



The Canadian Association of Gift Planners 2025-2029 Strategic Plan

Adopted by the CAGP Board of Directors on November 2, 2024

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About CAGP

CAGP is a national, non-profit professional association with a 30-year history of strengthening philanthropy in Canada. Our members are charitable fundraisers and professional advisors across the country. We inspire and educate people involved in strategic charitable gift planning, advocate for a beneficial tax and legislative environment that strengthens philanthropy giving, create a networking environment of like-minded professionals, and promote strategic charitable giving and estate giving to everyday Canadians.

Established in 1993, we are the only Canadian professional association that brings together charitable fundraisers and professional advisors. Through a commitment to a stringent Code of Ethics, continual learning and networking, and a willingness to share, our members help each other grow and develop as professionals in their respective fields.

As a national, community-based organization, our 20 local Chapters across the country are an essential partner in CAGP's mission and play a vital role in building relationships and engaging members to strengthen philanthropy and strategic charitable gift planning.

The CAGP Foundation was established in 2017 in response to a rising demand for CAGP to offer more education programming, public awareness, research and government relations work around strategic charitable philanthropy. It was a demand CAGP was unable to meet with its resources at the time. The creation of a charitable organization allowed us to raise additional funding through charitable contributions. With the support of our generous donors we were soon able to hire our first in-house faculty, greatly expand our education program, carry out relevant research and launch the Canada wide public awareness Will Power campaign.

About the Strategic Planning Process

The development of this strategic plan was informed by consultations with a broad range of partners and alliances on many topics and issues of importance, as well as a PESTLE analysis:

- **Focus groups and key informant interviews:** Chapter executives, members (both professional advisors and fundraisers at charities), volunteer board directors at the CAGP and the CAGP Foundation, and other partners participated in multiple focus groups and key informant interviews. The selection process strived to engage participants who represent of Canada's racial, cultural, linguistic and geographic diversity.
- **Member surveys:** At the 2023 CAGP Conference (April 19 to 21), CAGP sought the perspectives of conference participants (both members and non-members) on a broad range of topics, such as member benefits, education programs and chapter participation. In keeping with CAGP's commitment to diversity, equity and inclusion, conference participants were also invited to voluntarily and anonymously share demographic information, which will assist the organization to develop a baseline and monitor progress over time. CAGP subsequently engaged all members who did not attend the 2023 conference through an email campaign, which requested their input on the same topics that were addressed in the conference survey. As with the conference survey, members had the opportunity to share demographic information if they wished to do so.
- **PESTLE analysis:** The PESTLE analysis identified and assessed the potential implications of political, economic, social, technological, legal and environmental trends that are relevant to CAGP. This was an essential step, given the many significant shifts in CAGP's external context since the last strategic planning process in 2018.

Together, the consultation findings and the PESTLE analysis provided valuable information and context for the planning and decision-making process that culminated in this strategic plan:

- The boards and senior management of CAGP and the CAGP Foundation participated in two virtual planning sessions prior to a two-day in-person retreat in Toronto. These sessions provided opportunity to consider the results of the partner consultations and PESTLE analysis, and develop new vision, mission and values statements.
- A subsequent in-person staff retreat provided an opportunity for staff at all levels of CAGP and the CAGP Foundation to share their perspectives on draft vision, mission and values statements, and to develop strategic directions.
- Board directors and senior management from CAGP, and a representative from the CAGP Foundation, then convened for a final half-day planning session to refine and ensure consensus on the new vision, mission and values statements, as well as strategic directions and key initiatives for this strategic plan.

Our Strategic Foundations

This strategic plan is grounded in new vision, mission and values statements. Together, these elements convey the very foundations of our organizational strategy: they articulate what we do, why we do it, and how we strive to show up in the world.

Our Mission

We strive to expand resources for causes and communities by educating, advocating and increasing equitable access to charitable gift planning.

The new mission statement reflects not only CAGP's core purpose – to promote and support charitable gift planning through educational programs and public policy advocacy – but also our commitment to reach and support people and organizations that have not traditionally engaged in charitable gift planning. The intended impact of these activities is to expand resources for diverse causes and communities across the country.

Our Vision

A more generous and just society.

The new vision statement flows from the new mission statement, as it reflects our conviction that more equitable access to charitable gift planning will result not only in more charities establishing gift planning programs, but also more Canadians giving to charities through gift planning vehicles. Over time, we believe this increased generosity will enhance the sustainability of a broader range of charities with diverse missions, including the provision of services and supports to under-served communities. This, in turn, will result in more just outcomes for those who currently face the greatest barriers to their safety, security and well-being in our society.

Our Values

The new values statement will shape the character of our organization, inform the way we deliver on our mission and guide us through challenging situations and decisions. It will also support everyone in CAGP's community, others in the philanthropic sector and the general public to better understand the values we hold most dear.

Organizational values are principles that guide CAGP's decisions and actions, shape the culture of our organization and serve as a beacon to assist in navigating challenging situations as we deliver on our mission. In everything we do, we are committed to upholding these values:

Belonging

- *We provide a respectful, welcoming and engaging community that celebrates our diversity and fosters a sense of belonging for all.*
- *In all that we do, we strive to include and amplify the voices and perspectives of historically underrepresented groups.*

Generosity

- *We recognize and celebrate the myriad ways in which diverse people, communities and cultures contribute to the greater good.*
- *We strive to inspire everyone touched by our work to give in the ways that are meaningful to them.*
- *We believe philanthropy benefits those who give just as it benefits those who receive.*

Equity

- *We share our expertise, facilitate knowledge exchange and make information about gift planning more accessible for all*
- *We strive to identify and reduce barriers to participation in our programs, activities and events.*
- *We collaborate with others to advocate for greater justice, equity and belonging in our sector.*

Leadership

- *We are accountable for and will take responsibility for the consequences of our actions.*
- *We are courageous in challenging the status quo and will not be bystanders on issues relevant to our mission.*
- *We are honest, transparent and trustworthy in all of our relationships and dealings*
- *We keep abreast of new ideas and ground our work in quality research and empirical evidence.*

Strategic Directions

From 2025 to 2029, the following strategic directions and related initiatives will guide CAGP's work:

Strategic Direction: Expand the gift planning community by building awareness and strengthening our voice. We will do this by:

- Expanding awareness of CAGP and of gift planning as an integral aspect of fundraising strategy amongst leaders and fundraisers in the charitable sector.
- Expanding awareness of CAGP across a broader range of professions, and amongst employers of professional advisors.
- Improving local presence and building a more connected community from coast to coast to coast, with a focus on under-served geographic areas.
- Renewing and enhancing the value proposition of a CAGP membership.

Strategic Direction: Raise public awareness of the impact of charitable gifts in wills. We will do this by:

- Persuading more Canadians to make a charitable gift in their wills through the Will Power Campaign.

Strategic Direction: Increase recognition of CAGP as the educational leader and foremost expert on gift planning within in the philanthropic sector and the public policy spaces. We will do this by:

- Raising the profile and increasing the reach of education programs through new, non-traditional and sustainable approaches.
- Developing and adequately resourcing a research strategy.
- Developing and adequately resourcing a government relations strategy.

Strategic Direction: Ensure long-term sustainability and capacity to deliver on our mission well into the future. We will do this by:

- Investing in governance and our people to enhance organizational resilience and effectiveness.
- Developing and adequately resourcing a DEI strategy that informs governance and decision-making, reduces barriers, and supports inclusion and belonging for under-represented communities.
- Pursuing capacity-building initiatives to support thriving chapters across the country.

Acknowledgements & Gratitude

Many people supported and contributed to the creation of CAGP's 2025-2029 Strategic Plan.

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CAGP

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