

Survey Results

2007 Planned Giving Council Survey

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Survey: 2007 Planned Giving Council Survey

Author: Barb Owens/Barbara Yeager

Responses Received: 53

What is the name of your council?

Alaska Planned Giving Council
Arkansas Chapter of NCPG
Baton Rouge National Committee on Planned Giving
Blue Ridge Planned Giving Study Group
Central Ohio Planned Giving Council
Charitable Estate Planning Council of Long Island
Chesapeake Planned Giving Council
Chicago Council on Planned Giving
Colorado Planned Giving Roundtable
Delmarva Planned Giving Council (DPGC)
Eastern Iowa Planned Giving Council
GPGC Northeastern New York
Greater Cincinnati Planned Giving Council
Hawaii Planned Giving Council
Kentuckiana Planned Giving council
Mid-America Planned Giving Council
Minnesota Planned Giving Council
North Mississippi Planned Giving Council
North Texas Chapter, NCPG
Northern California Planned Giving Council
Northwest Planned Giving Roundtable
Planned Giving Council of Acadiana (Lafayette,LA)
Planned Giving Council of Broward County

Planned Giving Council of Central Florida
Planned Giving Council of Eastern Wisconsin
Planned Giving Council of Greater Philadelphia
Planned Giving Council of Houston (PGCH)
Planned Giving Council of Miami-Dade
Planned Giving Council of Northeast Florida
Planned Giving Council of Palm Beach County
Planned Giving Council of Rhode Island
Planned Giving Council of South Mississippi
Planned Giving Council of the Permian Basin
Planned Giving Council of Upstate New York
Planned Giving Council of Ventura County
Planned Giving Group of Connecticut (PGGCT)
Planned Giving Group of Indiana
Planned Giving Group of New England
Planned Giving Round Table Of Arizona
Planned Giving Round Table of Orange County
Planned Giving Roundtable of Southern Arizona
Planned Giving Roundtable of Southern California
Planned Giving Roundtable Southeast Michigan
Silicon Valley Planned Giving Council
South Sound Planned Giving Council
St. Louis Planned Giving Council
Suburban Chicago Planned Giving Council
Tampa Bay Area Planned Giving Council
Upper Valley Planned Giving Council
Washington Planned Giving Council
Western Michigan Planned Giving Group
Wisconsin Planned Giving Council

Approximately how many members does your council have?

Response	Count	Percent
Fewer than 50	12	22.6%
50 to 99	16	30.2%
100 to 149	11	20.8%
150 to 199	6	11.3%
200 to 249	3	5.7%
250 to 300	1	1.9%
More than 300	4	7.5%

Which of the following choices most closely matches the ratio of nonprofit to for-profit members in your council?

Response	Count	Percent
100% nonprofit / 0% for-profit	2	3.9%
75% nonprofit / 25% for-profit	28	54.9%
50% nonprofit / 50% for-profit	15	29.4%
25% nonprofit / 75% for-profit	1	2.0%
0% nonprofit / 100% for-profit	0	0.0%
Other	5	9.8%

Other Responses:

85% nonprofit/15% for-profit
80% nonprofit/ 20% for-profit
25 % Non Profit
60% nonprofit/40% for-profit
60% nonprofit / 40% for-profit
1/3 for profit; 2/3 nonprofit
95% non profit
90% non-profit/10% for-profit

Is your council's membership:

Response	Count	Percent
Growing	21	39.6%
Declining	7	13.2%
Staying about the same	25	47.2%

Comment Responses:

We lost about 50 members 2 years ago when South Sound Planned Giving Council was established.
Seems to fluctuate between 45 -65 members
We saw a decline in early 2000's but now growing again
modest growth...we like it that way
Declining steadily past 2 years.
about to start membership recruitment program
Our growth pattern tends to be slow, but steady.

How many people usually attend your council's meetings?

Response	Count	Percent
Fewer than 15	4	7.5%
15 to 29	11	20.8%
30 to 59	25	47.2%
60 to 100	10	18.9%
More than 100	3	5.7%

Is attendance at your council's meetings:

Response	Count	Percent
Growing	19	35.8%
Declining	3	5.7%
Staying about the same	31	58.5%

Comment Responses:

We have been above 60 attendees twice in the past year.
depends upon the speakers
depending on the speaker
3-4 years ago was about 25-30 attending. Now only about 15-20
New admin support helpful in Program marketing,
depends on topic
Attendance will always vary with the interest of the topic being presented.

How often does your council meet?

Response	Count	Percent
Monthly	6	11.3%
Monthly, except in the summer	9	17.0%
Bi-monthly	13	24.5%
Quarterly	11	20.8%
Semi-annually	0	0.0%
Annually	1	1.9%
Other	13	24.5%

Other Responses:

Except August and the month when we have a conference (June this year).
Five times a year, bimonthly except summer
CPGR Luncheons Attendance 60 - 100; other monthly meetings attendance 25 - 30
5 times a year
as needed
Quarterly but with at least two additional meetings
5-6 TIMES PER YEAR DEPENDING UPON SPEAKER AVAILABILITY
5 to 6 times a year
3 times a year
We do not meet during summer months
Every other month
5x p/year w/ add. Virt. Seminars as interested
Bi-monthly, except in the summer
5 meetings/year
five times per year
includes webinars and seminars

What amount does the majority of your council members pay for annual dues?

Response	Count	Percent
\$20 to \$59	13	26%
\$60 to \$99	12	24%
\$100 to \$149	10	20%
\$150 to \$199	8	16%
\$200 to \$250	7	14%

Are lunches or other meals included in the dues amount?

Response	Count	Percent
Yes	18	34.0%
No	35	66.0%

Do you have different classes of members who pay different dues amounts?

Response	Count	Percent
Yes	8	15.4%
No	44	84.6%

Does NCPG manage dues billing and processing for your council, through the ICDMS system?

Response	Count	Percent
Yes	37	71.2%
No	15	28.8%

Does your council have paid staff (e.g., an administrator to handle mailings, dues processing, etc.)?

Response	Count	Percent
Yes	30	58.8%
No	21	41.2%

Does your council include expenses related to the Assembly of Delegates in its annual budget?

Response	Count	Percent
Yes	45	84.9%
No	8	15.1%

How long are the terms for your council's board members?

Response	Count	Percent
1 year	15	29.4%
2 years	8	15.7%
3 years	22	43.1%
4 or more years	1	2.0%
unlimited	5	9.8%

Does your council have an annual conference?

Response	Count	Percent
Yes	26	49.1%
No	27	50.9%

If your council DOES have an annual conference, is it:

Response	Count	Percent
Half-day	11	37.9%
Full-day	15	51.7%
More than one day	3	10.3%

Does your council participate in joint programs with other organizations?

Response	Count	Percent
Yes	43	81.1%
No	10	18.9%

If your council DOES participate in joint programs, with whom? (Select all that apply.)

Response	Count	Percent
Other planned giving council(s)	11	20.8%
Other professional associations in the community (AFP, Estate Planning Council, etc.)	41	77.4%
Nonprofit organizations	14	26.4%
Educational institution(s)	12	22.6%

Comment Responses:

South Sound Planned Giving Council
We sponsor a planned giving track at the annual CT AFP conference. We also try to coordinate speakers who may come to PGGCT and PGGNE.
We do collaborate with other orgs such as AFP and the MN Bar on marketing, etc.
This is the first year we have not had a joint seminar. We plan to re-initiate it next year.
Community Foundation
Our LEAVE A LEGACY Program Sponsors an annual Development Day - which PGRTSEM assists with.

Does your council have a web site?

Response	Count	Percent
Yes	38	71.7%
No	15	28.3%

Comment Responses:

Hard to keep it up to date.
On the NCPG national website
We are in the midst of restructuring the website as we are now able to add additional features.
Delmarva Giving.org
In process of being redesigned
http://www.pgtampabay.org/
www.gpgnny.org
we need one desperately
We have a Leave A Legacy site that has information about UVPGC on the site.

How does your council recruit new members? (Select all that apply.)

Response	Count	Percent
Word of mouth	50	94.3%
Printed materials to prospects	34	64.2%
Electronic materials to prospects	31	58.5%
Telephone calls to prospects	30	56.6%
Special recruitment drive or annual membership campaign	9	17.0%
Other	4	7.5%

Other Responses:

Table at AFP Conference; free guest day at one meeting this year;
Via a beginner planned giving seminar series we hold which includes one year of complimentary membership.
Invitations to conference and bi-monthly meetings
Acknowledge guests at every program; have drawing for free lunch/program from evaluations turned in each program
When welcoming visitors during a meeting, they are encouraged to consider membership.
Booth at AFP and BEPC joint meeting
need to develop printed materials
We also encourage our current members to invite prospects to our meetings and presentation. Their first meeting is free of charge to encourage joining PGRTSEM.

Is NCPG membership information included in the council's recruitment materials or contacts?

Response	Count	Percent
Yes	43	84.3%
No	8	15.7%

What methods does your council use to communicate with members? (Select all that apply.)

Response	Count	Percent
E-mail	52	98.1%
FAX	6	11.3%
Mailings (letters, memos)	41	77.4%
Telephone	23	43.4%
Web site	29	54.7%
Printed newsletter or special mailings	8	15.1%
Other	2	3.8%

Other Responses:

email newsletter
e-newsletter

How would you describe your council's status with the LEAVE A LEGACY(R) program?

Response	Count	Percent
no plans to implement the program	6	12.0%
plan to launch a program within 12 months	3	6.0%
program is active	20	40.0%
program has ended	8	16.0%
Other	13	26.0%

Other Responses:

Partner with Estate Planning Council who is doing most of the work this year. We carried to lion's share in past years.
Want to reactivate it
program currently being revamped - remains active
someday
Plan to launch a program within 3 years
Has been discussed, no plans
Inactive program, but combined state effort is proceeding with other councils taking the lead
Program is suspended currently
Plan to launch a program
launched; plans for more outreach this year
Program has scaled down from stand-alone organization to committee within council
Members of WMPGG have access to Leave a Legacy materials through our Web site. Also, the Leave a Legacy coordinator is an ex-officio member of our board.

Comment Responses:

We have a subcommittee which is a state LAL steering committee with regional chairs. Some regions are very active, others are just starting again. We had two newspaper inserts this year.
Needs more funding

We have had no L.A.L program for several years but have revived it for this year.
MPGC is sponsoring regional Leave a Legacy programs in lieu of the state wide program at this time
Would like to start but have so many other pressing matters to get under control first. We were in the red last year and have been struggling to get cost effective programming and increase our membership.
We are in the process of deciding how to best move forward....or not.
Program publicly launched in March 2007
Not much interest when it was launched
LEAVE A LEGACY is growing in strength and outreach.

What would you say is the GREATEST challenge to increasing your council's membership?

Response	Count	Percent
Competition with AFP chapter	5	10.0%
Competition with estate planning council	3	6.0%
Services provided to fundraisers by community foundation or other local nonprofit group	2	4.0%
Charities not supporting professional development for gift planners	15	30.0%
Other	25	50.0%

Other Responses:

Member benefits need to be increased; perceived benefits need to be increased through promotion
We need a membership campaign.
Keeping professionals engaged in our Council
shrinking budgets and sheer number of professional organizations
prospective members understanding the niche that NCPG membership provides education and support.
getting past Katrina after shock
Continual transition of both not-for-profit and for-profit professional gift planners; and, lack of publicity/marketing from NCPG about its umbrella councils
market saturation; job changes
WE HAVE A LARGER PLANNED GIVING COUNCIL IN THE METROPOLITAN AREA, ALSO LACK OF FORMER LEADERSHIP
limited size of the community, most small local charities have no gift planning expertise
Work load of members
Need to clarify relevance in changing planned giving field
lack of value perceived
Don't know what it is....
Attracting/retaining members

The budgets for nonprofits continue to be tight. Thus, tough decisions must be made re: professional development/networking when multiple opportunities exist in the area.
Limited non-profit budgets
Misunderstanding of exactly what we are trying to accomplish
The ratio of charities that do not have gift planners is greater in our area than most.
both charities not supporting professional development for gift planners, plus people's perceived lack of time/work pressures, etc.
competition with PGGGNY
Few large non-profits in Hawaii, so few w/pg programs & few fundraisers focusing much on pg
General competition from other continuing ed groups aimed at non-profits.
geography and lack of people who want to join
When we profile members who leave PGRTSEM, the number one reason tends to be dues and lack of financial support from their organization. In addition, gift planners who transition from one charity to another is the second strongest reason for loss.
time & budget

What would you say is the GREATEST opportunity for increasing your council's membership?

Response	Count	Percent
Recruiting more professional advisors	19	38.8%
Recruiting generalist fundraisers from small charities	19	38.8%
Recruiting major gift officers	4	8.2%
Other	7	14.3%

Other Responses:

all of the above
All of the above
Making its presence known
Start a more concentrated effort.
MORE CONSISTENT COMMUNICATION WITH PROSPECTS AND CROSS MARKETING WITH OTHER FUNDRAISING ORGANIZATIONS
We have several EDs of NFPs in our council. I think they would be beneficial for getting board educated about planned giving and the EDs will attach the professional advisors.
Providing programs that appeal to a broad audience and levels of expertise
Increasing community partners through LAL program should translate into higher membership levels
Need to use broader topics to do so. Also think can recruit more professional advisors.
We focus recruiting on all TRUE gift planners, not on a specific area of expertise. By combining all areas of gift planning, we can share expertise and experiences which is the greatest learning tool and reason for joining a council and NCPG.