23rd Annual CAGP National Conference

BANFF 2016

SCALING NEW HEIGHTS

Ideation•Integration•Innovation

THE BANFF CENTRE

APRIL 6-8

Canada's only conference that specializes in strategic charitable gift planning

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The organizations listed were confirmed at time of publication.

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IDEATION • INTEGRATION • INNOVATION

Welcome!

At this year's CAGP conference, come with us as we explore challenges, discover new ideas, integrate practical information into our work and find innovative strategies to inspire, share and motivate our teams, our donors and ourselves.

With educational and dynamic sessions, networking and social events, the 2016 CAGP Conference promises to offer more opportunities than ever to scale new heights and bring ideation, integration and innovation to the gift planning profession.

Whether you are a new or seasoned fundraiser, professional advisor, board member or financial officer of a charity, this conference will provide opportunities at all levels to develop an invaluable network of contacts, meet like-minded professionals and share personal and professional experiences and aspirations.

We look forward to ascending new heights with you in Banff!

Co-chairs,
Host Advisory Committee

CINDY NEUFELD

ALEN OKANOVIC

2016 Host Advisory Committee

Committee Co-Chairs

Cindy Neufeld MA, CFRE	Between Friends
Alen Okanovic	Canadian Red Cross

Committee Members

Heather Berezowski	Salvation Army
Carey Bornn CFRE	University of Calgary
Jodi Larmour	Sandstone Asset Management
Robert Locke	Kerby Centre
Tania Loftsgard	Canadian Cancer Society
Sheelagh Mercier	Alberta Children's Hospital Foundation
Michelle Regel CFRE	ViTrēo Group

2016 National Program Committee

Committee Chair

Janice Williams CFRE	BC Children's Hospital Foundation

Committee members

Norma Cameron CFRE	The Narrative Company
Ruth MacKenzie	CAGP
Jill Nelson CFRE	The Princess Margaret Hospital Foundation
Alen Okanovic	Canadian Red Cross
Charles O'Neil EPC	QEII Health Sciences Centre Foundation
Michelle M.B. Osborne CFRE	University of Toronto
Doug Puffer	Simon Fraser University
Michelle Regel CFRE	ViTrēo Group
Sylvia Ugolini B.C.L, LL.B, Pl.fin, TEP	Concordia University
Ann M. Vessey	Dalhousie University
Shelley E. Waite TEP	McLeod Law LLP

COVER PHOTO: BANFF AVENUE, PAUL ZIZKA PHOTOGRAPHY

SCALING NEW HEIGHTS

Ideation·Integration·Innovation

THE BANFF CENTRE
APRIL 6-8

WHY ATTEND?

Ideation: Base Camp

Explore the challenges in gift planning then create and embrace ideas as solutions emerge

Integration: Ascend

Get in step and integrate practical information and tools to ease the climb

Innovation: Summit

Anchor your eureka moments and rappel home equipped with innovative strategies and strengthened networks

WHO SHOULD ATTEND?

Professionals in Charities

Development officers/managers, board members, senior staff, executive directors, fundraisers, major gift officers, finance and trust officers

Professional Advisors

Financial planners, lawyers, accountants, insurance specialists, estate planners and consultants who advise charities and Canadians

Conference Schedule

AT-A-GLANCE

Conference Location
The Banff Centre
107 Tunnel Mountain Drive

TUESDAY	
7:30 – 5:00	Gift Planning Fundamentals
3:00 - 6:00	Conference registration open
WEDNESDAY	
7:00	Registration opens / Breakfast in Plenary Room
8:00 – 9:00	Opening Plenary session
9:15 – 10:45	Education sessions
10:45 – 11:15	Refreshment Break in the Exhibit Hall
11:15 – 12:15	Education sessions
12:30 – 2:15	Lunch and Food for Thought Table Discussions
2:30 – 4:00	FRANK Talks Plenary session
4:15 - 5:15	Welcome Reception in the Exhibit Hall
6:30	Optional Social Activity - MountView BBQ Dinner
THURSDAY	
7:00	Registration opens / Breakfast in Plenary Room
8:00 – 9:00	Plenary session
9:15 – 10:45	Education sessions
10:45 – 11:15	Refreshment break in the Exhibit Hall
11:15 – 12:15	Education sessions
12:30 – 2:00	CAGP AGM
2:15 – 3:15	Education sessions
3:15 – 3:45	Refreshment break in the Exhibit Hall
3:45 – 4:45	Education sessions
6:00 – 11:00	CAGP Reception and Banquet
FRIDAY	
7:00	Registration opens / Breakfast in Plenary room
8:00 – 9:00	Plenary session
9:15 – 10:45	Education sessions
10:45 – 11:15	Refreshment break in the Exhibit Hall
11:15 – 12:15	Education sessions
12:30 – 2:15	Lunch and Closing Plenary
2:30	Optional Social Activity – Lake Louise Tour

PLENARY SESSIONS

Wednesday April 6 8:00 a.m.

Where Do We Go From Here? Canadian Gift Planning Now!


Malcolm Burrows

Malcolm Burrows,
Scotia Wealth Management
A personal reflection on our profession, our Association, and the joy of enabling philanthropy from one of Canada's best-known gift planners. Who are we and what do we face as we scale new heights and navigate rough terrain?

Sponsored by: Scotia Wealth Management™

Wednesday April 6 12:30 p.m.

Food for Thought Dine & Discuss

Join us for an informal lunch while you share ideas, perspectives, news and views with like-minded colleagues on a variety of planned giving topics.

Sponsored by: KCI (Ketchum Canada Inc)

Wednesday April 6 2:30 p.m.

FRANK Talks

A TED Talk style event, FRANK Talks, acknowledges CAGP's guru Frank Minton as a leader in gift planning education. Using the theme for the Talks, The Business Of Charity, well-prepped presenters will speak for 7 minutes each on this theme.

Sponsored by: Miller Thomson lawyers | avocats

Thursday April 7 8:00 a.m.

"I am not a philanthropist!" Planned Giving and the Rising Generation


Gena Rotstein

Gena Rotstein, Dexterity Consulting
What does philanthropy really mean for those about to inherit $8Trillion? Drawing upon research published by Jay Hughes and Dennis Jaffe, as well as case studies from Gena's clients and advisors across North America, the presentation will highlight the top three trends that planned giving officers should consider when reaching out to this generation of wealth inheritors and creators and their financial and legal advisors. It's never too early to start the planned giving conversation.

Sponsored by: Carters Barristers · Solicitors Trademark Agents; Fasken Martineau

Thursday April 7 12:30 p.m.

CAGP Annual General Meeting

Don't miss CAGP's Annual General Meeting! Hear from the Board Chair and Executive Director on highlights of the last year, elect new national Board members and receive the 2015 auditor's report. As members, this is your opportunity to engage and ask questions on issues pertinent to you.

Sponsored by: Bequest Cultivation PGgrowth

Friday April 8 8:00 a.m.

The Changing and Unchanging Realities of Gift Planning


Jim Langley

Jim Langley, Langley Innovations
While we are reminded constantly of the need to keep pace with change, extensive studies of the records of planned giving donors reveal that certain philanthropic behaviors remain remarkably constant over time as well as across cultures and institutions. This session will help gift planning professionals differentiate between constants and variables of donor behavior so that they will be able to allocate their time and apply their talents in such a way as to ensure they have the highest probability of achieving the most significant and sustainable successes.

Sponsored by: TD

Friday April 8 12:30 p.m.

Success by Design


Zahra Al-Harazi

Zahra Al-Harazi, Foundry Communications
Among Canada's most successful entrepreneurs, few have traveled a route with more obstacles to overcome than Zahra Al-Harazi. Zahra shows how her unique approach to entrepreneurship and leadership, as well as her personal experience as a pioneering woman and immigrant in the business world, can work for us all. In this insightful presentation, Zahra takes us on a detailed journey through our own personal Creative Brief. She shows how the right questions, the right structure, and the right methods can take us to the core of who we are. With that knowledge, every one of us can become free to live the lives we deserve to lead.

Sponsored by: BMO Wealth Management
BMO Private Banking

SESSION TOPIC STREAMS

Topic streams enable you to streamline your session choices and ensure your conference education covers the gift planning bases.

Gift Planning Fundamentals

Certain concepts and knowledge are essential for the qualified gift planner. If you're new to gift planning, looking for a general refresher on a certain topic, or need to take your knowledge to the next level, these will fit the bill.

Professional Skills

These sessions focus on the professional skills and knowledge that take your performance as a gift planner to the next level.

Managing Gift Planning

These sessions address different elements of proactively managing the special challenges and opportunities of a gift planning program.

Communications and Marketing

Sponsored by: **Good Works**
All these sessions set us up with the newest and best ideas for mining for donors and reaching out across many media.

Donor Relations

Sponsored by: **SickKids Foundation**
The heart of our profession: engaging donors who care about the mission. Learn from experienced gift planners how to build rapport and relationships.

Governance/Finance

Sponsored by: **Secure Capital Management Ltd**.
These sessions will be of particular interest to those responsible for the good governance of a charity. While many of these sessions touch on gift planning issues they cover a much broader spectrum and will be of particular interest to CEOs, Finance Directors, Board members and Founders.

Technical Expertise

Sponsored by: **Bull Housser**
These sessions will help you hone your technical knowledge and give you more confidence to help donors plan, manage a gift-planning program, or administer all forms of fundraising and governance.

Master Class Series

Sponsored by:

RBC Wealth Management
PH&N Investment Counsel

Created for participants of all skill levels, these sessions allow experts in a chosen field to delve deep into the topic. Informal, small classroom sessions will provide a combination of technical and practical information. All participants should come prepared to engage in a variety of activities over a 2.5-hour session. Designed to challenge and be interactive, participants will 'master' core concepts by applying them to real-life, work-related situations.

The 2016 Master Class Series will feature the following topics:

Estate Administration

Small Shops: How to Start a Planned Giving Program

Estate Accounting

Mastering the Art of Telling Stories by Sharpening Your Oracy Skills

Education Sponsor

THE DONOR MOTIVATION PROGRAM®
We Motivate Planned Giving!

EDUCATION SESSIONS

PRE-CONFERENCE SESSION

TUESDAY APRIL 5 7:30 – 5:00

Gift Planning Fundamentals

Whether you are new to gift planning or you are in need of a solid refresher, Gift Planning Fundamentals (formerly Gift Planning - All in a Day) is a one day introductory course that reviews Canadian trends and tax issues, common gifts in Canada and concludes with marketing, stewardship and discussing planned gifts with donors.

This course is applicable for 8.0 CFRE Credits

Institute accredited CE (8.0 credits)

EDUCATION SESSIONS

WEDNESDAY APRIL 6 9:15-10:45

MASTER CLASS

Estate Administration (2.5 hour session)

In this Master Class, the bottom line is to create a learning experience that provides gift planners with the legal fundamentals to the day-to-day reality of managing estate administration. We will focus on best practices, and tips and techniques to honour the legacy of the donor while maintaining your charity's integrity as a fiduciary beneficiary.

Note: This Master Class can be a stand-alone for those who wish to increase their overall knowledge of estate administration. More in-depth information on estate accounting will be presented in the Estate Accounting Master Class.

Peggy Killeen CFRE, Royal Victoria Hospital Foundation and McGill University Health Centre Foundation; Jill Nelson CFRE, The Princess Margaret Cancer Foundation; Jasmine Sweatman LL.B., Sweatman Charities Consultants

Sponsored by: RBC Phillips, Hager & North Investment Counsel Inc.

MASTER CLASS

Small Shops: How to Start a Planned Giving Program (2.5 hour session)

In this Master Class you will learn how to start or enhance your planned giving program in a small shop. Small charities can launch successful programs or expand current planned giving informal efforts using creative strategies and tactics. In this interactive workshop we will cover both a big picture overview as well as an in depth discussion that will give you the opportunity to take away tangible tools to use in your own shop.

Colleen Bradley, Planned Giving Solutions Inc.; Beth Proven CFRE, Children's Hospital Foundation of Manitoba

Sponsored by: RBC Phillips, Hager & North Investment Counsel Inc.

PROFESSIONAL SKILLS

Intermediate

What Do I Do Now? Ethical Issues, Twists and Turns

Ethics is an area that poses unique challenges to all fundraisers. Join us in this lively, panel based discussion with seasoned planned giving fundraisers to explore the muddy waters of ethics. Learn from others and participate yourself in hearing some of the real challenges in ethical issues that may arise in your own practice, see how others view them, handle them, and what is expected of you as a member of CAGP.

Deborah Barton CFRE, Children's Health Foundation; Colleen DeJager TEP, London Health Sciences Foundation; Lisa Gonering, St. Joseph's Healthcare

DONOR RELATIONS

Intermediate

Donor Advised Funds Two Ways

Donor Advised Funds are a misunderstood philanthropic structure with multiple incarnations. This interactive session will offer a balanced view on why donors choose to give through foundations, different DAF models and how charities can build better and more effective relationships with both community foundations and foundations associated with financial institutions.

Christina Attard, South Saskatchewan Community Foundation; Malcolm Burrows, Scotia Wealth Management/Aqueduct Foundation

ACCREDITATION

Some sessions are accredited by The Institute and sponsored by Advocis. Please visit our website to learn more. All sessions are applicable for CFRE points.

MANAGING GIFT PLANNING

Advanced

Unique Gift Planning from Entrepreneurs

Research confirms that high net worth individuals are interested in philanthropy and want to discuss planned giving with their advisers. This session is designed to help participants update their knowledge about the technical, legal, and tax implications of planned giving from business owners.

Adam Aptowitzer LL.B. and Alexandra Tzannidakis LL.B., Drache Aptowitzer LLP

PROFESSIONAL SKILLS

General

Authentic Leadership: The Key to Successful Planned Giving Programs

In this session, Leah will introduce the concept of Authentic Leadership. Long been embraced in the for-profit world as a prerequisite of success, Authentic Leadership is about being true to yourself, true to your values, and true to what you really believe in. It's about being driven by mission and results, leading with your heart, and focusing on the long term. Participants will leave this session inspired and motivated, as well as ready to transform the culture of their organization.

Leah Eustace, MPhil, ACFRE, Good Works

WEDNESDAY APRIL 6 11:15-12:15

MASTER CLASS

Estate Administration (continued)

MASTER CLASS

Small Shops: How to Start a Planned Giving Program (continued)

TECHNICAL EXPERTISE

Introductory

Insurance Gifts – Are You Really Getting a Gift?

The gift of insurance is a very powerful way to leave a legacy of caring, and there are thousands of advisors promoting insurance to their clients. In some cases, the advisor is using planned giving as the basis of their recommendation. The problem: is your organization really getting a gift? This session will show you how to assess whether or not the proposed gift makes sense for your organization to receive. Common mistakes will be illustrated and suggested gift acceptance policy statements will be presented and discussed.

DeWayne Osborn M.P.Ed, CFP, CGA, Lawton Partners

PROFESSIONAL SKILLS

Intermediate

Putting the Donor First – Engage, Inform and Empower Your Prospects

This session will address how three different donors were engaged to make large gifts when the discussion focused on estate, financial and charitable planning. The first case will examine the consistent annual donor who makes a large gift from her assets. The second case looks at the retired executive who donates registered shares and the reasons why and how this came about. The third case looks at the middle-aged businessman who has a farm business and makes a significant donation and secures his estate plans as well. All three scenarios will look at the pre-meeting environment and how the communication and outreach transformed the outcomes.

William Petruck, FUNDING matters Inc.

DONOR RELATIONS

Intermediate

Dancing with Values

Research confirms the role values play in making a legacy gift. What are those values? How can we passionately communicate them? In this session, participants will put on their dancing shoes. First, we will look at an array of values. Then, we will determine which values are at the core of our organization's mission. Finally, we will make these values "come alive" so that our legacy prospects can make a commitment to our charity's mission.

David Love, Agents of Good

TECHNICAL EXPERTISE

Advanced

Recent Legal Developments in Gift Planning

Attend this session to gain an understanding of recent legal developments that are relevant to fundraisers, gift planners, charities and their advisors. Through practical examples, learn about the opportunities these developments present as well as pitfalls to be avoided. Leave with confidence that you are equipped with the most up-to-date knowledge of legal issues affecting gift planning.

Andrew Valentine LL.B., Miller Thomson LLP

THURSDAY APRIL 7 9:15-10:45

TECHNICAL EXPERTISE

Intermediate

Shine a Light on Gift Annuities

A modern, practical discussion of the venerable gift annuity: how they work, how they can work for you, why they are good for both charity and donor; gift acceptance policies and management practices, comparing benefits & costs, simple ways of managing liabilities; marketing without the jargon. Why are they relatively rare in Canada? Is it because too few charity fundraisers understand annuities or is it just not a good gift plan? Our position is the former and we intend to support that with this presentation. We will not get caught up in the technical aspects of calculations and algorithms and risk assessments. Bring an open mind, questions, creativity and basic knowledge and let us do the rest.

Doug Puffer, Simon Fraser University; Michele Shea, University of Alberta

TECHNICAL EXPERTISE

Intermediate

When Is A Gift Not A Gift (And Why Should You Care)

Gift planning is premised on the assumption that a gift will be made. However, what in fact is a gift and why should we care are important questions to ask. This session will look at the legal characteristics of a gift, how the Income Tax Act has modified the definition of a gift at common law, and what are the consequences to the charity, its board members, and gift planners from a failure to determine when a gift has been made and how it is to be receipted. There will also be examples of arrangements with charities that do not meet the definition of a gift and what to do with them.

Terrance S. Carter LL.B, TEP, and Theresa L.M. Man LL.B., Carters Professional Corporation

TECHNICAL EXPERTISE

Intermediate

Protecting the Rights and Interests of an Aging Population

In 2011, 15% of Canadian seniors were living with a form of dementia. Seniors are set to grow four times faster than any other population in Canada. As our population ages our duty as friends and professionals is to protect and maintain the interests of our seniors. Learn tips on identifying cognitive impairment, communication strategies, workplace organization, and the legal measures and tests available to ensure we protect the rights and interests of an aging population.

Melanie Brooks, Alzheimer Society of BC; Shelley E. Waite TEP, McLeod Law LLP

COMMUNICATIONS & MARKETING

General

Writing Workshop: Collect, Write and Share Your Own Legacy Stories

Have you ever needed to write a legacy letter or website copy and didn't know where to begin? This session is aimed at fundraisers working in small or medium shops who need DIY legacy writing. We'll review basic storytelling principles, tips and tricks specific to legacy writing, and then spend some time drafting and revising your very own legacy copy. Be prepared for a hands-on writing workshop.

Leah Eustace MPhil, ACFRE, Good Works

DONOR RELATIONS

General

Faith & Philanthropy: Understanding the Faith-Based Donor

Understanding donor motivation is increasingly important. However, there has been little work done within Canadian faith communities. In 2012, Mennonite Foundation of Canada (MFC) sponsored doctoral research of a Tyndale University College and Seminary student, funding ten donor focus groups in churches of seven Christian denominations in five provinces (Ontario and Western Canada). Participants were asked questions based on earlier research done by the Muttart Foundation. Results speak to the importance of trust, connection and shared values and vision.

Kevin Davidson CFP and Harold Penner CFP, Mennonite Foundation of Canada

THURSDAY APRIL 7 11:15-12:15

GIFT PLANNING FUNDAMENTALS

Introductory

Rejuvenate Your Planned Giving Program

Is your Planned Giving Program stagnant? Are you struggling to get your existing program off the ground? Learn how to launch a rejuvenated Planned Giving Program by implementing five key fundamentals. Learn how to develop an integrated approach to planned giving, capture the interest of donors, grow your planned giving advocates, recruit and engage a planned giving committee and build relationships with current planned giving donors.

Jenny McLeod and Rhonda Roth, United Way of Calgary and Area

TECHNICAL EXPERTISE

Advanced

Social Impact Bonds-A Creative Tool for Advisors, Charities and Government

Susan Manwaring and Grant Monck will present an overview of social impact bonds and a practical case study based on real life examples. This session will demonstrate how this social finance investment may be a useful tool for advisors working with individuals and how charities, foundations and other entities may move their missions forward in a new and creative way to support communities across Canada.

Susan Manwaring LL.B., Miller Thomson LLP; Grant Monck LL.B., Grant Monck Fundraising Consultant Services

DONOR RELATIONS

General

Executor Dialogue: Engaging Sherpas on the Demographic Mountain of Modern Gift Planning

Surveys confirm Canadian testators 'don't know, don't care' attitude to their estates, yet executors have vested legal responsibilities to ensure well planned and executed estates. They're also the most trusted and influential people in their testator parents' lives, and new legislation means they'll even determine when charities receive donations. Executors are best able to help charities with the heavy lifting. They are the sherpas on the demographic mountain of modern planned giving. Learn. Engage. Thrive.

Mark O'Farrell, Canadian Institute of Certified Executor Advisors (CICEA)

GIFT PLANNING FUNDAMENTALS

General

Testamentary Charitable Gifting Revisited

This session will provide participants with a general overview of taxation on death and the tax benefits of testamentary charitable giving. It will provide an overview of the new rules relating to testamentary charitable gifting arising out of the 2014 Budget and explore testamentary charitable giving strategies and pitfalls to avoid.

M. Elena Hoffstein LL.B., Fasken Martineau DuMoulin LLP

DONOR RELATIONS

General

Service Value-Creating More for HNW Donors

Current 2015 market research shows that 76% of consumers see customer service as a "true test" of how a brand values them. Although the donor experience does not exactly replicate the consumer experience in all ways, HNW (High Net Worth) donors often bring very high expectations of service delivery to their charity interactions. Understanding how to create more value to the donor experience is critical for donor retention, engagement and stewardship and helps build a stronger culture of philanthropy.

Janice Moro MBA, CFRE, CHRP, JR Moro Consulting

THURSDAY APRIL 7 2:15-3:15

PROFESSIONAL SKILLS

Intermediate

Advisors Amplify Your Ask

Go beyond the 'professional advisor' event hosted by a charity and join us for an in-depth look at the world and win-win opportunity of working with these partners in gift planning. You'll leave this session with a better understanding of the nuances and needs of each part of this community-law, financial planning, insurance and accounting.

Ryan Fraser CFP, Quiet Legacy Planning Group; Paul Nazareth, CanadaHelps

GOVERNANCE/FINANCE

Intermediate

Is It Safe? Addressing Donor Concerns with Governance and Stewardship of Donated Funds

This session provides an overview of best practices for funds governance and discusses relevant considerations for investment management in the context of the current market environment and donor expectations.

Leila Fiouzi CFA, RBC PH&N Investment Counsel

COMMUNICATIONS & MARKETING

Intermediate

Nine Simple Things to Increase Your Legacy Gifts

As a planned giving professional you know that your donor database is a gold mine that could possibly be worth millions of dollars to your organization. But finding your best legacy prospects can be challenging and time consuming. In this session, you'll learn about simple solutions that you can implement that will have you spending less time searching and more time converting legacy prospects into legacy donors.

Ryan Garnett CFRE, Harvey McKinnon Associates

SPEAKER BIOGRAPHIES
can be found at www.cagpconference.org

GOVERNANCE/FINANCE

Advanced

In Black and White: A Practical Guide to Record-keeping

Gift planners know that record-keeping is essential in order for a charity to be successful in working with donors, receiving gifts and carrying out its mission. In this session, learn which documents you need to keep, where they can be kept and for how long. Case studies will provide an opportunity for practical discussion for gift planners and charity executives to manage the documents in your donor and bequest files.

Michael Blatchford LL.B. and Bryan A. Millman LL.B., Bull Housser LLP

DONOR RELATIONS

General

The Changing Face of Philanthropy: Working With Female Donors

Recent reports such as TD Bank's "Time, Treasure, Talent-Canadian Women and Philanthropy" (2014) document the growing presence, impact and characteristics of women's giving, creating a compelling opportunity for those in gift planning or development roles. Those attending this session will have the opportunity to build a better understanding of relevant trends and patterns; explore promising and documented strategies for attracting, engaging and retaining female donors; and consider new and innovative approaches.

Sheree Meredith MSW, Hamilton Community Foundation; Beth Webel MBA CPA CA, PwC

THURSDAY APRIL 7 3:45-4:45

GIFT PLANNING FUNDAMENTALS

Advanced

The Use of Life Insurance and Registered Gifts in Gift Planning

The Federal Budgets of 2014 and 2015 have significantly changed the landscape in insurance and retirement planning products. Due to the changes in testamentary trusts and the new Graduated Rate Estates, insurance will likely play an increasing role as will estate planning and the timing of charitable donations. The session will help planned giving professionals identify where the new rules can be used for the benefit of their organizations, existing donors and prospective donors.

David Wm. Brown CFP, CFC, CLU, Al G. Brown and Associates

GOVERNANCE/FINANCE

General

Government Relations at CAGP

The Government Relations Committee plays a key role in serving CAGP's members by ensuring our voice and expertise is a part of key government policies and legislation that impacts strategic charitable gift planning. Each year the Chair provides an update on issues the Committee is focusing on and this year, we will be joined by a representative from the Charities Directorate of the Canada Revenue Agency for a status report on recent developments and a look ahead at what charities can expect to see from the CRA.

Margaret Mason LL.B., Chair CAGP Government Relations Committee; Ara Stepanian, Canada Revenue Agency Charities Directorate

GOVERNANCE/FINANCE

General

The Overhead Dilemma

Pressure is increasing for charities to have low overhead – in fact, it is a measure of success. And yet, overhead is a critical investment to build capacity, attract and retain great people, and improve our ability to do charitable works. In this session we will examine the issue and the movements that are taking place and explore ideas to defend overhead costs and promote healthy overhead levels for our industry as well as better measures of success.

Kathy Arney CA, KEA Canada

TECHNICAL EXPERTISE

General

Incentives or Undue Influence: Rewarding Gift Planners Without Exposing Your Gifts or Your Charity to Challenge

Do you offer incentives to your employees and volunteers for meeting fundraising goals? Do you publicly reward or recognize your top fundraisers? Do your fundraisers and gift planners have a personal stake in your charity? Could your fundraisers and gift planners be accused of exerting undue influence to secure gifts? This session will show you how your well-intentioned practices can inadvertently expose your charity to criticism, and teach you how to protect your gifts and your charity from challenges.

Eric N. Hoffstein LL.B., TEP, Minden Gross LLP

DONOR RELATIONS

General

Combining the Art and Science of Fundraising in the Emerging New School of Philanthropy

There is a new school of philanthropy and philanthropist emerging and now is the time to stop, step back and reassess your landscape. What is driving donors today and particularly high net worth donors? How do we need to adapt our language, our culture, our relationships and our fundraising programs to be ahead of this curve rather than behind? This session will highlight the important aspects of an organization's philanthropic culture, emerging trends and how it applies to maximizing giving in this changing world.

Andrea McManus CFRE, ViTrēo Group

FRIDAY APRIL 8 9:15-10:45

MASTER CLASS

Estate Accounting — It's All in the Details! (2.5 hour session)

This Master Class will give participants the knowledge and tools to allow them to confidently review executor's or administrator's accounts on their own. It will start with the basics and move to

more complex considerations in reviewing accounts, including the evaluation of executor's remuneration and issues with the common form of releases that charities are often asked to sign. Note: This Master Class can be a stand-alone for those who wish to increase their knowledge of estate accounting or as a complimentary class to Estate Administration.

Yolanda Benoit, BC SPCA; Roger Lee LL.B., DLA Piper (Canada) LLP

Sponsored by: RBC Phillips, Hager & North Investment Counsel Inc.

MASTER CLASS

Mastering the Art of Telling Stories by Sharpening Your Oracy Skills (2.5 hour session)

Storytelling is arguably the most powerful way to motivate people to support your organization. And, the competencies of a successful gift planner include literacy, numeracy and oracy skills (speaking and listening). But it's more than knowing how to tell stories – it's also how to strategically choose the right stories told in the right order to raise funds. While there are many courses focused on writing stories, this class will delve into how to "tell" stories in a persuasive, engaging and strategic manner.

Norma Cameron CFRE, The Narrative Company

Sponsored by: RBC Phillips, Hager & North Investment Counsel Inc.

MANAGING GIFT PLANNING

Intermediate

Managing Expectations – Gift Acceptance and Naming Policies

With the increasing demand for donor involvement with and recognition from substantial gifts, it is important for charities to manage expectations by establishing clear guidance on what they can and cannot accept. This presentation will discuss the purposes of gift acceptance and naming policies, the process of developing a gift acceptance and naming policy and some of the key considerations, including compliance with Imagine Canada's accreditation requirements and ethics, by examining specific examples from the experience of the presenters.

Karen Colby-Stothart, National Gallery of Canada Foundation; Karen Cooper LL.B., Drache Aptowitzer LLP

TECHNICAL EXPERTISE

Advanced

Gift of Residual Interest: Scrambling up the Mountain

Incorporating a gift of residual interest into a donor/client's overall financial plan can free up heavily taxed assets, improve their lifestyle and help them achieve their goal to create a better society. Panellists will share case studies of such gifts highlighting stages and considerations for the donor/client and the charities. Learning to summit these important planned gifts is like climbing Mt Rundle: classified as an easy and non-technical "scramble" but a steep and strenuous hike at the same time. The view at the summit is worth the effort.

C. Yvonne Chenier LL.B., CFP, TEP, STI, QC, Drache Aptowitzer LLP; Michelle M.B. Osborne CFRE, University of Toronto; Doug Puffer, Simon Fraser University

DONOR RELATIONS

General

Taking Donors From Listening to 'Feeling'

Donors want to make a difference in the world they live in, both now and in the future. We start with simple messaging and must evolve into life-long relationships. In this innovative workshop we will demonstrate how to integrate your donors and prospective donors into your organization. Today more than ever taking your donors from listening to 'feeling' is paramount to sustain that relationship.

Rosalie Courage and Brent Platt CFRE, RBR Development Associates Ltd.

MANAGING GIFT PLANNING

General

New World Recruiting & Employment Strategies

This session is designed for hiring managers and job seekers who want to explore "fit" to ensure they hire effective fundraisers, build transformational teams or work with a team and organization that aligns with their personal values and career goals. Discussion will focus on strategies for effective DIY recruiting, how to research the culture of an organization, and tips for defining fit for yourself, your team, and your organization.

Michelle Regel CFRE, ViTrēo Group

FRIDAY APRIL 8 11:15-12:15

MASTER CLASS

Estate Accounting — It's All in the Details! (Continued)

MASTER CLASS

Mastering the Art of Telling Stories by Sharpening Your Oracy Skills (Continued)

MANAGING GIFT PLANNING

Intermediate

Win-Win-Win Canadian Style: Achieving Dynamic Integration With Fundraising Colleagues

Let us help you develop productive relationships between gift planners and other fundraising professionals, build team performance, and increase both planned giving expectancies and current gifts. You will learn how to work with fundraising colleagues as they expand their portfolios, assist annual and major gift fundraisers in obtaining planned gifts, and help market multiple gift options to donors. These "blended asks" increase support for your cause and enhance your organization's mission. In the end, everybody wins!

Cheryl B. Hebb CFRE, MBA and Deborah Walker, University of Victoria

PROFESSIONAL SKILLS

Advanced

The Skills the Future Will Demand

Building on research and insight provided in the plenary session, this workshop will focus on how planned giving professionals can convert the most relevant research into the most productive practices. In particular, the workshop will focus on specific skills that the most successful gift planner will require and particular practices that will represent the most effective applications of those skills.

James M. Langley, Langley Innovations

DONOR RELATIONS

General

Family Matters - Enabling Passionate Discussions

Family is an integral part of the gift planning process and many donors never fully disclose their plans to their next of kin. This lack of knowledge creates surprises that often does not work in your favour as a gift planner or cause. There are ways to drive a healthy discussion about passion among family members, adding security to your planned gifts and building your support base while being respectful of social limits on discussions about finances.

Conor Tapp, Canadian Breast Cancer Foundation

COMMUNICATIONS & MARKETING

General

Building an Integrated Brand Story

Achieving a meaningful lift in awareness and likelihood to donate is most effectively achieved when a communications strategy is firing on all cylinders. This case study brings to life an integrated marketing campaign that contributed to the single biggest giving month in the history of SickKids Foundation.

Malcolm Berry MBA, SickKids Foundation

Please note: Speakers and program are subject to change

STAND-UP SESSION

30-minute, quick information session

Legacy Giving in the Digital Age

Simon Trevelyan, S.T. Legacy Group

Looking for ways to engage your donors in legacy giving without taking up more of your limited time or resources? Share in this informal discussion on how new methods of digital engagement can help organizations with limited staff resources connect with their supporters in a sensitive and interactive way.

When: Wednesday 4:45 – 5:15 p.m.

Where: S.T. Legacy exhibit booth

Sponsored by: S.T. Legacy Group

CONFERENCE SOCIAL EVENTS

Exhibit Area – The hub of the conference!

Refreshment breaks, draws, games and other entertainment makes the exhibit area a great place to network.

Opening Reception

Wednesday April 6 4:15

Sponsored by: **PearTree Financial Services**

Enjoy a warm welcome to Banff as you mingle with our exhibitors and sponsors and connect with old and new colleagues and friends.

MountView BBQ

Wednesday April 6 6:30

Sponsored by: **RBC Royal Bank**

Inside a Donut tent open to the mountain sky, a central bonfire provides warmth and atmosphere as you enjoy a hearty buffet of barbecue hip of beef serenaded by a country and western duo. An alternate vegetarian dinner is available on request. Cash bar.

Transport sponsored by: **Good Works**

Price: $80.00 plus GST
Deadline to book: February 26, 2016

CAGP Reception and Banquet

Thursday April 7 6:00

Banquet sponsored by: **Legacy Leaders Inc.**

Join us in the exhibit area for a reception followed by dinner and entertainment. Grab your cowboy hat, kick up your boots and get ready for some fun line dancing following the presentation of the Friend of CAGP award. Western attire recommended!

Tour of Lake Louise

Friday April 8 2:30 – 7:00 (4–5 hours)

The "Jewel of the Canadian Rockies", your journey to Lake Louise will travel the scenic Bow Valley Parkway and upon arrival, a horse-drawn sleigh ride will take you along the lakeside trail to the end of majestic Lake Louise. There will be time to enjoy this magical wonderland before the return to Banff.

Includes: Guide, return transportation, sleigh ride and driver gratuity

Suggested Attire: Warm jacket, winter boots, hat, scarf, and mittens/gloves. Sunglasses are recommended.

Price: $80.00 plus GST
Deadline to book: February 26, 2016

GENERAL INFORMATION

CONFERENCE AND ACCOMMODATION LOCATION

The Banff Centre
107 Tunnel Mountain Drive
Banff, AB T1L 1H5
Reservations: 1-800-884-7574 / 403-762-6308

Room Rates:
Standard room* (single or double):
$120 (plus applicable taxes and fees) per night.
Superior Room* (single or double):
$160 (plus applicable taxes and fees) per night.

Mention the CAGP conference to receive this preferred rate or book directly through the customized web reservations page on the conference website: **www.cagpconference.org**

*Standard category rooms and suites are in Lloyd Hall. A limited number are available. Superior category rooms and suites with upgraded décor are in the Professional Development Centre.

All rooms and meeting spaces include complimentary wireless access.

Deadline to book: After March 3, 2016 the special conference rates are not guaranteed. Standard Lloyd Hall rooms are limited and based on availability.

GETTING TO BANFF

By Car
Banff is located a scenic 1.5 hour drive (130 km/80 miles) west of Calgary and 4 hours from Edmonton.

The **Banff Centre website** provides driving directions to the Centre.

All people using or passing through Banff National Park require a Banff National Park pass. The Banff Centre is situated within the Park boundaries.

For current Park rates visit **www.pc.gc.ca**

Parking
Parking is complimentary for all guests of the Banff Centre.

By Air
The Calgary International Airport (YYC) is approximately 1.5 hours from Banff. The Airport has daily direct and non-stop flights from Canada and the United States.

TRAVEL DISCOUNTS

Ground Transportation
The following transportation companies offer regular shuttle service between Calgary airport and the Banff Centre.

Banff Airporter
15% Discount on shuttle service
Online reservations: www.banffairporter.com/book
Promotional Code (on the final payment page): innovation
Phone reservations: 1-888-449-2901 / 403-762-3330
Mention the CAGP conference for discount
www.banffairporter.com

Brewster Transportation
20% discount off published rates
Discount valid: April 1st to April 20th, 2016
Online reservations: http://www.brewster.ca/transportation/brewster-banff-airport-express
Promotional Code (on the check out page): CAGP2016
Phone reservations: 1-866-606-6700
www.Brewster.ca
Note: A transfer to a second bus in Banff may occur (no additional charge) in order to take delegates directly to the Banff Centre

WESTJET

10% discount off the airline's best available Econo, Flex and Plus fares at the time of booking.
Availability: Discounted rates are available from March 30 – April 15, 2016
Promo code: YYCO2
Coupon Code: NQJRHWE
Reservations: **www.westjet.com**
WestJet terms and discount restrictions will apply.

BURSARY SUPPORT

Bursaries are available to cover the cost of conference registration. A bursary application form and guidelines can be found at: **www.cagpconference.org**.
Applications must be received by January 25, 2016.

QUESTIONS?

Tel: 1-888-430-9494 / 613-232-7991 x222
Email: **conference@cagp-acpdp.org**
Website: **www.cagpconference.org**

REGISTER ONLINE AT: www.cagpconference.org

CONFERENCE TWITTER TEAM

Join the CAGP volunteer tweeters as they share their knowledge and connections via Twitter #CAGP16

FOLLOW US

REGISTRATION INFORMATION

To register, complete the registration and session sign-up forms or visit our secure registration site at www.cagpconference.org.

CONFERENCE REGISTRATION FEES Note: GST (5%) is not included in fees	Early Bird (Until Feb 26, 2016)	Regular (After Feb 26, 2016)
Full Conference Fees		
Member*:	$800	$900
Non-member:	$1050	$1200
**In order to benefit from the "member rate", you need to be a member in good standing at the time of the conference.*		
One Day Fees		
Wednesday	$350	$450
Thursday*	$350	$450
**Thursday evening banquet ticket not included*		
Extra Thursday banquet ticket*: *(*one Thursday banquet ticket is included in the full conference registration fee)*	$101.19	
Gift Planning Fundamentals		
Pre-conference - April 5 | 7:30 – 5:00		
Member:	$350	$350
Non-member:	$400	$400
Optional Social Activity – booking deadline Feb 26, 2016		
MountView BBQ April 6 | 6:30	$80	
Tour to Lake Louise April 8 | 2:30	$80	

Full Conference registration includes:

- all plenary and educational sessions
- continental breakfast and lunch Wednesday, Thursday and Friday
- Wednesday Opening Reception; CAGP Banquet Thursday
- pre- and post-conference web access to all PowerPoint presentations (as released for inclusion)

Payment

Please make your cheque payable to CAGP Banff 2016. Payment may also be made by Visa or Mastercard®.
GST is not included in fees.

Cancellation and Refund Policy

Notice of all cancellations must be received in writing. Before **March 11, 2016**, if you must cancel your registration, three options are available:

1) Your registration may be transferred to a colleague within your organization at anytime (less a $50 administration fee);
2) Your registration may be carried forward for you to attend the 2017 conference;
3) Your fees may be refunded (less a $200.00 Administration Fee).

There will be no refunds or carry-forwards after March 11, 2016. No-shows forfeit the full registration fee.

Register online at: www.cagpconference.org

EDUCATION SESSION SIGN-UP FORM

SCALING NEW HEIGHTS

Ideation·Integration·Innovation

THE BANFF CENTRE

APRIL 6-8

Please indicate your first (1) and second (2) choice of session per timeslot, as space is limited.

First Name

Last Name

Telephone

E-mail

WEDNESDAY APRIL 6 9:15 - 10:45

- ☐ Estate Administration (Master Class) W1.1
- ☐ Small Shops: Start a Planned Giving Program (Master Class) W1.2
- ☐ What Do I Do Now? Ethical Issues (Intermediate) W1.3
- ☐ Donor Advised Funds Two Ways (Intermediate) W1.4
- ☐ Unique Gift Planning From Entrepreneurs (Advanced) W1.5
- ☐ Authentic Leadership (General) W1.6

WEDNESDAY APRIL 6 11:15 - 12:15

- ☐ Estate Administration (continued) W2.1
- ☐ Small Shops: Start a Planned Giving Program (continued) W2.2
- ☐ Insurance Gifts – Are You Really Getting a Gift? (Introductory) W2.3
- ☐ Putting the Donor First (Intermediate) W2.4
- ☐ Dancing with Values (Intermediate) W2.5
- ☐ Recent Legal Developments (Advanced) W2.6

THURSDAY APRIL 7 9:15 - 10:45

- ☐ Shine a Light on Gift Annuities (Intermediate) W3.1
- ☐ When Is A Gift Not A Gift (Intermediate) W3.2
- ☐ Protecting the Rights & Interests of an Aging Population (Intermediate) W3.3
- ☐ Writing Workshop (General) W3.4
- ☐ Faith & Philanthropy (General) W3.5

THURSDAY APRIL 7 11:15 - 12:15

- ☐ Rejuvenate Your Planned Giving Program (Introductory) W4.1
- ☐ Social Impact Bonds (Advanced) W4.2
- ☐ Executor Dialogue (General) W4.3
- ☐ Testamentary Charitable Gifting Revisited (General) W4.4
- ☐ Service Value-Creating More for HNW Donors (General) W4.5

THURSDAY APRIL 7 2:15 - 3:15

- ☐ Advisors Amplify Your Ask (Intermediate) W5.1
- ☐ Is It Safe? Addressing Donor Concerns (Intermediate) W5.2
- ☐ Nine Simple Things to Increase Your Legacy Gifts (Intermediate) W5.3
- ☐ Black & White: Practical Guide to Record-keeping (Advanced) W5.4
- ☐ The Changing Face of Philanthropy (General) W5.5

THURSDAY APRIL 7 3:45 - 4:45

- ☐ The Use of Life Insurance and Registered Gifts (Advanced) W6.1
- ☐ Government Relations at CAGP (General) W6.2
- ☐ The Overhead Dilemma (General) W6.3
- ☐ Incentives or Undue Influence (General) W6.4
- ☐ Combining Fundraising in the New School of Philanthropy (General) W6.5

FRIDAY APRIL 8 9:15 - 10:45

- ☐ Estate Accounting (Master Class) W7.1
- ☐ Mastering the Art of Telling Stories (Master Class) W7.2
- ☐ Managing Expectations: Gift Acceptance & Naming Policies (Intermediate) W7.3
- ☐ Gift of Residual Interest (Advanced) W7.4
- ☐ Taking Donors from Listening to “Feeling” (General) W7.5
- ☐ New World Recruiting and Employment Strategies (General) W7.6

FRIDAY APRIL 8 11:15 - 12:15

- ☐ Estate Accounting (continued) W8.1
- ☐ Mastering the Art of Telling Stories (continued) W8.2
- ☐ Win-Win-Win Canadian Style (Intermediate) W8.3
- ☐ The Skills the Future Will Demand (Advanced) W8.4
- ☐ Family Matters-Enabling Passionate Discussions (General) W8.5
- ☐ Building an Integrated Brand (General) W8.6

Please return this form to the CAGP National office:
1188 Wellington Street West, Suite 201
Ottawa, ON K1Y 2Z5
Fax: 613-232-7286
E-mail: **conference@cagp-acpdp.org**

CONFERENCE REGISTRATION FORM

SCALING NEW HEIGHTS

Ideation·Integration·Innovation

THE BANFF CENTRE

APRIL 6-8

To register online go to: www.cagpconference.org
To register by mail or fax, please complete this form and the education session sign-up form and send together with payment to:

CAGP Conference
1188 Wellington Street W., Suite 201
Ottawa, ON K1Y 2Z5 | Fax: (613) 232-7286

DELEGATE INFORMATION

First Name | Last Name | Designation(s)

Job Title | Organization

Address

City | Prov | Postal Code

( ) Telephone | E-mail

Twitter handle (for name badge)

Special dietary or accessibility requests

For all allergies we cannot guarantee that no cross contamination has taken place in the special preparation of an allergy free alternate meal.

EMERGENCY CONTACT INFORMATION

Contact Name | ( ) Day Phone

- ☐ I have my CFRE
- ☐ This is my first CAGP Conference
- ☐ I would like to volunteer at the conference
- ☐ I will be attending the Thursday night banquet (Full conference attendees receive a ticket with their registration)
- ☐ I grant permission to CAGP to publish my contact information, as listed above, in the conference delegate list made available to attendees, sponsors and exhibitors. You may receive promotional information from our sponsors and/or exhibitors.
- ☐ I would like to receive the CAGP eNews and other electronic communications

Tel: (613) 232-7991 or (888) 430-9494 x 222
Fax: (613) 232-7286
E-mail: conference@cagp-acpdp.org
www.cagpconference.org

CONFERENCE REGISTRATION FORM

CONFERENCE REGISTRATION FEES

	EARLY BIRD (Until Feb 26, 2016)	REGULAR (After Feb 26, 2016)	
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** Thursday banquet ticket not included*

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Optional Social Activity – booking deadline Feb 26		
MountView BBQ Dinner (Wednesday April 6 6:30)	tkts x $80.00	$
Lake Louise Tour (Friday April 8 2:30)	tkts x $80.00	$
Extra Thursday banquet ticket*:	tkts x $101.19	$

** One Thursday banquet ticket is included in the full conference registration fee*

Subtotal Conference Fees	$	A
5% GST	$	B
Registration number: 870678299RT0001		
Processing Fee	$ 5.00	C
Total Conference Fees (Total A, B, C)	$	

PAYMENT OPTIONS

☐ VISA ☐ MasterCard® ☐ Cheque (payable to CAGP Banff 2016)

Credit Card number

Expiry date

Name on card

☐ I authorize payment for total conference and activity fees by credit card

Cardholder Signature

Cancellation and Refund Policy
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Director, Canada
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Canadian Association of Gift Planners and Community Foundations

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- making connections in the charitable and professional advisor communities
- learning best practices that help donors achieve their philanthropic goals
- building strong communities with engaged and informed citizens

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The Winnipeg Foundation
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In the spirit of partnership, we're proud to jointly support the 23rd Annual 2016 CAGP National Conference

Community Foundations of Canada
all for community.

As members of Community Foundations of Canada, we're part of a remarkable movement of 191 community foundations who are building resilient, smart and caring communities from Victoria to St. John's.