



Northern California Planned Giving Council

2024 ANNUAL CONFERENCE SCHOLARSHIP APPLICATION APPLICATION MUST BE RECEIVED BY March 1, 2024

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, title within organization, and email address:	
2a. Employer organization name:	2b. Is the organization a 501(c)(3) nonprofit?
3a. Contact information for organization	
Website address:	
Mailing address:	
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.	



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6. In your current position, what percentage of your time is spent on fundraising?

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.)



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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.

Date

Signature