



**GREATER VANCOUVER CHAPTER
LEARNING PARTNER QUESTIONNAIRE**

*Thank you for your interest in the CAGP Vancouver Chapter Mentorship Program.
Please complete the following questionnaire to help us better pair you with one of our volunteer mentors.
E-mail the completed form to Tiffany at TLusher@genuscap.com*

Name: _____

Employer: _____

Position: _____

Contact Info*: ☐ Phone: _____ ☐ Email: _____

* Please indicate preference with a check mark if applicable

1. Are you a member in good standing with CAGP? Yes ☐ No ☐

If you are not a member you may still join the program

2. Please indicate the number of years you have been employed in the Planned Giving sector:

- ☐ 3 years or less
- ☐ 3 - 5 years
- ☐ 5 - 10 years
- ☐ More than 10 years

3. Please indicate how long you have been employed with your present employer:

- ☐ 3 years or less
- ☐ 3 - 5 years
- ☐ 5 - 10 years
- ☐ More than 10 years

4. Please indicate any professional designation(s) and if you hold a CFRE designation:

5. Please indicate what Planned Giving Courses you have taken:

- ☐ The Original Gift Planning Course
- ☐ Advanced Canadian Gift Planning Symposium
- ☐ BCIT Fundraising Course
- ☐ Other: _____

6. Referring to the [CAGP Competency Framework](#), please indicate which areas you wish your mentor to be most experienced (please rank 1=most important through to 6=least important):

- ☐ Relationship Building
- ☐ Ethics & Judgement
- ☐ Knowledge of Gift Planning Vehicles
- ☐ Knowledge of a charity's framework (policies and procedures, management & governance etc.)
- ☐ Knowledge of Legal Context of Gift Planning & the Charitable Sector
- ☐ Knowledge of Marketing & Communications

7. Imagine yourself at the end of the 12 month mentoring program. What would a successful mentoring relationship look like to you? What do you expect to walk away with?

8. Any Other Comments

SUBMIT

THANK YOU

We look forward to matching you with a Learning Partner and seeing you at future CAGP events. Don't forget to subscribe to our newsletter [here](#).