



Professional Development Roadmap

Supporting the Competencies of Charity-based Gift Planners

Become a CAGP Member

Membership in CAGP offers a variety of benefits that support your development as a gift planning professional!

These outstanding products and services are part of your CAGP member benefit package



PRODUCTS

- > Planned Giving for Canadians
- > A Charitable Guide to Planned Giving



SERVICES

- > Ask An Advisor
- > National Network of CAGP Members
- > Mentorship Program

1 - 3 years

3 - 5 years

5 years +



PROFESSIONAL DEVELOPMENT/ NETWORKING

Local Chapter Educational Events —————>

Present at your Local Chapter Educational Events —————>

Webinar Wednesdays & other CAGP Webinars —————>

Present a Webinar for CAGP —————>

CAGP National Conference —————>

Present at CAGP National Conference —————>

Mentoring program involvement as a learner —————>

Mentoring program involvement as a mentor —————>

Publish gift planning articles or blogs —————>



TRAINING COURSES

Gift Planning Fundamentals —————>

Original Canadian Gift Planning Course —————>

Strategic Gift Planning Bootcamp for Major Gift Professionals —————>

Advanced Canadian Gift Planning Course —————>

Getting the most
out of CAGP training
and professional
development

CAGP's training courses are designed to address the skills and attributes outlined in the Competency Framework for Charity-based Gift Planners and are for those with a basic understanding of fundraising principles and terminology (e.g. the fundraising cycle, various types of fundraising activities, donor motivations, etc.) as well as a minimum of one year active involvement in fundraising for a charitable organization.

Competency Framework for Charity-based Gift Planners

Professional Gift Planners require a comprehensive array of skills and attributes (competencies) to perform effectively, successfully and with excellence.

CAGP has developed the following list of the skills and knowledge necessary for a Gift Planner to excel in this profession. They fall into two basic categories of competencies within the overall framework: enabling and technical, reflecting the major pillars within the gift planning profession. Why not take a few moments to review CAGP's Competency Framework and, using the checklist, identify the areas you wish to focus on for personal and professional development.

ENABLING COMPETENCIES

Relationship Building

- ☐ Develop trusted relationships that achieve a donor's vision for philanthropy, desire for a legacy and personal needs
- ☐ Active listening
- ☐ Comfort in asking for money
- ☐ Empathy, understanding and comfort with end-of-life discussions
- ☐ Translate complex technical, legal and tax language/concepts into plain language
- ☐ Work with donors as their needs determine
- ☐ Work effectively with donors' families and advisors
- ☐ Commitment to stewardship activities that reflect donors' wishes
- ☐ Connect the charity's mission to the donor's vision
- ☐ Cultivate networks with trusted legal, tax, financial advisors
- ☐ Develop trusted relationships with charity colleagues to access resources and support

Ethics & Judgement

- ☐ Adhere to the CAGP Code of Ethics
- ☐ Balance alignment of a donor's needs and desired legacy with competence, financial viability, family commitments, etc.
- ☐ Ability to understand and retain information, recognizing and respecting lines of confidentiality
- ☐ Recognize when to redirect a donor to a more appropriate giving vehicle and in the donor's best interests
- ☐ Identify and avoid conflicts of interest
- ☐ Understand the concept of 'no gift before its time'

TECHNICAL COMPETENCIES

Knowledge of Gift Planning Vehicles

- ☐ Securities, registered funds, insurance, annuities, gifts in kind, for current and deferred giving
- ☐ Advantage of corporate vs personal giving
- ☐ Explain opportunities and impact of each option for the donor
- ☐ How to determine fair market value of a charitable gift and know what information to include on charitable receipts
- ☐ Know when to refer a donor to a professional advisor

Knowledge of Legal Context of Gift Planning & the Charitable Sector

- ☐ Legal implications of gift planning from the first conversation to appropriate stewardship
- ☐ Understand terminology, e.g. will clauses, gift agreements, etc.
- ☐ Management of estate gifts and estate administration
- ☐ Know when to seek legal advice and when to encourage donors to do so
- ☐ Familiarity with Canada's charitable sector and the legal framework of charities

Knowledge of Your Charity

- ☐ Familiarity with supporting data systems
- ☐ Understand and implement gift planning and gift receipting policies and procedures with diligence
- ☐ Understand management and governance
- ☐ Familiarity with vision, mission, values and strategic direction

Knowledge of Marketing & Communications

- ☐ Understanding of emerging philanthropic and sector issues and trends
- ☐ Planning and marketing techniques related to fundraising
- ☐ Understanding of the best outreach vehicles for donors
- ☐ Familiarity with donor prospecting approaches
- ☐ Ability to undertake applicable market research



Canadian Association of Gift Planners
www.cagp-acpdp.org

Now that you've completed the checklist, use the Roadmap and decide your next steps on your journey to becoming a more successful charitable gift planner.