



CAGP Ottawa Chapter Mentorship Program

The CAGP Ottawa Chapter is excited to launch its Mentorship Program, which will begin in November 2017. Experienced gift planners will be matched with fundraisers who are new to planned giving and other CAGP members who are looking to develop their knowledge of strategic charitable gift planning, including professional advisors who want to develop skills and comfort in philanthropic conversations.

Learning Partners and Mentors

As a Learning Partner the Mentorship Program is a great way to hone your skills and, with the help of a pro, broaden your technical expertise. You'll have someone you can turn to for insight and you'll take away ideas that you can put into practice.

For the mentor this program allows you to share your knowledge, to develop your coaching skills, and experience the personal reward of giving back by helping a budding gift planner. Many mentors discover they learn as much from the learning partner as they teach.

Mentors and Learning Partners are encouraged to meet on a monthly basis by phone, email or face-to-face. For a first meeting we encourage a face-to-face meeting. The CAGP Ottawa Chapter looks for a minimum commitment of eight months starting in November 2017 and running until June 2018.

Qualifications for a Learning Partner

- Is a CAGP member in good standing
- Has under three years' experience in gift planning
- Is able to devote at least one hour a month to the program
- For the first meeting the Learning Partner must provide a list of goals and objectives to accomplish working with a Mentor
- In advance of each meeting the Learning Partner must provide an agenda
- Be respectful of all meeting dates and times scheduled
- Respect confidentiality
- Has a genuine desire to become a capable gift planner with professional level skills

Qualifications for a Mentor

- Is a CAGP member in good standing
- Has a minimum of three years' experience in gift planning
- Must be able to devote at least one hour per month to the program
- Must be willing to share knowledge, provide advice, feedback and guidance
- Is able to create an atmosphere that encourages the Learning Partner to ask questions and share problems for which the Mentor can provide direction and support
- Ensure that the information shared by the Learning Partner is kept in the strictest confidence
- Help the Learning Partner to network and introduce them to other planned giving professionals
- Has a genuine desire to help an aspiring gift planner develop their craft

Matching

The Mentorship Committee matches Learning Partners with Mentors based on level of experience and interests. They will contact you prior to making a match. If you have questions, please email Barry Bloom at barry.bloom@nac-cna.ca or Dan Clapin at dclapin@prvhc.com.

If you are ready to participate please complete the appropriate application form and return to either Dan or Barry. Thank you for your interest in the CAGP Ottawa Chapter Mentorship Program.