

PROSPECTUS

FOR PARTNERS & EXHIBITORS

CAGP'S 29TH NATIONAL
CONFERENCE ON
STRATEGIC PHILANTHROPY



**GROWING
TOGETHER
MAKING CHANGE**



WESTIN BAYSHORE, VANCOUVER BC • APRIL 19-21, 2023



AN INVITATION

TO BE A PART OF CAGP'S 29TH ANNUAL NATIONAL CONFERENCE ON STRATEGIC PHILANTHROPY

Please join us from April 19-21 at the Westin Bayshore in Vancouver for CAGP's 29th Annual National Conference on Strategic Philanthropy.

CAGP champions the growth and development of strategic charitable gift planning in Canada.

Since 1994 CAGP's annual conference has been a premier event for gift planners, fundraisers, professional advisors and senior leaders to exchange information, knowledge and ideas on all aspects of strategic charitable giving.

For 2023, Vancouver provides the backdrop for an exciting array of session presenters and plenary speakers designed to provide delegates with the outstanding learning and networking event that CAGP consistently delivers each year.

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**CAGP IS THE MOST
IMPORTANT ANNUAL
CONFERENCE IN CANADIAN
PHILANTHROPY FOR THE
KNOWLEDGE, NETWORKING
AND TOTAL EXPERIENCE.**

--Malcolm Burrows
Scotia Wealth Management



WHY BECOME

A CONFERENCE PARTNER?

Sponsors and exhibitors are an important part of our National Conference. They play a crucial role in delivering an exceptional conference experience.

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VERY INTERESTING AND USEFUL SESSIONS. EVERYONE WAS VERY WELCOMING, I DIDN'T FEEL OUT OF PLACE. THIS EXPERIENCE ENERGIZED ME TO TAKE OUR GIFT PLANNING PLAN TO A HIGHER LEVEL.

*--Laura Kempthorne
Executive Director Brandon Area
Community Foundation*

PARTNER BENEFITS

Promote & Showcase

Present your brand and products to our delegates and raise your profile above your competitors. Promote your company as a partner of CAGP, the industry leader for strategic charitable giving.

Network & Connect

Connect with charitable gift planners, senior leaders and professional advisors who are

recognized leaders in philanthropy. You'll expand loyalty and build opportunities with current and future clients.

We Love You!

We're dedicated to making you part of a truly great conference experience. That's why we like to call our sponsors "partners". We work together to ensure everyone gets the most out of this event.



PARTNERSHIP OPPORTUNITIES

In addition to the specific benefits associated with each partnership (see sponsorship grid) all partners and exhibitors will be included on the conference website and will be acknowledged on-site at the conference.



CAGP CONFERENCE AFTER ALL THESE YEARS STILL DELIVERS EXCEPTIONAL EDUCATIONAL AND NETWORKING OPPORTUNITIES.

--Jennifer Ingham
VP University Relations Capilano University

DIAMOND SPONSOR OPPORTUNITY

Premier Conference Partner

~~\$30,000~~
(SOLD!)

With this exclusive sponsorship opportunity, you'll be our main partner on a conference that will leave delegates with a lasting memory of an outstanding experience. Our partnership will be further showcased throughout the year with an array of branding and promotional opportunities as we market the Conference and build excitement around all the Conference offers. An entirely customized package will be created for our Premier Partner.

PLATINUM SPONSOR OPPORTUNITIES

Education Sponsor

\$12,000

As the overall Education Sponsor, your company will support the country's premier learning event on strategic charitable giving.

Friend of CAGP Award Presenting Sponsor

\$15,000

The Friend of CAGP Award is CAGP's highest honour given each year to up to three outstanding leaders and influencers in strategic philanthropy. The award's presentation at the conference banquet is a special time and an anticipated part of the event. With this sponsorship, your company showcases itself as aligned with excellence in the strategic charitable gift planning community.

PARTNERSHIP OPPORTUNITIES

GOLD SPONSOR OPPORTUNITIES

Plenary Session

\$6,000 each (up to 6 packages)

Plenary sessions are the connective tissue of the CAGP Conference, showcasing inspirational and thought-provoking speakers and content.

The FRANK Event

\$6,000 (Plenary session)
\$6,000 (FRANK recording)

This signature CAGP Conference plenary session pushes the boundaries and stimulates new ideas with dynamic speakers debating provocative topics or sharing bold perspectives on an issue that impacts strategic philanthropy. This sponsorship can be upgraded to include video recording the event for year-round viewing and archiving on CAGP's YouTube channel.

Master Class

\$6,000 (up to 3 Master classes)

One of our most popular education session formats, these informal, small sessions allow participants to engage with experts in a chosen field and delve deep into the session topic.

First-time Delegate Reception \$6,000

A special way for CAGP to welcome first time delegates to the conference and introduce them to our Board and partners.

Banquet \$6,000

Thursday night's banquet is a highlight of the conference where CAGP honours its members and treats its delegates to a fine dinner and fun entertainment.

Delegate Bag \$6,000

Delegates tell us they use our unique CAGP conference bags all year long – with your logo on it!

Notebook \$6,000

Sponsored notebooks are handy for note-taking at the conference, and beyond.

Lanyard / Nametag \$6,000

Delegates will wear your company name at all times during the conference.

USB \$6,000

Support our paperless journey as delegate lists and other important conference material are distributed on a branded USB.

Conference Mobile App \$6,000

Delegates can review conference plenary and session descriptions, presenter bios, venue maps, and more on their smartphone using the conference app that showcases your sponsorship.

Conference Website \$6,000

The conference website is where delegates go to find information about sessions, social events and registration. This is a high-profile sponsorship for your organization.

Sponsored Early-Bird Breakfast Session \$5,000 (2 available)

Provide our delegates with a 45-minute session in which you can showcase your products, services or expertise during a scheduled breakfast.

Registration Sponsor \$5,000

The registration desk is where all delegates check-in with our CAGP staff and volunteers over the course of the conference, and where they pick up their delegate bags and badges. Every single delegate passes through registration, get your brand in front of them all by sponsoring this area.

Wifi Sponsor \$5,000

The conference wifi access is a complimentary benefit all delegates use during their time at the conference, providing a great profile for your organization's sponsorship.

Exhibit Hall Networking Lounge/Recharging Station \$5,000

The exhibit hall is a great place for networking and we have activities to complement the exhibitor booths and encourage delegate interaction. The lounge is a relaxing place within the exhibit area for delegates to recharge and network.

PARTNERSHIP OPPORTUNITIES

SILVER SPONSOR OPPORTUNITIES

Partners & Donors Reception \$4,000

This is our opportunity for a special and private thank you to all those who contribute to make the CAGP conference a success and to celebrate donors to the CAGP Foundation.

Banquet Entertainment \$4,000

During the banquet dinner, your organization will introduce and thank the entertainers for the evening.

BIPOC Delegate Bursary

Help us diversify our CAGP community by bringing someone from an equity-seeking group to the Conference who might not otherwise be able to attend.

For those new to our CAGP community, we also throw in a complimentary CAGP membership!

Local Bursary \$1,500

Covers conference registration for a local delegate

National Bursary \$3,500

Covers conference registration and a stipend to help with travel and accommodation expenses.

Welcome Reception \$3,000

The excitement is palpable at this opening event as delegates come together for their first opportunity to network and connect.



Banquet Reception \$3,000

The pre-banquet reception is a relaxing time as delegates warm up for a lovely evening ahead.

Conference Social Event \$3,000

This evening social event showcases local venues and food and the hospitality of the Host Conference Committee.

Photographer \$3,000

Sponsor a professional photographer at the conference to capture memorable moments.

Speaker Gift Sponsor \$3,000

Be the sponsor to help us say thank you to all of the wonderful speakers presenting at the conference.

Education Session Topic Stream (6) \$3,000 each or 2 for \$4,500

Support a stream of learning through sessions that align with your company's objectives and priorities.

Refreshment Breaks (3) / Desserts (2) \$1,750 each (discounted rate for two or more)

At 30-45 minutes, our refreshment breaks and desserts leave delegates with plenty of time to fuel up, circulate among exhibitors and network.

“THE CAGP CONFERENCE IS AN INVALUABLE OPPORTUNITY TO HEAR FROM OUR NATION'S BEST! IN EVERY SESSION AND PLENARY, THERE ARE NUGGETS OF WISDOM THAT HELP ME TO MOVE THE NEEDLE FOR THE FUTURE OF MY ORGANIZATION AND FOR THE SUPPORTERS WHO LOVE IT SO DEARLY.

--Anne MacKay
Hospice Wellington

Pre-Conference Day Sponsor \$3,000

CAGP's Gift Planning Fundamentals is a signature pre-conference course where delegates will spend the day in deep learning prior to the start of the conference.



SPONSORSHIP BENEFIT ADD-ONS

Interested in augmenting your sponsorship? It's a great way to enhance the delegate experience and notch up the profile of your company.

We are pleased to suggest the following sponsorship benefit "add-ons".

- **** NEW THIS YEAR **** CAGP is aiming to make the National Conference on Strategic Philanthropy carbon neutral! Increase your sponsorship with a minimum contrition of \$500 to our carbon neutral fund. We look forward to celebrating your unique support at the Conference, and announcing how many carbon offsets we were able to purchase!
Minimum contribution of \$500
- Send a targeted email message to conference delegates following the conference to remind them of your services or engage them further with your organization **\$1,000 (2)**
- Showcase your organization with a colour ad or organizational logo on the Conference website.
Prices range from \$125-\$250 depending on placement.
- Provide a conference registration(s) bursary for potential attendees who might not otherwise be able to attend. **\$1,500 per registration**

MEETING YOUR SPONSORSHIP OBJECTIVES

We know that our partners may have specific needs and goals for their sponsorship. While we are pleased to share a few ideas and opportunities, we'd be thrilled to customize a sponsorship package that meets your unique interests and objectives. Please reach out to CAGP President & CEO, Ruth MacKenzie, at rmackenzie@cagp-acpdp.org.

- Promote your company with a promotional item. Include an 8.5" x 11", one page advertisement or gift in our conference delegate bag (not exclusive). Marketing material or gift provided by your organization. CAGP strongly encourages eco-minded promotional items. **\$1,000 (2)**

CONFERENCE EXHIBITORS

WHY EXHIBIT AT THE CAGP CONFERENCE?

- Exclusive access to your target market of gift planners and professional advisors
- Our exhibit area is fully integrated in our conference floor plan and activities, maximizing interaction with delegates
- Connect with decision makers who are leaders in strategic charitable giving
- Maximize your company's visibility and exposure during extended conference networking breaks
- Build recognition of your company and products for increased brand awareness
- Showcase your latest products and services

“IT WAS TRULY ONE OF THE WARMEST, FRIENDLIEST CONFERENCES I HAVE EVER ATTENDED. EVERY TABLE I SAT AT RESULTED IN NEW FRIENDS AND COLLEAGUES!”

*--Emmy Stuebing
CEO of the Zebra Child & Youth
Advocacy Centre*

Exhibit Booths

\$2,500 (2 days) *(up to 15 booths available)*

Your package includes:

- One 8'x8' booth space, defined by pipe and drape
- One 6' table, with two chairs
- Standard electrical outlet

Value-Added Benefits of Exhibiting

- Your company's name, logo and website link on the CAGP Conference website
- One complimentary conference registration
- A conference delegate list
- Opportunity to update your database with a draw at your booth
- Link to company website in onsite mobile app

Contact our Conference Planner or complete our sponsorship form to confirm your partnership at the CAGP Conference:

Caralen Law

Conference & Event Planner
Canadian Association of Gift Planners (CAGP)

📞 613.232.7991 ext. 227

✉️ claw@cagp-acpd.org

Thank you for your interest in
CAGP's 29th Annual National
Conference on Strategic
Philanthropy!

CAGP CONFERENCE

DELEGATE PROFILE AND MARKETING REACH

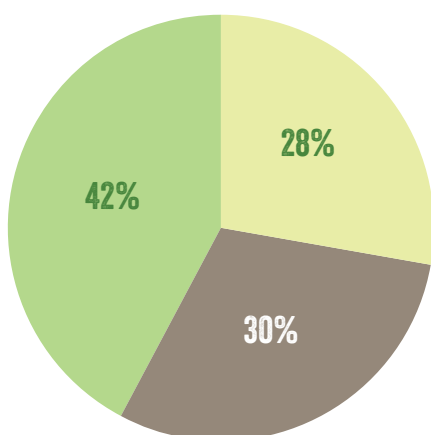
DELEGATE OVERVIEW:

Conference delegates are comprised of fundraising professionals within their respective charitable and not-for-profit organizations, board members, volunteers, professional advisors, lawyers, financial planners, estate planners and insurance brokers. Delegates attend from across the country and there is always a good representation of local gift planners and professional advisors in attendance.

AVERAGE OVERALL CONFERENCE ATTENDANCE



378



SIZE OF DELEGATE'S ORGANIZATION

- Small non-profits with 1-19 employees
- Mid-sized organizations with 20-100 employees
- Large organizations with over 100 employees

YEARS IN THE GIFT PLANNING FIELD

50%+

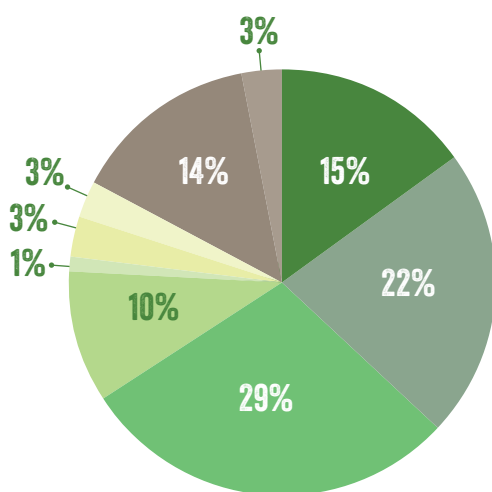
More than half of attendees are experienced gift planners with **6-20 years**;

38%

have under **5 years** of experience

10%

have advanced experience of **20 or more years**.



DELEGATE'S MAIN ROLE IN THEIR ORGANIZATION

- Gift Planner
- Fundraiser
- Gift Planner & Fundraiser
- Gift Planning Consultant
- Lawyer
- Financial Advisor
- Accountant
- Executive Director
- Other

DECISION-MAKING ROLE

62%

of delegates influence or assist in decisions to purchase gift planning services or products.

18%

of delegates have no decision-making role.

20%

of delegates actually make purchasing decisions.

CONFERENCE DIGITAL FOOTPRINT IN 2022

88%

of attendees used the 2022 Conference website to find information about the Conference, with

26,241

page views during our promotional period.

Our conference marketing emails reach an average of

2800 PEOPLE

and up to **350 people** when communicating with conference attendees

90%

of conference attendees downloaded and used the conference app in 2022

with an average of **90 page views** per user

The 2022 Conference hashtag **#CAGP22** created

2.9MILLION

total impressions across Twitter and Instagram, with **398.5k** of those being unique impressions.



YOU'LL BE IN GOOD COMPANY

Abundance Canada

Advocis

Blackbaud Canada

BMO Private Wealth

CAGP Foundation

CAGP Nova Scotia Chapter

CanadaHelps

Cape Breton University

Cardinal Capital Management

Carters Professional Corporation

CFRE

CI Assante Private Client

DLA Piper (Canada) LLP

The Donor Motivation Program™

DonorPerfect Canada

Environics Analytics

Environment and Climate Change Canada (ECCC)

Epilogue

Fasken

Good Works

Hilborn Charity eNews

iWave

KBF Foundation Canada

KPMG Family Office

Legacy Leaders Inc.

Miller Thomson LLP

Past Partners and Exhibitors

Norton Rose Fulbright Canada LLP

PearTree Canada

PGgrowth

Private Giving Foundation, Available through TD

QEll Health Sciences Centre Foundation

Raymond James Canada Foundation

RBC Wealth Management – Royal Trust

Scotia Wealth Management

Taste of Nova Scotia

The Foundation (WCPD)

PARTNERSHIP BENEFITS

AT A GLANCE

BENEFITS	DIAMOND*	PLATINUM	GOLD	SILVER	EXHIBITOR
A customized sponsor package	✓				
Logo on conference electronic materials		✓	✓		
Listing in conference electronic materials				✓	✓
Promotion of sponsor in conference related social media		✓	✓		
Acknowledgement next to sponsored session(s) or event on website		✓	✓	✓	
One complimentary conference registration		✓	✓		✓
Representative to bring greetings at sponsored session		✓	✓		
Introduce and thank speaker at sponsored session (if applicable)			✓		
Provision of delegate list onsite		✓	✓		✓
Company link to website in mobile app		✓	✓	✓	✓
Logo on speaker presentation materials website		✓			
Right of first refusal for same sponsorship for 2023 Conference		✓	✓		

* In addition to Conference related benefits, the CAGP Premier Conference Diamond-level Partner also receives an array of benefits throughout the year to promote you as CAGP's Premier Partner. To discuss a customized Premier Partner sponsorship package, please contact Ruth MacKenzie, CAGP President & CEO at rmackenzie@cagp-acdp.org.

Note: All benefits will be formalized once sponsorships are confirmed. Specific sponsorships may have additional benefits.

TESTIMONIALS

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“CAGP NATIONAL CONFERENCE IS A WORTHWHILE INVESTMENT. EXCEPTIONAL PLENARY SPEAKERS BOTH ENTERTAINED AND INSPIRED ME WITH THEIR MESSAGES. MASTER CLASSES PROVIDED ME WITH USABLE TAKE-AWAYS THAT I CAN IMPLEMENT INTO OUR LEGACY PROGRAMMING.”

Tracy Boyle, Saskatoon City Hospital Foundation

“I HAVE BEEN TO A LOT OF CONFERENCES AND CAGP RAN ON TIME AND WAS EXTREMELY WELL THOUGHT OUT AND PUT TOGETHER.”

Carolyn Soro, Globalfaces

“THIS CONFERENCE WAS A GREAT EXPERIENCE. I HAVEN'T ATTENDED CAGP SESSIONS FOR SOME TIME, AND THIS WAS A TERRIFIC REFRESHER AND ALSO OFFERED EXCELLENT UP-TO-DATE DATA, INDUSTRY TRENDS AND PRACTICAL TOOLS TO HELP US ENHANCE ALL OF OUR DEVELOPMENT PROGRAMS.”

Lisa Matte, Director of Philanthropy & Engagement Nova Scotia Nature Trust

“THERE WAS A LOT OF USEFUL CONTENT IN EVERY SESSION I ATTENDED. I ALSO REALLY LEARNED A LOT ABOUT HOW THE CHARITABLE SECTOR WORKS, WHAT THEIR NEEDS ARE, AND THE DIRECTION THEY ARE HEADING. IT WAS WONDERFUL TO MEET SO MANY DIFFERENT WONDERFUL PEOPLE, AND I LOVE THAT THE ATTENDEES INCLUDE BOTH FUNDRAISERS AND ADVISORS, FOR BETTER CONNECTIONS AND INFORMATION SHARING BETWEEN ALL THE PARTIES INVOLVED IN PHILANTHROPY IN CANADA.”

Jessica Holvik, Financial Planning Advisor, Assante Wealth Management

“GREAT TO BE ABLE TO SHARE IDEAS AND CHALLENGES FACING THE INDUSTRY.”

Glenn Stewardson, Donor Motivation Program

“THE CONFERENCE PROVIDED INVALUABLE INFORMATION, I FELT LIKE A GRATEFUL SPONGE. THE MEMBERS ARE EAGER TO SHARE AND CONNECT, MAKING IT EASY TO GROW MY NETWORK OF PEERS.”

Natasha Newby, Elgin St. Thomas Community Foundation

“LOVED EVERY MINUTE OF IT. VERY HIGH-QUALITY FIRST-TIME EXPERIENCE, WITH LOTS OF NETWORKING AND PROFESSIONAL TAKEAWAYS. I WILL BE ABLE TO IMPLEMENT AND USE MY KNOWLEDGE RIGHT AWAY!”

Meghan Maack, Carleton University

“RELEVANT INFORMATION, INSPIRING SPEAKERS, DIVERSITY OF SUBJECTS COVERED. IT WAS MY FIRST TIME AND IT WAS AMAZING!”

Isabelle Desroches, Centraide des régions centre-ouest du Québec

“EXCELLENT EDUCATIONAL CONTENT, WONDERFUL TO CONNECT WITH COLLEAGUES IN THE FIELD.”

Janice O'Dette, Planned Giving Manager, Eastern Canada Ducks Unlimited Canada

“GREAT CONTENT. LOADS OF NEW IDEAS AND CONTACTS. RENEWED ENERGY.”

Carolyn Ferguson, The Rotary Foundation — Rotary International

“INTENSIVE, RICH, INSPIRING, ALL IN ALL VERY POSITIVE.”

Antoine Gervais, Opéra de Montréal

“THIS WAS MY FIRST CONFERENCE AND I THOROUGHLY LOVED IT. THERE A WIDE RANGE OF TOPICS THAT SEEMED RELEVANT TO SEASONED FUNDRAISERS AS WELL AS NEWBIES LIKE ME. MET SOME FABULOUS PEOPLE!”

Mary Ellen Davies, Confederation Centre of the Arts

CAGP'S ANNUAL NATIONAL CONFERENCE ON STRATEGIC PHILANTHROPY

SPONSORSHIP/EXHIBITOR CONFIRMATION FORM

Company Name _____

(as it should appear on all sponsorship/exhibitor acknowledgements)

First Name _____ Last Name _____

Address _____

City _____ Province/State _____ Postal Code/Zip Code _____

Telephone _____ Email _____ Website _____

SPONSORSHIP/EXHIBITOR OPPORTUNITIES

SPONSORSHIP LEVEL	VALUE	PREFERRED SPONSORSHIP (check all that apply or list specific sponsorship)
Diamond Level — Premier Conference Partner	SOLD	
Platinum Level (Indicate specific Platinum sponsorship)	\$	
Gold Sponsor (Indicate specific Gold sponsorship)	\$	
Silver Sponsor (Indicate specific Silver sponsorship)	\$	
Exhibitor (2 days)	\$2,500	
Sponsorship Add-ons (Indicate specific add-on)	\$	

*The sponsorship fee is subject to GST/HST. GST/HST Registration number: 87067 8299 RT0001
Any discounts offered on a sponsorship level will be reflected on the invoice.*

PAYMENT

An invoice will follow with the total payment due. Sponsorships/exhibit space will be confirmed when the application form and full payment have been received and processed. Receipt of the application form with payment indicates acceptance of all rules and regulations governing the sponsorship level purchased.

Please return completed form to:

CAGP Conference Office
613-232-7991 ext. 227
claw@cagp-acpdp.org