



## 2021-2022 CCPG Scholars Program

The Chicago Council on Planned Giving is pleased to offer the 2021-2022 CCPG Scholars Program, a year-long educational opportunities for fundraising and charitable gift planning professionals hoping to expand their professional expertise in philanthropic gift planning techniques. Four CCPG Scholars will be chosen this year – each Scholar will receive:

1. A one-year membership to CCPG (September 1, 2021-August 31, 2022);
2. Attendance at all 2021-2022 Bi-Monthly Programs, the 2022 Annual All-Day CCPG Symposium and the ½ day Introduction to Planned Giving Essentials; and
3. A personally matched CCPG mentor for the year.

The Scholars Program is available to experienced fundraising professionals who are new to planned giving or professionals with little fundraising experience who are now responsible for all or part of a nonprofit's fundraising, including planned giving. The Scholars Program is also available to allied professionals who work with the Chicagoland nonprofit community. Successful applicants will demonstrate a commitment to expanding his/her fundraising knowledge and/or an interest in transitioning his/her career to one with an emphasis in planned giving.

CCPG encourages participation from organizations that have not developed planned giving as a fundraising strategy, but where potential exists for growth in this area. CCPG also encourages applications from individuals from diverse backgrounds or professionals who represent organizations serving traditionally underserved and/or under-represented individuals. CCPG members and non-members are eligible to apply.

### Eligibility Requirements for Fundraising Professionals

- Be responsible for fundraising in a Chicagoland 501(c)(3);
- Have the full support of his/her supervisor and the organization's leadership to participate in this educational opportunity;
- Be committed to attending the programs and events supported through the CCPG Scholarship Program.

## Eligibility Requirements for Allied Professionals

- Work as an accountant, estate planner, financial planner, attorney or related allied professional with various Chicagoland 501(c)(3) organizations;
- Have the full support of his/her supervisor and the organization's leadership to participate in this educational opportunity or be self-employed;
- Be committed to attending the programs and events supported through the CCPG Scholarship Program.

To apply, applicants must complete and electronically submit the application and supporting documentation to Chris Teed [cteed@ccpgonline.org](mailto:cteed@ccpgonline.org) by **5:00 pm CT on Wednesday, June 30, 2021**. Applications will be reviewed by a selection committee and symposium scholarship recipients will be notified electronically by July 14, 2021.

For additional information about the CCPG Scholars Program, please contact:

James Allan, Outreach Committee Co-Chair  
[jallan@artic.edu](mailto:jallan@artic.edu)  
(312) 443-3733

Beth Lye, Outreach Committee Co-Chair  
[betlye@mercyhome.org](mailto:betlye@mercyhome.org)  
(312) 738-4381

Christine Teed, CCPG Administrative Manager  
[cteed@ccpgonline.org](mailto:cteed@ccpgonline.org)  
(630) 599-7103



## 2021-2022 Scholars Program Application

I. PLEASE INCLUDE A COPY OF YOUR RESUME WITH YOUR APPLICATION.

II. ***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:\_\_\_\_\_

III. ***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:

#### **IV. 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.

#### **V. 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 2020-2021 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 Wednesday, June 30, 2021.** Applications will be reviewed by a selection committee and scholarship winners will be notified electronically no later than July 14 and introduced at the virtual bi-monthly program in September 2021.

For additional information about the Chicago Council on Planned Giving Scholars Program, please contact our Outreach Committee Co-Chairs, Beth Lye, via email at [betlye@mercyhome.org](mailto:betlye@mercyhome.org) or by phone at (312) 738-4381, James Allan via email at [jallan@artic.edu](mailto:jallan@artic.edu) or by phone at (312) 443-3733 or CCPG's Administrative Director, Christine Teed via email at [cteed@ccpgonline.org](mailto:cteed@ccpgonline.org) or by phone at (630) 599-7103.