Thank you for your participation in the CAGP Vancouver Chapter Mentorship Program. Please complete the following questionnaire to help us better pair you with one of our Learning Partners.

E-mail the completed form to Nicole.Jeschelnik@vancouverfoundation.ca

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 ☐
   *Please note: If you are not a member you may not join the program as mentor*

2. How long have you been a CAGP member for?
   ☐ 3-5 years
   ☐ 5-10 years
   ☐ more than 10 years

3. Please indicate the number of years you have been employed in the Planned Giving sector:
   ☐ 3-5 years
   ☐ 5-10 years
   ☐ more than 10 years

4. Please indicate how long you have been employed with your present employer:
   ☐ less than 3 years
   ☐ 3-5 years
   ☐ 5-10 years
   ☐ more than 10 years

5. Do you feel best suitable to mentor a Learning Partner from an organization with fundraising staff of
   ☐ 3 or less
   ☐ 4 – 9
   ☐ 10+
   ☐ Not sure

6. Please indicate any professional designation(s) such as a CFRE:
   ________________________________________________________________
7. In which industries have you worked as a Planned Giving professional?

Charity
- Animal Protection & Welfare
- Community services
- Culture & Recreation
- Education & Job Training
- Environment & Conservation
- Family & Senior Support
- Health & Wellness
- Health Research
- International Development
- Law & Legal Support
- Poverty Alleviation
- Youth Services

Professional Advisor
- Legal Advisor
- Financial Planner
- Other ________________________________

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

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

9. Referring to the CAGP Competency Framework, please indicate in which areas are you best suited to mentor:

- 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

10. Please tell us about the reason(s) for wanting to serve as a Mentor:

11. Any Other Comments