



CAGP's 27th National Conference on Strategic Philanthropy

Bursary Application Questions

1. Have you been a CAGP member-in-good-standing for at least 3 months prior to the application deadline (February 3, 2020)?
2. First Name
3. Last Name
4. Job Title
5. Organization/Company
6. City
7. Province
8. Telephone
9. Email
10. What CAGP local Chapter are you affiliated with?
11. What are your objectives in attending the Conference? (Up to 100 words)
12. How many years of experience do you have in Strategic Charitable Gift Planning?
13. How would you describe your level of Gift Planning knowledge and experience?
 - Beginner (can illustrate individual cash donations)
 - Intermediate (can illustrate above + listed securities)
 - Advanced (can illustrate above + insurance)

- Expert (can illustrate above + personal corporate and/or trust gifts)

14. What percentage of time is spent on gift planning? (e.g. program design, implementation, P&P, gift solicitation, stewardship, donor/client follow up, etc.)
15. Please list any gift planning workshops, courses, webinars, and/or conferences attended over the past five years:
16. On average, how many events does your Chapter host annually?
17. How many Chapter events have you attended in the last 12 months?
18. What is your approximate commute time to get to Chapter events, rounded to the nearest hour? *Minimum 1 hour; maximum 5.*
19. How many planned gifts (closed and/or prospective) have you been involved in over the last 12 months?
20. What is your organization's/company's budget for professional development?
21. Is attending the Conference contingent upon you receiving a bursary?
22. What is your organization's/company's total revenue?
23. For Fundraising staff: How many fundraising staff work in your organization? (For fundraising staff; N/A for advisors.)
24. How many meetings/interactions, including phone/text/email etc., with financial advisors have you had in the last 12 months? (For fundraising staff; N/A for advisors.)
25. Additional Comments