



Community, Collaboration and Planned Giving



Quick 'Get to Know You'

Where are you from?

How many fundraisers do you have?

Do you have dedicated Planned Giving Staff?

How many of you work your Planned Giving?

Program off the corner of your desk?





Kendra Clarke, CFRE

(705) 495-8129

kendra.clarke@nbrhc.on.ca





Today's agenda

1. Barriers to Growing Your Planned Giving Program
2. Review of Report on *Charitable Giving in Canadian Wills* (with US additions)
3. Will Power
4. Community Collaboration



1. Barriers to Growing Your Planned Giving Program



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Time!





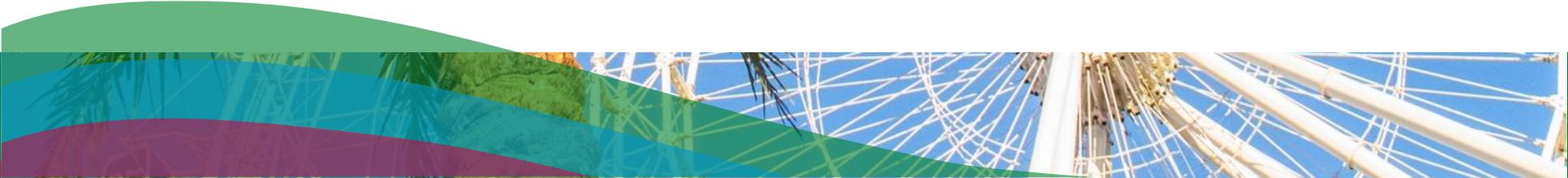
Barriers to Growing Your Planned Giving Program

- Time
- Financial Capacity
- Organizational Priorities – Immediate Needs
- Marketing Expertise
- Relationships with Advisors
- Advisor Education
- Prospect Pool
- Lack of Future Vision



2. Charitable Giving in Canadian Wills:

Current Trends & Opportunities in Legacy Giving





Charitable Giving in Canadian Wills:

Current Trends & Opportunities in Legacy Giving

- Most Canadians eventually write a will. We don't need to focus on the importance of writing or having a Will.
- Canadians know they can make a charitable gift in their will (86%) – we don't need to promote awareness!



Charitable Giving in Canadian Wills: Current Trends & Opportunities in Legacy Giving

82% of Canadians report giving to charity each year, while only 5% have included a gift to charity in their Will.

Why the Gap?



Charitable Giving in Canadian Wills: Current Trends & Opportunities in Legacy Giving

63% of Canadians said they are not interested in including a gift in their Will.



Charitable Giving in Canadian Wills: Current Trends & Opportunities in Legacy Giving

63% of Canadians said they are not interested in creative a gift in their Will.

**But there are still
1/3 of Canadians
who have shown interest!!**



Charitable Giving in Canadian Wills: Current Trends & Opportunities in Legacy Giving

The biggest barrier preventing more Canadians from being interested is a desire to leave everything to loved ones!



Demographics

35-50

Age group most interested in leaving a gift to charity in their Will.

65-74

Age group most seriously considering including a gift in their Will.

75+

Age group least likely to revise their Will.



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4. Will Power!



Will Power

The largest effort in Canadian history to make leaving a gift to charity in your will the Social Norm.



Will Power

The rising tide lifts all the boats.

John F. Kennedy



Will Power



[Learn & Plan](#) ▾

[Leave a Gift](#) ▾

[English](#) ▾

[START HERE](#)

Your Will is powerful

Change the world with a charitable gift in your Will, while still supporting those you love.

[LEARN MORE](#)





Will Power

Our 10 year goal

5% 8.5%
Goal reached in 2022
New Goal 13%! \$40B to Charity

REMEMBER A CHARITY
IN YOUR WILL
Help the work live on...

Modelled on success of the [UK campaign](#).



4. Community Collaboration



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Community Collaboration

Charitable funds are leaving our community for larger national charities with bigger budget to market and ask for planned gifts.



Community Collaboration

North Bay
Regional Health
Centre **Foundation**



Fondation du Centre
régional de santé
de North Bay



**NORTH BAY AND AREA
COMMUNITY FOUNDATION**





Why we partnered:

- Foster culture of philanthropy as a united front
- Embrace principle of collaboration
- Build relationships and steward local advisors
- Take advantage of each others contacts to spread the message
- Third party educational credibility
- Broaden our audiences



Education Sessions

1. **Advisor**

- All financial advisors, accountants and lawyers in the region

2. **Agency**

- All charitable/non-profit organizations in the region

3. **Donor**

- Our donor networks

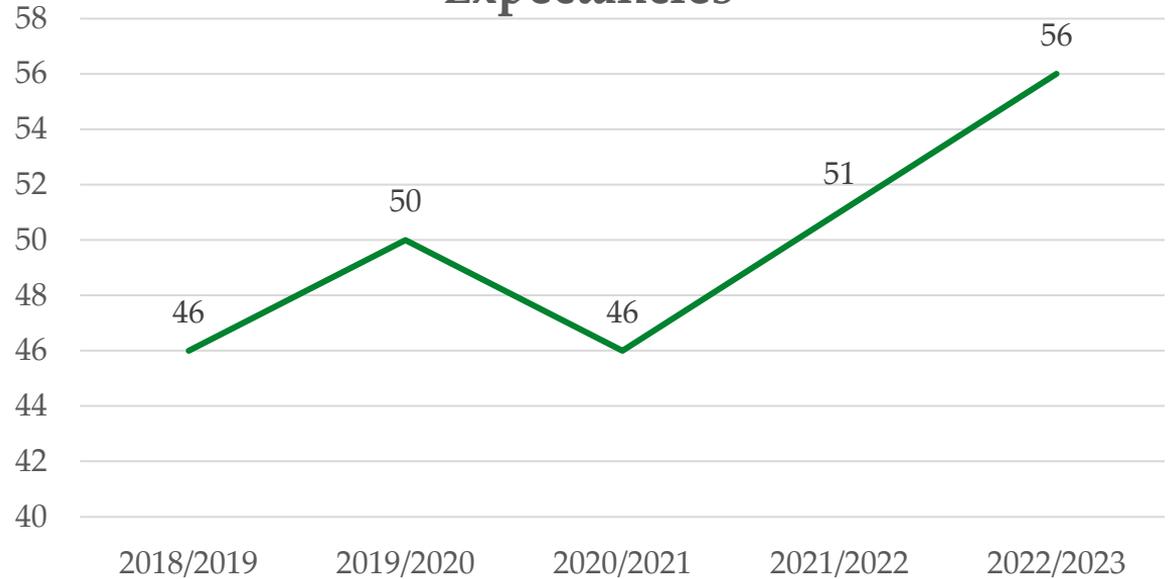
4. **Boards**

- The Boards of all charitable/non-profit organizations in the region



Results

Expectancies



Launched Sept 1, 2021





North Bay has figured out what Toronto and other urban networks haven't, that we need to overcome our egos and not take our brands too seriously as to hurt and hinder social-good."

Paul Nazareth

VP Education & Development
Canadian Association of Gift Planners





Brainstorm

Who might make good partners in your local community?

Write down 3 potential community partners right now.

Thanks!

Kendra Clarke

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Resources

CAGP Foundation & Evironics Analytics (2020) *Charitable Giving in Canadian Wills: Current Trends & Opportunities in Legacy Giving.*

www.WillPower.ca

Paul Nazareth, VP Education & Development, Canadian Association of Gift Planners