



## How the CAGP Membership Worked for Me

*Kim Cavener, Senior Development Officer, Planned Giving, at the Royal Victoria Hospital Foundation, celebrates the one-year anniversary of her Canadian Association of Gift Planners membership by taking a look at where she is today professionally, how she got here, and how the CAGP membership benefits have guided her.*

*The wisdom acquired with the passage of time is a useless gift unless you share it.*  
Esther Williams

It all came rushing back to me during a meeting last week. My Director and I sat down with a young professional who had come to ask us for advice on how to develop and implement a planned giving program at her organisation.

Of course, my first question was, “Are you a CAGP member?”

The meeting made me reflect back to the beginning of my own new career in planned giving. When I started at the Royal Victoria Hospital Foundation over a year ago, I was under the impression that I was going to work with seasoned fundraisers, and I was ecstatic about the idea. Little did I know that I would become part of an entire clan; kinfolk I could rely on in my pursuit to become the best planned giving professional possible. I’m talking about the family of CAGP.

My fundraising experience started five years ago and my interest in planned giving emerged while I was reviewing the acceptance of a bequest during a meeting with my board of directors. I had been privileged to work with a donor and volunteer who had left a substantial gift in her will to our organisation. I was very proud to play a role in honouring her wishes after she passed away. Suddenly I knew that I wanted to become a reputable, knowledgeable professional with a specialization; one which would allow my organization to lean on me, because I could create sustainability for years to come.

During this time I pursued my professional development and met some very impressive, experienced fundraisers, some of whom were also CAGP members. They not only captured my attention, but held it. They were filled with passion for their causes and shared their experience and knowledge with enthusiasm.

I kept a close eye on job postings and an ear to opportunities in the field. And one day it happened! I was invited in for a general interview at a hospital foundation raising funds for the very hospital at which many of my family members had been treated. I met the professionals I had seen at different conferences and, as the interview proceeded, I was asked the usual questions. But one question stood out for me. “What is the most important part of your current job that makes you want to continue to be a fundraiser?” My answer was simple, “My relationships with donors and volunteers.” I was asked if I had any experience in planned giving. I answered that at this point in time, I had only handled a few estate gifts, but I knew it was something I wanted to do.



I received an offer of employment shortly thereafter. As you may have guessed, the offer was to work for the planned giving program, reporting and training under the direction of an experienced fundraiser and planned giving expert, a Certified Fundraising Executive, who is also a CAGP board member.

Needless to say, I jumped on the opportunity.

Before I had even given notice at my old job, I was invited by my new director to attend some of the **local CAGP Chapter** sessions. These workshops offered so many opportunities to begin my professional development in the field, and they continue to make an impression on me, covering intriguing topics like the marketing of planned giving, the importance of stewardship, cultivation tools, and technical information on the more complex planned giving vehicles, just to name a few.

When I started my new job, I was immediately given a copy of **Planned Giving for Canadians** by Frank Minton and Lorna Somers. After taking a cursory glance at the e-book, it became apparent that I was well on my way! The fact that this incredible resource is regularly kept up to date with any changes in the Canadian legal and financial landscape, is a real bonus.

In the fall of last year, I attended the **CAGP Original Gift Planning Course** taught by Brad Offman and Michelle Osborne. This course has had more influence over my professional development than anything else. Meeting like-minded people from diverse backgrounds, both professionally and personally, all with the same goal, made for an outstanding adventure of discovery. I was surrounded by a broad spectrum of experienced professionals and newcomers. We were led by outstanding teachers who truly love what they do. The week was filled with sharing – on so many different levels. I came away from the course knowing that I had a people, a clan, who would support me and answer my questions, quickly and efficiently. New ideas came from fresh young minds, well-polished ideas from weathered fundraisers. Since the course, I have come to rely on this solid foundation. The members of this family that I am now a part of are willing to share their experiences through the trials and tribulations of the day-to-day operations of planned giving and provide an abundance of support.

So for me the **professional networking** has been paramount, both locally and nationally. Building relationships to collaborate on administering estates has been invaluable. Sharing best practices, resourceful tools, inventive techniques, procedures and policies has been worth its weight in gold and has given me confidence in the way that I present myself as a member of the CAGP and my commitment to planned giving.

An extremely important message is sent through the image of the infinity circle which is now the CAGP logo. The interweaving threads represent the way **professional advisors** work closely with **gift planning professionals**. In fact, CAGP is the only professional association with this unique membership benefit, and it is one of great synergy. Professional advisors who are



members of CAGP have formed an integral part of my new family. Their knowledge and expertise is crucial and they are generous with how they share it.

Attending the **CAGP National Conference** in Halifax earlier this year was especially rewarding and I was honoured to be chosen for a bursary by my local chapter to help me cover the cost. The conference is filled with learned professionals giving productive sessions, many of which not only reinforced components of the legacy program in my workplace, but opened my mind to new concepts about cultivating, stewarding, networking and measuring performance in gift planning.

*“...But how do you thank someone who has taken you from crayons to perfume...?”*

Jann Arden

A very dear friend and classmate used this quote from the lyrics of a much loved song in the film “*To Sir with Love*” under her year book picture. It comes to my mind as I talk to you about the significant relationships which have gently guided and directed me through my newly chosen career path.

Celebrating my one-year anniversary as a member of CAGP, I reflect upon the key role it has played in enriching both my personal and professional growth. Much like the continuity of the infinity circle of our logo, I am ready to take on the next leg of my journey – to give back to the association. Watch this space!