



NATIONAL ASSOCIATION of
Charitable Gift Planners

Council Leader Handbook

Council: _____

Username: _____

Password: localcouncil



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Support

Council Services List

Council Services Inventory				
	AFFILIATE	MEMBER	PARTNER	CHAPTER
Council Newsletter	✓	✓	✓	✓
Annual Council Affiliation Fees Required	✓	✓	✓	
Council Assembly Vote	✓	✓	✓	
501(c)3 Status Required	✓	✓	✓	
Membership Management Service		✓	✓	✓
Council Dues Collected		✓	✓	
National Membership Requirement			✓	✓
CFRE Credit Registration Fee Waived			✓	✓
Council Website Template and Hosting			✓	✓
Email Marketing Templates and Delivery			✓	✓
Email Member/Prospect Service			✓	✓
Historical Document Storage				✓
Council Group in CGP Link			✓	✓
Event Registration through Hosted Website			✓	✓

Council Status

When local or regional councils align with CGP, they form a powerful partnership that strengthens our membership at the local, regional and national levels. Our shared mission to facilitate, coordinate and encourage the education and training of the charitable gift planning community raises the bar for us all.

There are four levels of council affiliation with CGP:

Chapter

A Chapter is a group of national CGP members that meet locally for networking and events. Chapters receive all services listed in the chart above as well as a rebate of \$25 per member for operating expenses. Chapters fall under CGP's 501(c)3 designation and are required to submit an annual financial report. This affiliation is best suited for councils who have lost their own 501(c)3 status or are struggling financially.

Partner Council

A Partner Council is a local nonprofit with its own 501(c)(3) tax exempt status or listed under the CGP national group exemption. Partner Council members must also be national CGP members. Partner Councils are eligible for website services, membership management, email marketing benefits and more. This affiliation works well for councils looking to expand or improve services to their members.

Member Council

A Member Council is a local nonprofit with its own 501(c)(3) tax exempt status or listed under the CGP national group exemption. A Member Council does not require its members to be national CGP members. However, the council does encourage members to join both locally and nationally to receive a more well-rounded experience and access to enhanced benefits. CGP manages the membership and dues collection for Member Councils. All members of the council must join/renew on the CGP website at <https://charitablegiftplanners.org/joinrenew>.

Affiliate Council

An Affiliate Council is a local nonprofit with its own 501(c)(3) tax exempt status or listed under the CGP national group exemption. An Affiliate Council does not require its members to be national CGP members. However, the council does encourage members to join both locally and nationally to receive a more well-rounded experience and access to enhanced benefits. Affiliate Councils do not use CGP's membership management service. Members join/renew the local council via the council's website.

Each council, no matter its affiliation status, promotes and supports CGP membership and its mission to its members and charitable gift planning community. Language and logos are available to include on your website, membership promotion materials and meeting invitations to promote joining the National Association of Charitable Gift Planners.

Affiliation Payment

We are so pleased your council is affiliated with National Association of Charitable Gift Planners and we hope to continue the affiliation which forms a powerful partnership that strengthens our membership at the local, regional and national levels. Our shared mission to facilitate, coordinate and encourage the education and training of the charitable gift planning community raises the bar for us

The affiliation dues support CGP's efforts to assist councils with programming, management, membership and access to the council network across the country. Each spring (April-June) we ask councils to renew their affiliation with CGP. The affiliation dues are based on the number of members on your roster at the time of billing. If you are an Affiliate council your roster number is based on the roster you submitted during the affiliation dues process the previous year.



NATIONAL ASSOCIATION of Charitable Gift Planners

COUNCIL BENEFITS



Council Connections: A monthly newsletter for council leaders and administrators to keep up on tools, resources, events, and important reminders.



CGP National Website Listing: All affiliated councils are listed with contact information and a link to their website (if applicable) in the Council Directory on charitablegiftplanners.org. All inquiring members are referred to their local council in the directory.



Council Events: Councils may submit local council events to be featured on charitablegiftplanners.org.



Speakers Bureau: Councils have access to the CGP Speakers Bureau which includes presenters from the CGP National Board of Directors, past CGP Conference speakers, past CGP board members and members of the esteemed Leadership Institute. The speakers are available to present on a multitude of topics at your local council meeting.



CGP Shop: Councils are able to purchase CGP educational webinars (live or recorded) to use for local council meetings for \$149.00. CGP is available to provide councils help in developing programming for purchased webinars.



Council Community: This is where council leaders, boards and liaisons can come to learn, gather resources and connect to 80+ councils around the country.



Council Leadership Summit: Each year, CGP hosts the Council Leadership Summit - an opportunity for listening, learning and networking.



Member Support: CGP strives to make the membership experience as easy as possible. If you or any of your council members are having issues with joining or renewing membership we provide support and assistance.



Membership Management: Councils have the option for CGP National to manage their join/renewal process. Members are notified by email starting at 90 days from expiration.

Council Website: We offer Partner Councils the opportunity to have a local council website hosted



by CGP. We do not charge any additional fee. It can include event registration and donations. Partner Councils require National CGP membership for all members of the council.



CFRE Credit: Partner Councils are eligible to have the \$300 authorization fee for CFRE approval waived. Partner Councils require National CGP membership for all members of the council.

National Standards for Gift Planning Success Assessment: Council members complete short surveys to identify areas of interest for council programming. CGP staff will assist in planning your assessment project.

CGP NATIONAL MEMBER BENEFITS



CGP Link: The online community where members can download over 500+ resources, connect through our member directory to nearly 3,000 gift planners, and participate in the very active discussion forums.



CGP Career Center: Members can search for their next career move or post jobs for their organization at a discount.



Member Discounts: Enjoy savings on the CFRE exam and attend CGP Conference at the CGP member rate.



Advocacy Updates: CGP is an active force in Washington, DC. We work day in and day out to advocate for members and promote the value of the charitable giving profession to legislators and policymakers. CGP members can attend monthly advocacy updates for free.



CGP Shop: Members get 50% off all educational materials and webinars.



Perspectives Blog & Newsletter: The monthly newsletter and weekly blog are filled with event information, member benefits and the latest news from the field.



CGP Conference: Each year members can learn the best practices from the experts that created them at the CGP Conference.



Leadership Institute: CGP's Leadership Institute provides opportunities for the thought leaders who advance the art and science of philanthropy. Through the Institute, these leaders help shape standards and best practices for the gift planning community.



Tools and Resources

CGP Membership

Discover new ways to reach your goals. The National Association of Charitable Gift Planners is your professional home—a place to learn, advocate and build your career through a national network of charitable planned giving peers. If you are not a member of CGP, we invite you to join here: <https://charitablegiftplanners.org/join>.

CGP Link - Council Community

This is where council leaders, boards and liaisons can come to learn, gather resources and connect to 100+ councils around the country. When local or regional councils align with CGP, they form a powerful partnership that strengthens our membership at the local, regional and national levels. Our shared mission to facilitate, coordinate and encourage the education and training of the charitable gift planning community raises the bar for us all.

Tools in the Council Community Include:

- Resources- Here you will find council documents, samples, Council Leadership Summit notes and toolkits.
- Discussions- Use the forum to ask questions and share ideas and tools with other council leaders.
- Group News- Keep current on the programs and services offered to the CGP councils.
- Council Connections- Find links to all of the most current Council Connections newsletters.
- Speakers Bureau- Locate the right speakers for your upcoming council meetings using the Speakers Bureau search.
- Member Rosters- If CGP manages your council membership you have 24/7 access to your member roster.
- Council Profile- Access your council profile and make updates to your board roster, change contact information and pay your affiliation dues.

Here are step-by-step directions on logging in, connecting to the group and gaining access to your membership information. Please use your council login information (username: shortened council name and password: localcouncil).

- Log in by visiting charitablegiftplanners.org. If you are unsure of what your council login is, please contact us at councils@charitablegiftplanners.org
- Once you are logged in, click Groups, then click Council Community. If you are not already a member for this group, click "join" and CGP will approve your request.
- The Council Community gives access to the council membership roster for those councils that CGP provides with membership management, council profile and online payment of affiliation dues. Click on "Go To My Council Membership" button and you will be directed to these menu items.
- In addition to the Council Community group, CGP Partner and Chapter councils each have a group in CGP Link. These groups are for the local members to network, connect and share resources at the local level.
- You will then be directed to the page where you access your membership information and update your council profile.

Council Leadership Summit

Each year, CGP hosts the Council Leadership Summit. It's a day and a half of listening, learning and networking. If you are looking for programming ideas, council administration tips and leadership development, this is the event for you. As a council leader you will come away inspired and invigorated, ready to enrich your council.

Learn more about the new tools CGP has developed for council leaders so they can manage their councils in an effective and efficient manner.

- Preview programming that is ready to implement at your next council meeting.
- Spend time brainstorming with other councils on recruitment tactics. Learn about tools and resources your council could use to grow.
- You will have the opportunity to connect and network with other professionals in the charitable gift planning field who are also in the trenches of leading their local council.
- Exercise your council's right to vote on the National Association of Charitable Gift Planners board nominations.

For more information on how your council could benefit from sending a representative to the next Council Leadership Summit, visit <https://charitablegiftplanners.org/member-events>.

Speakers Bureau

Local CGP councils have access to the CGP Speakers Bureau. The Bureau includes presenters from the CGP National Board of Directors, past CGP Conference speakers, past CGP board members and members of the esteemed Leadership Institute. The speakers are available to present on a multitude of topics at your local council meeting.

The Speakers Bureau directory is located in your CGP Link Council Community. Once logged in, council leaders are able to search the directory by name, location, topic, or type of presenter. Click here to access the directory of speakers: <https://charitablegiftplanners.org/speakers-bureau>

CGP Events

Councils and members can use the CGP Events to purchase educational resources, webinars and salary reports. Councils will find special educational packages and a group rate they can purchase for programming. CGP members get discounts on all resources in CGP Events. To access the CGP Events, click here: <https://charitablegiftplanners.org/shop>

Council Programming

CGP develops council programming to help councils fill their meeting calendar. Over the years we have offered webinars, presentations and case study programs. Any programming available will be accessible in the CGP Link Council Community and the Speakers Bureau.

Rebrand toolkit/assistance

We invite councils that have not done so to adopt this stunning and professional new brand. CGP completes all of the design work for the councils wanting to update their name and adopt the new brand. We also provide an extensive toolkit. If you have questions or would like to discuss your specific council, please email councils@charitablegiftplanners.org.

Membership Promotional Materials

CGP has worked with many councils on creating membership promotion materials. We typically create the design and leave a portion of the piece blank for the council to add member benefits and contact information. It is the council's responsibility to print and distribute the promotional materials. Below is a sample:



NATIONAL ASSOCIATION of Charitable Gift Planners

Maximize Your Potential.
...RIGHT HERE WITH CGP.

Discover new ways to reach your goals. The National Association of Charitable Gift Planners is your professional home—a place to learn, advocate and build your career through a national network of charitable planned giving peers.

- Grow your network and your career
- Access current research data and gift planner profiles
- Receive exclusive communications and resources
- Connect and learn in CGP's virtual communities
- Enjoy discounted events and education offerings
- Be the first to receive advocacy updates

Find out more by visiting charitablegiftplanners.org

Councils are also able to access national promotional materials including membership and CGP CONFERENCE that they are able to distribute to members at council events. To start work on your promotional material, email councils@charitablegiftplanners.org.



Communication

Council Profile

Current contact information for your council leadership is key to efficient communication between CGP and the council. The best way to provide information that will better help us communicate with the appropriate leadership is to fill out the council's online profile and keep it updated as your board transitions or contact information changes. At the minimum CGP asks the council profile is updated yearly when the council affiliation fee is due (see 3.3).

It is important the President's term start and end dates field in the profile reflect the term length. Please indicate multi-year terms, if necessary. That information allows us to adjust our records at the appropriate time.

The council profile is also where you can opt in to receive the Council Connections newsletter for council leaders and administrators.

Council Connections Newsletter

Council Connections is a monthly e-newsletter that CGP distributes to council leaders. The newsletter contains information important to the support and operation of your council. It also provides updates on the tools and resources CGP provides councils, as well as educational offerings and opportunities for your members that you can promote. Council leaders opt in to the newsletter when the council profile is updated each year. The more informed your entire council board is, the more work you can accomplish. If you are not receiving the newsletter, but would like to, please email councils@charitablegiftplanners.org.

CGP Communication Tools

In addition to the Council Connections newsletter, which is specific to council related business, CGP also has a monthly member newsletter, Perspectives. To receive this newsletter you must be a national CGP member. Perspectives gives members updates on educational offerings, events, news from the field and ways to get more from their membership. Other tools we encourage councils to follow and share include:

[Perspectives Blog](#)

[CGP LinkedIn](#)

[CGP Facebook](#)

[CGP Twitter](#)

CGP Membership Team

The CGP Membership department includes the Director of Membership, Christi Martin, and the Membership Data Manager, Carey Wilson. Both are available to councils for support, strategic work and questions. To meet the rest of the CGP staff please visit: <https://charitablegiftplanners.org/people>.



Director of Membership

Christi Martin

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Membership Data Manager Carey

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CGP Board of Directors

The CGP Board of Directors is an active group of practicing charitable gift planners who support the organization and its affiliated councils. Many of the CGP board members are available to speak at your council meeting as a part of the CGP Speakers Bureau. In addition to this support, each board member is assigned a group of councils. Board members reach out to council presidents on an annual basis to ensure the council is doing well and has the support it needs from the national office. To meet the current CGP Board of Directors, please click here: <https://charitablegiftplanners.org/people>.

Each spring CGP asks councils and council leaders to nominate charitable gift planners for the National Board of Directors. If you know a candidate, please be sure to submit the name in April.

Partner/Chapter Services

If your council would like to transition to a Partner council or Chapter, we invite you to read more about the services and logistics of this process. We strive to make it as easy and seamless as we can. CGP provides language to share with your members about the transition. We also build the council website and train council leaders on the tools associated with the website.

Council Website

We offer the opportunity to have a local council website hosted by CGP. We do not charge any additional fee. It can include event registration and donations. Any event or donation income collected through the council site will be included in the monthly ACH deposit along with any dues collection and corresponding reports emailed to you.

CFRE Credit

The National Association of Charitable Gift Planners is a CFRE Participating Organization (PO). Planned giving councils that are Partner or Chapter councils are considered to be CFRE Participating Organizations. As a PO, you can apply to offer CFRE credit for your council programs and the authorization fee (up to \$300 for multiple programs) will be waived. If you are a Partner council and need directions on completing your approved provider application, please email councils@charitablegiftplanners.org.

Email Marketing

Each Partner council or Chapter can take advantage of Mailchimp, an email marketing program. The council will have an account which will allow for event marketing, newsletter, general announcements, etc. CPG can load templates as requested by the council. CGP will import a current membership list on a regular basis, moving expired members to a secondary list. The council may also import a clean prospect/nonmember list or keep a list for board only.

NOTE: Training for council website and Mailchimp management is required. CGP will schedule a training session, complete with materials, with any person(s) who assume this role.

Member Support

The National Association of Charitable Gift Planners strives to make the membership experience as easy as possible. If you or any of your council members are having issues with joining or renewing membership, please contact the national office by phone or email (see 2.4).

CGP offers three payment options: credit card, check and ACH (direct deposit). All memberships should be processed through our online form. Each payment method is available on the form. You can also find the information on our website at <https://charitablegiftplanners.org/join-membership-payment-methods#>.

The CGP address for membership applications and checks:

National Association of Charitable Gift Planners
1075 Broad Ripple Avenue, #306
Indianapolis, IN 46220-2034
Please include the member name in the check memo.

If CGP manages your membership billing, here is the schedule of notifications all members receive:

90 days from expiration – email reminder
60 days from expiration – email reminder
30 days from expiration - email with pdf invoice attached (only members with both National and council)
10 days from expiration - email reminder
Day of expiration - email reminder
10 days after expiration - email reminder
31 days after expiration – email reminder (only members with both National and council)

After the cycle is complete, the council is encouraged to contact any members who have let their memberships expire. You can monitor expiration dates on the council roster (column marked End Date and column marked Status) that can be downloaded from the council's profile.

Member Transfer Policy

National Association of Charitable Gift Planners (CGP) values our national members and the organizations that support them. We understand members change positions and organizations paying for memberships replace them with successors.

CGP is an individual membership association and an active membership transfers with the individual if they leave an organization, even if the organization paid for the membership. At the time of expiration, the individual or the new organization is responsible for renewing the membership. CGP asks that the individual update their personal profile when changing employment positions.

The organization, which paid for the membership, has the opportunity to replace the membership with the successor of the exiting individual for the remaining term of the membership without an additional cost. At the time of expiration, the organization or individual is responsible for renewing the membership. CGP asks the new individual assuming the membership to contact the CGP office to establish their individual member profile.

Councils managed by CGP are assumed to also follow this policy. If your council has questions please email councils@charitablegiftplanners.org.

Administration

Access Member Roster

If CGP manages your council membership, you have 24/7 access to your member roster. The includes any answers to demographic questions asked by CGP: length of time working in philanthropic planning, type of employer, nonprofit/for profit, etc. The roster also shows the member's status (New, Current, Grace and Expired). Use your roster to get to know your members and follow up with members who have let their membership lapse.

ACH Form

If CGP bills and collects local dues on behalf of your council, we require ACH as the form of transferring your dues monthly from CGP to the council.

If your council already uses ACH and makes any changes in banking, please submit new information using the link above.

To request the form, please email councils@charitablegiftplanners.org

Membership Applications

We encourage all memberships to be completed online for the most accurate reporting and access to information. However, when you need a paper application, please email councils@charitablegiftplanners.org if you need the application emailed to you.

Council Awards

CGP Outstanding Council Award

CGP presents an Outstanding Council award to recognize a council for significant achievement in the preceding year. The award is meant to celebrate innovative programming, special events, membership growth, community impact and other areas of contribution to the charitable gift planning field.

Nominations are accepted June 15-July 15. More information and the nomination form can be found:

<https://charitablegiftplanners.org/awards-program>.

The selected council will be recognized at the National Conference, on the CGP website and through associated media outlets.