

The Colorado Planned Giving Roundtable (CPGR) Fellowship Program Program Overview

As the Baby Boomers begin to retire from management positions with charities both nationally and locally, it can be more difficult for non-profit organizations to find enthusiastic staff members who are ready, willing and able to move into the challenging leadership positions being vacated. CPGR hopes to encourage talented new professionals to remain in the nonprofit sector, particularly those who are interested in careers in fundraising and planned giving.

The goal of the new CPGR Fellowship Program is to introduce the Roundtable and its various programs and opportunities to fundraising professionals across the state who:

- are experienced fundraising professionals, but new to planned giving
- have little fundraising experience, but are now responsible for all or part of a nonprofit's fundraising, including planned giving

Candidates from diverse backgrounds, those who work for smaller organizations, as well as those serving underserved communities are particularly encouraged to apply for the Fellowship Program.

The Fellowship program is an effort to reach out to new fundraising professionals or nonprofit professionals by offering an opportunity to participate in a two-year program that will:

- enhance their professional development and fundraising training, particularly in the area of planned giving
- offer access to networking opportunities, as well as fundraising and planned giving resources
- assist them in developing their organization's own planned giving program

This program will help fulfill CPGR's mission to increase the quantity and quality of charitable planned gifts in our community by expanding our efforts to offer quality planned giving education, increased awareness and networking opportunities.

Applications to the program will be accepted beginning in the fall with a deadline of **December 11, 2009**. Applications will be reviewed and Fellowship 2010 recipients will be notified by **December 28, 2009**. The application will include permission from the candidates' supervisor and/or the Chair of the Board/CEO/Executive Director of the hiring organization.

Candidates may come from Colorado or the surrounding states, but since attendance at a number of programs throughout the year is required, it is expected that candidates will most often be drawn from the metro-Denver area. Candidates who are able to travel to meet this commitment will be considered. The goal for the first year is 2-4 Fellows.

Fellows will receive:

- A complimentary membership to CPGR for two years
- Preference for a Summer Symposium scholarship
- An assigned member partner to serve as an advisor
- The fee waived for three of the five luncheon programs

Fellows will be required to:

- Attend four CPGR programs in the first year (to include Luncheon Programs, Brown Bag Series and Technical Series programs). *Note: There is no charge for CPGR members for the Brown Bag & Technical Series*
- Work with a CPGR committee to complete a project related to that committee's charge
- Meet quarterly with their Member Partner (two meetings face-to-face, two may be by telephone)

In the second year, each fellow will meet with the Fellowship committee to advise them on program evaluation and enhancements and is expected to attend at least three programs. The Fellow will complete a written evaluation of the program annually as well as participate in the Fellowship planning process for the second year of the program.

The Board President will appoint an ad hoc committee of three to four persons to oversee the program with the assistance of the Executive Director. Candidates for the Ad Hoc committee include but are not limited to the Board president, a member of the CPGR board, a member of the original fellowship planning committee, and a member of the sponsor organization.

The Ad Hoc committee will:

- Review the fellowship applications using the same scoring guidelines used by the Summer Symposium Scholarship Program
- Select the Member Partners to be matched with each Fellow
- Plan and hold the Fellow orientation in January
- Monitor the program on a quarterly basis and file a report with the Board
- Provide guidance for the program

CPGR FELLOWSHIP APPLICATION

Applicant Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____ 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. **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%+

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 If yes, indicate the year(s) you attended: before 2003 2003 2004 2005 2006 2007 2008 2009

Event (check all that apply) Luncheon Program Summer Symposium Brown Bag Other _____

9. **Have you ever received a Summer Symposium scholarship?** Yes No If yes, indicate the year: _____

10. **Has anyone in your organization ever been (or is currently) a member of CPGR ?** Yes No If yes, member's name: _____

11. **How did you learn about the Fellowship Program?** CPGR email Flyer A colleague
 CPGR Website Other Organizations Website Other _____

Please summarize in 500 words or less (typewritten, please) your interest in planned giving and how you anticipate that your participation in the Fellowship Program may enhance your level of knowledge, improve your job skills, advance your career and further the success of your organization. (Please attach a separate sheet).

Signature: _____ Date: _____

I have attached the required Organization Commitment Form, signed by my supervisor and/or President/Director.

All awardees will receive a two-year fellowship, providing full scholarship attendance for up to 5 events (not including Summer Symposium) for their first year of fellowship. Awardees must sign an agreement specifying their award and obligations.

Signed applications must be received in the CPGR office **by December 11, 2009 at 5:00 p.m.** Awardees will be notified by December 28, 2009.

Mail: Colorado Planned Giving Roundtable
 P.O. Box 101208
 Denver, CO 80250-1208
Fax: (720) 981-2858
Email: cpgr@msn.com

Questions? Contact Tina Drum, Executive Director – CPGR, (303)932-6168 or cpgr@msn.com



CEO and Board Recommendation Form

Dear Board and CEO/Executive Director,

_____ is applying for the Colorado Planned Giving Roundtable's (CPGR) Fellowship Program. This is a two year program where the applicant will receive the following:

- A complimentary membership to CPGR for two years
- Preference for a Summer Symposium scholarship
- An assigned member partner to serve as an advisor
- The fee waived for three of the five luncheon programs

Each Fellow will be expected to attend a certain number of programs as well as serve on a CPGR committee where they will receive an assignment to be completed before year end. A complete description of the Fellowship program is attached.

To help insure the success of the candidate, support from the executive and/or board leadership of your organization is important in the evaluation of his or her candidacy. Please complete the following and sign below to indicate your support for his/her application.

Kristin K. Walker, CFRE
CPGR, Fellowship Committee



Fellowship Program

CEO and Board Recommendation Form

Dear Board Chair and CEO/Executive Director,

_____ is applying for the CPGR Fellowship program. This is a new professional development program designed for promising development professionals from a wide range of fields within the nonprofit sector. If the candidate is selected, he or she will be making a significant commitment to advance his or her development skills and effectiveness. Selected candidates will be matched with a "seasoned" development professional to develop and complete a customized program that meets their needs and those of the organization. There will be flexibility in the type of activities that can be pursued as well as the timing of those activities. Additional time will be spent meeting periodically with other participants, exploring particular topics or areas of practice. A complete description of the program is attached.

Support from executive and board leadership of your organization's candidate is crucial in our evaluation of his or her candidacy. Please complete the following and sign below to indicate your support for his or her application. In addition to this form, please include a letter of recommendation regarding the candidate's leadership abilities and why this is an appropriate time for his/her consideration for this mentorship experience.

I understand the goals and expectations of the CPGR Fellowship program and believe this individual to be a worthy candidate. YES NO

I am fully confident that this candidate can manage the challenges of his/her current position while participating in this program. YES NO

Executive and Board leadership are prepared to support this individual during the mentorship experience. YES NO

Signature of Board Chair: _____ Date: _____

AND/OR

Signature of CEO/Executive Director: _____ Date: _____

Name of Organization: _____

The mission of the Colorado Planned Giving Roundtable, a 501 (c) (3) nonprofit, is to increase the quantity and quality of charitable planned gifts in our community.