

Planned Giving Council of Greater Philadelphia
Mentorship Program
September 2007

1. Purpose: To provide individual gift planners and professional advisors with guidance and support from experienced mentors from their field in the area of gift planning.
2. Mentorship Subcommittee: The mentorship program is managed by the Mentorship Subcommittee of the Education Committee. The Mentorship Subcommittee shall be made up of the Mentorship Subcommittee Chair (“Chair”), the Mentorship Subcommittee Vice Chair (“Vice Chair”) (selected by the Chair) and the volunteer mentors. The Vice Chair will serve as the Chair in the year following his/her service as Vice Chair. In order to qualify as the Chair or as the Vice Chair, an individual must have previously served as a mentor in the program. The Subcommittee shall meet twice per year (this may be by conference call). The first meeting shall be at the start of the year to review evaluations of the program from the prior year, make recommendations for the coming year and assign mentors to mentees. The second meeting shall be in August to review mid-year evaluations of the program.
3. Assignment of Mentors to Mentees: The Subcommittee will assign mentors to mentees at the start of each year. 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 Chair and Vice Chair shall assign a new mentor to the mentee if one is available. If no mentors are available, the Chair and Vice Chair will attempt to solicit additional mentors so that all mentees can be matched with a mentor. PGCGP cannot guarantee the assignment of a mentor to any mentee, nor can PGCGP 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 November the Vice Chair shall put out a call for mentors for the coming calendar year through the PGCGP e-mail list and by announcement at the regular meeting. Each potential mentor must be a member in good standing of PGCGP and is required to fill out a registration form, indicating level of experience and the type of gift planner to mentor. Mentors must have at least 4 years of experience in the field.
5. Mentor Responsibilities: Mentors provide professional and career advice to their assigned mentees, without providing tax or legal advice. The mentor will:
 - a. Arrange a one-on-one, in person 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. Some ideas include
 - i. Project: Defining a discreet 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 PGCGP meetings and sit with mentee at lunch
 - c. Take and respond to at least one contact (phone, e-mail, text message 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 mid-year “Mentor Feedback Form” in July and submit it to the Chair
 - f. Encourage the mentee to fill out the mid-year “Mentee Feedback Form” in July and submit it to the Chair
 - g. Meet with the mentee at the end of the year to obtain feedback for future years (may be by phone or in person)
 - h. Fill out the year-end “Mentor Feedback Form” in December and submit it to the Vice Chair
 - i. Encourage the mentee to fill out the year-end “Mentee Feedback Form” in December and submit it to the Vice Chair
6. **Mentee Qualifications:** Each November the Vice Chair shall put out a call for mentees for the coming calendar year through the PGCGP e-mail list and by announcement at the regular meeting. Each potential mentee must be a member in good standing of PGCGP and is required to fill out a registration form, indicating level of experience and the type of mentor preferred. Mentees may be admitted to the program other than at the start of the year by contacting the Chair 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 PCGCP nuts and bolts meetings, luncheon meetings and the annual conference, sitting 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
 - d. Fill out the mid-year “Mentee Feedback Form” in July and submit it to the Chair
 - e. Meet with the mentor at the end of the year to offer constructive feedback about the program
 - f. Fill out the year-end “Mentee Feedback Form” in December and submit it to the Vice Chair