

The Partnership for Philanthropic Planning held its annual Leadership Assembly on June 10 and 11, 2010 in Indianapolis, IN. In addition to council leadership and training activities, the PPP Board of Directors presented its annual report to delegates, and asked council leaders to share their thoughts about a possible affiliation between PPP and the Association of Fundraising Professionals (AFP). Reports and materials presented during the Assembly will soon be posted and available to all council leaders at www.pppnet.org.

The PPP/AFP affiliation discussion covered three major topics: the nature of the conversations between PPP and AFP thus far, thoughts about the *national level* implications of an affiliation, and the potential impact of an affiliation at the *local level*. PPP leaders took this opportunity to answer questions about the affiliation discussions to date and to clarify several key points:

- Conversations have centered on an affiliation of partners seeking to meet common goals, not a merger or absorption of mission or governance by either organization.
- No decisions have been finalized. In fact, the announcement of the affiliation discussions was deliberately shared with members very early in the process in order to promote dialog with both PPP council and AFP chapter leaders and individual members.
- PPP engages in discussions on partnerships and collaborations on a regular basis, seeking to accomplish its goal of reaching all of the broad constituencies involved in charitable gift planning. At least 1/3 of PPP members are also currently members of AFP, which represents 30,000 fundraising professionals. PPP and AFP have worked together in the past to advance joint legislative, research, and public awareness goals. Given this, it makes sense to ask whether some form of more formal collaboration might benefit the missions of both PPP and AFP, enhance value to members, and create operating efficiencies.

Council leaders supported and encouraged the goals of expanding the messages of charitable gift planning both locally and nationally. And they agreed that operational efficiencies that could provide enhanced services and value for both PPP and AFP members made sense. They felt strongly that any combined organization must encourage and enhance PPP service to senior gift planners and donor advisors. And finally, council leaders passed along the following additional advice and cautions.

Council leaders thoughts on the *national level* implications included:

- It would make sense to affiliate only if PPP can retain its unique identity, mission, and focus on charitable gift planning.
- PPP's value as an advocate for charitable gift planning and in promoting standards and best practices is critical to the field and must not be lost.
- An affiliation that saves both organizations' resources and provides enhanced member services (e.g. expanded employment and resource centers, education offerings, web services and social networking efforts, etc.) could be valuable in freeing resources for more strategic uses.

Council leader's thoughts on the *local level* implications included:

- In some communities, the PPP Council and AFP Chapter are currently coordinating efforts, in some cases quite regularly, and some of these areas foresee real benefits to an affiliation.
- In other communities, the PPP Council and AFP Chapter have little if any contact and don't currently envision that increasing. In these areas, the benefits of an affiliation are not apparent.
- Councils are concerned that many members would not be accepting of a mandatory requirement to join AFP.

Most council leaders emphasized that the "grass roots" nature of the relationship between PPP and councils and the diverse style of councils across the country, is a hallmark of PPP. Understanding that the AFP - chapter relationship is more uniform and prescribed, council leaders cautioned that the cultural differences seem significant and possibly insurmountable.

The input from Assembly delegates is a valuable voice as PPP leaders continue seeking advice on a possible affiliation. We look forward to continuing and expanding this dialogue with PPP individual members and council leaders.