



# Colorado Planned Giving Roundtable

## CPGR PROTÉGÉ APPLICATION FORM

Applicant Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

Phone (mobile) \_\_\_\_\_ (office) \_\_\_\_\_

Email: \_\_\_\_\_

1. **Current employment status:**  Full-time  Part-time
2. **Nonprofit type:**  Educational Health  Cultural  Social Service  Religious  Animal  
 Environmental  Other type of organization \_\_\_\_\_
3. **What is your organization's annual operating budget?**  Less than \$500k  \$500k - \$1 million  
 \$1.1 million - \$5 million  \$5.1 million - \$15 million  over \$15 million
4. **What is your organization's planned giving program budget?** \_\_\_\_\_
5. **Indicate years of fundraising experience:**  0 yr  1-3 yrs  4 – 6 yrs  7 – 9 yrs  10 yrs+
6. **Indicate years of planned giving experience:**  0 yr  1-3 yrs  4 – 6 yrs  7 – 9 yrs  10 yrs+
  - a. **What percentage of your work involves planned giving?**  0-5%  6-20%  21-50%  50%+
  - b. **What percentage of your work involves major gifts?**  0-5%  6-20%  21-50%  50%+
7. **How would you characterize your experience in planned giving?**  Beginner  Intermediate  
 Advanced
8. **Have you ever attended a CPGR event in the past?**  Yes  No
9. **Do you currently participate on a CPGR Committee?**  Yes  No If yes, which one? \_\_\_\_\_

**Please explain your development experience & results in the following areas:**

Annual Giving:

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Major Gifts:

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Marketing:

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Donor Meetings and Stewardship:

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Briefly describe what you do in your current job:

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Explain role in organization in regard to planned giving:

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What benefits or results do you seek as a protégé with personal or career goals?

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What results do you want to see with your planned giving program?

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Have you ever mentored or been mentored before? If yes, please describe positives and negatives.

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How many 1:1 donor meetings do you have monthly?

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Do you need help with donor conversation around planned giving? Please explain.

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What qualities are you seeking in a mentor?

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Please list any general information you would like a potential mentor to know about you. (Hobbies, family, activities, volunteer work, professional organization involvement)

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**Review topics below and select the top 5 in which you are interested in learning. Please number 1 to 5.**

\_\_\_\_ Boards and Planned Giving

\_\_\_\_ Working with Executive Leadership

\_\_\_\_ Planned Giving Prospecting

\_\_\_\_ Planned Giving Donor Meetings (How to ask or what to listen for)

\_\_\_\_ How to build a long term planned giving program

\_\_\_\_ Planned Giving Marketing Materials

\_\_\_\_ Working with Advisors

\_\_\_\_ Knowledge to be the expert for organization

**Planned Giving Vehicles – Please rate yourself.** After rating yourself, please select with a (\*) where you would like to focus on during the mentor program if selected.

1 = Would like help with understanding vehicle

2 = I know about this vehicle but could still use guidance

3 = I am good with this vehicle and don't need guidance

4 = Do not need to understand at this time

\_\_\_\_\_ Reading and Understanding Estate Documents

\_\_\_\_\_ Donor Advised Funds (DAF)

\_\_\_\_\_ IRA Beneficiary

\_\_\_\_\_ Life Insurance (LI)

\_\_\_\_\_ Charitable Gift Annuity (CGA)

\_\_\_\_\_ Charitable Remainder Trust (CRT)

\_\_\_\_\_ Charitable Lead Trust (CLT)

\_\_\_\_\_ Pooled Income Funds

\_\_\_\_\_ Charitable Bequest

\_\_\_\_\_ Contingent Bequest

\_\_\_\_\_ Gifts of Stock

\_\_\_\_\_ Gifts of Property

\_\_\_\_\_ Gifts of Securities

**Planned Giving program information: Does your program have the following....**

- Endowment Program  Yes  No
- Printed Planned Giving Materials  Yes  No
- Planned Giving Website  Yes  No
- CGA Program  Yes  No
- Legacy Society  Yes  No
- Gift Acceptance Policies  Yes  No
- Life Insurance Policies  Yes  No

**Please answer the following questions:**

Is your planned giving program proactive or reactive? Please explain.

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What fundraising system (CRM) does your organization utilize? Ex: Raiser’s Edge, Sales Force

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What planned giving company do you work with if any? Ex: Stelter, Crescendo, PG Calc

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A member of the steering committee will be contacting you for a one-on-one interview. Please make sure the number at the beginning of this application is the best number to reach you.

\*\*\*Please attach a copy of your resume and your current job description.

**Send to:**

Tina F. Drum  
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Colorado Planned Giving Roundtable  
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Email: [cpgr@q.com](mailto:cpgr@q.com)  
Fax: (720)981-2858  
Questions? (303)932-2764 or [cpgr@q.com](mailto:cpgr@q.com)

**Applications are due November 16, 2018.**

Incomplete applications will not be considered.



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## Executive Leadership Commitment Form

Dear Executive Leadership,

\_\_\_\_\_ is applying for the **CPGR Mentor Program**. This is a professional development program designed for promising fundraising professionals from the nonprofit sector. If the candidate is selected, he or she will be making a significant commitment to advance his or her planned gift fundraising skills and effectiveness.

This is a one-year program where the applicant will be paired up with a seasoned gift planning mentor. If selected the protégé will be required to commit to 8-10 meetings with their mentor, they will be required to join a CPGR volunteer committee and they will be expected to attend as many CPGR educational programs as possible including the 2-day Summer Symposium that will be held at the Denver Hilton Inverness on August 21 & 22, 2019.

Signature of CEO/Executive Director: \_\_\_\_\_ Date: \_\_\_\_\_

AND/OR

Signature of Board Chair: \_\_\_\_\_ Date: \_\_\_\_\_