

2021 ANNUAL CONFERENCE SCHOLARSHIP APPLICATION

APPLICATION MUST BE RECEIVED BY March 22, 2021

Dear Scholarship Applicant,

We are pleased to offer up to ten scholarships to attend Northern California Planned Giving Council's annual Planned Giving Conference.

For over 25 years, Northern California Planned Giving Council (NCPGC) has provided educational programs on planned giving. NCPGC members include major gifts officers, planned giving officers, fundraising consultants, accountants, attorneys, and financial planners, to name a few. NCPGC is a section 501(c)(3) nonprofit organization. Read more about NCPGC [here](#).

Our 2021 conference will be held virtually, over two days May 4th and 5th, from 8:30 am to 12:30 pm. Our program includes sessions for beginners and experienced gift planners alike. You can view the 2021 schedule [here](#).

The aim of this scholarship program is to engage individuals and organizations new to planned giving and to strengthen the capacity of organizations (including staff), particularly those who might not be able to participate in the conference if not for the scholarship.

ELIGIBILITY REQUIREMENTS

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.

Favorable 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.

Applicants should **individually**:

- Have an interest in a career in planned giving.
- Have a demonstrated commitment to the nonprofit sector (i.e., have worked in or volunteered for nonprofits).

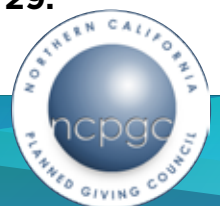
POST-CONFERENCE BENEFITS

Mentorship for 12 months. We will connect you with one or more current NCPGC members who will be available as a resource to you as you learn more about planned giving for your organization or in your personal career path.

Please return your application by **March 22**. We will notify recipients by **March 29**.

For more information, please email info@ncpgcouncil.org.

NORTHERN CALIFORNIA PLANNED GIVING COUNCIL
www.ncpgcouncil.org | 626.773.8030 | info@ncpgcouncil.org





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To help us learn more about you and your organization, please complete the following questions. 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.**

Please SAVE THIS FORM to your computer BEFORE completing it!

Please type or print CLEARLY.

1. Applicant name and title within organization:	
2a. Employer organization name:	2b. Is the organization a 501(c)(3) nonprofit?
3a. Contact information for organization (website address, mailing address, email address and telephone) Mailing Address:	
Website Address:	
Co. Contact Name:	
Co. Contact Email Address:	Co. Contact Telephone:
3.b. Briefly state or describe the mission of the organization:	
3.c. Is your Executive Director supportive of your application? (If you are the Executive Director of the organization, is your Board supportive of developing a planned giving program within the organization?)	
4. How long have you worked for this organization?	
5. Describe your nonprofit experience, either as an employee or as a volunteer.	
6. In your current position, what percentage of your time is spent on fundraising?	

Please type or print CLEARLY.

7. Does your organization currently have a planned giving program? Please describe.

8. Please list the board of directors here, or if they are on your organization's website, please paste a link.

9. What percentage of the board members come from the community your organization serves?

10. 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?

11. Briefly describe what steps (if any) 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.)

12. To your knowledge, has anyone from your organization previously applied for this scholarship or attended the NCPGC conference in the past?

13. Why are you interested in planned giving?

14. 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.

Applicant Name

Signature

Date

Email completed form to info@ncpgcouncil.org. Application must be received by March 22, 2021.

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