



CAGP 2016: Building Our Future

Strategic Plan 2016-18

January 2016

Executive Summary

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 affirm our position as Canada's recognized authority on, and foremost supporter of, strategic charitable giving.

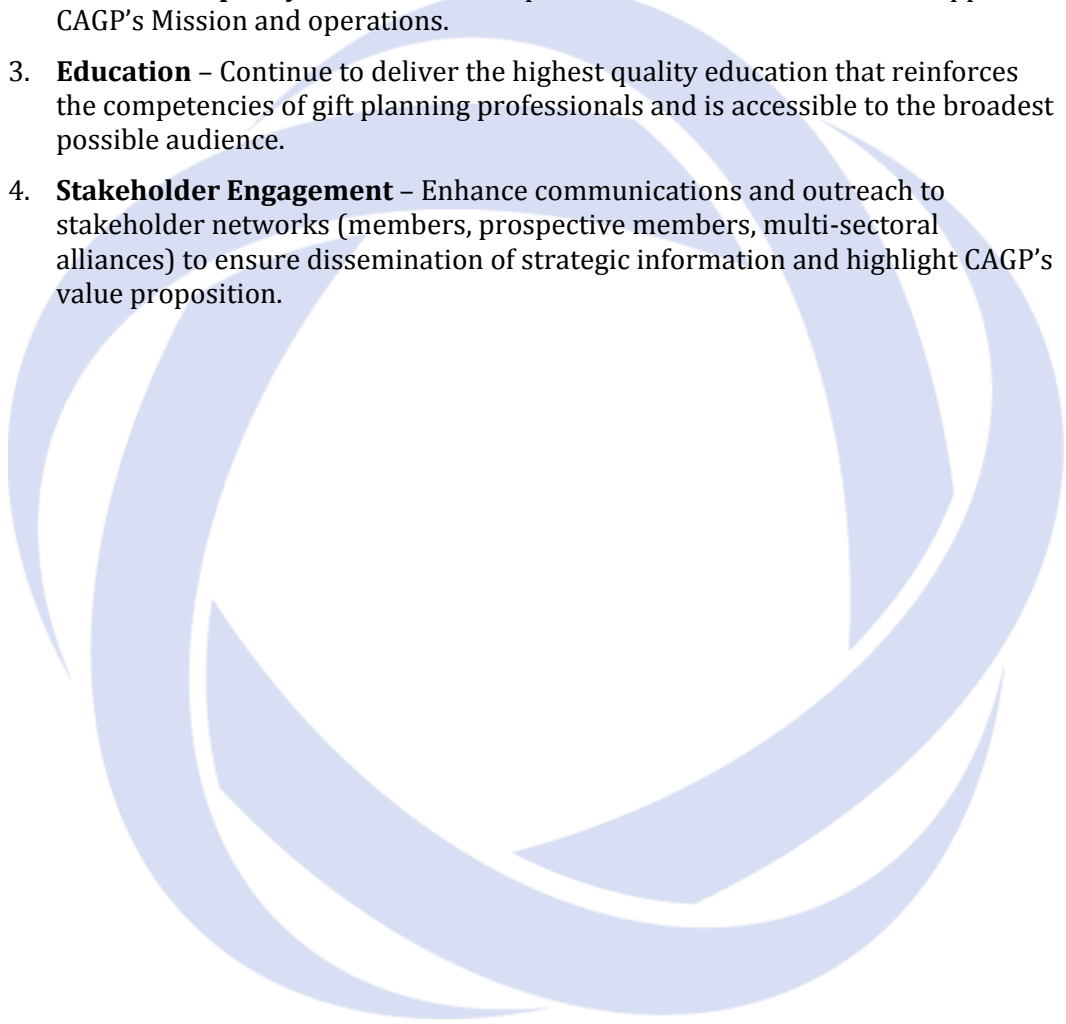
Strategic Initiatives

Our ability to build a meaningful future for CAGP and affirm our 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.



Background

CAGP has just concluded a three-year Strategic Plan approved at the Association's AGM in April 2013.

That plan, *CAGP 2013: The Next 3 Years*, had as its overarching theme the concept of leadership, while emphasizing that the organization's ability to make a difference was dependent on securing adequate levels of predictable annual funding to:

- Deliver the services demanded of 'the leader in gift planning;'
- Grow our membership through greater engagement; and
- Educate and promote awareness of gift planning and our Association.

We believed that the four major initiatives outlined in this plan, when executed together, would have a significant impact on our ability to survive and thrive in the years ahead:

1. **Positioning CAGP for the Future** – Reinforce CAGP's position as the recognized authority on all matters relating to gift planning.
2. **Business Model** – Develop a scalable business model capable of supporting CAGP's programs and initiatives now and in the future.
3. **Education** – Develop a comprehensive education plan that elevates the level of professionalism and competency in philanthropic planning, contributes to CAGP's authority and enhances the real and perceived value of a CAGP membership.
4. **Management, Board & Governance** – Ensure CAGP's management team and Board are prepared for, and equipped to handle, the Association's transition and growth.

Highlights

CAGP had a significant number of successes against this strategic plan. It's worth noting that at the very onset of its timeframe, a transition in leadership occurred with a new Executive Director being hired in April 2013.

Some key accomplishments include:

- The development of a refreshed comprehensive brand platform re-affirming and clarifying CAGP vision, mission and value proposition, providing a stronger, more compelling articulation of the importance of CAGP and its work and positioning. This also included a refreshed look and feel through a new logo and corporate image.
- Development of a new website and customer relationship management platform.
- Reviewing and renewing the organization's membership structure to meet members' needs and position CAGP for membership growth.

- Establishing new partnerships with certain national organizations to expand membership and reach.
- After several years of fiscal deficits, the 2014-15 fiscal year ended with a small surplus.
- Work commenced in developing a strong Case for Support to enable future outreach and dialogue in expanding partnerships and sponsorships
- CAGP's research, *The Philanthropic Conversations*, provided a much-needed evidentiary business case for financial advisors to discuss philanthropy with their clients. The study also provided a platform for CAGP to launch dialogue with partners and stakeholders.
- Establishing a set of Core Competencies for Charitable Gift Planners, providing a basis for the review and evolution of CAGP's education offerings.
- Expanding the delivery of education offerings by reaching out to different target audiences and customizing content to meet their needs.
- Increasing the delivery of the Gift Planning Fundamentals one-day course.
- Evolving the governance model to facilitate more active strategic board engagement and improve the Board-Executive Director-Staff partnership.
- Instituting a quarter Board communiqué to the membership to improve communication between the Board / National Office / local membership.

Gaps and In Progress

The goals identified *CAGP 2013* were realistic and largely achieved however, as with any plan, lessons learned along the implementation track meant tactics evolved and in some instances remain in progress.

While there continues to be interest in a CAGP establishing a formal certification program for gift planning professionals, it became apparent that the human and financial resources to do so was beyond current capacity. It was further identified that a separate organization would be required to ensure the necessary partition from CAGP as a provider of education. A collaborative approach with other certifying bodies was determined to be the best approach and partnership discussions are underway.

Our new membership program was developed and launched, but an intentional plan for growth is yet to be formally designed and executed. New partnerships and sponsorships have been cultivated, but a broader strategy requires continued attention as we build the value proposition for targeted stakeholders. Continued action is required to resolve the divergence and convergence of the dual CAGP and Leave A Legacy brands. Our education program requires more attention to ensure consistency across offerings, modularize topics and adapt content for the core competencies of professional advisors. HR capacity continues to be limited, something which CAGP must be continually mindful of when considering new opportunities.

Vision, Mission, Values and Value Proposition

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.

Our Vision

A better world through strategic charitable giving.

Our Mission

Our mission is to champion the growth and development of strategic charitable gift planning in Canada by:

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

Our Values

Collaborative

1. We freely share our expertise and knowledge with others in the charitable gift planning community.
2. We look for opportunities to involve specialists who can enhance the value that we provide to donors/clients.
3. We participate in local and national events where we network with our fellow members and introduce others to CAGP and the value of membership.
4. We partner with other organizations to advocate, with one voice, for strategic charitable giving, and for policies that will contribute to a better world.

Knowledgeable

1. We are committed to education and lifelong learning.
2. We keep abreast of cutting edge ideas and strategies that benefit our donors/clients.

3. We go out of our way to educate other members of our community in areas that we know best.
4. We take pride in being recognized as the go-to authority on all matters related to strategically planned gifts and bequests

Professional

1. We are transparent in all our dealings with our donors/clients and each other.
2. We value honesty, fairness, respect for others and doing the right thing.
3. We hold each other accountable for our actions and our professional reputation.

Influential

1. We are tireless advocates for a favourable legislative environment for strategic charitable giving and philanthropy.
2. We take every opportunity to increase awareness of the importance of strategic charitable giving.
3. We challenge ourselves to find new and innovative ways of serving our donors/clients.
4. We inspire each other to find innovative ways of helping clients/donors realize their philanthropic dreams

Our Value Proposition

We inspire and educate the people involved in strategic charitable gift planning.

Strategic Charitable Giving

A focused and financially strategic approach to philanthropy that results in maximum benefit for both the donor/client and charity.

Strategic Charitable Gift Planning

A donor/client-centered process of planning current and future charitable gifts in a way that meets their philanthropic goals and balances personal, family, and tax considerations.

Opportunities and Challenges

Research conducted in preparation for ***CAGP Strategy 2016: Building Our Future***, including a member survey and a number of key informant interviews, revealed an array of issues that have been factored into our plans.

CAGP's Value Proposition

While a sizeable majority of survey respondents (82.1%) rated CAGP's performance against the Value Proposition as Excellent or Good, a number of members believe CAGP needs to be more rigorous in articulating and communicating the value of membership to new and existing members.

Differentiating CAGP

The distinction between CAGP and other associations such as AFP is not as clear to some members as it should be. It is reasonable to assume that if it is unclear to members it is likely an issue for prospective members as well.

Chapters

Despite the many survey respondents who expressed satisfaction with the performance of their local Chapter, there were many "suggestions for improvement," as well as comments classified as "Dissatisfied / Negative" and "Not Sure."

Overall, the responses suggest a need to focus attention on the local scene as a way of growing membership, building awareness of the meaning and value of *strategic charitable giving* and ensuring Chapters can contribute to CAGP's overall impact.

National Office

While a significant majority of respondents (75.8%) expressed satisfaction with the performance of the National Office, specific comments suggested that many are misinformed or unclear about its role and contribution to the success of CAGP.

This suggests the need to find a way of more effectively communicating the role being played by the National Office and its relationship with the local Chapters.

Member Assessment of Initiatives Presented in CAGP 2013: The Next 3 Years

A majority of survey respondents felt CAGP's performance on each of the four major initiatives embedded in the last strategic plan was "Good" or "Excellent," with the work done on Positioning (81.7%) and Education (75.3%) receiving the highest ratings.

Initiative	% Good / Excellent	% Not Sure
Positioning	81.7	5.0
Education	75.3	5.1
Management/Governance	57.6	28.4
Business Model	55.3	33.0

On two initiatives, Business Model and Management/Governance, the sizeable number of members ticking 'Not Sure' suggests one of two things:

1. These activities are more 'behind the scenes' or foundational elements of the organization with action not readily visible; and
2. The need for a more effective way of communicating the work being done at the national level.

Member Services

Respondents were asked to rate the importance of the services offered by CAGP on a scale of 1 to 10, where 10 is *Extremely Important*.

Based on the weighted average calculated for each, *education and professional development* was the top rated service (achieving a weighted average of 9.7 out of 10.0).

Service	Rating (out of 10)
Education and professional development	9.7
Local Chapter meetings and events	7.6
Networking and connecting with peers	7.5
Information sharing on issues and trends relevant to philanthropy the gift planning field	7.1
Annual National Conference	6.3
Knowledge development and research	6.2

Those ranked at the bottom of the importance list included *notice of job opportunities* (2.9) and *visibility in the strategic charitable giving community* (4.3).

Conclusions

Analysis of the findings from the key informant interviews and the member survey suggest a number of significant opportunities and challenges.

Opportunities

1. Building our reputation as *the* go-to, donor-centered resource for information and education on strategic charitable giving.
2. Implementing a strategic communications plan to:
 - a. Build awareness of CAGP and the many benefits of membership.
 - b. Keep members up-to-date on the Association and its achievements.
3. Enhancing the ability of Chapters to attract new members, and build CAGP's reputation at a grassroots level through:
 - a. Assistance in on-boarding, supporting and strengthening Chapter leadership.
 - b. More frequent interaction between Chapter executives, the Executive Director and Board members.
4. Developing the strategic partnerships / sponsorships necessary to increase CAGP's visibility in the community and build revenues.

Challenges

1. Attracting and retaining more members / stakeholders.
2. Encouraging greater member participation on committees and volunteer engagement at the local Chapter level.
3. Clearly differentiating CAGP from other associations / purveyors of similar products and services by providing benefits unavailable elsewhere.
4. Overcoming the chronic resource deficiency (financial and human) limiting our ability to handle both the day-to-day demands of the Association and undertake new initiatives or opportunities that will enhance the value of membership, attract new members and build the association's reputation as the go-to resource for strategic charitable giving.

Theme & Strategic Initiatives

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.

Catch 22: A frustrating situation in which a desired outcome is impossible to attain due to contradictory rules or conditions.

This is, indeed, CAGP's Catch 22. As the foregoing list of opportunities and challenges makes clear, 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 it will be business as usual as 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 network of members, partners and stakeholders.

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.



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

By building and leveraging local relationships, Chapters are able to effectively champion philanthropy and strategic charitable giving. As such, our 19 Chapters are an essential partner in achieving CAGP's Vision and Mission, and promoting our Value Proposition.

Working together, we will focus on building awareness of strategic charitable giving and delivering our message around the importance of *strategic charitable giving* to communities across the country.

Over the next three years, based on securing sufficient additional resources, we will support our Chapters by:

- Providing information and tools to support Chapter management and oversight. (Completed – Year 1)
- Facilitating effective and efficient financial recordkeeping and management practices to ensure sufficient information sharing and fiduciary oversight in line with national audit requirements and federal regulations. (Start – Year 1; Completed – Year 2)
- Developing tools that Chapters can employ to communicate with members and others in the community. (Start – Year 1; Ongoing)
- Facilitating leadership development, to strengthen their ability to make a difference. (Start – Year 2; Implementation – Year 3)
- Providing tools to recruit and retain members, and promote the value of *strategic charitable giving* to the community. (Start – Year 1; Completed – Year 2)
- Maintaining a pan-Canadian connection to local Leave A Legacy activities and initiatives, and continuing to explore and evaluate opportunities for re-envisioning and re-investing in the program nationally. (Start – Year 2; Ongoing)
- Increasing the frequency and value of contact between Chapters, Chapter leaders, Board members and National Office staff members. (Ongoing)

Performance indicators of progress against this objective include:

- The establishment of Committee to oversee the creation of a long-term Chapter development plan; and to actively assist the National Office with implementation of this strategy.
- In the first 18 months, working with one or two Chapters, the introduction and validation of new ways of working with / assisting Chapters in the areas of leadership, communications, and connection.
- In year one of this plan, the development and implementation of one new or improved method of communicating important information to Chapters / members.
- Evaluation / feedback of quarterly Chapter Chair teleconferences.
- All Chapters are working with a fiscal year-end consistent with the National Office.
- Reporting templates are developed to facilitate simple information sharing from Chapters to National Office.
- A revised and updated Chapter Manual has been developed and circulated.
- A Chapter Chair onboarding process has been established.

FINANCIAL CAPACITY

Objective

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

Strategy

CAGP has numerous opportunities to engage stakeholders and promote the benefits of *strategic charitable giving* to Canadians across the country, however, each requires resources that are not, at present, available.

The primary sources of revenue are sponsorships / program funding, education and the National Conference, and membership.

Over the next three years, we will further explore and develop these sources by:

Sponsorships / Program Funding

- Establishing the CAGP Foundation, including formulating and actively implementing its development strategy. (Year 1)
- Developing a compelling case for support that can be used to cultivate discussion with potential sponsors. (Year 1)
- Identifying current initiatives or new project ideas that support CAGP's mission and priorities and are of potential interest to prospective partners and funders. (Year 1)
- Actively seeking out potential partners and funders, and working with them to build a mutually beneficial relationship. (Year 2)

Education

- Continuing to cultivate the relationship with Advocis to identify the educational requirements of their members and develop programs to meet these needs. (Start – Year 1; Implementation – Year 2)
- Identifying opportunities to partner with institutions, such as Simon Fraser University, to expand the revenue generating capacity of our educational offerings. (Start – Year 2)
- Identifying partnerships with other organizations to evolve CAGP's curriculum into the online learning realm, while ensuring that our profitable classroom courses are not cannibalized. (Year 2-3)

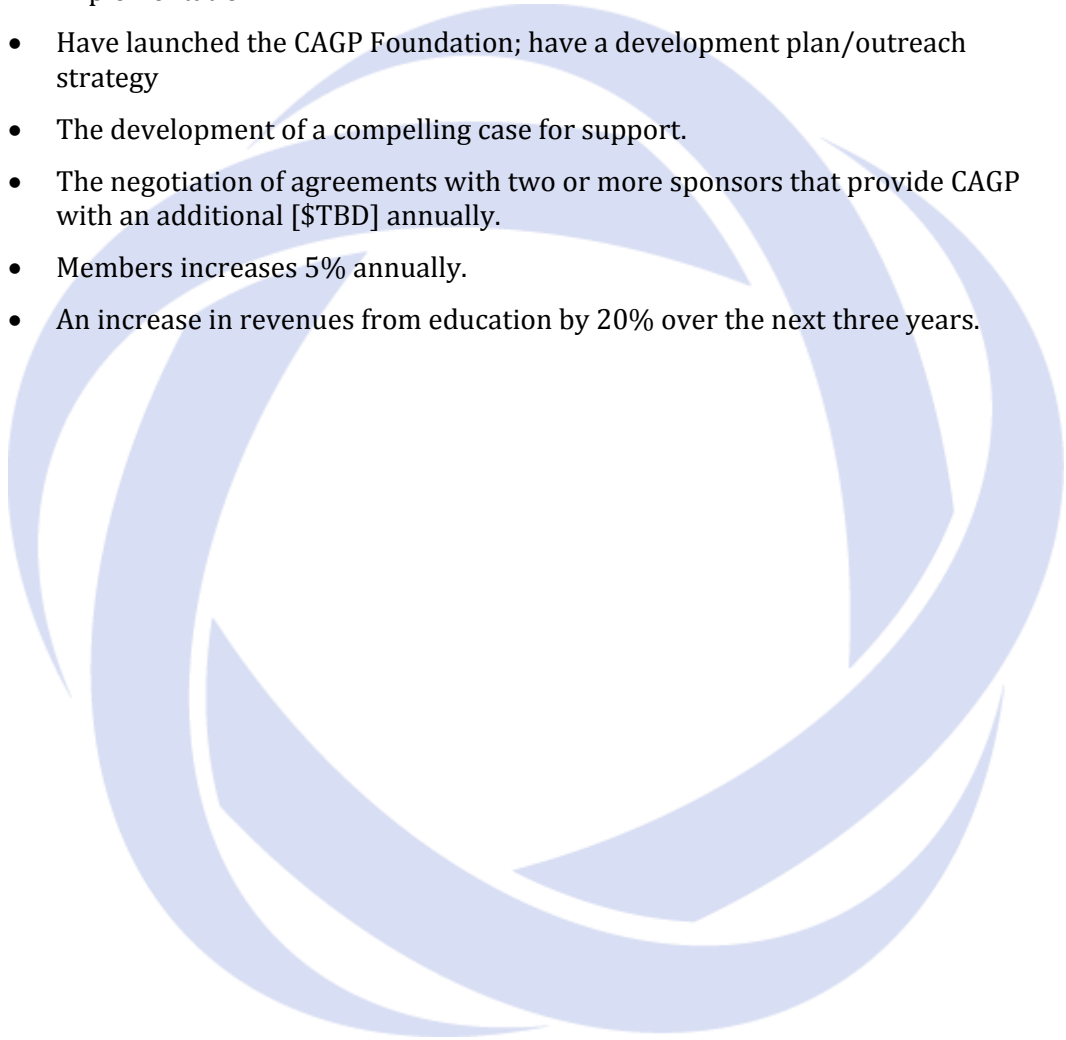
Membership

- Working with Chapters to enhance their ability to attract and retain members. (Start – Year 1; Ongoing)
- Increasing member retention through greater awareness of CAGP's achievements and the personal benefits of membership. (Start – Year 1;

- Working with Chapters to enhance the actual and perceived value of the local Chapter. (Start – Year 1; Implementation – Year 2)
- Reviewing and renewing packages to a) welcome to new members and b) recognize renewing members. (Year 2)

Performance indicators of progress against this objective include:

- The establishment a committee to oversee the preparation of a long tem revenue development plan; and to actively assist the National Office with implementation.
- Have launched the CAGP Foundation; have a development plan/outreach strategy
- The development of a compelling case for support.
- The negotiation of agreements with two or more sponsors that provide CAGP with an additional [\$TBD] annually.
- Members increases 5% annually.
- An increase in revenues from education by 20% over the next three years.



EDUCATION

Objective

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

Strategy

As Canada's leading provider of education on *strategic charitable gift planning*, to date our educational offerings have been provided primarily in classroom settings, and directly by CAGP-trained faculty.

We have the opportunity to significantly expand the number of people who are exposed to our educational offerings, by:

- Ensuring that we are delivering best-in-class education, through a commitment to continually updating and improving our offerings. (Ongoing)
- Developing and promoting a roadmap for learning that provides an evolution of professional development that supports gift planners and professional advisors through their career journey. (Year 1)
- Refining the content of the Gift Planning Fundamentals and continue to focus on this course as our broadest offering to promote the opportunities of strategic charitable gift planning. (Year 1)
- Further adapting course content as necessary for marketability to professional advisor 'community'. (Year 1)
- Expanding the base of trained faculty to ensure capacity in order to meet demand for education offerings. (Year 2)

Performance indicators of progress against this objective include:

- The establishment of an Education Marketing Committee (as distinct from the Education Committee) to identify opportunities for monetizing CAGP's intellectual property.
- A finalized agreement with Advocis.
- A strategy and implementation plan to offer one or more specific courses online.
- # of Gift Planning Fundamentals delivered
- # of course attendees; # of members/non-members; # of charity professionals & others

STAKEHOLDER ENGAGEMENT & COMMUNICATION

Objective

Enhance communications and outreach to stakeholder networks (members, prospective members, cross-sectoral alliances) to ensure dissemination of strategic information and highlight the Value Proposition of CAGP.

Strategy

Despite the communication that goes out from the National Office about CAGP and *strategic charitable giving*, surveys confirm that many members are not as familiar with our work and achievements as we would like. In addition, our Chapters lack tools to effectively communicate with members, prospects and others within their communities.

We have an extremely powerful story that deserves to be told. We will do this by:

- Ensuring effective communication platforms to share information on CAGP, our programs and assets, and content and issues relevant to the field of strategic charitable gift planning. (Start – Year 1; Implementation – Year 2)
- More effectively communicating the value in *strategic charitable giving* and CAGP to prospective members (through members, Chapters, etc.) (Year 2)
- Sharing the CAGP story, accomplishments and so forth with Chapters / members on a regular basis. (Year 2)
- Recognizing new members with an updated welcome package that includes information on how they will benefit, and providing renewing members with information that reinforces the wisdom of their decision. (Year 2)
- Increasing the frequency of Chapter visits by National Office staff, and Board members. (Ongoing)

Performance indicators of progress against this objective include:

- A Communications and Marketing Committee to support the development and implementation of a strategic communications plan to promote CAGP programs and initiatives.
- The development of a compelling CAGP story to promote the Association to prospective members, refresh member perceptions of the value inherent in membership and inform the community about *strategic charitable giving* and CAGP's advocacy role.
- A strategic communications plan with clearly delineated target audiences, communication channels and key messaging.
- Chapter communication and interaction – phone calls with Chapter Chairs, visits by staff and Board members. Year 1 – benchmark; Year 2 – determine target; Year 3 – determine target.
- A welcome package for new members.

- A package that recognizes the value CAGP places on renewing members.
- Monitoring social media activity – website, Twitter, Facebook, LinkedIn
- Fully leveraged digital platforms

