

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 among 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).

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 annual CGP Conference in October and one in the spring, in a city that is accessible from most major airports. These meetings offer roundtable discussion of key issues, identified and moderated by participants in the Institute. The Institute may also host phone meetings, webinars, and other events.

Networking—Through a private members only group in CGP’s e-community, you can connect with other Leadership Institute participants for in-person conversations or online forum discussions that facilitate conversation among a larger group of people. A [directory](#) of Leadership Institute members is available on the CGP website.

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 and serving as liaisons to partner organizations. Leadership Institute members are encouraged to 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.

How will participants be selected?

Nominees will submit an [application](#) summarizing their philanthropic planning and volunteer leadership experience. Applicants must obtain recommendations from at least two current members of the Leadership Institute. Applications are reviewed by a Leadership Institute peer committee of existing Institute members and either approved or recommended for reconsideration in the future, after experience requirements have been met.

What happens during Leadership Institute Roundtable Discussions?

Discussions begin with short presentations solicited from members of the Leadership Institute on topics such as recent legislative or regulatory developments, a planning technique (e.g., shark fin CLAT), or research of interest. Several topics can be covered during each session. The presentations are followed by open discussion among all Institute members. Attendees who are not members of the Leadership Institute may audit designated open sessions, but they will generally not participate.

The Leadership Institute was created with the assistance of many senior philanthropic planners. Special thanks to the members of the initial Steering Committee.

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