

2021 GRATITUDE REPORT

Thank you for being a part of everything we do.

Creating Hope.

In a challenging year for our sector, we received unwavering encouragement from our donors, and we are grateful for it. We could not have done it without you!



We educate people to empower donors to give more. We help build a strong network of professionals to support the growth of gift planning expertise.

Educating.

In 2021, we pivoted to a full year of delivering national [education](#) online. We're particularly proud of our first webinar mini-series delivered in French. We delivered **4** Gift Planning Fundamentals online, Webinar Wednesdays continued to run through 2021, and we launched a new online course – [Practical Philanthropic Conversations](#). In addition, we delivered **36** customized in-house training sessions and speaking engagements. There were **6,450** total engagements with our education in 2021.

Making Canadians Aware.

The Will Power campaign was a bright light in 2021. We accelerated our plan to go live across Canada because of the pandemic. Partners joined us in numbers surpassing targets. We signed up over **500** charities and advisors!

In just the first **2** months of the campaign, **11%** of Canadians knew about it and could recall the ads. **42%** of Canadians who saw the ads changed their minds and are now more likely to leave a gift in their Will. In total, **130,000** people explored the idea on [willpower.ca](#) and **11,500** actions were taken towards leaving a charitable bequest.

Expanding Knowledge.

In 2021 we partnered with the AFP Foundation Canada to study donor views on charities. The aim was to increase social impact through a deeper understanding of specific donor trends, segments, and their behaviours around charitable giving. [The findings](#) have been disseminated broadly in the sector.



aims to bring **\$40 billion of new gifts** to charities across the country and make gifts in wills a social norm.



Research enables us to keep abreast of ideas and strategies that serve philanthropists and the charitable sector as a whole.

Advocating.

Championing a legislative environment that is favourable to philanthropy is a crucial component of building a nationwide practice of strategic charitable giving. The financial support that the Foundation received was not only able to provide education to professionals, conduct research, and expand public awareness but also allowed CAGP to focus more resources on active Government Relations work.


Advocacy is a big part of the reason Donald K. Johnson, expressed great confidence in our work by pledging the inspirational amount of **\$1 MILLION** to the Foundation over the next five years. This gift represented not only a renewal of Don's extremely generous pledge to us as a Founding Donor, but a **DOUBLING** of his original support. His unwavering generosity since our founding has been critical to our growth in this crucial phase of our existence, allowing us to respond to demand and expand. His foresight allows us to continue to build and to dream even bigger.

Committing to the Cause.

Many of our supporters plan their gifts and are dedicated to strategic charitable giving – no surprise – we're gift planners! Our donor retention rate is well above industry standards at **63%** and **45%** of our donors give through monthly or annual pledges.

Two other important three-year term pledges were renewed in 2021. Benefaction Foundation will continue to give \$25,000 a year, for a total of **\$75,000**, thanks to the vision of CEO and Founder Nicola Elkins and her board. Keith Thomson and the Donor Motivation Program pledged **\$30,000** over three years, as well as continuing to support our fundraising activities.

We are deeply honoured to count 8 legacy commitments by the end of 2021.



This is a way for me to give back. No other organization could have offered me this kind of education and also introduced me to this incredible network of passionate people."

– Bob Strachan

Inspiring.

We were moved by a significant gift of **\$100,000** from Bob and Jill Strachan. Bob is a long-time believer in the power of strategic charitable giving – his CAGP membership dates back **26 years**. Although retired as a financial planner, Bob is still an engaged CAGP member. A Founding Donor when the CAGP Foundation was launched, he continues to attend our education offerings and conferences. As he says, *"There's always something new to learn!"*

By the Numbers.

Our revenue for the year was **\$621,953**, of which **\$222,855** came from our generous Will Power Campaign seed funders. The remaining **\$399,098** allows us to respond innovatively to the growing demand for our resources, education, and professional development offerings and gives us the capacity to provide a strong voice for tax policy supporting charitable giving in Canada. The market value of our endowment at The Winnipeg Foundation was **\$39,508** on December 31st 2021.

We appreciate the board members and volunteers who steered us and supported us through the year.

CAGP FOUNDATION BOARD 2021

Beth Proven – Chair

Andrew Valentine – Secretary

Andrea Robertson

Jill Nelson – Vice Chair

Brad Offman

Marcella Zanella

Ross Young – Treasurer

Ricky Piedrahita

Janice Feuer

ADDITIONAL VOLUNTEERS

Joan Blight

Roger Lee

Tina Tehranchian

Nicola Elkins

Greg Lichti

Keith Thomson

Michelle Johnson

Charles O'Neil

We are deeply grateful to all our donors and volunteers – you have a significant influence on building the capacity and sustainability of countless causes and communities in Canada.

We could not do it without you.

THANK YOU.

