

1. Tell us about our General Session Keynote Presenters:

	Excellent	Above Average	Average	Below Average	Poor	Rating Average	Rating Count
Keynote speaker: Jim Hutcheson	58.8% (30)	27.5% (14)	13.7% (7)	0.0% (0)	0.0% (0)	1.55	51
Keynote speaker: Dr. Michael Cofield	66.0% (33)	28.0% (14)	4.0% (2)	2.0% (1)	0.0% (0)	1.42	50
Keynote speaker: Brian Bateman	61.9% (26)	26.2% (11)	7.1% (3)	4.8% (2)	0.0% (0)	1.55	42
What more/else would you like to share?							8
answered question							52
skipped question							1

2. Tell us about our Advanced/Technical Track Breakout Sessions:

	Excellent	Above Average	Average	Below Average	Poor	Rating Average	Rating Count
Breakout Presenter Wesley Scott: Tax Updates	36.8% (7)	31.6% (6)	26.3% (5)	5.3% (1)	0.0% (0)	2.00	19
Breakout Presenter Stephen Happel: US and Arizona Economic Update	52.2% (12)	26.1% (6)	0.0% (0)	13.0% (3)	8.7% (2)	2.00	23
Breakout Presenter Rebecca Bibleheimer Panel: Real Estate Gifts	16.7% (2)	66.7% (8)	16.7% (2)	0.0% (0)	0.0% (0)	2.00	12
Breakout Presenter Karla Valas: Complex Asset Donations	30.8% (4)	46.2% (6)	23.1% (3)	0.0% (0)	0.0% (0)	1.92	13
Breakout Presenter Gerald Treacy: Advanced Corporate Philanthropy	13.6% (3)	59.1% (13)	13.6% (3)	9.1% (2)	4.5% (1)	2.32	22
						What more/else would you like to share?	8
						answered question	36
						skipped question	17

4. How was our overall Planning?

	Excellent	Above Average	Average	Below Average	Poor	Rating Average	Rating Count
Overall Fit to the Theme: The Business of Giving	54.0% (27)	36.0% (18)	10.0% (5)	0.0% (0)	0.0% (0)	1.56	50
Informational Presentations contained what you expected	24.5% (12)	44.9% (22)	22.4% (11)	8.2% (4)	0.0% (0)	2.14	49
Networking opportunities in between sessions and during Wine and Cheese social	32.7% (16)	38.8% (19)	22.4% (11)	6.1% (3)	0.0% (0)	2.02	49
Event location & venue	51.0% (26)	35.3% (18)	13.7% (7)	0.0% (0)	0.0% (0)	1.63	51
Food served at event	46.9% (23)	26.5% (13)	26.5% (13)	0.0% (0)	0.0% (0)	1.80	49
Event Website	29.5% (13)	31.8% (14)	29.5% (13)	9.1% (4)	0.0% (0)	2.18	44
Event On Line Registration Process	34.7% (17)	28.6% (14)	30.6% (15)	4.1% (2)	2.0% (1)	2.10	49
Event Reminder and Welcome	44.9% (22)	28.6% (14)	26.5% (13)	0.0% (0)	0.0% (0)	1.82	49
Event Registration Process	41.7% (20)	29.2% (14)	27.1% (13)	2.1% (1)	0.0% (0)	1.90	48
Electronic Presentation Delivery format	36.2% (17)	38.3% (18)	17.0% (8)	6.4% (3)	2.1% (1)	2.00	47
Event Program Booklet	26.5% (13)	38.8% (19)	18.4% (9)	12.2% (6)	4.1% (2)	2.29	49
Poll Everywhere Questions	23.8% (10)	31.0% (13)	28.6% (12)	11.9% (5)	4.8% (2)	2.43	42
Event Greeting, Wayfinding, and Welcoming Atmosphere	50.0% (24)	25.0% (12)	25.0% (12)	0.0% (0)	0.0% (0)	1.75	48
Value for your time investment	44.0% (22)	34.0% (17)	18.0% (9)	2.0% (1)	2.0% (1)	1.84	50
Value for your financial investment	48.0% (24)	32.0% (16)	20.0% (10)	0.0% (0)	0.0% (0)	1.72	50

answered question 51

skipped question 2








5. Please check all that apply:

		Response Percent	Response Count
CFA/Asset Manager/		0.0%	0
CFP/Financial Planner	<input type="checkbox"/>	8.2%	4
CFRE/Fundraising professional	<input type="checkbox"/>	38.8%	19
CLU/ChFc/Life Insurance Professional	<input type="checkbox"/>	2.0%	1
CPA/Accounting	<input type="checkbox"/>	4.1%	2
JD/Lawyer	<input type="checkbox"/>	6.1%	3
Trust Banking Professional	<input type="checkbox"/>	6.1%	3
Philanthropist	<input type="checkbox"/>	4.1%	2
Non Profit Staff	<input type="checkbox"/>	65.3%	32
Non Profit Board member	<input type="checkbox"/>	20.4%	10
	Other (please specify)		1

answered question 49

skipped question 4

6. How/from whom did you hear about this event?

		Response Percent	Response Count
PGRTAZ		85.7%	42
Arizona Community Foundation		22.4%	11
ASU Lodestar Center		4.1%	2
Association of Fundraising Professionals		18.4%	9
Central Arizona Estate Planning Council		2.0%	1
East Valley Estate Planning Council		0.0%	0
Phoenix Tax Workshop/Society of CPA's		0.0%	0
Organization of Non Profit Executives		2.0%	1
Arizona Endowment Building Initiative		0.0%	0
Planned Giving Basic Course Participant		6.1%	3
	Other (please specify)		2
answered question			49
skipped question			4



7. What did you enjoy or value the most about this event?

	Response Count
	34
answered question	34
skipped question	19

8. Do you have any suggestions for improving this event?

	Response Count
	23
answered question	23
skipped question	30

9. Will you attend this event again next year?

		Response Percent	Response Count
Yes		63.5%	33
No		0.0%	0
Maybe		36.5%	19
	answered question		52
	skipped question		1

10. Please add any further comments about this event or ideas for future events. Who else should know about this event?

	Response Count
	10
answered question	10
skipped question	43

Page 1, Q1. Tell us about our General Session Keynote Presenters:

1	Really like Brian and he is a wonderful presenter but I wish he had actually had a topic, rather than just a recount of the day. Reminded me of the newscaster telling me what I just heard after a political speech.	Jun 25, 2011 7:44 AM
2	Both of these speakers were fantastic. New information that I can use- I especially enjoyed Dr. Cofield's talk Psychology of Giving- Entertaining and extremely informative	Jun 15, 2011 4:31 PM
3	Did not attend the luncheon plenary? Would have liked more content from Brian	Jun 15, 2011 1:03 PM
4	Like the approaches -- all three were different and very interesting.	Jun 13, 2011 4:11 PM
5	Dr. Cofield was a good speaker, but he allowed the audience to drift too often into fairly meaningless discussion. He did not present new or particularly impactful information. But his story was definitely meaningful, and he is a good speaker.	Jun 9, 2011 3:27 PM
6	Good material and learned new things	Jun 9, 2011 2:54 PM
7	I arrived late and had to leave early, so I only heard the lunch speaker.	Jun 9, 2011 12:30 PM
8	Great Presenters; Great Information	Jun 9, 2011 9:51 AM

Page 1, Q2. Tell us about our Advanced/Technical Track Breakout Sessions:

1	Would have been appropriate to have a presenter from ACF instead of or in addition to from the Fidelity Charitable Gift Fund.	Jun 15, 2011 1:03 PM
2	Stephen Happel's presentation did not match his topic. Presentation was a summary of his political views. The specific points pertinent to Arizona was never mentioned.	Jun 15, 2011 12:26 PM
3	I learned about things I never had even thought were possible.	Jun 9, 2011 2:54 PM
4	Mr. Treacy and his partner presented ideas that had never been tested. They almost seemed sneaky, slimy, dishonest and very far from being "advanced" presenters.	Jun 9, 2011 2:34 PM
5	.	Jun 9, 2011 12:45 PM
6	Happel was a good speaker but didn't really address the topic, and he was so politically biased! Treacy was a good speaker with interesting material but his partner was not a good speaker. And the second half of their presentation was mostly a recap of the first half.	Jun 9, 2011 12:30 PM
7	I did not attend these sessions	Jun 9, 2011 12:22 PM
8	Dr. Happell is a great speaker but I would have preferred that he focus on something other than the politics that are causing the sky to fall.	Jun 9, 2011 11:45 AM

Page 1, Q3. Tell us about our Fundraising Track Breakout Sessions:

1	Not so thrilled with Chris Ostrowski's sales pitch.	Jun 25, 2011 7:44 AM
2	Chris was a complete sales job. Just got too much into selling his product and really nothing that I wanted to know. Didn't realize this was an event for people to do their sales pitch. Likewise Steven and Rebecca talked about their practices and really talked legalise all session and apparantly didn't care that most people didn't know much of the titles of transactions where they were using acronyms. Again, apparantly wanting people to pay for their services if they wanted to understand the possibilies for their agencies.	Jun 20, 2011 8:15 AM
3	Chris' presentation was too much of a sales pitch.	Jun 15, 2011 1:03 PM
4	Ostrowski -- ok, but more of a sales pitch for his program, then educational in nature.	Jun 13, 2011 4:11 PM
5	Not an advocate of non-profits using techniques that could jeopardize their non profit status.	Jun 11, 2011 6:21 PM
6	I think more of the financial presenters needed to be more clued in to what our role really is in the process of planned giving. They were presenting too high level information. We aren't going to be the one trying to explain the product to a CFO or a donor. What we need to know is who are the best candidates in our donorbase for these types of programs and what are the liabilities, and benefits for the nonprofit.	Jun 9, 2011 4:35 PM
7	Gerald Treacy's presentation was very interesting and offered exciting new information, but it bogged down a bit when his partner presented the detailed financial information for a little too long. Chris Ostrowski was obviously selling his company's services, and though he is a good presenter I felt it was inappropriate for this Forum.	Jun 9, 2011 3:27 PM
8	Mr. Ostrowski's prensentation was more like an infomercial than a workshop. Too much self-promotion.	Jun 9, 2011 12:45 PM
9	Chris' program was nothing more than an infomercial	Jun 9, 2011 12:22 PM
10	Chris was a sales pitch, pure and simple, for something that may or may not be legal.	Jun 9, 2011 11:57 AM
11	Chris was a bit too much a salesman.	Jun 9, 2011 11:56 AM
12	Ostrowski's presentation made me feel like I had just been sold a time share - it was purely a sales pitch and though its an interesting concept, think there could have been better topics more worth our time. He, however, has great energy and was a great presenter, I don't think I found his presentation to be all that applicable for everyone, and since he was missing portions of the presentation, it was difficutl to follow.	Jun 9, 2011 11:51 AM
13	Treacy great info - just a bit above the audience	Jun 9, 2011 11:36 AM
14	Mr Treacy had some good ideas and his approach was OK; his business partner and their sales approach to a not yet tried and tested concept was not what I came to hear. CO was a fun presenter, but this wasn't educational, it was a	Jun 9, 2011 9:51 AM

Page 1, Q3. Tell us about our Fundraising Track Breakout Sessions:

sales pitch; not something I would have expected at all. The US trust presentation needed better visuals and could have been stronger presentation skills; the information was very useful though.

15	I found the presentations given by lawyers to be too technical. I wish they had spent more time covering the terms - they assumed everyone knew the acronyms. I was annoyed by Mr. Ostrowski's session which seemed to just be a sales pitch for his product.	Jun 9, 2011 9:22 AM
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Page 2, Q5. Please check all that apply:

1	Philanthropic Consultant	Jun 9, 2011 12:32 PM
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Page 2, Q6. How/from whom did you hear about this event?

1	Try to plan it into my year, and review speaker line-up	Jun 13, 2011 4:14 PM
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2	Word of mouth.	Jun 13, 2011 7:27 AM
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Page 2, Q7. What did you enjoy or value the most about this event?

1	I liked the positive atmosphere.	Jun 27, 2011 2:35 PM
2	I enjoyed the session where there was some relevance to the non-profits and thoughts and ideas were shared openly and for the benefit of those attending with take away points and suggestions.	Jun 20, 2011 8:24 AM
3	Planned giving techniques that others are using. Tax information. Giving trends. Networking	Jun 17, 2011 9:49 AM
4	Learning about new, innovative ways to deal with people.	Jun 16, 2011 11:28 AM
5	Networking, exposure to new ideas, good investment of time and money	Jun 15, 2011 4:35 PM
6	Good education and networking opportunities.	Jun 15, 2011 1:07 PM
7	Contents of presentation was presented in a structured matter of fact way with reasonable suggestions.	Jun 15, 2011 12:28 PM
8	Presentor content was full of interest	Jun 13, 2011 4:14 PM
9	Brian Bateman's wrap up. It was fun, informational and very helpful.	Jun 13, 2011 7:27 AM
10	Seeing colleagues from PGRT	Jun 10, 2011 11:57 AM
11	I enjoyed the keynote speakers the best. The venue was excellent. We were made to feel very welcome.	Jun 10, 2011 11:14 AM
12	The information/education	Jun 10, 2011 7:23 AM
13	The lunch and wine and cheese presenters.	Jun 9, 2011 4:40 PM
14	The educational opportunity is excellent. The booklet was laid out very well gave the pertinent information in a concise format - I like the idea of saving paper & not having big things to carry all day. The signage was excellent too, and the proximity of all rooms was great - PCC was great for this. I thought the speakers were overall better than last year -- all except one I heard were very good.	Jun 9, 2011 3:31 PM
15	The intensity of the experience	Jun 9, 2011 3:16 PM
16	The dynamic subject matter presented by the various speakers	Jun 9, 2011 3:03 PM
17	Always a quality and educational experience	Jun 9, 2011 2:55 PM
18	Hearing Stephen Happel. He was my professor at ASU!	Jun 9, 2011 2:37 PM
19	networking	Jun 9, 2011 2:21 PM
20	Visiting with old friends. The programs were very good.	Jun 9, 2011 2:12 PM
21	Overall good day. Really enjoyed the economists presentation.	Jun 9, 2011 12:47 PM
22	Inspirational presenters and practical applications.	Jun 9, 2011 12:37 PM
23	This was excellent, thank you!	Jun 9, 2011 12:34 PM

Page 2, Q7. What did you enjoy or value the most about this event?

24	Mr. Treacy's presentation provided information that I have never seen anywhere before.	Jun 9, 2011 12:32 PM
25	All keynoters	Jun 9, 2011 12:23 PM
26	The keynote speakers	Jun 9, 2011 12:23 PM
27	Networking and hearing speakers I had not heard before	Jun 9, 2011 12:16 PM
28	The day was very well paced - each session seemed to be the appropriate amount of time. The theme of the day was carried throughout the day very effectively...and you can't go wrong with Brian at the end!	Jun 9, 2011 12:07 PM
29	the diversity of topics as well as the different levels of complexity offered. I enjoyed 1-hour presentations, rather than several hours on one topic. The location was great - having things so close together was very helpful and easy. The group size was also very manageable, making it easier to network and meet new people, without feeling overwhelmed.	Jun 9, 2011 12:05 PM
30	The psychologist was excellent - so was Brian.	Jun 9, 2011 11:59 AM
31	lots of very good information	Jun 9, 2011 11:36 AM
32	individual presentations were outstanding and the individuals were refreshing. great brain food.	Jun 9, 2011 11:29 AM
33	I liked the new ideas for how to keep the conference sustainable, but wasn't prepared to have my laptop with me the whole day. When can we see the results of the texting?	Jun 9, 2011 9:53 AM
34	Hearing confirmation that 80% of planned gifts come in the form of bequests, so if you're just starting with a planned giving program, it's easy to begin. The more complex gifts only make up a small portion of the total.	Jun 9, 2011 9:24 AM

Page 2, Q8. Do you have any suggestions for improving this event?

1	+ Request feedback at the meeting. This is too difficult to remember after the fact! + The booklet needed to be proofed. There were way too many errors in it! + I don't think this interactive feedback was a good thing. It was challenging to use and there were negative comments that were live as the event progressed. I don't think it added value. + If computers are needed to review documents at the conference, this should be in the marketing materials not in an email the night before. + The selection of speakers was refreshing.	Jun 27, 2011 2:35 PM
2	Stay aware from the folks who want to sell themselves & their company and are not there to give some tips and helpful information.	Jun 20, 2011 8:24 AM
3	The Phx CC was a very good venue. I think that the summer forum should stay focused only on planned giving/estate planning topics.	Jun 17, 2011 9:49 AM
4	Keep up the good work!	Jun 16, 2011 11:28 AM
5	Avoid speakers who will use their presentation time to sell their own product. Education provided should be done in a more general way.	Jun 15, 2011 1:07 PM
6	n/a	Jun 15, 2011 12:28 PM
7	Try to stay away from program sales, but it's a fine line between making people aware of new opportunities and program sales. . . .	Jun 13, 2011 4:14 PM
8	The lunchtime speaker.	Jun 13, 2011 7:27 AM
9	I felt that the workshops didn't really speak to me as a new professional in the field. I found little information useful or relevant to my specific position as being new. It would have been great to have more basic information or interactive workshops presented.	Jun 10, 2011 11:57 AM
10	I did not like the "green" process. When I uploaded the presentations to my laptop I was unable to take notes on the presentation materials because they were PDFs. It's very valuable to me to take notes and have my notes alongside the presentation rather than in a separate booklet. I didn't understand why we were asked to text our thoughts of the presentation - what if we didn't like it? We certainly wouldn't want that to show up publicly. I didn't feel the "beginner" track topics gave a very comprehensive view of planned giving.	Jun 10, 2011 11:14 AM
11	Better direction on location of breakout rooms, easier access to the actual handouts used during sessions	Jun 10, 2011 7:23 AM
12	Make it one fee for the nonprofit and have it include bringing a volunteer/board member who helps them with their planned giving programs. That way they could discuss how it would apply to your specific organization. I'd also suggest having Alan Knobloch give a session about where your planned giving program is at and the progression of them at the beginning. He is really good at this and if you did this, you might be able to track the NPOs into workshops that are more specific to them- make the day a little shorter and have them still come away with more of an impactful day.	Jun 9, 2011 4:40 PM
13	Better food	Jun 9, 2011 3:16 PM

Page 2, Q8. Do you have any suggestions for improving this event?

14	More of the same for next year	Jun 9, 2011 3:03 PM
15	None	Jun 9, 2011 2:55 PM
16	I received a save the date card. I went immediately to the website to see what you were offering and nothing was updated? Then I never heard another word about the event until it was past the early registration deadline and AZ Community Foundation sent out a reminder. Just a little attention to detail would improve this concern.	Jun 9, 2011 2:37 PM
17	all persons making the introductions for the speakers should have their bio read	Jun 9, 2011 12:16 PM
18	Keep the technical presentations in the morning - it's too much after lunch. Bookmark the materials on the thumb drive or have them be separate for each speaker. Where were the charging stations? I never saw them, just outlets in the rooms that were not convenient for those that brought laptops.	Jun 9, 2011 12:07 PM
19	The "green" attempt was great. having the presentations on a thumb drive was nice, however I don't think we needed out laptops to follow along. I would suggest offering the thumb drive with the presentations (separated, if possible, not in one PDF), but don't ask us to bring computers, they are bulky and not necessary. The small booklet was much better than a full binder, though there was very little space for notes, so I would suggest a few extra pages for note taking, but still in a smaller book like we had. Also the texting was a great idea, but not everyone has a "unlimited" text plan, so that could be costing people.	Jun 9, 2011 12:05 PM
20	More coffee stations, Have the presenters give more real world examples.	Jun 9, 2011 11:59 AM
21	no, the event was fabulous from start to finish; loved every minute of it.	Jun 9, 2011 11:29 AM
22	No more sales pitch presentations AV support/complete handouts on the thumb drive would have been nice	Jun 9, 2011 9:53 AM
23	Ask speakers who have a more technical background to speak more in layman's terms, don't have people come in who are pitching their own product.	Jun 9, 2011 9:24 AM

Page 2, Q10. Please add any further comments about this event or ideas for future events. Who else should know about this event?

1	Very much appreciated keeping to the time schedule for starting and ending sessions. 15-min break not really enough time for networking but enjoyed the time to visit during wine/cheese.	Jun 25, 2011 7:47 AM
2	I saw many new faces this year which is good. However, many of the "old timers" were not there. I wonder how we could bring them back. Their input at these meetings always adds value to the sessions.	Jun 17, 2011 9:49 AM
3	Some of the workshop descriptions did not fit the material that was presented. For example, one workshop was supposed to be about innovative fundraising and then the speaker spent 3/4 of the time reviewing a product he wanted us to sell to our members. It felt a little mislead.	Jun 10, 2011 11:57 AM
4	I am so grateful for the work the committee did to get sponsorship - I could not have attended without such a reasonable registration cost.	Jun 10, 2011 11:14 AM
5	The electronic version of the documents was a good idea, and dont let that sway you next year. now that people know what ot expect, we will know how to use the electronic versions next year. As a sponser, it would have been nice to provide a document for teh thumbdrive (just FYI).	Jun 10, 2011 10:35 AM
6	Again, I think you should offer a special rate if NPO members bring a board member with them who is their financial guru. This would help us to get the most of of the day. You did an EXCELLENT JOB on this event and the intent was clear...but it just missed the mark a little because this element was lacking and the financial planners didn't seem to understand where the NPOs were coming from and what our role is in the process. Also- don't let people come in to give a sales pitch like last track B presenter. That was a complete waste of time.	Jun 9, 2011 4:40 PM
7	This was the best summer forum I have attended. Very dynamic, good, timely info, good presentations and the tech support was great. Very 21st century style. Just great.	Jun 9, 2011 3:16 PM
8	I really liked the healthy lunch and wine and cheese	Jun 9, 2011 2:55 PM
9	As a sponsor, we set up a table as a place of visibility and a place to talk about our services with intersted attendees. The lack of a sponsor area does not give us the incentive to continue to sponsor. Also, the Community Foundation in Tucson would have attended but did not hear about the conference.	Jun 9, 2011 12:10 PM
10	It was very cold in the venue all day. It was a bit of a long day with such dense material. I could have done with about an hour to an hour and a half less.	Jun 9, 2011 9:24 AM