

**Survey Results
& Analysis**
for
2010 Survey of Council Leaders



Monday, April 11, 2011
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Survey Results & Analysis

Responses Received: 64

Please select the name of your planned giving council.

| Response |
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| Acadiana, Planned Giving Council of |
| Adirondack Planned Giving Society |
| Alabama Planned Giving Council |
| Arizona, Planned Giving Round Table of |
| Arizona, Planned Giving Roundtable of Southern |
| Arkansas Charitable Gift Planning Council, PPP |
| Baton Rouge, Planned Giving Council of Greater |
| Blue Ridge, Partnership for Philanthropic Planning of the |
| Broward County, Planned Giving Council of |
| California Planned Giving Council, Northern |
| CANARAS Group |
| Cape Cod, Planned Giving Council of |
| Central Coast Planned Giving Council |
| Charlottesville Area Planned Giving Council |
| Chattanooga Area Planned Giving Council, Greater |
| Chesapeake Planned Giving Council |
| Chicago Council on Planned Giving |
| Chicago Planned Giving Council, Suburban |
| Cincinnati Planned Giving Council, Greater |
| Colorado Planned Giving Roundtable |
| Connecticut, Planned Giving Group of |
| Dayton, Partnership for Philanthropic Planning of Greater |
| DELMARVA Planned Giving Council |

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| Evansville Area Fundraising Council |
| Florida, Planned Giving Council of Central |
| Florida, PPP of Northeast |
| Florida Planned Giving Council, Southwest |
| Four States, Planned Giving Council of the |
| Georgia Planned Giving Council |
| Green Country Planned Giving Council |
| Hampton Roads Gift Planning Council |
| Hawaii Planned Giving Council |
| Hills of Ohio Planned Giving Council |
| Houston, Planned Giving Council of |
| Idaho Planned Giving Council, Southwest |
| Illinois Planned Giving Council, Central |
| Illinois, Planned Giving Council of Northern |
| Illowa Partnership for Philanthropic Planning |
| Indian River, Planned Giving Council of |
| Indiana, Planned Giving Group of |
| Indiana, Planned Giving Council of Northeast |
| Inland Empire Planned Giving Roundtable |
| Inland Northwest Planned Giving Council |
| Iowa Planned Giving Council, Eastern |
| Kansas Planned Giving Roundtable, Central |
| Kentuckiana Planned Giving Council |
| Kentucky Planned Giving Council, Central |
| KYOWVA Planned Giving Council |
| Lee County, Planned Giving Council of |
| Lone Star Chapter of NCPG |
| Long Island, Charitable Estate Planning Council of |
| Los Angeles, Partnership for Philanthropic Planning of Greater |
| Mahoning/Shenango Planned Giving Council |
| Maine Planned Giving Council |
| Massachusetts, Planned Giving Council of Central |

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| Memphis, Planned Giving Council of Greater |
| Miami, Partnership for Philanthropic Planning |
| Michigan, Planned Giving Roundtable of Southeast |
| Michigan Planned Giving Group, Western |
| Mid-America Planned Giving Council |
| Mid-Hudson Valley (NY), Planned Giving Council of the |
| Mid-Iowa Planned Giving Council |
| Mid-Michigan Planned Giving Council |
| Minnesota Planned Giving Council |
| Mississippi Planned Giving Council, North |
| Mississippi, Planned Giving Council of South |
| Greater Naples Area Planned Giving Council |
| Nashville, Partnership for Philanthropic Planning of |
| National Capital Gift Planning Council |
| Nebraska Partnership for Philanthropic Planning |
| Nevada, Planned Giving Roundtable of Northern |
| New England, Planned Giving Group of |
| New Jersey, Gift Planning Council of |
| New Orleans Council of NCPG, Greater |
| New York, Gift Planning Group of Northeastern |
| New York, Planned Giving Council of Upstate |
| New York Planned Giving Consortium, Western |
| New York, Planned Giving Group of Greater |
| North Carolina Planned Giving Council |
| Northwest Planned Giving Roundtable |
| Ohio Planned Giving Council, Central |
| Ohio Planned Giving Council, North Central |
| Ohio Planned Giving Council, Northern |
| Oklahoma Planned Giving Council |
| Orange County, Partnership for Philanthropic Planning |
| Palm Beach County, Planned Giving Council of |
| Pennsylvania, Planned Giving Council of Central |

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| Permian Basin, Planned Giving Council of the |
| Philadelphia, Planned Giving Council of Greater |
| Pittsburgh Planned Giving Council |
| Portage County, Planned Giving for |
| Rhode Island, Partnership for Philanthropic Planning of |
| Sacramento, Planned Giving Forum of |
| Saint Louis Planned Giving Council |
| San Antonio, Planned Giving Council of |
| San Diego, Planned Giving Roundtable of |
| San Joaquin Valley Planned Gifts Council |
| Santa Barbara, Planned Giving Roundtable of |
| Savannah Area Planned Giving Council |
| Silicon Valley Planned Giving Council |
| Siouxland, Planned Giving Council of |
| Smoky Mountain Planned Giving Council |
| South Carolina Planned Giving Council |
| South Dakota Planned Giving Council |
| South Sound Planned Giving Council |
| Springfield Council of NCPG |
| Susquehanna Valley Planned Giving Council |
| Tampa Bay, Partnership for Philanthropic Planning |
| Texas, Planned Giving Council of Central |
| Texas Chapter of PPP, North |
| Texoma Planned Giving Council |
| Toledo Area Planned Giving Council |
| Treasure Coast Planned Giving Council |
| Tri-State Gift Planning Council |
| Upper Valley Planned Giving Council |
| Utah Planned Giving Roundtable |
| Ventura County, Partnership for Philanthropic Planning of |
| Virginia Gift Planning Council |
| Washington Planned Giving Council |

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| Wisconsin Planned Giving Council |
| Wisconsin, Partnership for Philanthropic Planning of Eastern |
| Wisconsin, Planned Giving Council of South Central |

Are you currently the president of this planned giving council?

| Response | Count | Percent |
|----------|-------|---------|
| Yes | 55 | 85.9% |
| No | 9 | 14.1% |

How would you describe your personal membership status in the Partnership for Philanthropic Planning (national organization)?

| Response | Count | Percent |
|---|-------|---------|
| I am currently a member of PPP. | 50 | 78.1% |
| I have been a member of PPP in the past, but am not currently a member. | 2 | 3.1% |
| I have never been a member of PPP. | 12 | 18.8% |

If you are NOT currently a member of PPP, why not? (Select all that apply.)

| Response | Count | Percent |
|---|-------|---------|
| My employer does not support membership. | 4 | 6.3% |
| National dues are too expensive. | 2 | 3.1% |
| PPP does not provide services that I need/want. | 1 | 1.6% |
| I belong to other professional organization(s). | 6 | 9.4% |
| Other (please specify) | 5 | 7.8% |

How frequently is PPP membership discussed and/or promoted at council meetings?

| Response | Count | Percent |
|--------------|-------|---------|
| Always | 22 | 34.4% |
| Occasionally | 37 | 57.8% |
| Never | 5 | 7.8% |

Have you personally reviewed the tools for council leaders provided in the Council Resources section (under the Partners tab) at www.pppnet.org?

| Response | Count | Percent |
|----------|-------|---------|
| Yes | 34 | 53.1% |
| No | 30 | 46.9% |

What other resources should PPP provide that would be helpful to you in your role as council president?

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| Right now membership is slipping and tools to address lapsed memberships is top on our priority list. |
| we continue to struggle with how to support the LEAVE A LEGACY program |
| What is being provided now is adequate |
| Training and models on to develop sustainable funding support for the organization, its programs such as Leave A Legacy, and organizational growth. |
| a full blown speaker's bureau would be great, as we spend lots of time going through conference schedules and other resources to identify speakers and then more time to contact them, etc. Even if this was only for current and past PP board members, that would be helpful |
| I think letter templates would be nice (maybe they are there and I've never found them). Speaker requests, thank you, sponsor, new member, lapsed member. Keep us from re-inventing the wheel and provide consistency across PPP. |
| Assistance with increasing membership and sponsorships |

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| Provide an accredited professional designation for the planned giving industry |
| We are beginning a Strategic Planning process to help us determine how we want to grow and what we'd like to change in view of our new name. I'd like to learn how other chapters have expanded their horizons in light of the name change. |
| Not sure - just began my role. |
| Current List of other Council presidents in my regional area! |
| Easier access to tools. Provide leadership webinars. Two years ago, Tanya did a terrific session at the LA. It should have been done as a leadership webinar. By the way, please call my council by its proper name: Partnership for Philanthropic Planning of Greater Philadelphia. Actual help with membership marketing would be nice. |
| I am new in this role and honestly haven't considered what else the national organization could do differently. |
| Access to speakers and presentors, which you already provide. |
| Help with attracting outside speakers for programs, possibly recommendations on their effectiveness/cost. |
| PPP does a great job with the listserve and updates both emailed and on the website. |
| It would be helpful to have e-mails sent to the President regarding programs available -- such as the CD/DVDs that you offer. |
| Insurance program for D&O and General Liability |
| We have spent a great deal of time/resources in researching online registration options and eventually decided to go with Cvent. We also spend a lot of resources on our website. I wish the council had a "package" that would have taken care of those infrastructure needs (like you do for membership). Then our all volunteer council/partnership (especially me as president) could have spent the time on more "important" things. |
| Need to reach out with more - especially in helping grow council membership |
| Programming; membership recruiting; Government Relations; Update on PG laws, etc. |
| Information and techniques for the small non-profit to get engaged and invested in planned giving practices. |
| Faster, more accurate membership information (new, lapsed, trends.) New vision about our newly expanded mission (securing major and transformative gifts). What will we offer that AFP, Jerry Panas and others don't. |

Has your council engaged in joint programs or other services with any of the following local groups? (Select all that apply.)

| Response | Count | Percent |
|-------------------------------------|--------------|----------------|
| We do not do any joint programming. | 4 | 6.3% |
| AFP chapter | 47 | 73.4% |
| Estate Planning Council | 30 | 46.9% |
| Community Foundation | 36 | 56.3% |
| Other (please specify) | 17 | 26.6% |

Would you like to increase cooperation in programming or other activities with any of the following groups? (Select all that apply.)

| Response | Count | Percent |
|-------------------------|--------------|----------------|
| AFP chapter | 27 | 42.2% |
| Estate Planning Council | 38 | 59.4% |
| Community Foundation | 19 | 29.7% |
| Other (please specify) | 13 | 20.3% |

In your community, do planned giving council activities and/or member prospect base overlap or compete too much with any of the following organizations?

| Response | Count | Percent |
|--|--------------|----------------|
| No significant overlap or competition between council and other organizations. | 27 | 42.2% |
| AFP chapter | 28 | 43.8% |
| Estate Planning Council | 18 | 28.1% |
| Other (please specify) | 6 | 9.4% |

Has your council set a specific goal to increase membership?

| Response | Count | Percent |
|--|--------------|----------------|
| Yes, we have set a specific goal. | 21 | 32.8% |
| No (We would like to increase membership, but have not set a specific goal.) | 42 | 65.6% |
| No (We are not seeking to increase membership at this time.) | 1 | 1.6% |

Have you specifically targeted any of the following people/groups for membership recruitment? (Select all that apply.)

| Response | Count | Percent |
|---|--------------|----------------|
| We have not targeted specific people or groups | 15 | 23.4% |
| Estate planners and/or financial service professionals | 44 | 68.8% |
| Students | 1 | 1.6% |
| Major gift fundraisers | 30 | 46.9% |
| Planned gift fundraisers | 32 | 50.0% |
| CEOs/CFOs/Development Directors or other nonprofit executive officers | 31 | 48.4% |
| Members who would increase the racial/ethnic diversity of the council | 8 | 12.5% |
| Other (please specify) | 4 | 6.3% |

If you are working to increase council membership, what strategies are you using to accomplish this? (Select all that apply.)

| Response | Count | Percent |
|---|--------------|----------------|
| Member-Get-A-Member Campaign | 11 | 17.2% |
| Incentive or reward for most new members recruited | 2 | 3.1% |
| Recruitment letters and/or e-mails to specific prospects | 34 | 53.1% |
| Discounted membership dues for first-time, student, or other target member groups | 11 | 17.2% |
| Joint membership arrangement with other local organization(s) | 2 | 3.1% |
| Other (please specify) | 15 | 23.4% |

Other Responses:

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| "Try it out" offer - 1 free program attendance. |
| We do have a membership committee which has developed a membership plan which focuses on lapsed members and people who attend our meetings but are not members of the Council. |
| meeting fees applied to "local only" membership |
| The membership committee has a plan to increase membership by adding value and members recommend membership but no specific campaign in place |
| We waive our meeting fee one time for a potential member |
| discount for additional members from same org. |
| Free meal for first-time attenders |
| We are discussing these issues at next week's board meeting |
| Making some events free to non-members to incent to attend |
| Adding Value added services; Mentorship and Study Groups |
| October is new members month in which guests pay the members rate. The program topic is specifically geared for development professionals. We are also working on targeting professional advisors. |
| Free attendance to first meeting |
| Quality programming that draws in prospective members |
| We've added Inclusive and Sponsoring Organization membership levels |

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| Waive guest fee for meetings |
| Working with Estate Planning Council & AFP |
| networking opportunities and outreach |
| We have talked about but not acted on our ideas. |
| Chamber Mailings with member names |
| Get one free coupon - guests of board members and committee members can come free to a breakfast and seminar. We follow up a week later and ask them to become a member. |

How could PPP provide your council with additional assistance in membership recruitment efforts?

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| Not sure. Possibly by having our Membership Chairperson attend the Leadership Assembly. |
| is there an e-brochure highlighting PPP benefits? |
| Nothing that I can think of at this time |
| Would love to have name of president of AFP in Western Chicago suburbans and names of other similar organizations |
| Any trainings or examples of special programs (i.e. direct mail, email, trainings,) to recruit members would be most helpful. |
| a tough one, as many of our problems in this area come down to \$: I suspect that if prof. development funds flow again as they did before 2008 |
| A "best practices" site would be helpful so we can all see what has worked and what hasn't worked for other councils. Again - letter templates would be beneficial as well. |
| Ideas or materials that we could implement in attracting new members |
| PPP lacks relevance. A professional designation from our profession's association with CE credits at meeting creates relevance. |
| Keep us informed as to what other chapters are up to. Try to determine "best practices" for chapter in addition to professional growth and development. |
| Better promotional materials emphasizing value of PPP membership, since almost all of the dues go to PPP |
| Ideas that have worked for councils |
| Updated membership packets |

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| Provide a list of lapsed or prior members (and their contact information) for last several years that we could try contact and re-engage. |
| Not sure, what do you recommend? |
| PPP could actually do membership recruitment mailings to folks in my community. |
| Not sure. Members continue to be confused about Council membership and Leave a Legacy partnership. |
| Your gift of a complimentary registration for the conference was very useful in our recruitment efforts. |
| Again, assistance and advice in acquiring quality, nationally known speakers (from the PPP board or otherwise) |
| We've considered using PPP's membership processing capabilities but have refrained from doing so because it doesn't give us enough flexibility to handle the various and differing membership levels that we offer. |
| The new member application on the website is a bit confusing to website visitors. We recently had a new member sign up for PPP only thinking she was joining the local Council |
| Not Sure. |
| I have not familiarized myself with what is provided. |
| customizable brochure |
| I need to learn more about the "Member-Get-A-Member Campaign. |
| Turn key ideas, i.e. incentive program ideas or joint membership ideas |
| Programs; what other groups are doing and being successful with |
| examples of successful campaigns |
| Better, clearer, even more relevant reasons for members to be a member of PPP, not just MPGC. What's in it for them? |

Has your council used any of the following PPP resources as part of your membership recruitment efforts? (Select all that apply.)

| Response | Count | Percent |
|--|--------------|----------------|
| The Journal of Gift Planning (e.g., providing articles or free issue to prospects) | 11 | 17.2% |
| PPP Gift Planner Update e-newsletter or Legislative Update e-newsletter (e.g., to share news with prospects) | 8 | 12.5% |
| Recruitment strategies described at PPP Leadership Assembly | 15 | 23.4% |
| Membership Recruitment/Marketing models from PPP Council Resources section at www.pppnet.org | 11 | 17.2% |
| Links to information or resources on PPP web site | 19 | 29.7% |
| Other (please specify) | 2 | 3.1% |

Has your council used any of the following PPP resources to identify speakers for council programs? (Select all that apply.)

| Response | Count | Percent |
|---|--------------|----------------|
| PPP national board members | 41 | 64.1% |
| PPP national conference faculty | 26 | 40.6% |
| PPP Virtual Seminar series | 27 | 42.2% |
| authors from The Journal of Gift Planning | 10 | 15.6% |
| speakers used by other PPP councils | 34 | 53.1% |
| contributors to the GIFT-PL e-mail discussion group | 3 | 4.7% |
| Other (please specify) | 2 | 3.1% |

How could PPP provide your council with additional assistance in planning its programs?

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| keep the Assembly going - the networking, meeting other councils IS the best thing! |
| as noted above, a more integrated speaker's bureau or list would be great, though PPP already has many recources as you list above |
| A list of speakers on different topics that we could approach. |
| I would like help but I cannot define what that is at this time. Possibly marketing material templates, sample meeting agendas with content, how to offer great educational programs with a checklist, etc. |
| Continue providing a list of those who are speakers and the topics they speak on. |
| Suggest program topics and align those by discipline that might be responsive or appeal to(attorneys, non-profit, etc.) |
| Speakers bureau. |
| By providing a true speakers bureau with recommendations on quality programs. Ideas about underwriting program costs (travel, lodging, fees) |
| Frankly, while the content of the virtual seminars is good, the presentations (watching a PowerPoint on a screen for almost 90 minutes) is deadly. Our folks began to lose interest after an hour. I would suggest shortening them, or if possible, providing video. In this day and age of webinars people are expecting more. |
| Again, I have not familiarized myself with all that PPP offers to assist in program planning. |
| I don't know if our program planning committee utilizes the resources you have in place already. My sense is, not as fully as is currently available. |
| Communicating easy to use, easy to implement programs that any non-profit would be able to use to develop a planned giving strategy. |

Will your council send one or more representatives to the PPP Leadership Assembly, June 10-11, in Indianapolis, IN?

| Response | Count | Percent |
|-----------------|--------------|----------------|
| Yes | 26 | 40.6% |
| No | 10 | 15.6% |
| Not Sure | 28 | 43.8% |

Does your council subsidize any of the following expenses for representative(s) attending the Leadership Assembly? (Select all that apply.)

| Response | Count | Percent |
|---------------------------|--------------|----------------|
| Assembly registration fee | 43 | 67.2% |
| Travel and/or lodging | 34 | 53.1% |
| Meals | 22 | 34.4% |
| Other (please specify) | 4 | 6.3% |

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