

**Survey Results
& Analysis**

for

**Central Ohio Planned Giving Council Membership
Survey**

Wednesday, September 17, 2008

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Executive Summary

This report contains a detailed statistical analysis of the results to the survey titled *Central Ohio Planned Giving Council Membership Survey*. The results analysis includes answers from all respondents who took the survey in the 24 day period from Wednesday, August 13, 2008 to Friday, September 05, 2008. 49 completed responses were received to the survey during this time.

Survey Results & Analysis

Survey: Central Ohio Planned Giving Council Membership Survey

Author: Barbara Yeager

Filter:

Responses Received: 49

Please describe your current involvement with COPGC.

Base Question	Nonprofit organization	For-profit business, practice or firm
I am a current member of COPGC.	92.9% (39)	100.0% (7)
I have been a COPGC member in the past, but am not currently.	7.1% (3)	0.0% (0)
I have never been a member of COPGC.	0.0% (0)	0.0% (0)
Other	0.0% (0)	0.0% (0)
Total Counts	42	7

Please describe your current involvement with the National Committee on Planned Giving (NCPG).

Base Question	Nonprofit organization	For-profit business, practice or firm
I am currently a member of NCPG.	80.5% (33)	71.4% (5)
I have been a member of NCPG in the past, but am not currently.	12.2% (5)	14.3% (1)
I have never been a member of NCPG.	7.3% (3)	14.3% (1)
Total Counts	41	7

If you are currently a member of COPGC, how many years have you been a member?

Base Question	Nonprofit organization	For-profit business, practice or firm
Less than 1 year	12.8% (5)	0.0% (0)
1 to 5 years	41.0% (16)	28.6% (2)
6 to 10 years	23.1% (9)	28.6% (2)
More than 10 years	23.1% (9)	42.9% (3)
Total Counts	39	7

If you are a former member of COPGC, why did you decide not to renew your membership?

Response	Count	Percent
I am no longer employed in the gift planning field.	1	2.0%
Council programming was not relevant to my job.	0	0.0%
Educational programming was too basic/introductory for my professional level.	0	0.0%
Educational programming was too advanced for my professional level.	0	0.0%
Cost of membership was too high.	0	0.0%
Other (please specify)	1	2.0%

Other Responses:

didn't receive a bill and forgot to check to see why not
I pay my own AFP and COPG membership and cannot afford both every year

If you have never been a COPGC member, what has prevented you from joining?

Response	Count	Percent
Cost of membership.	0	0.0%
Location of meetings.	0	0.0%
Time commitment.	0	0.0%
Don't know enough about COPGC.	0	0.0%
Other (please specify)	0	0.0%

Who pays for your COPGC membership?

Base Question	Nonprofit organization	For-profit business, practice or firm
I pay for my own membership.	2.4% (1)	71.4% (5)
My employer pays for my membership.	97.6% (40)	28.6% (2)
Total Counts	41	7

How many years has your work included charitable gift/estate planning duties?

Base Question	Nonprofit organization	For-profit business, practice or firm
0	0.0% (0)	0.0% (0)
less than 1	4.8% (2)	0.0% (0)
1 to 3	23.8% (10)	14.3% (1)
4 to 6	11.9% (5)	0.0% (0)
7 to 10	23.8% (10)	0.0% (0)
More than 10	35.7% (15)	85.7% (6)
Total Counts	42	7

How many years have you worked at your current place of employment?

Base Question	Nonprofit organization	For-profit business, practice or firm
Less than 1 year	14.6% (6)	14.3% (1)
1 to 3 years	36.6% (15)	0.0% (0)
4 to 6 years	14.6% (6)	0.0% (0)
7 to 10 years	9.8% (4)	14.3% (1)
More than 10 years	24.4% (10)	42.9% (3)
I am currently retired.	0.0% (0)	28.6% (2)
Total Counts	41	7

To which of the following professional groups do you or your organization belong? (Choose all that apply.)

Response	Count	Percent
AAFRC--American Association of Fundraising Counsel	0	0.0%
ABA--American Bar Association and local associations	4	8.2%
ACGA--American Council on Gift Annuities	11	22.4%
AFP--Association of Fundraising Professionals	30	61.2%
AHP--Association for Healthcare Philanthropy	2	4.1%
APRA--Association of Professional Researchers for Advancement	1	2.0%
ASAE--American Society of Association Executives	0	0.0%
CASE--Council for Advancement and Support of Education	11	22.4%
FPA--Financial Planning Association	4	8.2%
IAAP--International Association of Advisors in Philanthropy	0	0.0%
Local estate planning council	13	26.5%
SFSP--Society of Financial Service Professionals	0	0.0%
Other (please specify)	5	10.2%

Other Responses:

Parent organization affinity group
Organization -- NCPG
ICAA
ALDE- Assn of Lutheran Development Executives
Ohio State Bar Association
Council on Foundations
OANO

Which of the following professional credentials do you hold? (Choose all that apply.)

Response	Count	Percent
JD	11	22.4%
Certified Specialist in Planned Giving (CSPG)	0	0.0%
Certified Gift Planning Associate	0	0.0%
CFRE/ACFRE	8	16.3%
Chartered Advisor in Philanthropy (CAP)	0	0.0%
CPA	0	0.0%
CHFC	0	0.0%
CLU	0	0.0%
FAHP	0	0.0%
AEP	0	0.0%
CIC	0	0.0%
CFP	1	2.0%
Other (please specify)	6	12.2%

Other Responses:

Series 6 and 63 licenses
Paralegal certificate
M Div
MBA
MBA
MPH

Is your primary employer...

Response	Count	Percent
Nonprofit organization	42	85.7%
For-profit business, practice or firm	7	14.3%

Which of the following types of organizations is your primary employer? Please select only one and answer subsequent questions as they apply to that employer.

Base Question	Nonprofit organization	For-profit business, practice or firm
Public University	9.8% (4)	0.0% (0)
Private University	12.2% (5)	0.0% (0)
Small College	4.9% (2)	0.0% (0)
Community/Junior College	0.0% (0)	0.0% (0)
Technical School	0.0% (0)	0.0% (0)
Academy/Private School	0.0% (0)	0.0% (0)
Hospital/Health Care Organization	4.9% (2)	0.0% (0)
Religious Organization	7.3% (3)	0.0% (0)
Social Services Organization	12.2% (5)	0.0% (0)
Environmental Group	7.3% (3)	0.0% (0)
Community Foundation	19.5% (8)	0.0% (0)

Museum, Symphony, Arts/Cultural Organization	9.8% (4)	0.0% (0)
Private/Family Foundation	0.0% (0)	0.0% (0)
Continuing Care Community/Facility	7.3% (3)	0.0% (0)
International Aid/Education Organization	0.0% (0)	0.0% (0)
Public Broadcasting	0.0% (0)	0.0% (0)
Other	4.9% (2)	0.0% (0)
Total Counts	41	0

Other Responses:

religious social services agency
Delta Gamma Foundation

What is your job title? Choose the option that most closely matches your title. (nonprofit only)

Base Question	Nonprofit organization
Director of Development (including executive, senior, assistant, associate, etc.)	33.3% (13)
Director of Gift Planning (including executive, senior, assistant, associate, etc.)	12.8% (5)
Director of Principal Gifts (including executive, senior, assistant, associate, etc.)	2.6% (1)
Gift Planning Officer	5.1% (2)
Director of Major and Planned Giving (including executive, senior, assistant, associate, etc.)	2.6% (1)
Major and Planned Giving Officer	5.1% (2)
Development Officer	2.6% (1)
Executive Director	10.3% (4)
President/CEO	2.6% (1)
Vice President (including executive, senior, assistant, associate, etc.)	7.7% (3)

Other	15.4% (6)
Total Counts	39

Other Responses:

Senior Philanthropy Advisor
Major Gifts Officer
Estate administrator
Director of Development & Marketing
Director of Planned Giving
Director of Endowment and Shared Services Fund Raising
Assoc VP & Director of Planned Giving

Approximately what percentage of your time is spent on the following activities? (nonprofit only)

	0%	1 to 25%	26 to 50%	51 to 75%	76 to 99%	100%
annual gifts	25.0% (9)	50.0% (18)	16.7% (6)	8.3% (3)	0.0% (0)	0.0% (0)
special events	12.5% (4)	71.9% (23)	9.4% (3)	6.3% (2)	0.0% (0)	0.0% (0)
outright/major gifts	5.3% (2)	52.6% (20)	26.3% (10)	10.5% (4)	5.3% (2)	0.0% (0)
estate gifts (bequests, etc.)	0.0% (0)	57.5% (23)	30.0% (12)	10.0% (4)	2.5% (1)	0.0% (0)
life income gifts (trusts, gift annuities, etc.)	17.1% (6)	48.6% (17)	31.4% (11)	2.9% (1)	0.0% (0)	0.0% (0)
other (describe in Comments field)	29.4% (5)	23.5% (4)	35.3% (6)	5.9% (1)	0.0% (0)	5.9% (1)

Comment Responses:

I assist some of TNC's top supporters with their comprehensive philanthropic goals and assist them with things like mission statements and annual giving plans. Discussions about planned gifts are often part of these conversations.
Administration and supervision
donor stewardship, donor record keeping
I'm responsible for \$4.3 million in annual giving and the second half of the \$80 million endowment/capital campaign
All aspects of Marketing
marketing planned gifts
Administrative duties
as ED involved with other activities and programs
Administration and management
Management and strategic direction
Database management, computer services, various other duties as assigned
administration of joint venture projects and general administration
corporate and foundation fundraising;
administration of these gifts

What is your organization's annual development budget? (nonprofit only)

Base Question	Nonprofit organization
Less than \$50,000	4.9% (2)
\$50,000 to \$99,999	14.6% (6)
\$100,000 to \$249,999	7.3% (3)
\$250,000 to \$499,999	19.5% (8)
\$500,000 to \$999,999	4.9% (2)
\$1M to \$4.9M	12.2% (5)
\$5M or higher	19.5% (8)
Don't know	17.1% (7)
Total Counts	41

Which of the following types of organizations is your primary employer? Please select only one and answer subsequent questions as they apply to that employer. (for-profit only)

Base Question	For-profit business, practice or firm
Law Practice/Firm	14.3% (1)
Financial Planning Practice/Firm	0.0% (0)
Consulting Practice/Firm	28.6% (2)
Insurance Company	14.3% (1)
Accounting Practice/Firm	0.0% (0)
Bank or Trust Company	28.6% (2)
Brokerage Firm	14.3% (1)
Other	0.0% (0)
Total Counts	7

Approximately what percentage of your time do you spend on work related to charitable gift or charitable estate planning? (This includes meetings with clients, research and study, networking and professional development, trustee duties, etc.) (for-profit only)

Base Question	For-profit business, practice or firm
0%	0.0% (0)
1 to 25%	85.7% (6)
26 to 50%	14.3% (1)
51 to 75%	0.0% (0)
76 to 99%	0.0% (0)
100%	0.0% (0)
Total Counts	7

How many people on your staff have charitable gift planning responsibilities (including yourself and support staff)?

Base Question	Nonprofit organization	For-profit business, practice or firm
1	38.1% (16)	71.4% (5)
2	23.8% (10)	28.6% (2)
3 to 5	19.0% (8)	0.0% (0)
6 to 10	9.5% (4)	0.0% (0)
More than 10	9.5% (4)	0.0% (0)
Total Counts	42	7

What is your gender?

Base Question	Nonprofit organization	For-profit business, practice or firm
Female	57.1% (24)	28.6% (2)
Male	42.9% (18)	71.4% (5)
Total Counts	42	7

What is your age?

Base Question	Nonprofit organization	For-profit business, practice or firm
Under 30 years	4.8% (2)	14.3% (1)
30 to 39 years	11.9% (5)	0.0% (0)
40 to 49 years	31.0% (13)	28.6% (2)
50 to 59 years	28.6% (12)	28.6% (2)
60 to 69 years	23.8% (10)	28.6% (2)
70 or more years	0.0% (0)	0.0% (0)
Total Counts	42	7

How frequently do you attend planned giving council meetings?

Base Question	Nonprofit organization	For-profit business, practice or firm
I attend all council meetings.	19.5% (8)	71.4% (5)
I attend 3 to 5 meetings a year.	48.8% (20)	28.6% (2)
I attend 1 or 2 meetings a year.	24.4% (10)	0.0% (0)
I have never attended a council meeting.	7.3% (3)	0.0% (0)
Total Counts	41	7

What would encourage you to attend more council meetings?

Response	Count	Percent
Different location(s)	4	8.2%
Different presentation topics and/or presenters	12	24.5%
Different meeting time	2	4.1%
Other (please specify)	14	28.6%

Other Responses:

New member -- will be attending more meetings in the future
the day of the week is a problem for me
time availability
I liked the meetings I attended were there were live presentations. I don't like online or video presentations. Even if programs were over my head, I enjoyed the opportunity to network and meet others.
no schedule conflicts!
Improved programs and a greater sense of vitality and relevance for the chapter.
better information on meetings . . . a card or something that shows I am a

member would help too
more time for meetings
I am brand new.
Less conflicts with work meetings
Watching the funds and not concentrating on PG right now
I feel like I'm out of the information loop. I don't even really remember getting contacted for a long time.
I just have to remember to make time for the meetings.
friendlier environment; stuffy crowd
I'm usually out of town in mid-week

Many planned giving councils charge their members a fee for lunch meetings in addition to annual membership dues. Such a fee allows members to pay for meetings they actually attend, while keeping the fee to affiliate with the council relatively low. What is your opinion of a \$15 fee for each lunch meeting, in addition to the regular annual membership dues?

Base Question	Nonprofit organization	For-profit business, practice or firm
The \$15 fee is too high.	30.8% (12)	42.9% (3)
The \$15 fee is about right.	69.2% (27)	57.1% (4)
The \$15 fee is too low.	0.0% (0)	0.0% (0)
Total Counts	39	7

Would the addition of a \$15 fee for lunch meetings prevent you from joining COPGC?

Base Question	Nonprofit organization	For-profit business, practice or firm
Yes	16.2% (6)	0.0% (0)
No	83.8% (31)	100.0% (6)

Total Counts	37	6
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How valuable are the following components of your COPGC membership?

	Very valuable	Somewhat valuable	No opinion	Limited value	No value
Networking	59.2% (29)	30.6% (15)	6.1% (3)	2.0% (1)	2.0% (1)
Professional education	49.0% (24)	46.9% (23)	2.0% (1)	0.0% (0)	2.0% (1)
Job searching	4.3% (2)	21.3% (10)	36.2% (17)	19.1% (9)	19.1% (9)
Professional recognition/prestige	2.1% (1)	29.2% (14)	33.3% (16)	29.2% (14)	6.3% (3)
Modeling/promoting ethical practice	36.2% (17)	40.4% (19)	10.6% (5)	12.8% (6)	0.0% (0)

What would make your COPGC membership more valuable to you?

What would make your COPGC membership more valuable to you?
OK as is
I'm completely satisfied at this time.
Activities that permit and promote networking; pertinent luncheon topics (though the two I've been to were very good)
Donor presentations
More interface with other Ohio Councils. Cleveland offers a wonderful series of educational meetings that we may want to take advantage of from time to time. Perhaps you all could arrange to advertise those to us - and they could advertise ours to their members in return.
Presentations on substantive topics relating to the profession, such as those noted below.
Topics can be pretty dry at times. I'm not sure how to work around this, given the fact that most are technical subjects, but speakers like Belskis make a dry topic fun and interesting.

Sometimes the most valuable part of a meeting is when the Q&A after a presentation results in discussion and expansion of the topic. It would be good to foster this somehow where appropriate, and allow time for it.
The chapter has declined in quality during the past five or more years. There needs to be better leadership and better programing. AFP has less qualified members but is much better in meeting the needs of its members. I served on the board and am a past president, so it pains me that COPGC is less than what it could be and less than it was. It's time for some members to invest more of their volunteer time and talent into this organization.
It is very valuable to me. I want to be a part, I need org support for membership dues.
Better topics with more interesting speakers.
Having some of the programs geared toward smaller shops instead of just the large university or hospital settings.
Move monthly meeting to Tuesdays

Please rate your interest in the following topics or issues. To assist us in prioritization, please use the "very interested" rating for no more than three topics. If there are other topics in which you are interested, please note them in the Comments field.

	Very interested	Somewhat interested	Not interested
Professional ethics	30.4% (14)	52.2% (24)	17.4% (8)
Retirement planning	35.4% (17)	62.5% (30)	2.1% (1)
Marketing planned gifts	66.0% (31)	29.8% (14)	4.3% (2)
Valuing planned gifts (e.g., for cost/benefit analysis)	35.4% (17)	50.0% (24)	14.6% (7)
Counting planned gifts in a campaign	39.6% (19)	35.4% (17)	25.0% (12)
Teamwork among nonprofit and for-profit planners	38.3% (18)	42.6% (20)	19.1% (9)
Donor recognition and stewardship	30.6% (15)	61.2% (30)	8.2% (4)
Legislative/regulatory updates	31.9% (15)	63.8% (30)	4.3% (2)
Planned gift administration	27.1% (13)	52.1% (25)	20.8% (10)
Investment management	21.3% (10)	48.9% (23)	29.8% (14)

Charitable bequests	45.8% (22)	47.9% (23)	6.3% (3)
Charitable gift annuities	36.2% (17)	55.3% (26)	8.5% (4)
Charitable remainder trusts	35.4% (17)	60.4% (29)	4.2% (2)
Charitable lead trusts	25.5% (12)	66.0% (31)	8.5% (4)
Life insurance gifts	37.5% (18)	41.7% (20)	20.8% (10)
Real estate gifts	21.7% (10)	58.7% (27)	19.6% (9)
Gifts of retirement plan assets	56.3% (27)	39.6% (19)	4.2% (2)
Gift planner performance evaluation	27.7% (13)	53.2% (25)	19.1% (9)
Integrating planned and major gift fundraising	53.2% (25)	34.0% (16)	12.8% (6)
Time management and personal growth	27.7% (13)	40.4% (19)	31.9% (15)
Working with volunteers and board members	25.0% (12)	56.3% (27)	18.8% (9)

Comment Responses:

Legislative/regulatory updates are not "interesting" but should be a part of every meeting. If bequests are 80% and the rest follow, how many people actually set up lead trusts?

In particular, Board Members and moving vols to donors.

Is there a topic that you would like to present at a planned giving council meeting? Consider case studies and best practices from your own experience, donor profiles, etc. Please describe your topic(s) here. Please include your name and phone number in this response so we can contact you about developing this topic.

The planned giving track from beginning to now - based on my experience of 46 years. A look at then and now from a practical perspective and what it takes to operate a good, sound gift planning segment in both profits and non-profit environments. Name and address on next number 29.
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If you are interested in serving as a mentor to a less experienced gift planner, please provide your contact information.

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Dr. Thomas Kolda, 614.899.9993 koldat@sbcglobal.net

Dave VanWassenhove, 614-251-4643, vanwassd@ohiodominican.edu
--

Terry Schavone

Lisa Jolley, 545-3244, ljolley@columbusfoundation.org

Ruth Messick, 740.420.8209, ruth.messick@bergerhealth.com

Do you know anyone who should be invited to join the planned giving council? Please provide names and contact information here.

Have already passed on names to the membership committee.

Suzie Childs (614) 358-8721

Please indicate your response to the following statements.

	Strongly agree	Agree	No opinion	Disagree	Strongly disagree
I have enough information about opportunities to volunteer with COPGC.	16.7% (8)	50.0% (24)	25.0% (12)	8.3% (4)	0.0% (0)
I have enough information about COPGC educational programs.	14.6% (7)	66.7% (32)	8.3% (4)	8.3% (4)	2.1% (1)
I have enough information about NCPG programs and services.	14.9% (7)	59.6% (28)	14.9% (7)	8.5% (4)	2.1% (1)
I have enough information about opportunities to volunteer with NCPG.	10.6% (5)	27.7% (13)	40.4% (19)	19.1% (9)	2.1% (1)
I would recommend COPGC membership to other gift planners in my field.	40.4% (19)	51.1% (24)	6.4% (3)	2.1% (1)	0.0% (0)

How do you prefer to receive announcements of COPGC programs and activities?

Base Question	Nonprofit organization	For-profit business, practice or firm
E-mail	100.0% (41)	100.0% (7)
US mail	0.0% (0)	0.0% (0)
Web site postings	0.0% (0)	0.0% (0)
Other	0.0% (0)	0.0% (0)
Total Counts	41	7

Approximately how often do you visit the COPGC web site (www.copgc.com)?

Base Question	Nonprofit organization	For-profit business, practice or firm
Daily	0.0% (0)	0.0% (0)
Weekly	7.3% (3)	0.0% (0)
Monthly	17.1% (7)	0.0% (0)
Several time a year	46.3% (19)	57.1% (4)
Once a year	19.5% (8)	42.9% (3)
Never	9.8% (4)	0.0% (0)
Total Counts	41	7

Are there additional concerns or comments you would like to share?

None except appreciate the opportunity to respond to this survey.
Not at this time
Nope
Last time I went to the web site it was out of date!
I think we have an excellent group and have done a great job with the variety of speakers.
I would like to join again. Don't know what happened that we didn't receive the billing this year.

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