

Planned Giving Group of Indiana
Mentorship Program
August 2009 – May 2010

1. Purpose. To add value to PGGI membership and further the Group's mission of serving as a professional resource by providing individual gift planners and professional advisors with guidance and support from experienced mentors from their field in the area of gift planning.
2. The mentorship program will be managed by the Membership Committee of the PGGI Board of Directors.
3. Assignment of Mentors to Mentees. The Membership Committee will assign mentors to mentees in August of each year. The Mentor/Mentee relationship is intended to sustain through the standard PGGI year, ending the following May. If additional mentees request mentors over the course of the year, a mentor-mentee relationship is problematic, or a mentor must resign from the program, the Membership Committee shall assign a new mentor to the mentee, if one is available. If no mentors are available, the Membership Committee will attempt to solicit additional mentors so that all mentees can be matched with a mentor. PGGI cannot guarantee the assignment of a mentor to any mentee, nor can PGGI vouch for the experience or advice provided by any mentor, although every effort will be made to provide only experienced mentors to mentees.
4. Mentor Qualifications. Each April, the Vice Chair shall put out a call for mentors for the coming PGGI meeting year in the monthly meeting announcement, on the PGGI website, and at the regular April PGGI meeting. Each potential mentor must be a member in good standing of PGGI and is required to fill out a registration form, indicating level of experience and the type of gift planner or allied professional to mentor, and the Mentor Program Participation Agreement. Mentors must have at least 4 years of experience in the field.
5. Mentor Responsibilities. Mentors provide networking and professional and career advice to their assigned mentees, without providing tax or legal advice. The mentor will:
 - a. Arrange a one-on-one meeting within one month of being assigned a mentee, to coordinate how the two will be in contact for the year. At this meeting, the mentor and mentee will determine how the mentor can best assist the mentee. A one-hour per month time commitment is suggested. Some ideas include:
 - i. Project: Defining a project and working together to plan and implement it (i.e. starting a professional advisors group; developing a gift planning website; creating a training program for development staff/executive director; increasing board knowledge of gift planning)

- ii. Networking: Increasing contacts in the field
 - iii. Education: Learning more about financial planning, estate planning, investing, insurance, life-income gifts, donor-centered philanthropy
 - b. Attend all regular PGGI meetings and sit with mentee at lunch
 - c. Take and respond to at least one contact (phone, email, etc) from the mentee each month, and more if possible
 - d. Share materials, experiences, contacts in the field, and other information that might be helpful to the mentee
 - e. Fill out the year –end feedback form and submit to Membership Committee
- 6. Mentee Qualifications. Each April, the Vice Chair shall put out a call for mentees for the coming PGGI meeting year in the monthly meeting announcement, on the PGGI website, and at the regular April PGGI meeting. Each potential mentee must be a member in good standing of PGGI and is required to fill out a registration form, indicating level of experience and the type of mentor preferred, and the Mentor Program Participation Agreement. Mentees may be admitted to the program other than at the start of the year by contacting the Membership Committee directly. Mentees may have any level of experience. The only requirement is a desire to have a professional relationship to enhance one’s gift planning acumen.
- 7. Mentee Responsibilities. Mentees should be respectful of mentors’ time, as they are volunteering to assist mentees’ professional development. Mentees will:
 - a. Attend a one-on-one, in person meeting with the mentor to arrange how to be in contact for the year. Identify specific ways or projects that you hope your mentor might assist you in your work this year.
 - b. Attend all regular PGGI meetings and sit with the mentor for lunch when the mentor is also in attendance.
 - c. Contact the mentor when assistance is required or desired, but limit those contacts based upon the agreement reached with the mentor in the first meeting. A time commitment of one hour is suggested.
 - d. Fill out the year-end feedback form and submit to Membership Committee.

PGGI Mentor Program – Participant Agreement

For a successful mentoring partnership, both parties should expect to:

- Set a meeting schedule for the year at the first meeting and stick to it
- Develop a work plan with clear goals and objectives. Identify one or two projects the mentee is currently working on so that advice can be put to use immediately
- At the end of each session, identify two or three specific follow up tasks for the next session
- Recognize that priorities change and stay flexible

Mentors agree to:

- Minimum time commitment of 1 hour per month for September through May
- Share materials on requested topics during each session
- Commit to providing feedback on the program to the PGGI Membership Committee
- Contact their partner and the PGGI Membership Committee if changes affect their ability to be a mentor

Mentees agree to:

- Clearly identify their needs and develop specific questions for each session
- Commit to providing feedback on the program to the PGGI Membership Committee
- Contact their partner and the PGGI Membership Committee if changes affect their ability to be a mentee
- Be respectful of mentor's time

I agree to the above and wish to participate in the mentoring program as a mentor/mentee (please circle).

Participant Signature

Date