

NCPG Survey of IRA Distributions to Charity

Results as of March 24, 2008

(for distributions through December 31, 2007, when the charitable IRA provisions expired)

The National Committee on Planned Giving is tracking information on IRA distributions received by charities since the enactment of the Pension Protection Act of 2006, in August. As of March 24, 2008, approximately 900 charitable organizations had reported 8677 individual distributions, with a total value of more than \$140 million. Distribution values range from \$25 to \$100,000. Most major IRA administrators appear to be processing qualified charitable distributions.

NCPG encourages all charitable organizations to report their IRA distributions using this brief online survey. Results will be used to demonstrate the impact of these gifts to legislators, and also to identify questions and problems that may impede the widest possible use of charitable IRA distributions. **Each response should describe only one completed gift (do not respond for gifts you expect to receive in the future).** Responses will be completely anonymous, unless you choose to provide contact information. If you have questions or comments about this survey, please contact Barbara Yeager at byeager@ncpg.org.

Link to the survey: <https://websurveyor.net/wsb.dll/24399/hr4survey.htm>

Key Findings

All respondents (8677)

Number of organizations reporting.....approximately 900

Total dollar value of gifts reported.....\$140,544,069

Median distribution:\$4,378

Average distribution:\$16,197

Most common distribution\$5,000 (717 distributions)

	Number of Gifts	Dollar Value
distributions of \$1,000 or less	30%	1%
distributions of \$1,001 to 5,000	28%	5%
distributions of \$5,001 to 10,000	13%	7%
distributions of \$10,001 to 25,000	11%	13%
distributions of \$25,001 to 50,000	8%	20%
distributions of \$50,001 to 99,999	3%	13%
distributions of \$100,000	6%	40%

Type of organization receiving donation

Response	Percent
Public University	31.4%
Private University	29.3%
Small College	9.2%
Community/Junior College	0.2%
Technical School	0.0%
Academy/Secondary School	1.5%
Hospital/Health Care Organization	4.2%
Religious Organization	6.0%
Social Services Organization	3.2%
Environmental Group	0.4%
Community Foundation	3.2%
Museum, Symphony, Arts/Cultural Organization	4.4%
Private/Family Foundation	0.0%
Association	0.1%
Other	5.4%

Job title of person submitting response

Response	Percent
Director of Development	3.3%
Director of Gift Planning	40.7%
Gift Planning Officer	21.6%
Director of Major and Planned Giving	5.6%
Major and Planned Giving Officer	2.2%
Development Officer	7.1%
Executive Director	1.4%
President/CEO	0.5%
Vice President	5.3%
Other	10.3%

Selected "Other" responses

Annual Giving Manager
Assistant Director of Planned Giving
Assistant Director, Finance

CFO
Chief Development Officer
Development Associate
Director -- Legacy Estate Programs
Director of Estate Planning Services
Donor of gift
Donor Services Director
Executive Administrator
Gift Administration Coordinator
Gift Records Clerk
Life Income Plan Manager
Volunteer Chair, Finance Committee
VP of Development