

# CAGP • ACPDP™

CANADIAN ASSOCIATION OF GIFT PLANNERS  
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONS PLANIFIÉS

## 2010 National Conference Bursary Application

**Applicants must submit a completed Bursary Application form by March 10, 2010**



The CAGP-ACPDPTM Conference Bursary Program is designed to contribute to the professional development of individuals in the gift planning profession - or those who provide advice to donors, who might otherwise be unable to attend CAGP-ACPDPTM's Educational offerings due to financial constraints. Equally important is our desire to promote equal opportunity and cultural diversity, reflective of Canadian society, within the gift planning field.

The Bursary Program offers financial support in the form of waived registration fees only.

### Qualifications

All applicants must **currently** be a CAGP-ACPDPTM member in good standing and have been a member for 3 months prior to this application. Applicants applying for CAGP-ACPDPTM membership at time of bursary application are not eligible for a bursary.

Applicants from all organizations, regardless of size, are welcome to apply. Preference will be given to individuals in organizations that, due to smaller size and staffing budgets, would be unable to otherwise afford these educational opportunities. Only one application per organization will be considered. Exceptions will be made for national organizations that have several regional offices.

Once a National Bursary has been granted, further bursary applications for any national CAGP-ACPDPTM event will not be accepted from that individual for a period of three years.

### Coverage

Our policy stipulates that bursaries will cover **registration fees only**. However, travel and accommodation expenses for the national conference might be covered for some bursaries - depending on the bursary sponsors stipulations. For more details on the available bursaries and coverage, please see the section entitled "Details on Available Conference Bursaries 2010".

### Application Procedure

**Applicants must submit a completed Bursary Application form by March 10, 2010**

If your attendance depends on you receiving a bursary, you do not need to register or complete a registration form. Should you receive a bursary, that information will be collected later.

The CAGP-ACPDPTM Conference Bursary Committee will review all applications and inform all applicants of its decision at least six weeks before each event.

PLEASE RETURN COMPLETED BURSARY APPLICATION FORM BY MAIL OR FAX TO:

Sharyon Smith  
CAGP-ACPDPTM

325 Dalhousie Street, Suite 201 Ottawa, ON K1N 7G2

Tel: 613-232-7991, 1-888-430-9494 Fax: 613-232-7286 [education@cagp-acpdp.org](mailto:education@cagp-acpdp.org)

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Name: \_\_\_\_\_

Job Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Tel (with area code): \_\_\_\_\_ Fax (with area code): \_\_\_\_\_

Email: \_\_\_\_\_

Staff (Yes/No): \_\_\_\_\_ Volunteer (Yes/No): \_\_\_\_\_

If staff, percentage of time spent on planned giving: \_\_\_\_\_

Years of experience in your profession: \_\_\_\_\_

Years of experience in charitable gift planning: \_\_\_\_\_

Does your organization have a budget for professional development/conferences? (Yes/No) \_\_\_\_\_

If yes, please indicate the total professional development budget: \_\_\_\_\_

If yes, please indicate the number of staff that shares the professional development budget: \_\_\_\_\_

What is your organization's mission \_\_\_\_\_

What are the fundraising gross overall revenues for most recent year? (Please attach most recent audited income statement)(Applies to charities) \_\_\_\_\_

Fundraising gross planned giving revenues for most recent year? (Applies to charities) \_\_\_\_\_

Briefly describe your current position and your gift planning activities within your organization:

\_\_\_\_\_  
\_\_\_\_\_

What are your objectives in attending this CAGP-ACPDP™ offering? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

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How would you describe your Gift Planning knowledge/experience? Introductory, Intermediate or Advanced? \_\_\_\_\_

How would you describe your organization's gift planning commitment? Introductory, Intermediate or Advanced? \_\_\_\_\_

Please list any planned giving workshops, courses or conferences attended over the past five years:

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Do you attend CAGP-ACPDPTM RoundTable meetings? \_\_\_\_\_

If yes, how many meetings do you attend per year? \_\_\_\_\_

If you do not receive this bursary, will you be able to attend this CAGP-ACPDPTM offering? \_\_\_\_\_

Please have your CEO, Manager or Chair sign this form to indicate authorization for you to attend, if awarded a bursary. By signing, they also recognize that the bursary **only covers tuition costs**, except in cases where the bursary sponsor provides additional coverage. See "Details on Available Conference Bursaries 2010".

Electronic signatures are accepted.

Authorizing Name – (can be CEO/Manager/Chair Name/self)

\_\_\_\_\_  
Name Signature

\_\_\_\_\_  
Title

Tel: (with area code) \_\_\_\_\_ Email: \_\_\_\_\_

Additional comments: \_\_\_\_\_

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Sharyn Smith  
CAGP-ACPDPTM

325 Dalhousie Street, Suite 201, Ottawa, ON K1N 7G2

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