- Adherence to the CAGP Code of Ethics;
- Ability to identify where donor needs align or differ from those of desired legacy due to competence, financial viability, family commitments, and other factors;
- Ability to identify and retain confidential information that may not be appropriate to share with the employer;
- Knowing when to re-direct a donor to more appropriate gift planning vehicles or charities, whether or not such is in the best interest of the person undertaking gift planning discussions;
- Ability to identify and avoid conflict of interest scenarios;
- Understanding of the concept of “no gift before its time” (in the best interests of the donor).

TECHNICAL COMPETENCIES

Knowledge of Gift Planning Vehicles. An understanding of:

- A variety of gift vehicles such as securities, registered funds, insurance, annuities, gifts in kind for both current and deferred giving;
- Advantages of corporate vs. personal giving;
- The opportunity and impact various options have for the donor (including degree of control, access to capital, timing and tax treatment perspectives);
- How to determine fair market value of various charitable gifts and what information should appear on the charitable tax receipt;
- When to refer the donor to specific professional advisors.

Knowledge of Legal Context of Gift Planning and Charitable Sector. An understanding of:

- Legal implications of Gift Planning from the first conversation through to appropriate stewardship of the gift;
- Legal terms, wills, gift contracts;
- How to manage estate gifts and estate administration;
- When to refer donors to legal advisors and to seek legal advice regarding a gift;
- Familiarity with Canada's charitable sector and the legal framework within which charities act.

Knowledge of Charity (you are associated with/employed by):

APPENDIX B

- Familiarity with data systems, their maintenance, interpretation and application of such to Gift Planning;
- Ability to understand and implement the policies, procedures and diligence around gift planning and gift receipting;
- Understanding of charitable management and governance;
- Familiarity with the mission, vision, values, tactical and strategic directions of the charitable organization for which the gift planner is engaged.

Knowledge of Marketing & Communications. An understanding of:

- Emergent philanthropic and charitable sector trends and issues;
- Fundraising-related planning and marketing techniques;
- The best outreach vehicles for donors;
- Familiarity with different donor prospecting approaches;
- Ability to undertake market research applicable to Gift Planning.

DONOR STORIES

INSPIRING A COMMUNITY OF LEADERS

SEPTEMBER 28, 2016 — University of Manitoba Source: U of M website

15th anniversary of the Pitblado Scholars Fund celebrated by current students and alumni

An alumni dinner held on September 27 marked the 15th anniversary of the Pitblado Scholars Program. The event was an opportunity for James and Sandra Pitblado to celebrate the achievements of current and former Pitblado Scholars. “We wanted to invest in young people who will make a difference,” said James Pitblado. “You will be role models, you will give back to your community. We are so gratified to make this investment and see the outcome.”



Kathleen McCandless [LLB 06] with James & Sandra Pitblado

Kathleen McCandless [LLB/06] spoke at the dinner about the impact the Pitblado scholarship had on her academic and professional success. She was an early recipient of the scholarship in 2004 and 2005 and now works as an associate with Pitblado LLP.

“I wish to emphasize just how important the Pitblado Scholarship was to me as a student,” said McCandless. “Being a Pitblado Scholar allowed me the freedom to focus on my studies, but more than that, gave me the motivation that allowed me to succeed. It set me up for success and opened opportunities for me.”

At the event, Jim and Sandra Pitblado renewed their commitment to the University with a gift of \$500,000 to bolster the Pitblado Scholars Program. This gift will inspire the next generation of law students in Manitoba to realize their full potential.

“The impact Jim and Sandra have had on law students over the past 15 years extends far beyond the considerable financial support provided through this prestigious scholarship,” said President and Vice-Chancellor David T. Barnard. “The Pitblados have always demonstrated the vision and commitment to ensure their philanthropy has the greatest impact possible, personally connecting with and developing a community of leaders who are helping to write the story of this province and its people.”

The Pitblado Scholars Fund was established in in 2001 with an initial gift in excess of \$1 million by James and Sandra Pitblado. Since its inception, the Pitblado scholarship has supported more than 200 law students at the University of Manitoba. Pitblado scholars are the top 10 per cent of students in their first and second years in the Faculty of Law.

Mission is what gives us the privilege to ask for philanthropic support.

CHRISTOPHER LIVES

‘Tricky leukemia’: that’s what Christopher Brundage called his. It was indeed tricky. It defied chemotherapy. And, despite two bone marrow transplants, it came back. But his family are determined that tricky leukemia’ – in what his mom describes as “Christopher’s immortal words” – will not have the last word. That’s why his family have created the Christopher Brundage Leukemia Endowment Fund at SickKids, and why his parents (who have two other children) are leaving what they call ‘Christopher’s share’ of their estate to SickKids in their will. It’s also why they continue to share Chris’ story, to encourage others to make a gift in their will.



CHRIS BRUNDAGE AT AGE 5

Christopher had just started school. His family doctor originally put down a persistent sore throat to the new germs of junior kindergarten. Further tests at SickKids led to a more serious diagnosis: acute myeloid leukemia. Unfortunately, chemotherapy didn’t put him into remission. The next step was a bone marrow transplant, which Chris received on Valentine’s Day 2002.

Chris went home with his family. At their cottage in Haliburton, Chris was able to swim, play and just be a five-year old boy. But a year later, he relapsed. Another bone marrow transplant seemed to work for a few months, but his family noted he was out of breath going up stairs – a huge red flag for a bundle of energy like Chris. Tests confirmed another relapse.

There were no further treatment options. With the support of the Palliative Care team at SickKids and Mount Sinai Hospital, his parents took Chris home. Chris’ passing was peaceful, surrounded by love. His mother’s last words to him were the ones she’d said on the day he was born. “I told him that the sun shone brighter and the sky was bluer and the world a better place because he was in it.” Chris told his family he didn’t want anyone else to get his ‘tricky leukemia’. So they requested donations instead of flowers. That initial ask was the beginning of the Christopher Brundage Leukemia Endowment Fund at SickKids, which today stands at \$1.5 million.

This is a tribute to the dedication of the Brundage family and their network of friends, and an example of what encouraging gifts in your will can achieve. In this very tangible way, as Kate Brundage says, “Chris lives at SickKids.”



Charitable Purposes and Activities

Statement of Purpose 1

1. To promote and maintain efficiency and high standards of practice in the areas of planned giving, fundraising and other philanthropic services for the benefit of the public by:
 - (a) developing educational programs, courses and workshops designed to educate charitable representatives and donor advisors and the general public on strategic and ethical charitable gift planning and gift giving;
 - (b) conducting research on:
 - (i) best practices related to the provision of planned giving, fundraising and philanthropic services; and
 - (ii) the charitable giving environment in Canada; and disseminating the results of the research to the public; and
 - (c) engaging in national dialogues designed to build awareness and promote philanthropy;

Activities in Support of Purpose 1

The Applicant will carry on research and education activities currently carried out by the Canadian Association of Gift Planners (CAGP). The Applicant's faculty will consist of seasoned fundraisers and professional advisors who have extensive teaching experience in the field of gift planning. The Applicant's educational programs will consist of those professional development opportunities currently provided by CAGP. Attached are the details of CAGP's educational initiatives to be operated by the Applicant upon registration:

1. Gift Planning Fundamentals
2. Original Canadian Gift Planning Course
3. Strategic Gift Planning Bootcamp for Major Gift Professionals
4. Advanced Canadian Gift Planning Course
5. Webinar Wednesdays
6. The Annual CAGP National Conference

Each of the Applicant's educational programs are designed to ensure that charitable representatives and donor advisors develop and maintain the skills necessary to provide knowledgeable and ethical planned giving, fundraising and other philanthropic services. Attached is a document outlining the CAGP Competency Framework, which serves as the foundation for the development of each of the foregoing educational programs. A majority of the Applicant's educational programs are eligible for continuing education credits. These credits will be available either through Certified Fund Raising Executive International,

which offers an internationally recognized baseline professional credential for philanthropic fundraising executives or the Institute for Advanced Financial Education, the leading accreditation body in Canada for financial service practitioners in the specialty areas of advanced estate and wealth transfer and living benefits.

CAGP currently operates the Leave-A-Legacy awareness program, which encourages people to leave a gift to charity through their will or any other gift-planning instrument. The Applicant will may, from time to time, carry on the educational components of this program.

The Applicant will also provide bursaries to individuals attend at its various education sessions. Recipients will be chosen based on financial need.

In addition to developing and providing educational programs, the Applicant will engage in research covering a variety of topics related to the Canadian philanthropic sector. The Applicant will engage in such research with a view to disseminating the results to the public at large as well as tailoring its educational programs to Canada's gift-giving environment of the day. This will enable the Applicant to equip its program participants with the knowledge and resources necessary to provide effective gift-planning/advisory services. The Applicant will make all of its research available to the public.

At times, the Applicant's activities will be conducted through CAGP's regional chapters, which will act as agents on behalf of the Applicant. These activities will be conducted through an agency agreement substantially in the form enclosed with this application. The agency agreement will ensure full direction and control over all activities conducted with funds of the Applicant. The Agreement will contain all elements set out in CRA Guidance CG-002 to demonstrate direction and control.

Among other things, the agreement will provide for the following:

- commitment by agent to carry out research and/or education projects in accordance with both initial and ongoing instructions from the Applicant;
- regular narrative and financial reporting from the agent;
- requirement to track all funds of the Applicant separately from the agent's other funds, with funds being held in a separate account.

Statement of Purpose 2:

To receive and maintain a fund or funds and to apply all or part of the principal and income therefrom, from time to time, to qualified donees as defined in subsection 149.1(1) of the *Income Tax Act* (Canada) that have charitable purposes under Canadian law.

Activities in Support of Purpose 2

From time to time, the Applicant will make grants to qualified donees that are registered charities under the Income Tax Act.

SPONSORS FUNDERS PARTNERS

CAGP is grateful for our many sponsors, funders, and partners. We thank them for their generous support that makes our work possible.

BMO Private Banking	Mindpath
Bull Houser	PearTree Financial Services
Capacity Marketing for Charities	PG Calc
Carters Professional Corporation	PGgrowth
Canadian Institute of Certified Executor Advisors	Philanthropic Foundations of Canada
DLA Piper	ProDon-Logilys
The Donor Motivation Program	RBC Wealth Management / Philips Hager North
DonorPerfect Canada	Investment Council
Environics Analytics	Russell House Marketing
Fasken Martineau DuMoulin LLP	S.T. Legacy Group
GIV3	Scotia Wealth Management
Great-West Life, London Life, Canada Life	SickKids Foundation
Harvey McKinnon Associates	TD Waterhouse
Johnson Insurance	United Way Centraide Canada
Lawton Partners	Vancouver Foundation
Legacy Leaders	Wealth Professionals
Miller Thomson LLP	

NATIONAL WEBSITE PARTNERS

SickKids Foundation	Foundation
Canadian Cancer Society – ON Division	CAGP Greater Toronto Area Chapter
The Donor Motivation Program	CAGP Alberta South Chapter
Mennonite Foundation of Canada	CAGP Greater Vancouver Chapter
Princess Margaret Cancer Foundation	CAGP Montreal Chapter
Queen Elizabeth II Health Sciences Centre	CAGP Manitoba Chapter

APPENDIX F

INVESTMENT OPPORTUNITIES - DETAILED	IMPACT	ANNUAL INVESTMENT REQUIRED
<p>1. Support employee retention with market salaries and best-in-class working conditions</p> <ul style="list-style-type: none"> • CAGP’s four staff (manager, finance; manager, education; manager, communications & stakeholder relations; and coordinator, membership) are currently paid below market rate, resulting in employee recruitment and retention challenges. • Additional funds would support modest increases in salary and an investment in professional development. 	<ul style="list-style-type: none"> • CAGP is better able to recruit and retain staff, mitigating the costs and disruption of high employee turnover. • Team morale and productivity is improved, resulting a strengthened ability for CAGP to effectively and efficiently meet its mission. 	\$40,000
<p>2. Expand CAGP’s national office capacity by augmentation of core staff complement</p> <ul style="list-style-type: none"> • CAGP staff are currently at workload capacity, limiting the ability to focus strategically on priorities to enable excellence and development, and to undertake new opportunities. • We propose additional new team members as follows, and seek funds accordingly: <ul style="list-style-type: none"> ○ Finance Assistant (.5 FTE) ○ Office Administrator/ Admin Assistant to the CEO (1 FTE) 	<ul style="list-style-type: none"> • President and CEO as well as other staff freed of administrative tasks to devote more time to higher level initiatives • Team resources and skill sets are more effectively, efficiently and strategically deployed across functional areas • Chapter relations and communication is more efficient and effective • Members’ needs are better served and engagement with members is increased, resulting in better member retention • Member recruitment is increased because of improved, more strategic marketing and outreach 	\$80,000
<p>3. Expand CAGP’s education outreach with the addition of a new education and development faculty position (VP, Learning and Development)</p> <ul style="list-style-type: none"> • Currently CAGP is limited in its ability to 	<ul style="list-style-type: none"> • Strategic Initiative # 1 can only be achieved with the addition of a staff position with the relevant expertise and knowledge required to expand the educational offerings. 	\$120,000 to be self-sustaining by end of year 3

APPENDIX F

INVESTMENT OPPORTUNITIES - DETAILED	IMPACT	ANNUAL INVESTMENT REQUIRED
<p>meet potential market demand for courses and education. A senior in-house faculty position would enhance our ability to meet current demand more efficiently and create capacity for enhanced marketing and promotion.</p>	<ul style="list-style-type: none"> • This means enhancing the focus on gift planning fundamentals as CAGP’s key offering for both gift planning professionals and advisors alike. • It would contribute to maintaining and enhancing CAGP’s commitment to best-in-class education with ongoing course renewal and update. • It would strengthen CAGP’s membership value proposition by having direct access to the knowledge and information on trends/issues affecting the sector and our mission. • It would also contribute raising CAGP’s profile in the sector, profile among segments of allied professionals, strengthening local chapters to deliver quality education and professional development programming, thereby strengthening their ability to recruit and retain members. • It would contribute to CAGP’s core operations, strengthening its capacity and credibility related to its voice in government relation and public policy dialogue. • Strengthening CAGP’s ability to attract sponsors and funders to support the delivery of core CAGP programs, while also leveraging new programs. 	
<p>4. Enhance and expand education and</p>	<ul style="list-style-type: none"> • CAGP continues to be recognized as a leading provider of relevant, 	<p>*one-time investment of</p>

APPENDIX F

INVESTMENT OPPORTUNITIES - DETAILED	IMPACT	ANNUAL INVESTMENT REQUIRED
<p>professional development</p> <ul style="list-style-type: none"> • Support committee engagement to undertake annual/continual analysis and adaptation of CAGP’s courses • Modularize course content, for easy customization to target audiences • Adapt content for competencies of target markets (i.e., professional advisors, lawyers, estate planners) • Support recruitment and development of qualified faculty to meet market needs • Evolve curriculum into an online / e-learning context* 	<p>strategic education related to philanthropy in Canada</p> <ul style="list-style-type: none"> • Education related to strategic gift planning is available to a larger and broader audience through CAGP • Gift planners and advisors better able to meet donors/clients’ needs because of education and training provided by CAGP • CAGP’s fiscal sustainability is enhanced by earned income from a more robust education program 	<p>\$50,000- \$100,000</p>
<p>5. Invest in and support chapter leadership and development</p> <ul style="list-style-type: none"> • CAGP chapters play a crucial role in advancing our mission, yet CAGP lacks the resources to invest in support and development of chapter leadership. • CAGP seeks resources to enable strategic analysis of the leadership and development needs of chapter chairs (executive committees), to convene chairs annually / bi-annually and to develop tools that will support chapter management and administration. 	<ul style="list-style-type: none"> • Chapter chairs provide strengthen leadership at the local level, enhancing and improving delivery of programs and activities • Tools and resources enable better and more efficient administration of CAGP locally • Chapters are better able to reach out to and connect with local stakeholders, members and prospective members • National-Chapter relations are more positive effective because of increased bi-lateral communication 	<p>\$50,000</p>
<p>6. Assist ~ 10 - 15 CAGP members and/or prospective members in accessing CAGP education offerings and the CAGP Annual National Conference.</p> <ul style="list-style-type: none"> • Provide bursaries to offset registration and attendance expenses 	<ul style="list-style-type: none"> • A broader spectrum of CAGP members and prospective members are able to access CAGP education events and conferences • The value proposition of a CAGP members is enhanced, thereby increasing membership • CAGP’s positioning as a leader in 	<p>\$25,000</p>

APPENDIX F

INVESTMENT OPPORTUNITIES - DETAILED	IMPACT	ANNUAL INVESTMENT REQUIRED
	education related to strategic charitable gift planning is enhanced.	
<p>7. Invest in government relations / public policy to increase activity and capacity</p> <ul style="list-style-type: none"> • Support development of a comprehensive government relations / public policy strategy for CAGP. • Through leadership and consultation with CAGP members, identify key public policy issues relevant to CAGP’s mission and mandate • Develop CAGP member engagement and communication strategy related to public policy and government relations • Support Government Relations Committee engagement • Enhance CAGP’s ability to engage in government relations activities • Support CAGP’s participation in sector wide public policy / government relations collaborative opportunities (i.e., annual Hill Day); participation in public policy forums/events 	<ul style="list-style-type: none"> • Government views CAGP as an important and credible voice in policy discussions related to philanthropy and charitable giving • CAGP’s value proposition to members is enhanced through a more robust engagement with government and on policy discussions • CAGP is recognized by the charitable sector as an important partner in policy discussions and collaborations 	\$50,000

Note: to be included in a funding proposal, these investment opportunities must be further developed.