Partnership for Philanthropic Planning

National Conference on Philanthropic Planning

October 3-5, 2012
New Orleans, Louisiana

# National Conference on Philanthropic Planning—Who Attends?

**Based on demographic information collected at previous conferences, following is a snapshot of our attendees:**

### ■ First Time Attendee?

| | |
|---|---|
| No | 74% |
| Yes | 26% |

### ■ Currently employed by:

| | |
|---|---|
| Not-for-profit? | 82% |
| For profit? | 18% |

### ■ Years of gift planning experience:

| | |
|---|---|
| 0 years | 3% |
| 1 to 3 years | 13% |
| 4 to 6 years | 13% |
| 7 to 10 years | 13% |
| more than 10 years | 57% |

### ■ Time they spend on gift planning:

| | |
|---|---|
| 100% | 35% |
| 75-99% | 21% |
| 50-74% | 13% |
| 25-49% | 13% |
| 1-24% | 15% |
| 0% | 3% |

### ■ Functional areas or job titles:

| | |
|---|---|
| Fundraiser specializing in planned gifts | 55% |
| Fundraiser specializing in major gifts | 2% |
| Fundraiser with general responsibilities | 5% |
| Director of Development or other director/vice president supervising fundraisers | 12% |
| CEO, CFO or other chief officer of a charitable organization | 4% |
| Professional advisor providing counsel primarily to individuals | 3% |
| Professional advisor providing counsel primarily to charitable organizations | 6% |

### ■ The role they play in purchasing products/services:

| | |
|---|---|
| Recommend | 49% |
| Final say | 27% |
| No role | 10% |
| Specify | 9% |
| Specify & Recommend | 3% |
| Final Say & Recommend | 1% |

| | |
|---|---|
| Specify & Final Say | <1% |
| Specify, Final Say, & Recommend | <1% |

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**■ Attendees would like the following product/service vendors to exhibit at future conferences:**

| | |
|---|---|
| Planned Giving Services | 55% |
| Donor Development | 41% |
| Donor Recognition | 44% |
| Gift Planning Internet Services | 37% |
| Legal Counsel | 17% |
| Gift Planning Software | 40% |
| Marketing Publications | 40% |
| Donor Research | 41% |
| Professional Training/Education | 32% |
| Professional Publications | 31% |
| Financial Planning | 30% |
| Wealth Management | 31% |
| Capital/Endowment Campaign | 30% |
| Trust Administration | 27% |
| Gift Administration Software | 27% |
| Consulting Services | 26% |
| Gift Administration Services | 23% |
| Trust Services | 26% |
| Investment Management | 20% |
| Appraisals | 23% |
| Executive Search | 16% |
| Accounting-Audit Tax | 10% |
| Life Insurance | 14% |
| Life Settlements | 10% |

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**■ How attendees heard about the conference:**

| | |
|---|---|
| Attended previous PPP conference | 53% |
| E-mail invitation | 17% |
| Recommendation from colleague | 16% |
| PPP Website | 8% |
| Postcard mailing | 3% |
| Advertisement | 3% |

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**■ Attendees' Other Educational Experiences:**

| | |
|---|---|
| Regular meeting of a planned giving council | 80% |
| Regular meeting of an AFP chapter | 25% |
| Regular meeting of an estate planning council | 33% |
| Regional conference sponsored by a planned giving council | 38% |
| AFP International Conference | 6% |
| ACGA Conference | 21% |
| Other national professional conference (Heckerling, ACTEC, CASE, etc.) | 25% |

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**■ Organizations PPP Members Belong to:**

| | |
|---|---|
| American Bar Association and local associations | 9% |
| American Council on Gift Annuities | 29% |
| Association of Fundraising Professionals | 45% |
| Association for Healthcare Philanthropy | 10% |
| Council for Advancement and Support of Education | 29% |
| Financial Planning Association | 4% |
| Local estate planning council | 30% |
| Local planned giving council | 72% |

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## ■ PPP Members by Affinity Area:

**Nonprofit:**

| | |
|---|---|
| Public University | 14% |
| Private University | 15% |
| Small College | 7% |
| Community/Junior College | 1% |
| Academy/Private School | 2% |
| Hospital/Health Care Organization | 16% |
| Religious Organization | 9% |
| Social Services Organization | 11% |
| Environmental or Animal Welfare Group | 3% |
| Community Foundation | 5% |
| Museum, Symphony, Arts/Cultural Organization | 4% |
| Continuing Care Community/Facility | 2% |
| International Aid/Education Organization | 1% |
| Public Broadcasting | 1% |

**For-profit**

| | |
|---|---|
| Law Practice/Firm | 31% |
| Financial Planning Practice/Firm | 14% |
| Consulting Practice/Firm | 9% |
| Insurance Company | 5% |
| Accounting Practice/Firm | 13% |
| Bank or Trust Company | 20% |

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