



# Colorado Planned Giving Roundtable

## CPGR PROTÉGÉ APPLICATION FORM

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

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

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

1. **Current status:** Full-time Part-time

2. **Employer:**

Employer Name: \_\_\_\_\_

Employer Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ County: \_\_\_\_\_

3. **Nonprofit type:** Educational Health Cultural Social Service Religious Animal Environmental  
Other type of organization \_\_\_\_\_

4. **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

5. **What is your organization's planned giving program budget?**

6. **Indicate years of fundraising experience:**  0 yr  1-3 yrs  4 - 6 yrs  7 - 9 yrs  10 yrs+

7. **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%+

8. **How would you characterize your experience in planned giving?**  Beginner  Intermediate  Advanced

9. **Have you ever attended a CPGR event in the past?**  Yes  No

If yes, indicate the year(s) you attended:  before 2014  2015  2016  2017  2018  2019

Event (mark all that apply)  Professional Luncheon  Summer Symposium  Educational Session  PG: The Basics

**10. CPGR Membership is required to participate in this program. Would you need a scholarship to cover the \$105 membership fee?**     Yes     No

If **yes**, please summarize in 500 words or less (typewritten, please) your interest in planned giving and how you anticipate that participation in this program may enhance your level of knowledge, improve your job skills or advance your career. (Please attach a separate sheet).

**Please explain your development experience in the following areas (Please answer and attach):**

- Annual Giving
- Major Gifts
- Marketing
- Donor Meetings and Stewardship

**Briefly describe what you do in your current job:**

---

---

---

---

**Have you ever mentored or been mentored before? If so, please describe:**

---

---

**What benefits or results do you seek as a protégé?**

---

---

---

---

**As a prospective protégé, I am particularly interested in (check all that apply):**

- setting career goals/time lines
- developing leadership skills
- learning about organizational structure, priorities, politics and culture
- learning how to facilitate organizational change
- learning more planned giving
- Learning how to bridge event & individual fundraising to planned giving
- fostering effective professional relationships
- receiving help with professional writing
- finding community outreach/education opportunities
- assessing current skills/gaining new skills

\_\_\_\_\_ balancing personal and professional priorities  
\_\_\_\_\_ having someone to connect with, someone with whom I can discuss work  
\_\_\_\_\_ issues or life issues and goals on a regular or periodic basis

\_\_\_\_\_ other (please describe):

**What qualities are you seeking in a mentor?**

(If you know people who exemplify these qualities, please list their names to facilitate the matching process.)

---

---

---

**Please list any general information you would like a potential mentor to know about you.**

(e.g., hobbies, family, activities, volunteer work, professional organizations, etc.).

---

---

---

**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.**

**Mail to:**

Tina F. Drum  
Executive Director  
Colorado Planned Giving Roundtable  
PO Box 101208  
Denver, CO 80250-1208

**or Email:**

CPGR@q.com

**or FAX:**

(720)981-2858

**Questions?**

(303)932-2764 or CPGR@q.com



# Colorado Planned Giving Roundtable

## CEO Commitment Form

Dear CEO/Executive Director,

\_\_\_\_\_ 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 27 & 28, 2020.

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

AND/OR

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