CAGP'S 33RD NATIONAL CONFERENCE ON STRATEGIC PHILANTHROPY

Weaving the Fabric OF GENEROSITY

APRIL 7–9, 2027 | TORONTO

LE 33E CONGRÈS NATIONAL DE L'ACPDP SUR LA PHILANTHROPIE STRATÉGIQUE

Tisser la toile de LA GÉNÉROSITÉ

7–9 AVRIL 2027 | TORONTO

Call for PROPOSALS

& INFORMATION FOR PRESENTERS

Appel à PROPOSITIONS

ET INFORMATIONS POUR LES PRÉSENTATEURS

Table of Contents

The National Program Committee invites you to participate in CAGP's 33rd 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 gift planning, from the interpersonal to the highly technical, as well as broader issues and trends pertinent to our delegates.

In our efforts to strengthen diversity, CAGP welcomes proposals from people of all backgrounds, especially those from equity-deserving communities to present at our upcoming conference. Allyship begins with listening, speaking and amplifying, and CAGP would like to play an active role in providing opportunity to share experiences, promote awareness and create a more inclusive sector.

Our theme this year is:

Weaving the Fabric of Generosity

Conference objectives are:

- Offer leadership and learning on strategic gift planning
- Explore and discuss the evolving landscape of charitable giving in Canada
- Centre philanthropy's role in a more inclusive, equitable and just future
- Strengthen the networks of gift planning professionals

2. Conference Format & Delegates

CAGP's 33rd Annual National Conference will take place April 7th-9th, 2027, in Toronto, Ontario**.** We anticipate engaging 450+ delegates from across the country.

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
- Bring the conference theme and objectives to life

- Be relevant and engaging for attendees at all levels of experience and across the professional spectrum of gift planners.
- Address traditional topics of gift planning, as well as the changing face of philanthropy and broader professional issues or trends.
- 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

In our ongoing efforts to offer the CAGP National Conference as an inclusive and diverse event, we welcome and encourage proposals for sessions which limit participation to individuals with shared intersectional identities, in order to create spaces for nuanced conversation and learning connected to experiences borne-out of those identities.

The deadline for submissions is Friday July 3rd, 2026

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 strengthening one's relationship with donors and clients. As experienced professionals, share strategies and tactics for building an authentic rapport with donors and clients that are mission driven and 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. 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

C. Legal Issues & Ethics

These sessions will help professionals hone their technical knowledge and sharpen their expertise, tackle unique challenges and opportunities of gift planning, and manage gift planning programs with excellence.

- Understanding tax planning and advantages; Common law and Quebec Civil Code issues; legal obligations for charities
- Non-profit accounting, gift processing and receipting
- Legal, regulatory and financial aspects of gift planning; New Trust laws and impact on estate administration
- Transitioning into retirement
- Boundaries in gift planners' relationships with donors;
- Scandals around charity/philanthropy and the impact on citizen trust

D. 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

E. 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

F. Not About Gift Planning

We know there's more to learn and share than the technical stuff, and 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, consider submitting a proposal. Our delegates have also told us they're interested in:

- Leadership skills and career development
- Personal growth and wellness
- Curiosity and critical thinking
- The evolving philanthropic landscape
- Social change, inclusion, equity

5. Session Format

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

*Workshop Presentation*s: Workshops should be a combination of presentation and dialogue with participants

Panel Discussions: Panels should reflect diverse views and experiences. A maximum of three (3) panelists is recommended.

Engaging & interacting: sessions that are geared to be a bit more hands on, sharing knowledge in a creative and engaging way.

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.

ADVANCED: 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.
- 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 5, 2027**. 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 by CAGP following the conference. All presentation content remains the intellectual property of the presenter.
- **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 sponsored-content opportunities.

A Word on Speaker Compensation

Open sharing of knowledge and expertise related to philanthropy and strategic charitable gift planning has been a core tenet of CAGP since its establishment in 1993. In addition to professional development delivered through local Chapters, the CAGP National Conference has been a central place where members and other experts gather, inform, share and learn from each other. That sharing spirit is part of CAGP's ethos and we are enormously grateful to all who so generously give in this way to lift up our community, and strengthen gift planning in Canada.

We also recognize that many who wish to be part of our community of knowledge sharing face limitations and barriers to participating in the CAGP National Conference. To help ensure our delegates can benefit from the widest array of speakers and expertise, we recognize that speaker compensation is an important consideration.

In keeping with our goals of building greater equity and access for all. We are pleased to offer an *optional* speaker fee of $250 to those who wish to be compensated for presenting at the CAGP Conference.

For those who may require additional financial support, we also have a *limited* budget available to assist with travel and accommodation of up to $750 per person.

We would like to thank those who decline a speaker fee or other financial assistance because their participation is supported by their employer, or they otherwise have financial means to attend and speak at the CAGP Conference. This allows us to offer greater support to those who might otherwise be unable to attend.

Please note that all requests for a speaker fee and/or financial assistance for travel and accommodation will be kept strictly confidential. This information will not be shared with the Conference Program Committee and will not be considered as part of the review and selection process for speakers.

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 one session, 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 here: 2027 CAGP Call for Proposals Submission Link

The deadline for submissions is Friday July 3rd, 2026.

The primary presenter on the Session Proposal form will be notified of acceptance in October 2026.

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) Choose the length of your session
e) Choose the topic stream for your session
f) What is the education level of your session
g) Session title
h) Provide a 100 word abstract of your proposal
i) Speaker biographies (link to LinkedIn profile or personal/organization website)
j) Speaker photo (jpeg or png, 72-92 dpi, 1000-2000 pixels on the long side)
k) Provide 3 learning objectives for your session
l) How do you plan to engage the participants
q) Teaching or speaking experience in the past two years
r) If you have given a virtual presentation, please provide the url
s) If you would like to request for speaker compensation or travel assistance

10. For Further Information

If you have any questions, please contact:
Caralen Law
Conference & Event Planner, CAGP
Tel: 416-706-8652 or 1-888-430-9494 x227
Email: claw@cagp-acpdp.org