

Frequently Asked Questions about the CGP Leadership Institute

When and where is the Institute?

The Leadership Institute is not a single event, but an on-going series of programs, activities and conversations for the most highly experienced philanthropic planners.

Are there examples of this type of program in other professional organizations?

The Leadership Institute is modeled on “masters” groups that operate in a number of professions, including the American College of Trusts and Estate Counsel (ACTEC) and the Key Philanthropic Organizations Committee (KPOC) of the American Society of Association Executives.

What are the benefits of participating in the Institute?

Education—The Leadership Institute offers a minimum of two in-person meetings each year—one at the National Conference on Philanthropic Planning in October (see below for more information), and one in March, in a city that is easily accessible from most major airports. These meetings offer roundtable discussion of key issues, identified and moderated by participants in the Institute. The Institute will also host on-line chats, webinars, and other events that focus on learning among Institute participants.

Networking—Through a private group in CGP’s e-community, you can connect with other Leadership Institute participants for in-person conversation or online forum discussions that facilitate conversation among a larger group of people. While CGP’s general membership will be able to see a directory of Leadership Institute participants, the Institute’s discussion groups, and education events will not be open to the general membership.

Influence—Through surveys, focus groups and other short-term commitments, you will have the opportunity to:

- provide guidance on professional standards that govern important aspects of philanthropic planning
- help develop best practices models
- design and participate in research projects
- inform CGP responses to legislative and regulatory issues
- weigh-in on CGP’s strategic initiatives

Service—There are many opportunities to provide service to the national community of philanthropic planners, including speaking, publishing articles and reviews, moderating forums and discussion groups, serving as press spokespersons, and liaisons to partner organizations. Leadership Institute members may participate in service options that fit their interests and time constraints.

Is there a cost to join the Leadership Institute?

The annual fee for participating in the Institute is \$150, in addition to individual membership in CGP, which costs \$150 for members of a local planned giving council and \$190 for those who are not local council members.

How will participants be selected?

New members of the Leadership Institute must be nominated by at least two current members. Nominees will submit an application summarizing their philanthropic planning and volunteer leadership experience, which will be reviewed by a Leadership Institute peer committee of existing Institute members and approved or recommended for reconsideration in the future, after experience requirements have been met.

What will happen during Leadership Institute Roundtable Discussions at the National Conference on Philanthropic Planning?

These structured discussions begin with short presentations by members of the Leadership Institute on topics such as recent legislative or regulatory developments (e.g., new legislation, case or ruling), a planning technique (e.g., shark fin CLAT) or research of interest. Three or four topics will be covered in each 90-minute session. The presentations will be followed by open discussion among all members of the Institute who attend the session. Conference attendees who are not members of the Leadership Institute may audit the discussion, but they will not participate, and there will be no Q&A. The discussions are modeled on similar sessions offered by the American College of Trust and Estate Council. Each session will be facilitated by two members of the Leadership Institute who represent the nonprofit and for-profit sectors.

The Leadership Institute has been created with the assistance of many senior philanthropic planners. The members of the Steering Committee are:

Joe Bull, Columbus Zoo
Reynolds Cafferata, Rodriguez, Horii, Choi & Cafferata LLP
Marc Carmichael, R & R Newkirk
Laura Hansen Dean, The University of Texas at Austin
Shari Fox, University of Michigan
Jackie Franey, Communities Foundation of Texas
Tanya Howe Johnson, Partnership for Philanthropic Planning
David Wheeler Newman, Mitchell, Silberberg & Knupp
Jay Steenhuysen, Steenhuysen Associates