The CAGP Vancouver Island Lunch & Learn sessions provide high-quality presentations and networking opportunities for CAGP members, non-members and professional advisors. Sessions are eligible for CFRE credits.

Monday, September 9, 2019
CAGP's Annual Mix & Mingle
Pacific Opera Victoria's Baumann Center
925 Balmoral Road - 4:00 pm – 6:00 pm
Please join us to mix and mingle and celebrate the new 2019/2020 CAGP VI program season.

*TWO DIFFERENT DATES AND LOCATIONS*
Wednesday, September 18, 2019 - NANAIMO
3:00 pm – 6:00 pm (registration at 2:45 pm)
Wednesday, September 25, 2019 - VICTORIA
12:00 pm – 1:30 pm (registration at 11:45 am)

Untapped Potential: Tools for Building Your Planning Giving Program
Sara Neely & Natasha Benn, Victoria Foundation
In this session, you will learn how to develop, manage and build your legacy program. Sara and Natasha will discuss how to receive and administer bequests, donor stewardship and recognition, tracking and reporting activities and expectancies, and marketing a planned giving program. They will also touch on policy areas that are important to address in today’s fundraising environment and practical applications of gift acceptance policies.

Original Canadian Gift Planning Course
September 23 - 27, 2019
Saskatoon, Saskatchewan
Faculty: Jill Nelson & Paul Nazareth

Wednesday, October 23, 2019
12:00 pm – 1:30 pm (registration at 11:45 am)
The Donor’s Perspective
Moderator: Jennifer Jasechko
As advisors and charity representatives, we all have ways of communicating with donors about their strategic charitable giving intentions. But are we always on the right track? Flexibility, innovation, and empathy can help. Join us for a lively panel discussion and hear from four local philanthropists to find out what motivates their giving and what makes them say ‘yes’ to your funding requests.

Strategic Gift Planning Bootcamp
October 29 – November 1, 2019
Montebello, Quebec
Faculty: Michelle Osborne & Sara Neely

National Philanthropy Day
Wednesday, November 13, 2019
Hosted by the Association of Fundraising Professionals
For details visit: afpvancouverisland.afpnet.org

Monday, November 18, 2019
12:00 pm – 1:30 pm (registration at 11:45 am)
Who to Name as Your Executor
Gurpreet K. Randhawa, Sitka Law Group
This session will explore the duties and responsibilities of an executor, the potential options with respect to who to name as your executor and the differences between the various options. This session will also explore how to structure charitable gifts in the will and how naming a charitable organization in your will may impact your executor.

Wednesday, January 29, 2020
12:00 pm – 1:30 pm (registration at 11:45 am)
We’re Leaving a Legacy: Like it or Not
Lyndsay Green, Author, The Well-Lived Life
Using findings from her latest book, Lyndsay will discuss challenges facing us, both as participants in the philanthropic sector and as caring citizens. Lyndsay will explore strategies for change from the donor perspective. Author Susan Selecky encourages people to read The Well-Lived Life ‘when you’re ready to stop taking your life for granted’.

Presentation series events are held at the Union Club of BC, 805 Gordon Street, Victoria
Pricing (all applicable taxes included)
Unless otherwise noted, the cost for each session is:
Members $35 | Non-Members $50
Each session held over the lunch hour includes a buffet lunch. Online reservation available at:
www.cagp-acpdp.org/en/events/upcoming
**Wednesday, February 12, 2020**
12:00 pm – 1:30 pm (registration at 11:45 am)

**A Narrative Approach to the Philanthropic Conversation**  
Norma Cameron, The Narrative Company

While many organizations have wonderful stories, often what’s missing is the knowledge of how to choose, craft and tell stories **strategically** to educate prospects and donors about the mission of your organization and clearly articulate the crucial role they can play now (and in the future). Norma will share how by tapping into the power of a strategically chosen line-up of stories and discovery questions – you can create more meaningful conversations which can lead to more funds raised.

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**Tuesday, March 10, 2020**
12:00 pm – 1:30 pm (registration at 11:45 am)

**Joint meeting with the Victoria Estate Planning Council**  
**The Future of the Charity, Not-for-profit and Volunteer Sectors in Canada**  
Grant Monck, LLB, Consultant

In June 2019, the Special Senate Committee on the Charitable Sector tabled its report entitled *Catalyst for Change: A Roadmap to a Stronger Charitable Sector*. CAGP played a vital role in submissions to the Committee. Leading these discussions was the National Government Relations Committee (GRC) of CAGP. GRC Committee Chair Grant Monck will give an overview of the Senate Report. The report’s recommendations present an action plan on how charities, donors and their professional advisors can play a vital role in advocating for strategies and regulatory reforms needed to maximize the impact of our sector in communities across Canada and around the world.

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**27th Annual CAGP National Conference on Strategic Philanthropy**  
April 22 – 24, 2020  
Regina, Saskatchewan

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**May 2020 *Details to follow***

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**Wednesday, May 13, 2020**
12:00 pm – 1:30 pm (registration at 11:45 am)

**Communications that Support Relationship Building**  
Vanessa Chase Lockshin, Consultant

Asking is just one part of a successful fundraising program. The other part – the big part – is the relationship building that happens through cultivation and stewardship. If you work with annual level donors, much of this relationship building happens through the content and communications you send to your donors. But the question to asking is – is that content actually doing its job to help build relationships?

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**Wednesday, June 24, 2020**
4:00 pm – 6:00 pm (registration at 3:45 pm)

**Cocktail Reception**  
**Millennials and Giving**  
**Annual General Meeting**  
Shachi Kurl, Angus Reid Institute

In a four-part independent study, the Angus Reid Institute and CHIMP explored the state of giving in Canada and, in particular, millennials and giving. Shachi Kurl will share the in-depth study which uncovered some of the ways younger Canadians prefer to engage with charities, illuminating the role of social media and other online channels.

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This year’s program is being generously sponsored by:

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**HOW TO JOIN CAGP**

CAGP HAS A NEW MEMBERSHIP STRUCTURE TO MEET YOUR NEEDS. FOR MORE INFORMATION:

[www.cagp-acpdp.org](http://www.cagp-acpdp.org)

BY PHONE: 1.888.430.9494

FOR MORE INFORMATION ON CHAPTER MEMBERSHIP

Hilary Abbott, Membership Chair

cagpvimemberchair@gmail.com

FOR MORE INFORMATION ON THE PROGRAM

Natasha Benn, Program Chair

nbenn@victoriafoundation.bc.ca

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For other upcoming events, webinars, and educational opportunities sponsored by CAGP National: [www.cagp-acpdp.org](http://www.cagp-acpdp.org)