

# Planned Giving Council Survey (test)

The [name of council] is eager to help you enhance your skills as a charitable gift or estate planner and network with the people in our community whom you need to meet in order to succeed. Your response to this survey will help us tailor programs and services to your specific needs and interests. Your responses are completely anonymous, unless you provide contact information for specific responses. Results of the survey will be reported at an upcoming council meeting, and will be used to guide programming throughout the coming year.

This survey is being conducted for us by the Partnership for Philanthropic Planning. If you have questions about the survey, please contact Barbara Yeager at [byeager@pppnet.org](mailto:byeager@pppnet.org). Thank you for participating!

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

- 0
- less than 1
- 1 to 3
- 4 to 6
- 7 to 10
- More than 10

## 2) How would you describe your level of expertise in charitable gift/estate planning?

- Beginner
- Intermediate
- Expert

## 3) How would you describe your Partnership for Philanthropic Planning membership status?

- I am currently an PPP member.
- I have been a member in the past, but am not currently.
- I plan to join PPP in the future.
- Other (please specify)

If you selected other, please specify

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

- AAFRC--American Association of Fundraising Counsel
- AALU--Association for Advanced Life Underwriting
- ABA--American Bar Association and local associations
- ACGA--American Council on Gift Annuities
- AFP--Association of Fundraising Professionals
- AHP--Association for Healthcare Philanthropy
- APRA--Association of Professional Researchers for Advancement
- ASAE--American Society of Association Executives
- CASE--Council for Advancement and Support of Education

- Family Office Exchange
- FPA--Financial Planning Association
- IAAP--International Association of Advisors in Philanthropy
- Local estate planning council
- Local planned giving council
- NAIFA--National Association of Insurance and Financial Advisors (formerly NALU)
- NAPFA--National Association of Personal Financial Advisors
- SFSP--Society of Financial Service Professionals
- Other (please specify)

If you selected other, please specify

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

- JD
- Certified Specialist in Planned Giving (CSPG)
- Certified Gift Planning Associate
- CFRE/ACFRE
- Chartered Advisor in Philanthropy (CAP)
- CPA
- CHFC
- CLU
- FAHP
- AEP
- CIC
- Bar Membership
- CFP
- Other (please specify)

If you selected other, please specify

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**6) How many years have you been a member of the planned giving council?**

- 1 year
- 2 years
- 3 years
- 4 years
- 5 or more years

**7) How frequently do you attend planned giving council meetings?**

- Always
- Frequently
- Occasionally
- Never

**8) Please rate the frequency of the following situations in your professional experience.**

	Frequently	Occasionally	Never
You ask a planned giving council member for volunteer or paid assistance on a gift planning matter.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Another planned giving council member asks you for volunteer or paid assistance on gift planning matter.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
You use a technique or information that you learned through the planned giving council.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
You learn about NCPG programs and activities at planned giving council meetings.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
You invite a guest to a planned giving council meeting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**9) What do you find most valuable about planned giving council membership?**

- Education on gift planning tools and techniques.
- Networking for general purposes.
- Networking for professional referrals.
- Other (please specify)

If you selected other, please specify

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**10) What programs, services or other activities would make planned giving council membership more valuable to you?**

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**11) Please rate your interest in the following topics or issues. If there are other topics in which you are very interested, please note them in the Comments field.**

	Very interested	Somewhat interested	Not interested
Professional ethics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirement planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing planned gifts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Valuing planned gifts (e.g., for cost/benefit analysis)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Counting planned gifts in a campaign	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teamwork among nonprofit and for-profit planners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Donor recognition and stewardship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Legislative/regulatory updates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Planned gift administration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investment management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Charitable bequests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charitable gift annuities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charitable remainder trusts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charitable lead trusts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Life insurance gifts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Real estate gifts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gifts of retirement plan assets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gift planner performance evaluation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Integrating planned and major gift fundraising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**12) 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.**

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**13) Are you interested in strengthening the planned giving council by serving in a board or committee position? If so, please indicate when you expect to be available for this service, and provide your name and phone number in the Comments field.**

- I am not interested in serving.
- I am currently available.
- I will be available next year.

Additional comments

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**14) Is your primary employer...**

- Nonprofit organization
- For-profit business, practice or firm [skip to question 18]

**15) 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.**

- Public University
- Private University
- Small College
- Community/Junior College
- Technical School
- Academy/Private School
- Hospital/Health Care Organization
- Religious Organization
- Social Services Organization
- Environmental Group

- Community Foundation
- Museum, Symphony, Arts/Cultural Organization
- Private/Family Foundation
- Association
- Continuing Care Community/Facility
- International Aid/Education Organization
- Public Broadcasting
- Other (please specify)

If you selected other, please specify

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**16) What is your job title? Choose the option that most closely matches your title.**

- Director of Development (including executive, senior, assistant, associate, etc.)
- Director of Gift Planning (including executive, senior, assistant, associate, etc.)
- Director of Principal Gifts (including executive, senior, assistant, associate, etc.)
- Gift Planning Officer
- Director of Major and Planned Giving (including executive, senior, assistant, associate, etc.)
- Major and Planned Giving Officer
- Development Officer
- Executive Director
- President/CEO
- Vice President (including executive, senior, assistant, associate, etc.)
- Other (please specify)

If you selected other, please specify

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**17) Approximately what percentage of your time is spent on the following activities?**

	0%	1 to 25%	26 to 50%	51 to 75%	76 to 99%	100%
annual gifts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
special events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
outright/major gifts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
estate gifts (bequests, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
life income gifts (trusts, gift annuities, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
other (describe in Comments field)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[nonprofits skip to question 20]

**18) 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.**

- Law Practice/Firm
- Financial Planning Practice/Firm
- Consulting Practice/Firm

- Insurance Company
- Accounting Practice/Firm
- Bank or Trust Company
- Brokerage Firm
- Other (please specify)

If you selected other, please specify

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**19) 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.)**

- 0%
- 1 to 25%
- 26 to 50%
- 51 to 75%
- 76 to 99%
- 100%

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

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**21) Are there additional comments you would like to share about your membership in the planned giving council and/or the Partnership for Philanthropic Planning?**

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Thank you for completing the [council name] Profile survey. Whenever you have questions or suggestions about council PPP programs or services, please don't hesitate to contact us using any of the contact information provided at [\[web\]](#) address or other contact info].