

**Survey Results
& Analysis**
for
2008 Planned Giving Council Survey

National
Committee
on Planned
Giving®

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Survey: 2008 Planned Giving Council Survey

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Filter:

Responses Received: 50

What is the name of your council?

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Susquehanna Valley Planned Giving
Gift Planning Council of New Jersey
The Greater Cincinnati Planned Giving Council
Mid Iowa Planned Giving Council
Planned Giving Council of Greater Philadelphia
Western New York Planned Giving Consortium, Inc.
Blue Ridge Planned Giving Study Group
Wisconsin Planned Giving Council
Planned Giving Council of Greater Baton Rouge
Planned Giving Group of CT
Tampa Bay Area PGC
Planned Giving Council of Nebraska (for now)
Northern Illinois Planned Giving Council (NIPGC)
Planned Giving Council of Northeast Indiana
Hampton Roads Gift Planning Council
Chicago Suburban Planned Giving Council
Planned Giving Roundtable of Northern Nevada
Chicago Council on Planned Giving
Miami-Dade Planned Giving Council
Quad City Planned Giving Council
Planned Giving Council of Central PA

KYOWVA Planned Giving Council
Planned Giving Roundtable of Southeast Michigan
Planned Giving Group of New England
Planned Giving Round Table of Southern California
Northern Ohio Planned Giving Council
Colorado Planned Giving Roundtable
Planned Giving Council of Rhode Island
Saint Louis Planned Giving Council
Lone Star
Planned Giving Council of Palm Beach County
Central Texas Chapter of NCPG
Pittsburgh Planned Giving Council
Central Ohio Planned Giving Council
Kentuckiana Planned Giving Council
Planned Giving Council of Greater Memphis
Smoky Mountain Planned Giving Council
Minnesota Planned Giving Council
Northwest Planned Giving Roundtable
Planned Giving Roundtable of Santa Barbara
Toledo Area Planned Giving Council
Susquehanna Valley Planned Giving Council
Planned Giving Council of South Central Wisconsin
Northwest Florida Planned Giving Council
Planned Giving Roundtable of Arizona
The Greater Cincinnati Planned Giving Council
Planned Giving Council of Broward County
Greater Chattanooga Area Planned Giving Council
South Dakota Planned Giving Council
North Central Ohio Planned Giving Council

Approximately how many members does your council have?

Response	Count	Percent
Fewer than 50	14	28.0%
50 to 99	14	28.0%
100 to 149	9	18.0%
150 to 199	7	14.0%
200 to 249	1	2.0%
250 to 300	2	4.0%
More than 300	3	6.0%

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	0	0.0%
75% nonprofit / 25% for-profit	35	72.9%
50% nonprofit / 50% for-profit	8	16.7%
25% nonprofit / 75% for-profit	1	2.1%
0% nonprofit / 100% for-profit	0	0.0%
Other (most said 60% nonprofit/40% for-profit)	4	8.3%

Is your council's membership:

Response	Count	Percent
Growing	18	36.7%
Declining	6	12.2%
Staying about the same	25	51.0%

Comment Responses:

growing slightly
We have a new web page and have hired an administrative assistant
We are initiating an active membership campaign
344 now; end of 2007 - 335; end of 2006 - 373; end of 2005 - 342
Having difficulty getting over this plateau.
We're interested in ways to grow the membership!

How many people usually attend your council's meetings?

Response	Count	Percent
Fewer than 15	2	4.2%
15 to 29	9	18.8%
30 to 59	28	58.3%
60 to 100	5	10.4%
More than 100	4	8.3%

Is attendance at your council's meetings:

Response	Count	Percent
Growing	19	38.8%
Declining	3	6.1%
Staying about the same	27	55.1%

How often does your council meet?

Response	Count	Percent
Monthly	3	6.1%
Monthly, except in the summer	12	24.5%
Every other month	5	10.2%
Every other month, except in the summer	9	18.4%
Quarterly	13	26.5%
Twice a year	1	2.0%
Annually	1	2.0%
Other (please specify)	5	10.2%

Other Responses:

March, July, October
Programs with speaker are qtrly. We also do free virtual seminars on the non-program months and we have a year end holiday celebration.
Meetings are typically held around seminars
Depending on when we can get good speakerst
Quarterly "live" meetings + schedule of NCPG Virtual Seminars + annual joint meeting with local estate planning council
except July & December
3 in the fall and 4 in the winter/spring

What amount does the majority of your council members pay for annual dues? Please consider council dues only, and not NCPG dues.

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\$250-\$500
\$20
\$25
\$30
\$35
\$40 (six responses)
\$45
\$50 (three responses)
\$55
\$60 (three responses)
\$65 (two responses)
\$70 (three responses)
\$75 (two responses)
\$95 (three responses)
\$100 (six responses)
\$110
\$115
\$120 (two responses)
\$125 (five responses)
\$135
\$150?
\$180
\$200
\$250

Please check expenses that are covered by member dues.

Response	Count	Percent
Program attendance	33	66.0%
Lunches or other meals	18	36.0%
Other (please specify)	16	32.0%

Other Responses:

discount on fall conference registration
VS and programs are covered. Meals at programs are additional \$15 for members and \$50 for non-members.
Membership only, we charge for programs
discount on meeting fee
Members pay a reduced fee to attend all CCPG programs
Separate charge for annual joint dinner meeting with local estate planning council
None of the above
Program attendance is an additional fee which includes lunch
Some Programs - discount for other programs
Council directory, reduced program/lunch admissions, secure website access
\$5 less per meeting if a member
Allied professional conferences co-sponsored by our council
administration, networking, e-newsletter
a small surcharge for program and meal
breakfast
Membership Directory/Website Access
Mailings, Salary for Adm. Asst.

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

Response	Count	Percent
Yes	7	14.0%
No	43	86.0%

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

Response	Count	Percent
Yes	36	72.0%
No	14	28.0%

If your council does not participate in the ICDMS system, please tell us why you have decided not to participate.

If your council does not participate in the ICDMS system, please tell us why you have decided not to participate.
This is something that we will be seriously considering in the future. We are very young but growing and maturing as an organization.
We get excellent support from CAMI.
We have been able to handle it on our own thus far.
We have had too many problems a few years ago and decided we could do things easier on our own.
I have just recently taken over as president, and it was just always handled internally. As we grow, we will probably participate.
we have decided to do this
CCPG has a variety of administrative needs, so we use a provider who can handle not only the financial work, but also our communications needs.
We have a great service provider maintaining our lists and doing our back office work (Center for Association Management).
Better, closer communication with our members.

Have no idea what the ICDMS system is.

One time you quit and we are not familiar with your process. You also can't seem to adequately track members from other areas of Tennessee. You inform us of national members who are not in our chapter, but they live hundreds of miles away.

we have a third party administrative group that handles this for us as part of their contracted duties

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

Response	Count	Percent
Yes	28	56.0%
No	22	44.0%

Does your council include expenses for attending the NCPG Leadership Assembly in its annual budget?

Response	Count	Percent
Yes	34	68.0%
No	16	32.0%

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

Response	Count	Percent
1 year	9	18.8%
2 years	15	31.3%
3 years	18	37.5%
4 or more years	1	2.1%
unlimited	5	10.4%

How often does your council's board meet?

Response	Count	Percent
Weekly	0	0.0%
Twice a month	0	0.0%
Monthly	12	24.5%
Every other month	17	34.7%
Quarterly	11	22.4%
Twice a year	1	2.0%
Once a year	0	0.0%
Other (please specify)	8	16.3%

Other Responses:

monthly except for during summer months
Usually 2 times but more if needed
January, May, September
Before every luncheon
After each meeting and whenever necessary
Full board every other month; Executive board on alternate months
Prior to meetings and planning sessions over the summer
As needed

Does your council offer targeted programming or services for any of the following groups? (Choose all that apply.)

Response	Count	Percent
Charity CEOs, CFOs, or board members	17	34.0%
Donors' legal/financial advisors	27	54.0%
Major gift fundraisers	23	46.0%
Donors	5	10.0%
Prospective donors or the general public	5	10.0%
Novice gift planners	31	62.0%
Small charities	18	36.0%
Other (please specify)	3	6.0%

Other Responses:

We don't target groups now
In addition to the Beginner's Program listed above, we also offer on an annual basis a Master's Seminar and a full-day Symposium
Senior gift planners

Does your council have an annual conference?

Response	Count	Percent
Yes	16	32.0%
No	34	68.0%

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

Response	Count	Percent
Half-day	1	6.3%
Full-day	11	68.8%
More than one day	4	25.0%

Does your council participate in joint programs with other organizations?

Response	Count	Percent
Yes	40	80.0%
No	10	20.0%

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

Response	Count	Percent
Other planned giving council(s)	7	14.0%
Other professional associations in the community (AFP, Estate Planning Council, etc.)	37	74.0%
Nonprofit organizations	9	18.0%
Educational institution(s)	3	6.0%

Comment Responses:

This is the first year to join LANO (Louisiana Association of Non-profit Organizations and AFP
Occasionally, not regularly
Additionally, we offer CCPG member rates to members of the suburban planned giving council who attend special CCPG programs like the Annual Symposium
Trying to get something started
"Will to Give" (our LAL outreach) is done with Center for Philanthropy; Legacy Awards done with Community Foundation; participate in AFP's annual conference
Limited join programs, we hope to increase.

Does your council have a web site?

Response	Count	Percent
Yes	35	70.0%
No	15	30.0%

Comment Responses:

It is brand new
We just redesigned our website this year, using Ron Gallagher and his colleagues at ROAT Corp. We are thrilled with the outcome!
Major re-launch accomplished this year.
We see a great need for this but have not yet organized a site.
Web site is currently being upgraded

If your council does have a web site, what is the URL?

If your council does have a web site, what is the URL?
www.svpgc.org
http://www.giftplanning-nj.org
http://www.gcpgc.org/
www.mipgc.org
pgcgp.org
Our council sponsors a LEAVE A LEGACY(R) WESTERN NEW YORK program which does have a website: www.leavealegacywny.org
brpgsg.org
http://www.pgcgbr.org/
www.pggct.org
http://www.pgtampabay.org/ We are in process of changing website manager and functionality.
www.pgcnebraska.com

www.pgcni.org
www.scpgc.org
www.ccpgonline.org
www.plannedgivingmiami.org
www.plannedgivingpa.org
www.plannedgivingroundtable.org
www.pggne.org
www.pgrtsc.org
www.nopgc.org
www.cpgr.org
www.pgcri.org
www.slpgc.org
www.ncpg.org/councils/homepages/index.asp?section=about&id=12
ppgc.net
www.copgc.org
www.kygiftplanners.org
www.smpgc.org/default.asp
http://www.mnpgc.org/
www.nwpgrt.org
www.svpgc.org
info@pgrt.org
www.gcpgc.org/
www.NCPGBroward.org
http://www.ashland.edu/ncopgc/

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

Response	Count	Percent
Word of mouth	46	92.0%
Printed materials to prospects	33	66.0%
Electronic materials to prospects	38	76.0%
Telephone calls to prospects	24	48.0%
Special recruitment drive or annual membership campaign	12	24.0%
Other (please specify)	8	16.0%

Other Responses:

personal invite to lunch meetings from current members
offer free breakfast for 1st time guests at monthly meeting, free museum tickets to members who refer a new member, use AFP mailing list for educational events,
Promotions at other professional assn. events
We offer special bring a friend meetings at \$25 versus the usual guest fee of \$50.
Every program attendee who is not a CCPG member receives a packet of membership information with their nametag at each event.
Special encouragement of non-member guests at council meetings to pick up membership brochures
Exhibitor tables at local non-profit programs and conferences
Referrals
Leave A Legacy
Meetings/seminars

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

Response	Count	Percent
Yes	39	78.0%
No	11	22.0%

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

Response	Count	Percent
E-mail	50	100.0%
FAX	2	4.0%
Mailings (letters, memos)	24	48.0%
Telephone	12	24.0%
Web site	26	52.0%
Printed newsletter or special mailings	9	18.0%
Other (please specify)	2	4.0%

Other Responses:

Annual Every Member Campaign (annual direct mail fund raiser)
we use print only for special half day programs
Directory
We've "gone green" this year -- focusing our communication on electronic means such as e-mail blasts and the web site.
special mailing regarding educational seminars, VOG & LAL

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

Response	Count	Percent
no plans to implement the program	9	18.0%
plan to launch a program within 12 months	2	4.0%
program is active	22	44.0%
program has ended	7	14.0%
Other (please specify)	10	20.0%

Other Responses:

We coordinate four (4) programs - two very active, one somewhat active, and one reorganizing
We have funds to continue the full program for 2 years and are seeking funding to continue.
we understand that this program ended
We will soon take over as the host chapter for the Akron area Leave a Legacy
We've talked about it, but still need to learn more about it
On and off, now back on
program has been moderately active and we are looking to increase as we transition into new year
Program was active some years ago, work has begun to revive it.
There are Leave a Legacy chapters in MN but I wouldn't call our work with them "active."
Inactive currently
Program not as active as before
Program hasn't ended, just mothballed

Comment Responses:

We are now preparing for our second annual Wills Week, two programs are coordinating efforts on area billboards, we are starting a regional newsletter. etc.
LAL provides the marketing and the majority of our funding

CT is very active in Leave a Legacy lead by our PGGCT Baord and its CT Leave a Legacy Steering Committee and country committees.
We have \$ from the community foundation set aside to start program but have never had success getting it off the ground.
We had a program a few years back, and are working to get it back online
LAL St. Louis is very active; it's our Council's major focus after monthly programs
We still have a small progam in Salem, OR, otherwise it is mothballed
Just started this program in 07
We have funding for another 18 months and are seeking a corporate sponsor for VOG which we hope to continue.

What would you say are the TWO GREATEST challenges to increasing your council's membership?

Response	Count	Percent
Competition with AFP chapter	4	8.0%
Competition with estate planning council	3	6.0%
Not enough prospects for whom gift planning is a high job priority	5	10.0%
Charitable employers do not approve time for council participation	0	0.0%
Charitable employers do not provide financial support for council membership	8	16.0%
High employment turnover among prospective members	5	10.0%
Lack of council visibility	8	16.0%
Prospects do not understand value provided by council	12	24.0%
Other (please specify)	5	10.0%

Other Responses:

Several reasons: high turnover, meeting time-7:30 am and location-downtown),not enough time spent by council on reruiting new members.
Cost of joint PGCGP/NCPG membership is too high for introductory members
#1 - Financial support no longer provided with tighter budgets, #2 Planned

giving not a high priority
Several of the above answers apply: budget, time involved in meetings, lack of perceived value, lack of visibility
Limited market
Cut backs because of weak economy
Just raised recently
It would not allow us to choose two. The second would be getting people to understand what we provide
a previous absentee president and poor administrative services by our outside vendor
I tried to select two options above, but the program only allowed me one choice. My other selection would be the high employment turnover among prospective members.
Can't choose two on this form - would also pick "turnover"
Only let me do one - other competition with AFP
& prospects understanding value
could not select 2, rural area is a problem
2nd-prospects do not understand value of concil
The option only permitted one selection. Time and money are the two greatest challenges

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

Response	Count	Percent
Recruiting more professional advisors	17	34.0%
Recruiting generalist fundraisers from small charities	16	32.0%
Recruiting major gift officers	6	12.0%
Other (please specify)	11	22.0%

Other Responses:

A concentrated marketing effort to recruit members from all sources would be the greatest way to increase membership-targeting all groups.
First two bullets + making sure we bring programs that are not overly basic or overly technical and not repetitive from previous programs.
Prominent educational programming
Get better organized which we are doing now
Increasing our visibility and taking a more active approach to building membership
cleaning up membership and dues "list" and have a preset schedule of programs
Everyone needs to be recruited.
small nonprofit CEOs
More visible in the community - see what we do and the value we give
engaging current members to get the full value of what GCPGC has to offer. developing leadership for the generation.
More energetic recruiting generally

What is the most valuable program or service that NCPG provides to support your council?

What is the most valuable program or service that NCPG provides to support your council?
link to national issues
journal of gif planning
National seminar, ties to Washington/legislative updates, LEAVE A LEGACY, assistance with strategic planning.
Resource for speakers, written materials, training opportunities
Name recognition or branding w. national association
Continued teleseminars Communications with members on latest legislation Printed materials to recruit prospective member
HANDLING THE MEMBERSHIP DUES AND MEMBERSHIP REMINDERS
Keeping us informed about legislation affecting planned giving.
Mentoring for those who are new in the field or who had added planned giving to their development programs
The Leadership Conference.
Programs are the key to increased membership and value perceived. I think it would be VERY beneficial to have a list available (with easy access) for program chairs and program committees to pull topics and speakers from. We are all volunteers and program committee takes the most time and effort. The easier NCPG can make it to bring GREAT speakers and top notch informative programs, the stronger all PGC chapters will be.
Educational programming on par with any NCPG affiliate in the country.
The annual conference.
Leadership assembly Legislative updates
the retreat that tanya adn david presented in February and the website resource for councils
Information on Web-site
There are so many good tools to use on both the public and the council-only section of the NCPG web site.
Not sure
Virgual Seminars

Virtual Seminars
Government Relations Update
ICDMS
Valuable information on the website and access to other councils.
dues collection
Speakers for monthly meetings.
ICDMS System
None
Strategic Planning services
online registration and dues collection
Mentoring Program
Expertise - I'm looking forward to learning more about all programs/services at the Assembly.
Council dues billing and legislative updates
information and the connection to others in the field
Availability of NCPG Board members to speak at our annual conference without a speaker's fee.
Assembly of delegates.
the NCPG website
tele- and video-conferences w/ well-known, highly-qualified speakers
Connection to and wisdom of other councils, connection to issues relevant to gift planning.
Handle dues, but this is not always a pleasant experience.
access to your website
Structure, guidance, legislative updates, connection to Washington, networking with other councils.
Education
Speakers for no fee
Membership renewals
Billing, Journal and resource speakers, as well as education through national convention