

**Survey Results
& Analysis**

for

2009 Planned Giving Council Survey



Wednesday, July 08, 2009
Powered by Vovici EFM
www.vovici.com

Survey Results & Analysis

Survey: 2009 Planned Giving Council Survey

Author: Barb Owens/Barbara Yeager

Filter:

Responses Received: 77

What is the name of your council? (Note: if your council has decided to change its name as a result of PPP rebranding, please provide the new name, even if it is not yet legally registered in your state.)

Alabama Planned Giving Council
North West Planned Giving Roundtable
Planned Giving Council of Upstate New York
PPP - North Central Ohio Council
Philanthropic Planning Group of Greater New York (PPGGNY) [formerly Planned Giving Group of Greater New York or PGGGNY]
Susquehanna Valley Planned Giving Council
The Planned Giving Council of Houston
PPP of the Blue Ridge
Charitable Estate Planning COuncil of Long Island
The National Capital Gift Planning Council
North Texas chapter of Partnership for Philanthropic Planning
Chesapeake Planned Giving Council
Northern California Planned Giving Council
Planned Giving Round Table of Northern Nevada
Partnership for Philanthropic Planning Orange County
Partnership for Philanthropic Planning of Rhode Island
Partnership for Philanthropic Planning of Ventura County
Suburban Chicago Planned Giving Council
Greater Cincinnati Planned Giving Council
Chicago Council on Planned Giving
Nebraska Partnership for Philanthropic Planning
Planned Giving Council Ventura County
Planned Giving Council of the Mid-Hudson Valley

Mid America Planned Giving Council
Planned Giving Council of Central Florida
Central Kentucky Planned Giving Council
Partnership for Philanthropic Planning of Tampa Bay
Evansville Area Fundraising Council
Partnership for Philanthropic Planning of Miami-Dade
Mahoning / Shenango Planned Giving Council
Hawaii Planned Giving Council
KYOWVA Planned Giving Council
Planned Giving Roundtable of Southeast Michigan
Colorado Planned Giving Roundtable
Green Country Planned Giving Council
Greater New Orleans Council of NCPG
Eastern Iowa Planned Giving Council
Washington Planned Giving Council
Western Michigan Planned Giving Group
Planned Giving Council of San Antonio
South Carolina Planned Giving Council or SCPGC. We decided not to change our name.
Pittsburgh Plannd Giving Council
Wisconsin Planned Giving Council
Georgia Planned Giving Council
Virginia Gift Planning Council
Southwest Florida Planned Giving Council
Planned Giving Council of Siouland
The Planned Giving Council of Broward County
Northern Ohio Planned Giving Council
Toledo Area Planned Giving Council (serving NW Ohio and SE Micigan)
Mid Iowa Planned Giving Council
Gift Planning Group of Northeastern New York
Smoky Mountain Planned Giving Council
Planned Giving Round Table of San Diego
Gift Planning Council of New Jersey
Minnesota Planned Giving Council
PPP Springfield Ohio Chapter
Planned Giving Roundtable of Arizona
The Planned Giving Group of New England (PGGNE)

"South Dakota Planned Giving Council"
Planned Giving Forum of Sacramento
Planned Giving Council of Indian River
planned Giving Council of Northeast Indiana (no change)
Planned Giving Group of Connecticut
Planned Giving Council of Palm Beach County
North Carolina Planned Giving Council
Central Ohio Planned Giving Council
Partnership for Philanthropic Planning Lone Star Council
Partnership for Philanthropic Planning of Northeast florida
Planned Giving Council of South Central Wisconsin
The Saint Louis Planned Giving Council
Greater Chattanooga Area Planned Giving Council
Utah Planned Giving Roundtable
Planned Giving Roundtable of Southern Arizona
Partnership for Philanthropic Planning of Greater Dayton
Planned Giving Roundtable of Santa Barbara
PPPNashville

How is your council incorporating the new PPP brand into your local identity and communications?

Response	Count	Percent
We have changed the name of our council to include PPP.	14	18.2%
We use the PPP logo on our written and/or web communications.	20	26.0%
We include copy about PPP in our written and/or web communications.	20	26.0%
We have proactively introduced the PPP brand/mission to potential partner groups in our community.	12	15.6%
We have not made any changes to our council identity or communications.	36	46.8%
Other (please specify)	13	16.9%

Other Responses:

We have explained the name change to our membership in meetings and our newsletter.
We will make a decision in a few months
We are in the process of appointing a task force to look into the branding issues that have arisen in light of the new PPP name.
We have a plan to change. Needs implementation
We have a task force right now evaluating a the name change
we include wording like "affiliated with the PPP"
may be doing more as well-
We are exploring how best to work with PPP.
We provide a link to PPP on the PGCIR site
We will use the PPP logo, etc. just have not been able to get it done
We are still in the assessment stage and will be polling our membership in the fall.
We are in the process of reviewing all of the above and will make the appropriate changes shortly
We have a task force reviewing whether we should change our name to include PPP or to take any other actions relating to the name changes.
Board declined to take this on in 2009. I am hopeful we will tackle in 2010.

Has your council undertaken a formal strategic planning process in the past five years?

Response	Count	Percent
Yes	36	46.8%
No	41	53.2%

If your council HAS conducted formal strategic planning, please select the statement that best describes your success in implementing the most recent strategic plan objectives.

Response	Count	Percent
We are making good progress toward the plan objectives.	26	72.2%
The plan objectives are still valid, but we are not making progress toward achieving them.	2	5.6%
The plan objectives are no longer valid; a new strategic plan is required.	2	5.6%
Other (please specify)	6	16.7%

Other Responses:

We are currently engaged in a review of those results and a modified strategic planning process.
We are making good progress, but now that we have changed identity, should revisit & perhaps revise some of the strategies
Still Valid and making some progress towards them
We have done a strategic plan (more than 5 years ago). Our Council has taken a downturn in membership/interest. We are trying to re-organize without much success.
We have just completed it and are in the process of moving to implementation.
We are making SOME progress toward ...
Progress is slower than I would hope and we have many new board members, so they all need bringing along.

Has your council conducted a survey of members in the past five years (i.e., to learn about member satisfaction, demographics, etc.)

Response	Count	Percent
Yes	36	46.8%
No	41	53.2%

Approximately how many members does your council have?

Response	Count	Percent
Fewer than 50	23	29.9%
50 to 99	22	28.6%
100 to 149	18	23.4%
150 to 199	8	10.4%
200 to 249	1	1.3%
250 to 300	2	2.6%
More than 300	3	3.9%

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	3	3.9%
75% nonprofit / 25% for-profit	47	61.8%
50% nonprofit / 50% for-profit	19	25.0%
25% nonprofit / 75% for-profit	0	0.0%
0% nonprofit / 100% for-profit	0	0.0%
Other (please specify)	7	9.2%

Other Responses:

60% nonprofit/40% for-profit
40% nonprofit/ 60% for-profit
60% nonprofit / 40% for-profit
60% non-profit, 40% advisor
90% notprofit/10% for-profit
90% nonprofit
67% nonprofit / 33% for-profit

Is your council's membership:

Response	Count	Percent
Growing	12	15.8%
Declining	12	15.8%
Staying about the same	52	68.4%

Comment Responses:

but grew in last 3-4 years
We are down from 5 years ago
Nonprofit membership is down due to economy
slowly growing
Perceived relevance; info obtained from other areas
New membership drive being planned
We have gone down about 5% members this year.

How many people usually attend your council's meetings?

Response	Count	Percent
Fewer than 15	5	6.5%
15 to 29	16	20.8%
30 to 59	42	54.5%
60 to 100	10	13.0%
More than 100	4	5.2%

Is attendance at your council's meetings:

Response	Count	Percent
Growing	17	22.4%
Declining	5	6.6%
Staying about the same	54	71.1%

Comment Responses:

Staying about the same over the past 2 years, but looking back over a longer period, we are down.
Depends on offering sts or growing
higher quality programs lead to higher attendance
Don't have monthly program and business meetings
Recently added meetings with CE Credit

How often does your council meet?

Response	Count	Percent
Monthly	1	1.3%
Monthly, except in the summer	25	33.3%
Every other month	9	12.0%
Every other month, except in the summer	12	16.0%
Quarterly	14	18.7%
Twice a year	1	1.3%
Annually	0	0.0%
Other (please specify)	13	17.3%

Other Responses:

Three times a year plus special programs
5 times per year
Five times a year and one joint program with the Baltimore Estate Planning Council
One major annual meeting and quarterly or twice a year regional activities.
Live meetings (4) quarterly + Virtual Seminars (up to 6 annually) locations sponsored by council

We offer over 15 programs throughout the year
4 - 5 times a year
Three times a year
3 times a year
5-6 times/year but not specifically every other month
No set schedule- we hold 4 to 6 programs per year
Quarterly, plus virtual seminars and day and a half conference
An educational program with an invited guest speaker is occasion for a meeting of our council.
5 times a year, excluding summer months
Monthly, except for July and October, when we have another technical seminar offered by the university and local community foundation
Four meetings per year, plus virtual seminars

What was the general topic and/or the speaker for your council's best-attended meeting in the past year?

Turney Berry Changes in Federal Tax Laws
Innovations in Planned Giving Marketing Also instituted a "PG 101" offering just before the above topic that increased attendance - valued added program addressing those who need to start at ground zero in PG
Any National Speaker
How Long Term Care Affects the Charitable and Estate Planning Process in the Light of the New Ohio Law
annual planned giving quiz with Jon Tidd at December lunch; usually also have more substantial food and drink then too
Bruce Bigelow - Planned Giving in a Down Economy
Planned giving marketing
Larry Stelter
35+ attended a four hour session 1. Special Needs Trusts and Fundraising using the Pooled Trust 2. Transamericas Charitable Trust 3. IRA and Qualified Plan "Pension Rescue" and gifts 4. Prospect Identification and Research
Joe Bull, 60 minutes on CRTs, plus "What's wrong with this gift?" examining real life scenarios and what gift planners should or should not have done.
Panel of well known philanthropists that shared their own strategies for giving
Our annual planned giving roundtables. Five speakers facilitate roundtable discussions.
Ethics
Chuck Morris, former Western States Director for IRS Estate/Gift Tax Division spoke on the Service's policies re estate & gift tax, as well as predictions for future changes in the Code

"Buddy, Can you Spare a Million?" about giving in this economy, and importance of deferred giving right now.
Effective Donor Visits Juan Ros
The State of the Economy and its impact on fundraising/gift planning
Bryan Clontz
Fiscal or current?
Beginning a Planned Giving Program at your Organization
Chris Hoyt and tax update
state of the economy
Charitable gifts of IRA assets
36 people - April 24, 2008. Bryan Clontz "Non Cash Considerations"
Our annual Leave A Legacy luncheon/program. Our speaker was Dr. Linda L.M. Bennett, President-elect, University of Southern Indiana. Dr. Bennett's topic was "Today's University and the Common Good."
Anatomy of a Gift
Any audio conference with either Pamela J. Davidson or Robert F. Sharpe, Jr.as the presenters. Breakfast round tables are popular.
Bequests
Making it Work: Estate Planning in 2009
How the Attorney General's Office Protects Charities -- Tracy Sonneborn, Assist. Attorney General, Consumer Protection Division, State of MI
Economic forecast for 2009
Planned Giving - by Debra Ashton
Frank Minton; planned gifts in a down economy
Just had Larry Stelter in. Wonderful job.
Judge in the Probate Court who spoke on 4-5 observations.
planned giving instruments - technical in nature
Overview of giving: When they don't give you cash
Pamela Davidson and Adam Gaslowitz. We have 2 speakers, one that focuses on the non-profit and one that focuses on the professional advisors.
They were all about the same.
Katherine Miree
Estate Planning with Charitable Intent
Women in Philanthropy & Community Foundations roundtable
a program w/ Pam Davidson - general charitable planning - done in partnership w/ several other organizations
ethics, legislaion and capital campaigns and use of planned gifts
Building Blocks of a Planned Giving Program, with multiple local speakers

valuing planned gifts/building and endowment program Suzanne Iler
Valuation Issues
Ethics
Stelter on their survey results.
Day-long seminar in marketing, followed by teleconference with IRS about new 990.
our annual Summer Forum--an all day event--was attended by about 100 participants. Regular monthly meetings consistently attract 40-50 attendees
Conrad Teitell honors Carolyn Osteen
Trends in charitable gift planning--Mpls lawyer Lowell Stortz
Kay Sprinkle Grace
Pinnacle Award to recognize a local advisor for excellence in charitable planning. Co-hosted by PGCIR & local estate planning council. 67 Attendees.
Donor advised funds vs. private foundations
N/A
Nov. 2008 - Women and Philanthropy - speaker: Nancy Schwartz Sternoff, Director of Dobkin Family Foundation Feb. 2008 - Gift Planning Ethics - speaker: Tom Cullinan
Tanya Howe Johnson
Tax and Legislative Update/Craig Wruck
IRS Update: Hot Button Issues in Gift and Estate Tax by IRS attorney
Sam Coldwell
Our best attended meeting was the May meeting, our annual meeting, where the topic was marketing and Larry Stelter was the presenter.
Sam Caldwell of the Planned Giving Company
Donor Panel - why we give
AB Trusts, Craig Wisnom. +
"Charitable Gifts of IRA / Retirement Plan Assets" Presenter: Christopher Hoyt
Review of the PPA-2006, presented by local attorney Mike Schley
super session / kathyrn miree

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

Dues Amount	Percent
0	1.00%
20	1.00%
25	4.00%
30	2.00%
35	5.00%
40	7.00%
50	8.00%
55	1.00%
60	7.00%
65	2.00%
70	2.00%
75	4.00%
80	4.00%
85	2.00%
90	1.00%
95	5.00%
100	14.00%
110	2.00%
120	2.00%
125	5.00%
130	1.00%
135	1.00%
145	1.00%
150	1.00%
160	4.00%
225	1.00%
275	1.00%

Please check expenses that are covered by member dues.

Response	Count	Percent
Program attendance	48	62.3%
Lunches or other meals	25	32.5%
Other (please specify)	25	32.5%

Other Responses:

Discounted use of web site for position advertising
member webpages, discounts on programs
Only discount on attendance, membership list access, e-newsletter, etc.
Ability to attend members-only events such as case studies and summer tours of local charitable organizations; also reduced luncheon and conference fees
None - all programs/lunches are additional
Reduced program fees for members
None
Membership dues help defray the administrative costs of running the council. Members pay a fee to attend all programs.
None of the above
Web seminar attendance
Programs and lunches in part.
Discount on meetings
Annual meeting attendance, grants program and regional trainings/events
Organizational and program-offset.
Support of council -- lunches are not included
mentoring program
all included in membership except annual Symposium which is \$60 for members
partial program and lunch
\$25 Discount off program registration fees
extra fee for leave a Legacy participation
we charge an additional \$200 for pre-paid meals
Speaker expenses
All expenses, including meals & program cost
Lunches are subsidized
Office Expenses such as postage

We charge and make a little money off the \$20 per mtg
Breakfast is another \$20, generally no one attends without having bfst
Our meetings vary; most with CE credit are \$25; meals vary as well, from free to \$25

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

Response	Count	Percent
Yes	16	22.2%
No	56	77.8%

Does PPP manage dues billing and processing for your council, through the ICDMS system? Note that 80% of all councils use ICDMS; the percentage below is for councils responding to this survey.

Response	Count	Percent
Yes	53	72.6%
No	20	27.4%

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

Response	Count	Percent
Yes	43	56.6%
No	33	43.4%

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

Response	Count	Percent
Yes	50	66.7%
No	25	33.3%

Which of the following non-dues sources of revenue has your council received in the past year?

Response	Count	Percent
Grants from community or other public foundations	7	9.1%
Grants from private foundations or individual donors	5	6.5%
Grants from corporate foundations	4	5.2%
Sponsorship of programs or other activities	55	71.4%
Advertising on web site or in printed materials	12	15.6%
Voluntary contributions from council members	13	16.9%
In-kind support (e.g., use of meeting room, printing, etc.)	38	49.4%
Other (please specify)	5	6.5%

Other Responses:

Professional participation in Educational Programs
we need to concentrate on the above
Job postings on local web-site
none
Job postings
separate charge for meals
Partnership with local community foundation around planned giving

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

Response	Count	Percent
1 year	12	15.8%
2 years	17	22.4%
3 years	28	36.8%
4 or more years	8	10.5%
unlimited	11	14.5%

How often does your council's board meet?

Response	Count	Percent
Weekly	0	0.0%
Twice a month	0	0.0%
Monthly	24	33.3%
Every other month	24	33.3%
Quarterly	14	19.4%
Twice a year	2	2.8%
Once a year	1	1.4%
Other (please specify)	7	9.7%

Other Responses:

monthly but not in July or August
Approximately, 3 to 4 times a year in person and monthly via conference call.
5 times annually, + emergency meeting as needed.
5 - 6 times per year
Three times a year
4 or 5 times per year, no set frequency
Every other month during conference planning; this fall we had weekly phone conferences to discuss sponsorship, conference planning, etc.
never
No such meetings are held
we meet We meet on the same dates as our membership meetings.

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	22	28.6%
Donors' legal/financial advisors	28	36.4%
Major gift fundraisers	25	32.5%
Donors	4	5.2%
Prospective donors or the general public	5	6.5%
Novice gift planners	41	53.2%
Small charities	32	41.6%
Other (please specify)	2	2.6%

Other Responses:

We have a "masters program" for our more experienced planned giving colleagues.
Some joint programs with AFP local
We try to cover all

Does your council have an annual conference?

Response	Count	Percent
Yes	31	40.8%
No	45	59.2%

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

Response	Count	Percent
Half-day	9	30.0%
Full-day	14	46.7%
More than one day	7	23.3%

Does your council participate in joint programs with other organizations?

Response	Count	Percent
Yes	56	75.7%
No	18	24.3%

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

Response	Count	Percent
Other planned giving council(s)	11	14.3%
Other professional associations in the community (AFP, Estate Planning Council, etc.)	54	70.1%
Nonprofit organizations	13	16.9%
Educational institution(s)	9	11.7%

Does your council have a web site?

Response	Count	Percent
Yes	57	76.0%
No	18	24.0%

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

Response	Count	Percent
Word of mouth	72	93.5%
Printed materials to prospects	43	55.8%
Electronic materials to prospects	52	67.5%
Telephone calls to prospects	42	54.5%
Special recruitment drive or annual membership campaign	16	20.8%
Other (please specify)	5	6.5%

Other Responses:

Scholarships for small or financially disadvantaged organizations;
BoARD MEMEBERS solicit

Membership materials/applications are paperclipped to the namebadge for each non-member who attends one of our programs.
networking
first time guests are free
New member drive being planned
Try to keep a motivated membership chair on the board
conference exhibitor
scholarships

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

Response	Count	Percent
Yes	54	76.1%
No	17	23.9%

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

Response	Count	Percent
no plans to implement the program	21	28.0%
plan to launch a program within 12 months	5	6.7%
program is active	26	34.7%
program has ended	12	16.0%
Other (please specify)	11	14.7%

Other Responses:

Still retain oversight with four area programs
Individual choice of agencies
CCPG does not participate in the Leave a Legacy program.
on hold
Availability national materials
Remnants of the program still exist

for the cleveland area we have not plans to implement the program. However, we just became the fiduciary entity for the active LAL Portage, Summit and Medina counties chapter.
We had jump started the program very aggressively a few years ago and are now looking to revisit our marketing strategies in "Leave a Legacy".
We are full partners with the Leave A Legacy program and the co-chairs are also members of our board
Leave a Legacy is incorporated as a message of the PGRTSAZ
Active program 10 years ago, fizzled out due to lack of interest
program was launched 5 years ago, dropped to focus on council

Comment Responses:

Important part of our programing - include representatives on BOD
It's only a little bit active.
www.leavealegacysoutheastmichigan.org
it is a separate budget and is always a funding issue
relationship with LAL is under review
May consider relaunching after member drive
But we are partnering in the fall with a Leave a Legacy organization in a metro area.

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

Response	Count	Percent
Competition with AFP chapter	7	9.5%
Competition with estate planning council	3	4.1%
Not enough prospects for whom gift planning is a high job priority	9	12.2%
Charitable employers do not approve time for council participation	0	0.0%
Charitable employers do not provide financial support for council membership	15	20.3%
High employment turnover among prospective members	4	5.4%
Lack of council visibility	12	16.2%
Prospects do not understand value provided by council	13	17.6%
Other (please specify)	11	14.9%

Other Responses:

don't understand value or provide the money necessary (sorry, only would let me check one)
--

turnover would be second (could hit only one button)
combo of not enough prospects and the proximity to NYC so that those involved in Gift Planning tend to join PGGNY
Couldn't select two from list. Wanted to also select 5th one as well
Competition with local non-profit that offers national speakers for professional advisors.
AND prospects do not understand value provided by council
Prospects do not understand value provided by council
Most of the reasons above
incomplete data base
Time and resources of our members. In actuality we are pleased with our membership numbers and the rate at which we are growing. One member at a time!
Also inconsistent council leadership
economic scare
Did not allow to select two choices: Competition with AFP and EPC are also challenging.
Lack of consistent staffing to retain and recruit members.
#5 (fin. support) & #6(turnover) above -- (survey would not let me choose two options)
Relevance of NCPG; competition from other professional associations
I also think a lack of marketing on our part.
only let us select one choice, not two
Capturing northern members and southern members of the state. North Jersey members tend to go to PGGNY. South Jersey residents sometimes go to Philadelphia. The 2 southernmost counties in NJ do not tend to attend our meetings or get involved.
We are a statewide council with a far-flung membership
Lack of council visibility among advisors
LAL is, and has been a problem for years
the option does not allow me to choose two. Our second challenge is high employment turnover.
It won't let me choose more than one challenge.
volunteer-power first. Developing better orchestrated approach.
#2 - Prospectd do not understand value provided by council

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

Response	Count	Percent
Recruiting more professional advisors	27	36.0%
Recruiting generalist fundraisers from small charities	26	34.7%

Recruiting major gift officers	13	17.3%
Other (please specify)	9	12.0%

Other Responses:

all of the above, but push has been for major gifts folks
Choice one Professional Advisors but the downside is them selling at meetings
We are discussing this currently.
More effective programing
All of the above are our likely prospects.
Professional certification
The economy is decreasing budgets and our fees are less than most organizations.
Not sure
Need to offer basic & intermediate programs
Corporate memberships

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

What is the most valuable program or service that PPP provides to support your council?
Bi-monthly meetings
Government Relations
Virtual Seminar at this point in time, plus Gift -PL and magazine
national standards and best practices; advocacy on national level for planned giving
As the new President, I feel somewhat detached from PPP even though I attended two Leadership Assemblies. Dues processing would be the most helpful service provided
ICDMS & Leadership Assembly
handling the dues
general support - always happy with responses
Gift PL
annual conference and speakers on natl. board that will come without speaker fees.
Legislative lobbying at the Fed level, speakers' bureau, nation-wide networking
Access to PPP Board Members as program speakers with no speaking fee
Opportunity to network, contrast & compare with other councils to learn what works and what doesn't
Networking.
Information from the website and conferences.
resource for speakers and strategic planning

Advocacy
Resources provided through the "council access" portion of the PPP web site are very valuable.
Dues collection and disbursement to local council. Use of board members as speakers Leadership Assembly
Web Seminars
tracking membership; resources through website
membership billing
Resource Center
We utilize the audio conference library is very helpful for program planning. We share the legislative status reports and other bits with the membership.
Dues collection and tracking
Leave A Legacy
Dues billing
Journal of Gift Planning
Leave A Legacy
Information that is sent out; legislative updates
National Confernece, GIFT PL, Forum to exchange ideas, Lobbying
Legislative Update
The use of the ICDMS system
Leave a Legacy
best practices and free quality speakers
Membership billing
website
membership processing
programming ideas
network
Strategic planning with Tanya Howe Johnson, ICDMS, PPP website,
I do not think most of our members participate or are aware of PPP. They are mostly limited to the local chapter and have not attended a national meeting. You are eyes and ears for us nationally.
Website and resources, along with the annual conference.
The virtual seminar
access to your website
Access to national standards and trends
Membership record keeping and renewal
Being able to utilize National Board members as speakers has been very useful
PPP Board Members speaking at local councils w/o charging a fee /Nat' Conf discount & Gift

Planning Journal to nonprofit PPP members.
luncheon programs
A quality annual national conference
National leadership conference
Materials from other councils. Free speakers from the board.
Handling new member aps and renewals
ICDMS System
Guidence and membership support
Leave a Legacy
Access to speakers for programs and training for Council leadership. In addition the membership processing helps us.
Speakers at a reasonable price!
Membership billing
There have been several over the years: leadership development, networking, strategic planning, help with administration
Virtual seminars
Opportunity for charity professionals and allied advisors to network
high quality programs

What information or service would you like to receive from PPP that is not currently available?

Hadn't thought about it beyond some type of certification, etc.
tool kits for our individual members to use in their daily work with the kind of information that PGCalc and other commercial vendors currently provide
Officers and Directors Liability Insurance and general coverage - large expense for our small organization.
More specific information on broadening our membership prospects as you develop PPP's strategy.
notification of current membership list
Ideas for other ways to administer our business other than hiring a person to handle the business. We pay an administrator currently but want to know how other Council are managing.
not sure
You extend memberships three month past members' expiration dates. This does not match our system and complicates the membership renewal process.
More sample administrative templates for general planned giving use - donor-related (pledge agreements, etc.) and administrative (job descriptions, annual review criteria, budget formats, etc.)

More guidance in building council membership, particularly among professional advisors
I can't think of anything.
Not sure
how to advertise and get media coverage - to market membership vs jsut coming one or two times
Nothing that I can think of at this time.
To become an affiliated fund of PPP versus the need to file on our own with IRS and to file Articles of Incorporation locally
LEAVE A LEGACY materials preformatted articles for newsletters
speaker availability
List of plug and play programs and speakers.
Perhaps an annual or bi-annual visit from either the PPP ceo or key staff for the council to personally connect with the bigger picture in this field.
Special program grants that assist us in building our partners and programs.
Professional Certification for PG
What value our Council can receive from PPP
Suggestions on increasing membership, what other councils are doing in this area, best practices, etc.
Legislative information
More program ideas that can be done locally
more great programming ideas
More printed materials, brochures
monthly email offering to all members
an update of what is going on as terms change, when you step into the role of chair your information is really only as good as the person before you shared, a overview of the services, expectations, deadlines, reports, what is available, etc would be most helpful with the volunteer and turning of leadership just being the nature of the business.
I cannot think of any at this time.
In a medium to small market we just do not draw financial or legal professionals and those type firms do not encourage their participation in local chapters.
Guest speakers to provide annual updates
perhaps some assistance with recruiting and monthly programs (always a challenge)
Promotional materials for PPP that can be shared with our members easily and that clearly demonstrate why individuals should belong to both organizations
Ideas on how to serve a statewide constituency
List of compelling reasons why an allied professional should join PPP! (Many feel their own professional association is enough -- joining PPP would be redundant in many instances).
better communication and information in general...
More info on best practices of other councils

More flexibility with website provided by PPP
Assistance with improving our website.
Help build regional chapters so everyone within 120 miles could possibly build day long events. Everyone is losing travel and meeting budgets faster than we are reacting, but just local meetings could be enhanced with regional day trips. Think United Way structure.
A list of lapsed/prior members from last five years.
more informal gatherings (brown bags)

Generated: 7/8/2009 11:24:18 AM