

# WELCOME TO THE 2022 GRATITUDE REPORT

## IT WAS A BIG YEAR

We reached a milestone and the CAGP community warmed our hearts with their confidence and generosity. Where did the time go? The month of March marked five years since we received our charitable status – and it's been a gamechanger. We've been able to achieve so much towards our vision of having long-term impact on philanthropy in Canada. We are moved by all the support we've received since we took our first baby steps.

## A GREAT MATCH

As we celebrated our birthday we focused on giving thanks. We launched the Gratitude Movement, a way to show appreciation to our colleagues and those who've inspired us, by making a gift to the CAGP Foundation. Keith Thomson generously offered **up to \$100,000** to match gifts and pledges and **we were able to reach our goal by December 31st!** How did we do it? Through new pledge donors and some great collaboration and team work. For example, the Donor Motivation Program team brought us closer in a big way – by collectively pledging over \$25,000. Our gratitude goes out to Keith, and every single person that stepped up.



"I'm thrilled that the Gratitude Movement has been such a success. These commitments will go a long way to support the Foundation's important work and I'm glad to have had the opportunity to amplify them. Thank you to all our donors - you're making a huge difference!"

**KEITH THOMSON**



**CAGP Foundation**

## WE FEEL THE LOVE

It should come as no surprise that **58%** of our supporters make their gifts through monthly gifts or multi-year pledges. We all know the value of planning and the importance of building sustainability.

"Making monthly donations helps the Foundation and me at the same time. They know that there is a certain amount that they can count on each month and I'm able to spread it out over the year."

**EMELITA ERVIN**  
**MONTHLY DONOR**



"We see your gifts coming in and we feel the love. We know that there are so many great causes out there, so we're very honoured that you've chosen this one! Your support means everything. Thank you for giving us stability and room to grow. "

**JILL NELSON**  
**CHAIR, CAGP FOUNDATION BOARD**

## THE HEART OF OUR MISSION

We are also honoured to have received **three new legacy commitments** this year, bringing our total to eleven. Talk about going straight to the heart of our mission! Our deepest thanks to these visionaries.

### BOTTOM LINE

**\$738,807**

RAISED IN GIFTS AND PLEDGES

**\$523,515**

OUR ACTUAL REVENUE

**\$36,952**

ENDOWMENT AT THE  
WINNIPEG FOUNDATION

We're immensely grateful to our **family of donors** for their dedication and generosity. We could not do this without you - our community. Thank you for all that you do to build a better world.

**CAGP Foundation**

# OUR WORK

## EDUCATION

Our education program has blossomed. This last year we delivered two **Gift Planning Fundamentals** online, continued with our **Webinar Wednesdays** series, and expanded to offer a webinar series in French. We launched a successful new **Bequest Administration Essentials Course**. We welcomed people back in person to experience the **Original Canadian Gift Planning Course** and **Advanced Gift Planning Summit**, and were reminded how powerful those educational offerings are when we're around the table together. On top of all that, we delivered 26 "in-house" gift-planning training sessions and speaking engagements, customized to meet the specific needs of individual clients.

## RESEARCH

Research is one of our key objectives. The most recent example is a publicly available report called "**Influence, Affluence and Opportunity: Donor-advised Funds in Canada**", produced in partnership with KCI. The report follows research done in 2018 and 2021 and discusses the latest information on DAFs, presents their scope and growth in Canada, discusses misconceptions, and suggests ways to improve how DAFs can support donors and Canadian charities. A big thank you to an anonymous donor who helped us make this happen!



## PUBLIC AWARENESS

Public awareness has increased exponentially in the past three years since the launch of the fully bilingual **Will Power/ Volonté de faire** campaign. We've seen amazing progress! When we started the campaign our benchmark polling told us that only 5% of Canadians had left a gift to charity in their Will. After public polling done with Environics this last year, we now see that **8% of Canadians** have done so. We also know that:



**18%**

OF THE PUBLIC NOW SAY THEY ARE AWARE OF THE CAMPAIGN.

**2.7 M**

CANADIANS SAY THEY ARE NOW THINKING ABOUT LEAVING A GIFT IN THEIR WILL BECAUSE OF THE CAMPAIGN.

**450,000+**

PEOPLE HAVE VISITED THE **WILL POWER WEBSITE** TO FIND OUT HOW THEY CAN LEAVE A GIFT IN THEIR WILL, EXPLORE CHARITIES TO SUPPORT AND CONNECT WITH ADVISORS.

None of this could have been accomplished without Will Power's seed funders and our community of 550 charities and professional advisors. They have invested and amplified the movement, *keeping the love going* ([watch the video](#)).

# POWERED BY VOLUNTEERS



"At a time when need is increasing, and the demand on charities is overwhelming, there is hope on the horizon."

**RUTH MACKENZIE**  
**EXECUTIVE DIRECTOR**  
**CAGP FOUNDATION**

We are grateful for the gifts of time, talent and treasure from these **special people**.

## BOARD OF DIRECTORS 2022

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Jill Nelson – Chair  
Michelle Osborne – Vice Chair  
Andrew Valentine - Secretary  
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Barbara Chambers  
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Brad Offman  
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## ADDITIONAL VOLUNTEERS

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Nicola Elkins  
Roger Lee  
Greg Lichti  
Michelle Johnson

Charles O'Neil  
Andrea Robertson  
Tina Tehranchian

Thank you to all our donors and volunteers for allowing us to expand the scope and availability of the highest quality philanthropic education, to develop knowledge, build awareness, create connections and engage in national dialogues.



[www.cagpfoundation.org](http://www.cagpfoundation.org)