**NCPGC Mission**

The Northern California Planned Giving Council is a professional organization dedicated to:

1. Encouraging charitable gift planning;
2. Promoting a wider understanding of charitable gift planning by both non-profit and for-profit practitioners; and
3. Raising the technical skills and professional competence of charitable gift planners.

Council members are non-profit gift planners, attorneys, consultants, CPAs, financial planners, insurance agents, stock brokers, trust officers, and professional advisors, as well as other persons interested in planned giving.

**NCPGC Conference**

Each year, NCPGC hosts a one-day Conference for those interested in sharpening their skills and   
to network with others in the field. Workshops are available for all levels of planned giving   
experience with tracks in Fundamentals, Cultivation and Administration, Technical, and Special Topics in Planned Giving.

**When**: Monday, May 4, 2020, 7:30 a.m. – 5:30 p.m.

**Where**: The Palace Hotel, San Francisco

**NCPGC Conference Scholarships**

The Conference Committee is pleased to announce that ten scholarships are available this year. The aim of this scholarship program is to promote equity and diversity within our planned giving community and to strengthen the planned giving capacity of organizations and their staff, particularly those that might not be able to participate in the conference but for the scholarship. Applicants should work within organizations that:

* Have begun or are considering developing a planned giving program in their organization.
* Have the support of the Board of Directors and/or Executive Director.
* Have the organizational and staff interest and motivation to build a planned giving program.
* Special consideration will be given to applications from individuals who work for organizations which serve underrepresented and economically disadvantaged communities and whose boards of directors and staff demonstrate a high degree of diversity.

|  |
| --- |
| ***Applications must be received by March 27, 2020.*** Qualifying recipients will be notified by April 13, 2020.  If you have any questions or would like additional information, please contact:  **Holly Wilkerson, Executive Director** (415) 738-8438 / info@ncpgcouncil.org |

We appreciate your interest in our Conference scholarship program. In order to help the Committee learn more about you and your organization, we ask all candidates to complete the following questions as part of the application process. Please take as much room as you need to provide the information requested below. You may use separate attachments if necessary. Please sign and date your completed application, and email it to [info@ncpgcouncil.org](mailto:info@ncpgcouncil.org).

**Be sure to SAVE THIS FORM to your computer BEFORE completing it!**

Please type or print CLEARLY. Fields will expand as needed to accommodate your text.

|  |  |
| --- | --- |
| ***1. Organization name:*** | |
|  | |
| ***2a. Is the organization a 501(c)(3) nonprofit?*** | ***2b. Year organization was founded:*** |
|  | |
| ***3. Name of likely attendee:*** | |
| ***4. Relationship of attendee to organization (President, Director of Dev, Board Member, etc)*** | |
| ***5. Contact information for organization (mailing address, email address and telephone):*** | |
|  | |
| ***6. Website URL:*** | |
|  | |
| ***7. Please state or describe the mission of the organization:*** | |
|  | |
| ***8. What were the organization’s revenue and expenses in the previous fiscal year?*** | |
| ***9. List approximate percent of total revenue provided by difference sources in the previous fiscal year (use a multi-year average if that better represents the organization’s recent history). Categories below provided with intent to help, please edit if the organization tracks differently:***  *Government:*  *Foundations:*  *Corporate gifts:*  *Events (galas, auctions, etc.):*  *Major donors:*  *(a major gift at this organization is $\_\_\_\_\_\_\_+)*  *Other individual donors:*  *Estate/legacy gifts (will and trust distributions, etc.):*  *Investment gains, interest, dividends:*  *In-kind contributions:*  *\_\_\_\_\_\_:* | |
| ***10. How many staff or volunteers (including board members) at the organization spend at least part of their time on fundraising/development? Do any of them work full-time (40 hrs/wk) on fundraising/development? How many full-time equivalents do these efforts add up to?*** | |
| ***11. Approximately how many years has the organization solicited gifts from individual donors?*** | |
| ***12. Approximately how many individual donors did the organization receive gifts from during your organization’s last complete fiscal year?*** | |
| ***13. a) How many directors serve on the board of the organization?*** | |
|  | |
| ***b) How many of the board members support the organization financially (any amount)?*** | |
|  | |
| ***c) If applicable, how many of the board members come from the community the organization serves?*** | |
|  | |
| ***14. In the last 12 months, approximately how many times has the organization received any estate gifts, received notice of inclusion in a donor’s estate plan (will, trust, retirement account, etc.), or been asked by a donor how to plan a legacy gift?*** | |
| ***15. Briefly describe what steps your organization has recently taken to develop, implement, and/or restart a planned or legacy giving program? (E.g., strategic planning, new staff or new responsibility to existing staff, advisory committee, board engagement, etc.)*** | |
|  | |
| ***16. Have associates of your organization attended the NCPGC Annual Conference in the past? Which year(s), if known?*** | |
| ***17. Has this organization previously applied for this scholarship? (Please note if the scholarship was awarded.)*** | |
| ***18. Is there any other information that you would like us to consider? Feel free to include any information or data that may qualify you under our special consideration goals.*** | |
|  | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  | ***Completed application must be received by March 27, 2020, to:*** |
|  | | |  | [**info@ncpgcouncil.org**](mailto:info@ncpgcouncil.org)(preferred) |
|  | | |  |
| ***Signature*** | | |  |
|  | | |  |
|  | | |  |
| ***Printed Name*** | | |  |
|  | | |  |
|  | | |  |
| ***Title*** | | |  |