



COUNCIL ON PLANNED GIVING

## 2018-2019 Scholarship Application

### I. *APPLICANT INFORMATION*

Name:

Title:

Organization:

Current Employment Status:  Full Time  Part Time

Address:

City, State, Zip:

Email:

Work Phone:

Other Phone:

Organization's Federal Tax Identification Number:

How long have you been with your current organization?

Indicate years of fundraising experience:

What percentage of your work involves planned giving?

Allied Professional:

Accountant

Attorney

Estate Planner

Financial Planner

Other: \_\_\_\_\_

Have you attended a CCPG event in the past?  Yes  No

If yes:  Bi-Monthly Luncheon Program  Symposium

Approximate Date(s) of Program or Symposium: \_\_\_\_\_

### II. *ORGANIZATIONAL INFORMATION*

Organizational Mission Statement:

Year organization was founded or established:

Organization's most recent operating budget for fiscal year ending on:

\_\_\_ Less than \$500,000      \_\_\_ \$500,000 to \$1 million      \_\_\_ \$1.1 million to \$5 million  
\_\_\_ \$5.1 million to \$10 million      \_\_\_ \$10 million+

For nonprofits:

Organization raised \$ \_\_\_\_\_ for fiscal year ending on \_\_\_\_\_.

Source of funds raised:

Individuals \_\_\_\_\_%      Corporations \_\_\_\_\_%      Foundations \_\_\_\_\_%

Bequests/Planned Gifts \_\_\_\_\_%

For allied professionals, please list services provided to individuals or nonprofits:

### **III. ADDITIONAL QUESTIONS**

A. In no more than one page, address the following questions:

- Why do you need a scholarship?
  
- How do you anticipate taking what you learn at CCPG and specifically using it to serve your organization, its constituents or others?
  
- How will attending CCPG educational programs and meetings enhance your career growth; your professional and personal skills; your short and long term personal goals?

B. In no more than one page, describe your organization's current philanthropy program and its potential to use gift planning as a fundraising strategy. For allied professionals, please describe how you or your organization works with the nonprofit community and its philanthropic programs.

C. In no more than one page, provide a brief statement about the nature of your fundraising and/or gift planning responsibilities including tasks you routinely perform and the amount of time you spend on development activities.

D. Please include a resume with your application.

**IV. STATEMENT OF SUPPORT FROM ORGANIZATION'S LEADERSHIP**

*At a minimum, the following statement must be submitted on letterhead from a member of your organization's leadership team (such as Executive Director, President or Board Chair). You may also attach a one-page letter of recommendation, if so desired.*

I fully endorse the application of (*applicant's name*) to participate in the 2018-2019 Chicago Council on Planned Giving Scholarship Program, understanding that this is a fundraising educational program designed to enhance my organization's capacity in this area. I understand that the above-named will need to be available to attend bi-monthly luncheon programs and an annual all-day symposium in order to meet the obligations as described in the "Benefits of Participation" section of this application. Finally, I understand that a non-refundable \$50 enrollment fee will be required in the event that the candidate is selected as a CCPG Scholar.

Signed:

Name (printed):

Title (printed):

Organization:

*For self-employed allied professionals, at a minimum, the following statement must be submitted. You may also attach a one-page letter of recommendation, if so desired.*

I fully understand that this is a fundraising educational program designed by the Chicago Council on Planned Giving. I understand that I will need to be available to attend bi-monthly luncheon programs and an annual all-day symposium in order to meet the obligations as described in the "Benefits of Participation" section of this application. Finally, I understand that a non-refundable \$50 enrollment fee will be required in the event that I am selected as a CCPG Scholar.

Signed:

Name (printed):

**To apply, applicants must complete and electronically submit the application and supporting documentation to CCPG [ccpg@ccpgonline.org](mailto:ccpg@ccpgonline.org) by 5:00 p.m. CDT, on October 12, 2018.** Applications will be reviewed by a selection committee and scholarship winners will be notified electronically no later than Friday October 19 and introduced at the bimonthly luncheon program on November 13, 2018 at the University Club in Chicago.

For additional information about the Chicago Council on Planned Giving Scholarship Program, please contact our Outreach Committee Chair, Michelle DeMent, via email at [dementconsulting@icloud.com](mailto:dementconsulting@icloud.com) or by phone at (773) 859-1613 or CCPG's Administrative Manager, Christine Teed via email at [cteed@ccpgonline.org](mailto:cteed@ccpgonline.org) or by phone at (630) 599-7103.