



# 28th Annual National Conference on Strategic Philanthropy

April 14-16, 2021  
Halifax, NS

Call for Proposals &  
Information for  
Presenters - **May 2020**





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The CAGP National Conference Program Committee invites you to participate in CAGP's 28th National Conference on Strategic Philanthropy.

## 1. Conference Theme and Objectives

The annual conference is a showcase for gift planners, fundraisers and professional advisors and other senior leaders to exchange information, knowledge and ideas on all aspects of the gift planning process, from the interpersonal to the highly technical, as well as broader issues and trends pertinent to our delegates.

Our theme this year is:

### *Rise Again: Navigating the Future*

#### **Conference objectives are:**

- Provide advanced education and new strategies in charitable giving
- Strengthen gift planning networks and connections
- Showcase the destination where the conference takes place

## 2. Conference Format & Delegates

Given the uncertainty of the course of the COVID-19 pandemic and the implications it might have for planning the 2021 conference, ***CAGP is in the process of determining if the conference will be either an in-person conference, a virtual conference or a hybrid of the two.*** We still anticipate engaging 300+ delegates from across the country in whatever form the conference eventually takes.

CAGP members are leaders in Canada's charitable community and provide donors/clients with new and innovative ways of achieving their philanthropic dreams and impacting Canada's philanthropic landscape in meaningful ways. Members also include professional advisors – lawyers, insurance brokers, accountants, financial planners etc. who advise clients at all ages and stages on the management and disposition of their wealth. Through a commitment to a stringent Code of Ethics, continual learning and networking and a willingness to share, our members are committed to growth and development as professionals in their respective fields.

## 3. Call for Proposals

The Conference Program Committee is seeking proposals for sessions to contribute to an overall program that will:

- Attract and serve a rich, diverse audience
- Support the conference themes and objectives
- Be relevant and engaging for attendees at all levels of experience and across the professional spectrum of gift planners.
- Be flexible in its presentation format with the ability to adapt to an in-person presentation or a virtual presentation
- Address the traditional topics of gift planning as well as the changing face of philanthropy; broader professional issues or trends; issues around the impact of the COVID-19 pandemic and its effect on charities, donors and charitable giving
- Clearly demonstrate how an understanding of gift planning wisdom can help organizations, communities and donors achieve their philanthropic dreams
- Engage delegates through creativity and interaction, a variety of approaches, concepts and applications

**The deadline for submissions is June 29, 2020.**

## 4. Topic Streams & Session Examples

Topic Streams are set to be congruent with [CAGP's Competency Framework](#). Speakers are encouraged to consider the following Topic Streams and examples in developing their proposal, as well as submit additional topics of interest/relevance to our delegates.

### A. Building Relationships

Sessions that explore the art of being truly donor/client-centred, as experienced professionals share strategies and tactics for building an authentic rapport with donors and clients that will evolve relationships from the transactional to transformational.

- Working with people who are bereaved or facing mortality
- Donor visits; Working with donors with dementia; Tough donor conversations
- Diversity and inclusion; Building cultural competency
- Recognition and stewardship practices
- Managing a gift planning portfolio; identifying gift planning prospects; closing a gift
- Working with executors and trust companies
- Building and cultivating relationships with donor's families and professional advisors

### B. Ethics & Judgement

Strategic charitable gift planning often brings unique opportunities and challenges. These sessions will enable delegates to proactively tackle challenges and pursue opportunities to manage gift planning programs with excellence.

- Transitioning into retirement;
- Boundaries in gift planners' relationships with donors;
- Scandals around charity/philanthropy and the impact on citizen trust

### C. Gift Planning Vehicles

Bequests are the cornerstone, but why stop there? These sessions will serve to increase knowledge and understanding of the variety of current and deferred gift vehicles, such as securities, registered funds, insurance, gifts-in-kind, as well as the opportunities and impact they have for donors.

- Testamentary gifts, insurance, registered funds, blended gifts and strategies; Problematic or innovative gifts and receipting case studies; Strategic giving case studies
- Advanced gift vehicles, e.g. gifts of options, dividends, flow through shares, real estate, CRT's
- Donor Advised Funds; Working with high net worth donors

### D. Legal Issues of Gift Planning & the Charitable Sector

These sessions will help professionals hone their technical knowledge and sharpen their expertise to support donors / clients along their philanthropic journey, and manage their gift planning program or practice with confidence and competence.

- Understanding tax planning and advantages; Common Law and Quebec Civil Code issues
- Non-profit accounting/gift processing
- Legal, regulatory and financial aspects of gift planning; New Trust laws and impact on estate administration
- Legal obligations of the charity

## E. Know Your Charity

Philanthropists are becoming increasingly involved and savvy, and estates are becoming more complex, making a sound understanding of governance and financial matters integral to success. These sessions reach beyond gift and estate planning to the broader spectrum of charity management and oversight.

- Digital tools for gift planning; Data
- Leadership development; Organizational culture
- Hiring/Motivation/Evaluation/Training; Workplace issues, e.g. toxicity, harassment
- Integrated gift planning; Breaking down silos
- Sub-sector issues: education, health, faith-based, community foundations, arts/cultural sectors
- Gift planning in a small shop
- Creating a gift planning case for support for your Board; Goal setting and measurements for senior staff and Board reporting
- Policies & procedures

## F. Marketing & Communications

These sessions introduce delegates to the newest and greatest ideas to develop and distribute targeted gift planning marketing and communications collateral across multi-media platforms.

- Demographics
- Multicultural perspectives on death, dying, estate giving, etc.
- Benchmarks and metrics; research on giving and analytics
- Marketing methods, e.g. advertising, direct marketing, face-to-face, social media, websites, etc.
- Messaging in an age of information; Competing for attention in a multi-fractured information space

We love new ideas, so don't let the above limit you. If you have a concept to share, a difficult situation to discuss, a challenge you've learned from, an inspiring approach to reveal, or an apple cart to upset, that you think will be of interest to our delegates, consider submitting a proposal.

## 5. Session Format

In planning for different possible conference scenarios we have divided the session formats as follows:

### *In-person Sessions*

We are seeking proposals for sessions, either 60 or 90 minutes in length in the following formats:

I. Workshop Presentation: Workshops should be a combination of presentation and dialogue with participants

II. Panel Discussions: Panels should reflect diverse views and experiences. Panel presentations may feature no more than three panelists.

### *Virtual Sessions*

These sessions will be shorter presentations, either 45 or 60 minutes in length. They can follow the format for workshop or panel discussions above but attention to audience engagement and participation is particularly important and proposals for virtual sessions will be reviewed with this in mind. Virtual presentations may also be presented as one of the following:

I. Pre-recorded Session: Speakers may have the option to pre-record their session if that better suits their presentation style and content. If sessions are pre-recorded, speakers will be asked to be available during the virtual session to answer delegate questions following the recorded presentation.

II. Live Session: Speakers may present their virtual session live at the time the virtual conference takes place.

## 6. Education Levels

Please tailor your session to address one of the following educational levels:

**INTRODUCTORY:** Teaches basic gift planning skills. Best suited to those with less than 2 years of gift planning experience, those currently working in major, annual or campaign positions who wish to learn more about gift planning, or staff / board members considering establishing a gift planning program at their organization.

**INTERMEDIATE:** Advances or improves an active gift planning program. For audiences with *more than 2* years of gift planning experience, e.g. gift planning officers, staff/board members who work on major giving, annual campaign, donor relations, policy, financial transactions and/or administration. Also suitable for professional advisors with an interest in improving their technical knowledge and basic skills in gift planning.

**EXPERIENCED:** Concerned with more detailed technical, regulatory and legal aspects of gift planning and dealing with donors/clients who are looking for expert advice on complex, transformational gifts. Best suited to those with 5 or more years in gift planning and professional advisors who follow a values-based, holistic approach in serving clients, and wish to incorporate charitable giving into their practice.

**GENERAL:** Educational sessions that would be of interest to gift planners, professional advisors or charity staff, volunteers or board members with any level of gift planning experience.

## 7. Expectations of Presenters

Presenters are expected to:

- Be open to discussing changes to the proposed presentation as recommended by the Program Committee.
- Submit a proposal that can be adapted to either an in-person presentation or a virtual presentation.
- Review the attached article on writing conference session descriptions and ensure the session description provides clear learning objectives and accurately describes what the actual presentation will deliver.
- Not deviate from content, process, names or numbers of presenters outlined in the proposal without prior approval of the Program Committee.
- Provide a complete presentation in electronic format **by March 22, 2021**. This is a tentative date and will be confirmed in the new year.
- Conference delegates will be able to access the presentation on the CAGP website. Access will be password protected and available to registered delegates only.

- Agree to have the session audio and video recorded (if appropriate) and the presentation captured electronically for possible broadcast and sale by CAGP following the conference. All presentation content remains the intellectual property of the presenter.
- Should there be a virtual component to the conference, speakers must be available for a rehearsal up to 4 weeks before the virtual conference goes live. Dates and times will be provided in the new year.
- **Understand that sessions are not to be a marketing opportunity for products or services, and the content should provide learning and actionable ideas for participants.** If you wish a speaking opportunity to market services or products, please speak to CAGP about one of our Sponsored Education Early Bird Sessions.
- Present without remuneration. While we are enormously appreciative of the contribution of our education presenters, CAGP regrets it is not able to pay a speaker fee or reimburse for conference related expenses, including travel. We do however, offer speakers a discount on the conference registration fee. Details will be included with the speaker confirmation information.

## 8. Proposal Selection Criteria

We seek diversity in methodology, topics and sector focus, size of shop, experience level and demographics of presenters. We also try to balance regional representation by showcasing the experience and knowledge of presenters in the city where the conference is held.

The Conference Program Committee evaluates all proposals using an established review process based on the following criteria:

- Clear session purpose, description and intended results
- Presentation of ideas, experience and learning that reflects new thinking and/or improves the field of gift planning
- Level of audience engagement
- Draws on documented theory and/or practice
- A clear relationship between the session content and the conference theme and any or all of the conference objectives

An individual may submit more than one proposal. Please note that we seek to have a diversity of topics and speakers and thus prefer not to have speakers present more than once, or have more than two presenters from any one organization, unless otherwise decided by the Program Committee.

## 9. Submission Information

To submit your proposal, please visit the online submission form or request a Word version: <https://airtable.com/shrRNsp3dt3D08YGd>

**The deadline for submissions is June 29, 2020.**

The primary presenter on the Session Proposal form will be notified of acceptance in mid October 2020.

In the online submission form you will be asked to complete these questions to submit a session proposal:

- a) Primary Presenter Name & Contact Information
- b) Additional Presenters with Contact Information
- c) Day/Time Conflicts
- d) Is the session appropriate for in-person only, virtual only or both?
- e) If you present virtually, do you prefer to pre-record your session or present it live?
- f) Choose the length of your session
- g) Choose the topic stream for your session
- h) What is the education level of your session?
- i) Session Title
- j) Provide a 100 word abstract of your proposal
- k) Provide a more descriptive abstract of the session (250 words)
- l) Speaker biographies (100 words each)
- m) Speaker photo (jpeg or png, 72-92 dpi, 1000-2000 pixels on the long side) Please name the file with the speaker's last name.
- n) Provide 3 learning objectives for your session?
- o) How do you plan to engage the participants especially in a virtual format?
- q) Teaching or speaking experience in the past two years
- r) If you have given a virtual presentation please provide the url to it.

## **10. For Further Information**

If you have any questions, please contact:

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## 11. Optional Resources: Presentation Preparation

CAGP has provided some speaker resources to help you prepare for your proposal submission and presentation.

- A. An article on writing conference session descriptions that helps speakers write descriptions that provide clear learning objectives and accurately describe what the presentation will deliver.

<http://velvetchainsaw.com/2010/03/18/crafting-better-conference-materials-writing-session-descriptions-for-dummies/>

- B. CAGP has created an exclusive professional development opportunity for conference workshop presenters. *Presentation Impact: How to craft and deliver professional, meaningful and memorable presentations*, is a 3-part webinar series by Sarah Louise Turner, founder and lead coach of *VoiceWerx*, a highly respected presentation skills training company based in Vancouver. To access the series, please contact Erin Kuhns, 1.888.430.9494 x222/ [ekuhns@cagp-acpdp.org](mailto:ekuhns@cagp-acpdp.org)