

2014 Summer Forum Steering Committee Meeting Notes
June 26, 2014 2pm

Upd: 12/5/2013

Note: Use the PGRTAZ membership directory for contact information and the Committee member E-mails

7 repeat committee members, without counting Event Day Volunteers who may repeat. We've met that committee success metric!

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	Repeat Committee Members	SF Committee Focus	Organization	Collaborate	Attending
1	Melissa Kemp	Sustainability and Learner Centric emphasis	Premium Organization	All working groups	Yes
2	Russ Goldstein	PGRTAZ President, Organizational Sponsor Representative	US Trust Bank of America	Board	No
3		PGRTAZ Program Committee Chair	ACF/AEBI, Giving Counsel	All working groups	
4	Adele Dietrich	2014 Event Chair, AFP liaison	Arizona Community Foundation	SF Cmmttee, AFP	Yes
5	Lindsey Jackson	Communications/Messaging/PR, Social Media	Gammage & Burnham	Marketing Collaborators	Yes
		Social Media, Step and Repeat Interviews, Community Lounge		Phoenix Fashion Week	
6	Nicole Powers	End of Day giveaways, 50/50 Raffle	Make-A-Wish® America	All committees	Yes
7	Chris Sar	Program Planning	Phoenix Children's Hospital Fdtn	Monthly meetings	No
8	Mallary Tytel	Program Planning		Monthly meetings	Yes: Call In
		Program Planning		Monthly meetings	
		Program Planning		Monthly meetings	
10	Tiffany Coggashall	Sponsorships/Event Day Volunteers		Membership	Yes
111	Beth Salazar, Diane Jezek-Powell	LAL liaison, cttee member at large-LAL generally has a table in the community lounge for promoting LAL	YMCA/Consulting Gomper's Habilitation Center	Leave a Legacy	No Yes
12	Brad Harris	Marketing Collaborators		SF/Programs	Yes
		Board member or Philanthropic Interest Point Of View, eg: AZ Grantmakers' Forum		Program Planning and Marketing Collaborators	
13	Steve Brock	Sponsorships	Bell Financial	Sponsorship	Yes
14	Allison Gee	Sponsorships	Allison Gee Fine Art Appraisals	Sponsorship	No
15	Sierra Kamela	Sponsorships	Hacienda Health Care	Sponsorship	Yes
16	Stephanie Weadock	Administrative Support	Premium Organization	All	Yes

As of 11/11/13, 9 direct SF Committee Volunteers. 3 additional with the efforts of the [sponsorship committee](#) to sell SF sponsorships. 2 additional with LAL liaisons. 2 additional with BOD leadership link We meet this success metric!

Reference Documents/Links provided:

1. Planned Call Agenda
2. Program Schematic
3. Event survey results
4. Sponsorships summary
5. 2014 SF Event Success Metrics Results
6. [Link to the SF Committee Reference Page on the PGRTAZ website](#)
7. [Link to OurVolts for volunteer hours tracking](#)

Opening Round - Adele Dietrich

An opening round was conducted to include introductions, meeting focus (what are you hoping to get out of the meeting?), and time restraints. All were good for the hour slated.

Event attendance numbers (Stephanie)

Stephanie reported 171 registrations and 155 actually attended. The guarantee to the venue was 165. A lot of the no shows were complimentary registrations for sponsor representatives. 2013 attendance was 149.

Thank yous (Adele)

Adele expressed her sincere gratitude to all for being so engaged and making this year's event preparation and execution seemingly easy. Adele noted this was one of the best volunteer experiences she has ever had.

Programs (Adele)

The program schematic was provided with the agenda for ease of program/speaker line up reference. The program schematic will be made part of these notes as exhibit A for reference as needed.

A review of the event survey comments for speakers noted:

- Dr. Cofield was very well received and most enjoyed his opening plenary presentation to kick off the day.
- The closing plenary may benefit from having PGRTAZ board members present on reflections of the day, PGRTAZ mission and vision, and inspiring take aways. This would allow for those connected so close to PGRTAZ and the Summer Forum to really hit home the point of the organization and the event.
- The learner centric effort needs to be emphasized with the speakers.
- Clear communications with speakers for presentation expectations is needed.
- The number of attendees in each session needs to somehow be defined for determining the size of the presentation room for each session.
- The leadership track panel discussion was somewhat high jacked by two attendees. How can this be avoided in the future?

Sponsorships (Steve)

A summary of the total sponsorships sold was provided with the meeting agenda and will be made part of these notes as exhibit B for reference as needed.

Stephanie advised not all sponsors with the table in the community lounge benefit, took advantage of the benefit. There were 11 tables staffed by sponsors in the community lounge, compared to 14 sponsors who had this benefit.

Stephanie reported Goodwill of Central Arizona agreed to do an in kind sponsorship to furnish the community lounge for a second time this year. Martha Stoneberger was not present at the meeting to give sponsor feedback. Debrief attendee quick reaction round and review of the survey comments for the community lounge noted:

- Too much furniture (Steve Brock as a sponsor)
- Tradeshow layout may be beneficial with sponsor tables around the room, against the walls (Steve Brock as a sponsor)
- Consideration to have the community lounge downstairs, and all sessions upstairs
- There a need for a call to action at each station in the community lounge to quantify attendee connections with sponsors

The KJZZ/K-BACH media in kind sponsorship included 20 spots for announcing the SF on the radio stations, and distribution of SF event details to their members. Resulting registrations from this in kind totaled one. Laura Barton wasn't present to provide sponsor comments.

Debrief non-attendee sponsor comments:

- Phoenix Philanthropy Group: We were very happy with our sponsorship and the networking opportunities. Love the Lounge! And the event was so well-planned, well-executed and I felt well-cared for as a sponsor.

Marketing and PR (Lindsey)

Lindsey noted setting the speaker/program sooner would help with marketing and PR. Requesting speaker/sponsor social media info on the AV/Sponsor commitment forms would be efficient and useful.

LAL (Diane Jezek-Powell)

Diane reported 25 non-profits are interested in the fall write a will workshop. This interest is mostly in part to capturing feedback before, during and after the event by way of the meeting reminder, drop box at the event and the event survey.

Marketing Collaborators (Brad Harris)

Brad reported only five marketing collaborators executed the 2014 marketing collaborators' agreement for renewing their partnership with PGRTAZ. All other 2013 marketing collaborators continued to collaborate with PGRTAZ without a formal agreement. This led to the question if the marketing collaboration annual renewal is necessary. Generally, once organizations agree to collaborate, they continue to do so without annual agreements. Stephanie noted a hiccup with not requesting annual renewals, is the benefits noted for collaboration. The benefits may change from year to year for various reasons. The annual renewal will be a focus of discussion throughout the year according to this meeting's dialogue and feedback.

Volunteers (Stephanie)

Stephanie reported seven volunteers and three staff members were involved in this year's event. Seven volunteers worked perfect allowing all positions to be covered, and allowing one for back up to cover as needed.

The volunteers had a debrief call on June 25th. The notes from the call will be made part of these notes as exhibit C.

Event Survey Feedback (Adele)

The event survey results was provided with the meeting agenda. These results will be made part of these notes as exhibit D. Most common feedback through the event survey noted:

- Ron Wilson was unable to attend
- There is a desire for a Planned Giving 101 track
- There is a need for clear and concise track descriptions
- Most attendees enjoyed the event and found it to be very valuable and informative
- Longer breaks for networking preferred
- Presentations lacked focus on the overall event theme
- Most attendees were non-profit staff
- Encouraging networking is a great added benefit to the event
- The sponsors were difficult to identify for passport signoff
- 80% of those who completed the survey noted they will attend next year and 20% noted maybe. No one noted they will not attend next year.

2014 Success Metrics (Adele)

The 2014 SF success metrics results were provided with the meeting agenda. This document will be made part of these notes as exhibit E for reference as needed.

2015 Summer Forum (Adele)

Adele, Lindsey, Mallery, Steve, Nicole, Diane, and Brad and Sierra noted Interest in serving for 2015.

Adele would be thrilled to chair again for 2015.

Capitalizing on 2014 buzz

Sponsorship campaign to begin in July with renewals and move into new outreaches by August.

A membership campaign is slated for July/August in an effort to capture those who attended this year's SF, so they can take advantage of the discount coupons that were proved in the proceedings booklet.

OurVolts (Adele)

[Reminder to log your hours](#)

Additional comments

- Attendees of the closing presentation may benefit if the presentation was held in another room besides the community lounge. This would allow attendees to sit and plenty of room for the number of attendees without the distraction of the community lounge room layout and/or networking.
- The closing plenary may see an increased attendance if it ended before 5pm due to downtown rush hour traffic.
- Ending the event before 5pm may result in an increased end of the day attendance due to downtown rush hour traffic.
- An icon key for denoting the track variations between beginner, intermediate and advanced may help with attendees identifying appropriate tracks for their level of skill.
- A change of venue may need to be considered due to room layout. Perhaps holding the event somewhere that offers a block of rooms for out of area attendees could be considered.
- Notice of CEs credits each session may qualify for would be beneficial to attendees.
- Ability to accept credit card payment for the 50/50 drawing may increase sales. However, purchasing 50/50 tickets with a credit card before or during the event makes it very difficult to provide the cash at the end of the event to the winner.
- Initial SF committee meetings should be held in person.

Closing Round (Adele)

A closing round was conducted to include evaluating the meeting facilitation, meeting efficiency, and group effectiveness: "What went well? What can we improve?" All agreed the facilitation was great, the meeting was efficient and the group is very effective, during this meeting and throughout the season in planning the event.

The meeting adjourned at 3:30pm

20th Annual Summer Forum: Nurturing Philanthropy Across Generations

	Program Development Tool Kit	Professional Development	Leadership
Breakfast 7:45 AM-8:45 AM	<p>Resilience: The Science of Health, Happiness & Higher Performance Resilience, or the ability to resist or “bounce back” from adversity, is highly related to every important aspect of success & higher functioning. This presentation will identify resilience core concepts, and highlight four (4) proven pillars shown to enhance it.</p>		
Keynote Dr. Michael Cofield Banner Health			
Break: Community Lounge Opening Ceremony			
Breakout AM1 9:00 AM-10:00 AM	<p>Authentic Conversation – Ron Schiller, Aspen Leadership Group Giving is personal, and our communication with donors must be authentic. Building belief, confidence, and strong bonds of trust involves openness while avoiding “institution-speak” and avoiding perils presented by our own biases and those of donors. We’ll discuss a variety of actual challenging situations faced by development professionals as well as recommendations on how to prepare for the pleasures and perils of human discourse in fundraising.</p>	<p>Issues and Developments Regarding Gift Annuities - Frank Minton, PhD, Frank Minton Consulting, LLC This session is about increasing the volume of gift annuities by doing three things: (1) marketing them with reference to recent developments pertaining to rates, economic conditions, and risk concerns; (2) accepting contributions of non-traditional assets as well as cash and publicly-traded securities; and (3) showing how gift annuities can apply to a variety of donor situations.</p>	<p>Multiple Truths – Mallary Tytel, Ph.D., Healthy Workplaces Every interaction carries with it a unique set of stories and perspectives: the ‘story’ of what really happened —“Just the facts, ma’am;” and the ‘stories’ of each individual involved. This interactive presentation will help participants understand different perspectives, and provide a new tool to help examine the four “truths” of any situation.</p>
Break: Community Lounge: Bloggers Begin Interviews and Posts			
Breakout AM2 10:15 AM-11:15 AM	<p>Charitable Giving Through Life Insurance- J.T. Bell and Steve Brock, Bell & Associates This presentation will demonstrate how to significantly leverage your donors’ charitable dollars and guarantee that you can remain as the beneficiary. Life insurance can be the cornerstone of long-term goals and planned future income. Charitable gifts of life insurance can avoid or reduce income, estate, gift and capital gains taxes.</p>	<p>Ahh! The Pitfalls! (of joint representation) - Russell Yurk, Jennings, Haug & Cunningham LLP Jointly representing a husband and wife, multiple family members, or an employer and employee is fraught with pitfalls. Joint representations raise myriad ethical issues, most of which must be considered and resolved <i>before</i> agreeing to the representation. Failure to properly navigate these issues can force a lawyer to withdraw from representing all of the jointly represented parties <i>or worse</i>. This seminar will teach you how to approach joint representations and how to avoid violating the ethics rules when representing multiple clients.</p>	<p>The “Saved” Gift - Ron Schiller, Aspen Leadership Group Standards for counting bequest intentions in campaigns have changed significantly in recent years. Much can change and a lot of time can pass between bequest intention and bequest realization. We’ll discuss the impact on stewardship programs and practices and the increased importance of long-term stewardship planning.</p>
Pre Lunch Power Networking 11:15 AM-11:40 AM	<p>Power Networking Window in the Community Lounge: Increase today’s impact for YOU!</p> <ul style="list-style-type: none"> • Catch the person(s) you met earlier this morning, and exchange cards and stories. • Find the professional you’ve been trying to catch by phone for weeks. • Introduce your board members or leadership to some local centers of influence. • Make some follow up breakfast meeting dates. 		

20th Annual Summer Forum: Nurturing Philanthropy Across Generations

	<ul style="list-style-type: none"> • Pull out your resume and adjust it for greater impact in the market with any ideas that have come to you this morning as you were listening. • Charge yourself up with some fresh caffeine, or charge up your phone and laptop at the charging station. • Fill in some blanks in your Passport to Prizes, and learn something new about each sponsor that might help you in your endeavors. 		
Lunch 11:45 AM-11:55 AM	Honoring our PGRTAZ Past Presidents		
Keynote Chris Yates, University of Southern California 11:55 AM – 12:55 PM	<p>Minding Your EQs: What Really Counts When it Comes to Success in Gift Planning</p> <p>With over 20 years of gift planning experience to draw upon from his work at USC, Stanford and Caltech, Chris will share his thoughts and observations on emotional intelligence and the critical role it plays for those who achieve success and career satisfaction in the field of charitable fundraising. The audience will learn:</p> <ul style="list-style-type: none"> ▪ What is emotional intelligence? ▪ How does it impact our ability to connect most effectively with our donors, prospects, and colleagues? ▪ Some practical tips for improving and/or deploying your own emotional intelligence in ways that will make you more effective as a development professional 		
Lunch Presentation Visual Representation Taryl Hansen, Visual Artist	During the Lunch Plenary, Taryl Hansen will be capturing the message in real time while creating a visual representation designed to enhance and stimulate thinking around what is being shared. Taryl works in symphony with groups to create a colorful frame around ideas, bringing essential elements to the forefront for learners, and helps bring an inspiring and innovative approach to meetings, conferences, workshops, and strategic planning sessions to meet the needs of all learners, ensure long-term application of ideas, and accelerate deeper understanding.		
Break: Community Lounge: Bloggers Continue their Interviews and Posts, Prize Drawings Begin			
Breakout PM1 1:10 PM – 2:10 PM	<p>A Multi-Tasking Marvel: Mastering the Many Roles of Gift Planning in a Campaign - Chris Yates, University of Southern California</p> <p>Drawing on his 20+ years in gift planning and development at Stanford, Caltech, and USC -- where he has participated in planning and implementing several billion-dollar campaigns -- the speaker will discuss the role of deferred gifts and the gift planning staff in a campaign. He will suggest some best practices for ensuring that the gift planning staff is appropriately recognized and included in all aspects of campaign planning and strategy; for maximizing the value of planned gifts over the course of the campaign; and for fully utilizing and leveraging the talents of the gift planning across the campaign enterprise. Last but not least, he will explore the various ways that institutions are counting deferred gifts in</p>	<p>Reading The Tea Leaves- Frank Minton, PhD, Frank Minton Consulting, LLC</p> <p>This session, using the analogy of tea, first looks briefly at how planned giving has developed. Then it projects how planned giving is likely to change in five areas: donor relations, technology, marketing, gift instruments, and professional qualifications. In each instance it offers suggestions for adapting to the changes.</p>	<p>Evolving trends in social investing – aligning your investments with your philanthropy - Jason Barron, U.S. Trust, Bank of America Private Wealth Management</p> <p>This presentation will visit the topics of social investing, providing background and lexicon to both historical options and evolving trends. We will discuss merging strategies and cutting edge vehicles of aligning your philanthropic values and your investment portfolio.</p>

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	their campaigns and weigh the costs and benefits of each.		
	LAST 20 minute Break: Community Lounge: Bloggers Continue Interviews and Posts, Prize Drawings Begin, Last Chance to Complete Passport		
Breakout PM2 2:20 PM – 3:20 PM	Ethical Considerations Related to Wills, Trusts, and The Administration of Estates and Trusts, John Paul Parks, Attorney At Law	Elder Law & Planning for Incapacity, Stephanie Bivens, Elder Law Attorney A Funny thing Happened on the way to the funeral...mom lost her mental faculties due to dementia, needed help with activities of daily living and couldn't appreciate that fact, mismanaged her own funds and then believed someone else stole from her, mismanaged her own medication and needed psychiatric care, and wrecked her car and demanded the right to keep driving, ... Elder law attorneys often handle matters involving incapacitated persons which may involve guardianship/conservatorship, public benefits planning to pay for long term care expenses (ALTCS), special needs planning, estate planning with special considerations, and representing Agents/Trustees f incapacitated persons. This presentation will highlight real world problems and practical solutions in dealing with incapacity.	Expert Panel Discussion – “The Dilemma of Abundance” Greg Kruzel, Braun Siler Kruzel; Leslie Deshaw, Human Side of Enterprise, LLC and Rick Fresia, Tumbleweed Non profit organizations often face what they feel is a dilemma between addressing the needs for short-term funding and long-range planning and endowment building. This panel, composed of a non-profit CFO, an estate planning attorney (and board member) and a board member who is also an organizational development consultant and advisor to donors will speak to a range of scenarios facing non profits and their donors.
break; turn in your Passports, head directly to Community Lounge			
Closing Plenary 3:30 PM -4:20 PM 50 minutes max	Inspirational Presentation		
In the Community Lounge			
4:20 PM – 5:00 PM Closing Reception In the Community Lounge	Wine and Cheese, End of Day Announcements and Kudos, Introduce our Bloggers and their posts, Thank the event day volunteers and conduct the Volunteer Committee Prize Drawing, Best Items/Packages End of Day Giveaways drawing (maybe 4 packages at most?), and then the Big Passport to Prizes drawing. Conclude.		

Exhibit B

Sponsorship	Organization	Addresses
<p>\$5,000.00 Forum</p>	<p>Arizona Community Foundation Adele Dietrich 602.682.2025 adietrich@azfoundation.org</p>	<p>2201 E Camelback Road Ste 405B Phoenix AZ 85016</p>
<p>\$2,500.00 Breakfast</p>		
<p>\$3,000.00 Lunch</p>	<p>U.S. Trust, Bank of America Private Wealth Management Russell Goldstein 602-523-2924 russell.goldstein@ustrust.com</p>	<p>201 E Washington St 23rd Floor Phoenix AZ 85004</p>
<p>\$2,500.00 Closing</p>	<p>Gammage & Burnham Mike King (602) 256-4405 mking@gblaw.com</p>	<p>Two North Central Avenue, 15th Floor Phoenix AZ 85004</p>
Breakouts		
<p>\$1,500.00</p>	<p>Catholic Community Foundation Kimberly Feng 602-354-2401 kfeng@ccfphx.org</p>	<p>400 E Monroe Street Phoenix AZ 85045</p>
<p>\$1,500.00</p>	<p>Phoenix Philanthropy Group Marc Kellenberger/William Bessette 602-291-0370 / 602-421-2287 kellenberger@phoenixphilanthropy.com / bessette@phoenixphilanthropy.com</p>	<p>3301 E Glenrosa Avenue Phoenix AZ 85018</p>

\$1,500.00					
\$1,500.00	Dana Law Firm Matt Dana and Alisha 480-924-4424 mdana@danafirm.com Aterhufen@danafirm.com	8817 E Bell Road Suite 201	Scottsdale	AZ	85260
\$1,500.00	RC Securities Michael Barnes Assistant Vice President 857-350-9562 mbarnes@rcsecurities.com	One Beacon Street 14th Floor	Boston	MA	2108
\$1,500.00	AXA Insurance Company Janet Elie Janet.elie@axa.us.com 816-718-8668	1290 Avenue of the Americas	New York	NY	10104
\$1,500.00	Dignity Health Alan Knobloch 602-406-1025 alan.knobloch@dignityhealth.org	350 W Thomas Road	Phoenix	AZ	85013
	Comerica Legacy Foundation Mick Koster (O)734-930-2415 (C)408-930-2415 mekoster@comerica.com	101 North Main Street, Suite 100	Ann Arbor	MI	48104
\$1,500.00	Fennemore Craig, P.C. Kendis Muscheid 602-916-5354 kmuschei@fclaw.com	2394 E Camelback Rd Ste 600	Phoenix	AZ	85016
\$1,500.00	Allison Gee Fine Art Appraisals Allison Gee 623-535-0631 allisongee@msn.com	14325 W Verde Lane	Goodyear	AZ	85395

\$1,500.00	Bell & Associates Kristi Bell 602-381-8600 kristi@wbassoc.com	14425 N 7th St #101	Phoenix	AZ	85022
\$1,500.00	PGRTAZ Board of Directors	PO Box 4130	Phoenix	AZ	85016
\$3,000.00 Media Inkind	KJZZ/K-BACH Linda Pastori <i>Director of Development</i> 480-774-8452 lpastori@rioradio.org	2323 W 14th Street	Tempe	AZ	85281
\$1,000.00 Proceedings	Symetra Life Insurance Company Jeffrey Wright 281-520-9276 Jeffrey.wright@symetra.com	777 108th Avenue NE, Suite 1200	Bellevue	WA	98004
\$1,000.00 A/V	Protective Live <a href="mailto:Steve Brock <steve@wbassoc.com>">Steve Brock <steve@wbassoc.com>	No address provided: Steve Brock is contact			
\$1,000.00 A/V					
\$750.00 Advertiser/Attendee					
\$250.00	American Cancer Society Nicole Hill Nicole.hill@cancer.org 520-481-6454	4550 E Bell Road	Phoenix	AZ	85054
\$250.00	America Heart Association Dayton Gilbert dayton.gilbert@heart.org 602-414-5366	292 S 48th Street	Tempe	AZ	85282
\$500.00	David J. McHenry Anonymous	PO Box 9356	Phoenix	AZ	85068
\$1,000	Goodwill of Central Arizona	2626 W Beryl Avenue	Phoenix	AZ	85021

Inkind

Martha Stoneberger

602-535-4028

martha.stoneberger@goodwillaz.org

Total Cash

Sponsorships:

\$28,500.00

Total with inkind:

\$32,500



2013-2014 Season
 Russ Goldstein John House, President
 Claudia Cucitro, Treasurer
 Denise McClintic, Secretary
 John House, Past President

2014 Summer Forum Volunteers Call Agenda

June 25, 2014

2:00pm

Attendance:

Yes	Tiffany	Coggeshall	tiffanyc@beyondtheask.net	480-585-8593
No	Cathy	LaSusa	cmlasusa@yahoo.com	516-459-5189
Yes	Dave	McConachie	mconachie@aol.com	602-451-1966
No	Nora	Calato	nora@premiumorganization.com	602-840-2900
Yes	Nicole	Powers	npowers@wish.org	602-792-3249
Yes	Steve	Brock	steve@wbassoc.com	602-792-3249
Yes	Sierra	Kamela	skamela@haciendahealthcare.org	602-243-4231
No	Emily	Cowden	emily@premiumorganization.com	602-840-2900
No	Frank	Bourget	Frank.Bourget@redcross.org	602-336-6679
No	Laura	Barton	Lebarton2@cox.net	480-774-8458

Recording of the call:

http://apps.calliflower.com/recording/download/57529?rec_key=680537566f809dc4be93405a09c18067d3b71dd0

Opening Round

An opening round was conducted to include meeting focus and time constraints. Nicole and Sierra must exit the call at 2:30.

The agenda was approved as submitted.

Volunteer Training and Preparation

All referenced the run of show and found it very valuable. Dave did note the time constraints reflected in the run of show were tight but knew they were a bit flexible.

All agreed the job descriptions were communicated effectively. Suggested one on one contact between administrative staff and volunteers for direct job description/expectations and opportunity to answer questions.

All noted they were confident in their volunteer position. Nicole noted the only challenge was way finding for the elevator due to its location and access. Signage was suggested for additional ease of way finding for the elevator.

All noted they were slated for a position according to your noted availability and preferences.

Planned Giving Round Table of Arizona
 in care of Premium Organization
 P.O. Box 4130
 Scottsdale, AZ 85261-4130
 Phone: 602-840-2900 Fax:480-922-5283
 Email: info@PGRTAZ.org
www.pgrtaz.org



2013-2014 Season
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Denise McClintic, Secretary
John House, Past President

Volunteer Experience

- Prior to event

All found value of the reduced registration fee. Nicole noted she didn't think the reduced fee was necessary for her role as a way finder volunteer.

All noted information was provided timely helped them feel comfortable and know what to do.

All agreed their time before the event for volunteer preparation was well spent and the volunteer prep benefited the overall preparation and execution of the event.

- During event

All agreed they did know what their role was, what to do and they were comfortable doing it. Dave noted if sponsors are not attending, room monitors need to be advised.

Attendees recognized volunteers as a source of information.

All noted they did get to attend sessions they wanted to attend.

- Nicole and Sierra noted their willingness to volunteer next year.
- Advisement for room monitors on where to adjust the lighting.

Volunteer Success Metrics

The metric results were provided with the call agenda and will be made part of these notes as exhibit A for reference as needed.

Event Survey results

Common feedback noted fewer sessions and longer breaks for networking.

Common feedback from attendees at the event noted fewer sessions and more speaker variety.

Additional feedback and comments

- Sierra: I was the afternoon host for 2 sessions in the very large room. We had very few people in there and they were scattered. Is there some way we can estimate the popularity of the speaker's topic and put them in rooms that would be more appropriate?
- Nicole: 50/50 drawing needs some focus to make it better executed and perhaps move the task of selling to another capacity.



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- Steve: Volunteering for registration may limit the ability to attend the breakfast/opening plenary keynote presentation. This should be communicated before the event to set expectations.
- Emcee to show and explain the passport to prizes process during the breakfast announcements.
- Difficulty finding sponsor reps. to sign off on passport to prizes. Perhaps signage in the community lounge noting who is in attendance for signing off on the passport. A large passport to prizes on an easel noting who is and who is not in attendance for signing off on the passport. A map of the community lounge for what station each sponsor is located. Perhaps another large picture of the community lounge layout on an easel allowing the ability to note the morning of where each sponsor has chosen to station themselves.
- Steve: community lounge too crowded with the furniture and the layout made it difficult to navigate through the room. Preference would be to have sponsor tables against the walls.
- Dave: KJZZ's sign off using stickers was a great idea. Perhaps all sponsors with stickers would make it a bit easier to capture sign offs instead of actually signing the passport.

Closing Round

A closing round was conducted to include evaluation of the call facilitation, was the time on this call well spent, and was the information provided valuable. All noted great facilitation, time well spent and information provided was valuable.

The call was adjourned at 3:01pm.

Planned Giving Round Table of Arizona
in care of Premium Organization
P.O. Box 4130
Scottsdale, AZ 85261-4130
Phone: 602-840-2900 Fax:480-922-5283
Email: info@PGRTAZ.org
www.pgrtaz.org

Exhibit A

2014 Summer Forum Volunteer Success Metrics

1. Zero unsatisfactory ratings with event registration & welcome processes
 - 0 poor ratings
 - 1 below average rating
 - 3 average ratings
 - 14 above average ratings
 - 41 excellent ratings

2. Zero unsatisfactory rating with finding sessions throughout the day
 - Signage
 - Venue layout in the proceedings booklet

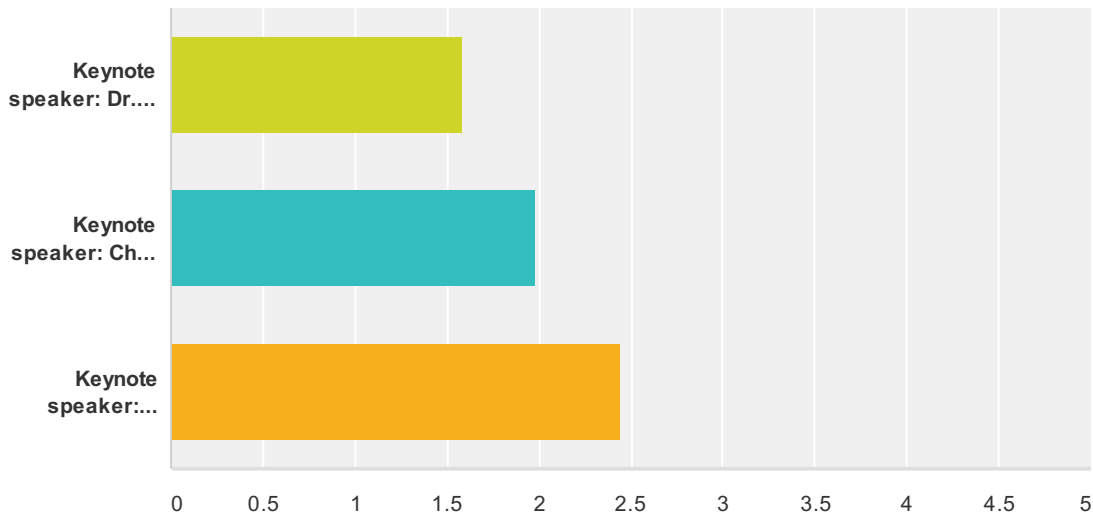
Room Monitors success from comments on:

- Zero unsatisfactory ratings for sessions start and end on time **Met**
 - Zero unsatisfactory ratings for rooms supported a great presentation (AV, lights, sound working right) **Met**
3. At least 75 passports turned in for drawing **63 turned in**

Exhibit D

**Q1 Tell us about our General Session
Keynote Presenters: Were they dynamic
and easy to listen to? Was their content
useful and informative? Did you learn
something new, find inspiration, or find
that they started you thinking along a new
approach to your work?**

Answered: 62 Skipped: 2



	Excellent	Above Average	Average	Below Average	Poor	N/A	Total	Average Rating
Keynote speaker: Dr. Michael Cofield: Resilience: The Science of Health, Happiness and Higher Performance	53.23% 33	16.13% 10	17.74% 11	0.00% 0	0.00% 0	12.90% 8	62	1.59
Keynote speaker: Chris Yates: Minding Your E's & Q's - Emotional Intelligence	29.51% 18	37.70% 23	24.59% 15	1.64% 1	0.00% 0	6.56% 4	61	1.98
Keynote speaker: Stephanie Bivens & Mallary Tytel, PhD: Reflections & Highlights	9.68% 6	25.81% 16	25.81% 16	1.61% 1	3.23% 2	33.87% 21	62	2.44

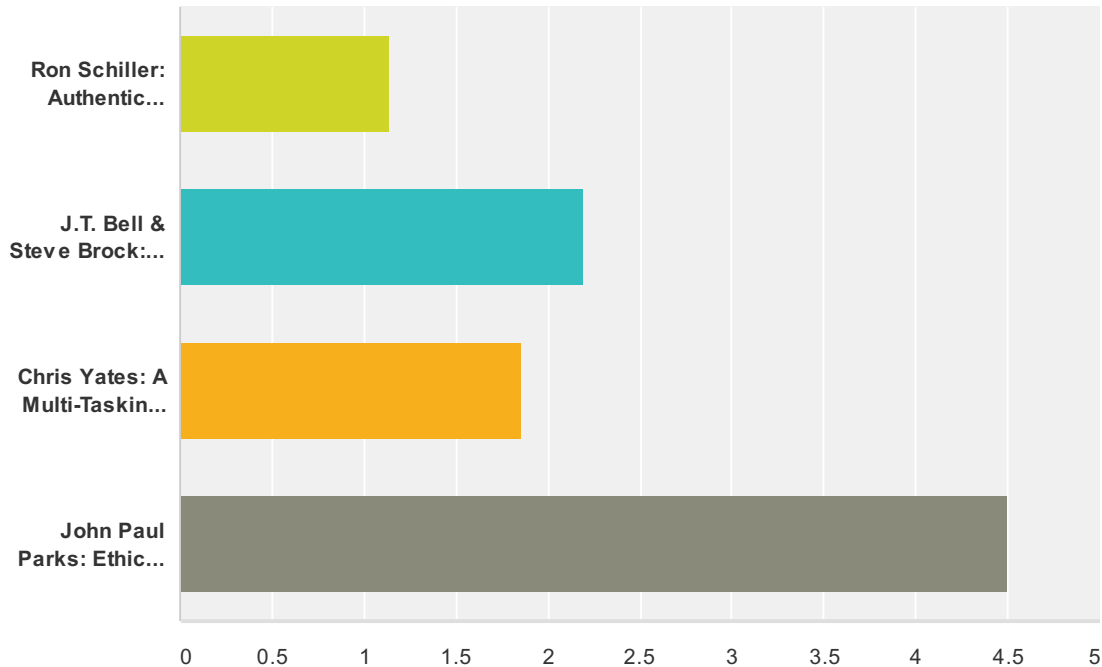
#	What more/else would you like to share?	Date
1	Did not attend	6/11/2014 11:20 AM
2	Ron Miller was unable to attend the PGRTAZ 2014 Summer Forum. An employee of the Phoenix Art Museum attended in Ron's place. Please remove this email contact, jan.nesburg@phxart.org, from your list. Thank you. Julia Ramult, Interim Assistant to Ron Miller, Chief Development Officer	6/10/2014 9:49 AM
3	I got a tremendous amount out of the morning and lunch keynotes. Thank you very much! I don't think the final keynote was really that, but I thought Stephanie and Mallary did a fine job of wrapping things up and having us reflect on our learning and experience for the day.	6/7/2014 12:02 PM
4	I do not think the last session in the lounge was very useful. I think if there is a closing speaker(s), we should be in one of the larger rooms sitting down. If wine and cheese is in the lounge, people will go there.	6/6/2014 11:53 AM

PGRTAZ 2014 Summer Forum: Nurturing Philanthropy Across Generations

5	It's always hard at the end of the day, when people are tired and sort of want to get going. I thought the gals did a good job, but not sure it's necessary. I did feel it segued nicely into the drawings. Drawings were slow and needed a little more fine tuning, to keep things going. Makes it hard when people leave and you have keep pulling numbers. Sort of fun, though.	6/6/2014 11:02 AM
6	I liked the "drawing" during the keynote....having that also being projected on to an overhead of some type would have been cool.	6/6/2014 10:58 AM
7	Dr. Cofield was an excellent choice to kick off the day!	6/6/2014 9:39 AM
8	I didn't hear Cofield or Yates.	6/5/2014 9:46 AM
9	Nothing was intellectually exciting or innovative. On a positive note, however, focusing on the 'individual' was consistent throughout....but it gave more of a feel of a personal-development, self-help conference than one for our profession.	6/5/2014 9:40 AM
10	The day had great energy! Very friendly crowd!	6/4/2014 9:20 PM
11	The closing session was a little confusing...not sure what the point was?	6/4/2014 12:03 PM
12	It was hard to hear Dr. Cofield in the beginning, but seemed to even out as he went through his presentation.	6/4/2014 8:54 AM
13	Very much in tune with audience, their roles, and what the group needed at the time. Very real!	6/4/2014 4:44 AM

Q2 Tell us about our Program Development Toolkit Breakout Sessions: Were they dynamic and easy to listen to? Was their content useful and informative? Did you learn something new, build a skillset or identify a program need, or find that you started thinking along a new approach to your work?

Answered: 58 Skipped: 6



	Excellent	Above Average	Average	Below Average	Poor	N/A	Total	Average Rating
Ron Schiller: Authentic Conversation	49.06% 26	3.77% 2	1.89% 1	0.00% 0	0.00% 0	45.28% 24	53	1.14
J.T. Bell & Steve Brock: Charitable Giving Through Life Insurance	16.00% 8	16.00% 8	14.00% 7	6.00% 3	0.00% 0	48.00% 24	50	2.19
Chris Yates: A Multi-Tasking Marvel: Mastering the Many Roles in a Gift Planning Campaign	6.38% 3	21.28% 10	2.13% 1	0.00% 0	0.00% 0	70.21% 33	47	1.86
John Paul Parks: Ethical Considerations Related to Wills, Trusts and the Administration of Estates and Trusts	0.00% 0	0.00% 0	0.00% 0	4.44% 2	4.44% 2	91.11% 41	45	4.50

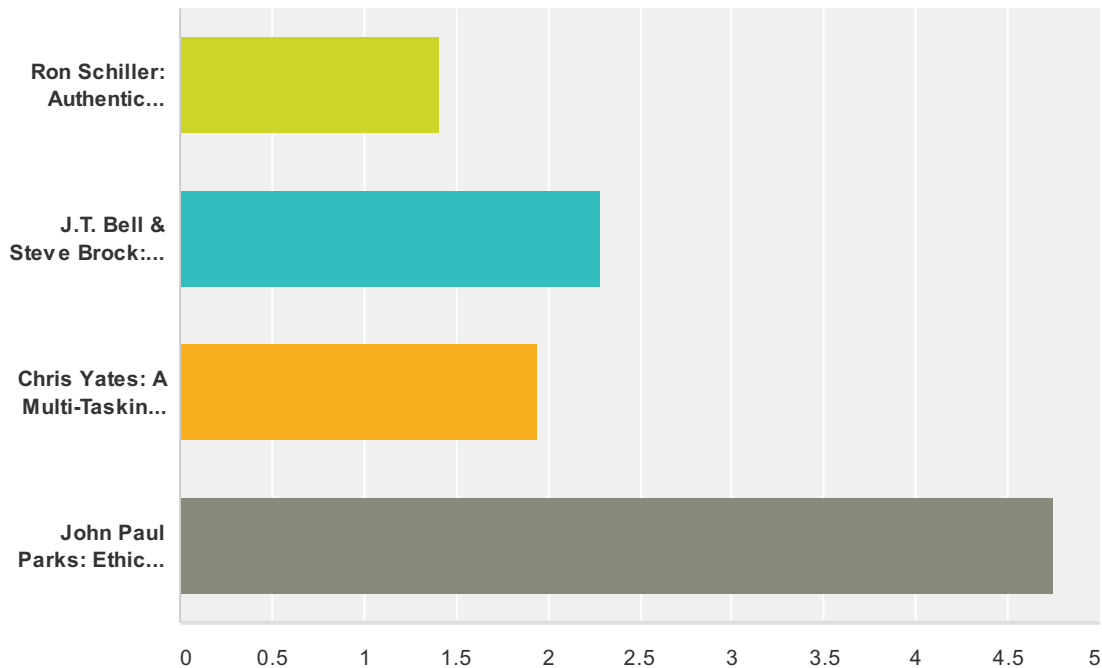
#	What more/else would you like to share?	Date
1	Ron Miller was unable to attend the PGRTAZ 2014 Summer Forum. An employee of the Phoenix Art Museum attended in Ron's place. Please remove this email contact, jan.nesburg@phxart.org, from your list. Thank you. Julia Ramult, Interim Assistant to Ron Miller, Chief Development Officer	6/10/2014 9:49 AM
2	I truly enjoyed Ron Schiller and learned quite a bit from his talk. I took many notes.	6/6/2014 11:53 AM

PGRTAZ 2014 Summer Forum: Nurturing Philanthropy Across Generations

3	A powerful message that should be shared more and more and more!	6/6/2014 11:02 AM
4	good use of case studies...	6/6/2014 10:58 AM
5	I thought these were great the Breakout sessions	6/5/2014 11:05 AM
6	In my humble opinion Bell & Brock probably gave the greatest presentation in the history of the PGRTAZ Summer Forum. I didn't hear anyone else.	6/5/2014 9:46 AM
7	Appreciated Ron's message and examples. He's a great resource.	6/4/2014 9:20 PM
8	While what Mr. Parks had to say was interesting, it was probably more so to attorneys. He spoke about actual cases and I was hoping for more day to day ethics discussion.	6/4/2014 9:30 AM

Q3 Learner Centric Programming: We challenged each of our presenters in their engagement letter to deliver their message in ways that purposefully integrated and welcomed audience engagement, participation, tailoring, and input. Did our our Program Development Toolkit Breakout presenters bring your objectives, your questions, your requests, into their program delivery?

Answered: 58 Skipped: 6

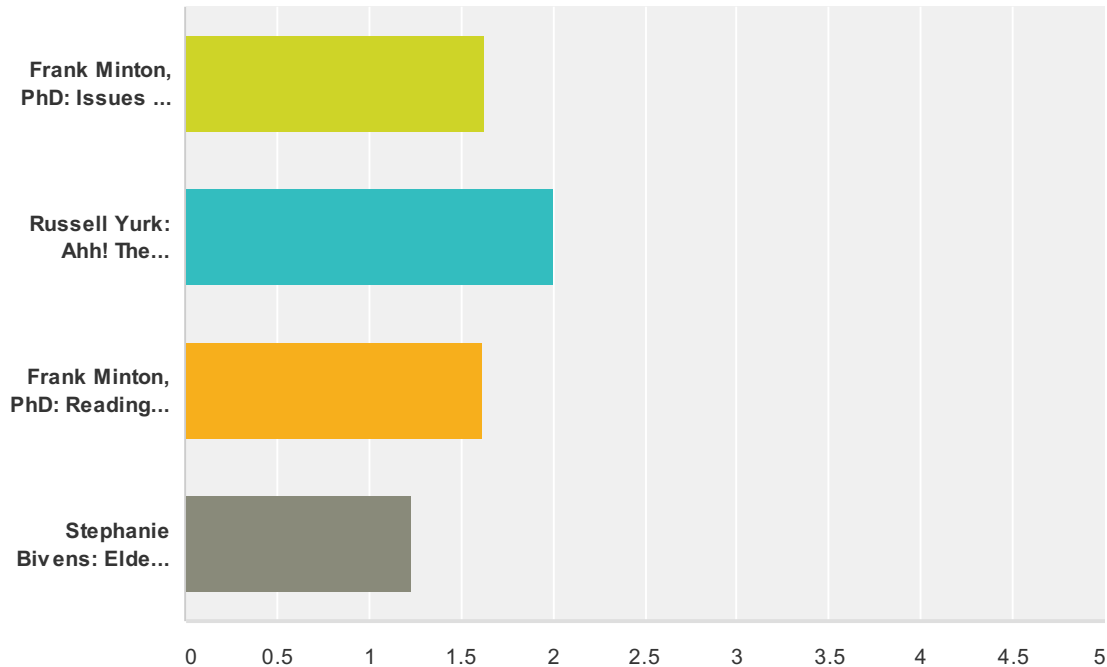


	Excellent	Above Average	Average	Below Average	Poor	N/A	Total	Average Rating
Ron Schiller: Authentic Conversation	35.85% 19	11.32% 6	1.89% 1	1.89% 1	0.00% 0	49.06% 26	53	1.41
J.T. Bell & Steve Brock: Charitable Giving Through Life Insurance	20.83% 10	6.25% 3	16.67% 8	0.00% 0	6.25% 3	50.00% 24	48	2.29
Chris Yates: A Multi-Tasking Marvel: Mastering the Many Roles in a Gift Planning Campaign	13.64% 6	11.36% 5	11.36% 5	0.00% 0	0.00% 0	63.64% 28	44	1.94
John Paul Parks: Ethical Considerations Related to Wills, Trusts and the Administration of Estates and Trusts	0.00% 0	0.00% 0	0.00% 0	2.27% 1	6.82% 3	90.91% 40	44	4.75

#	What more/else would you like to share?	Date
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Q4 Tell us about our Professional Development Breakout Sessions: Were they dynamic and easy to listen to? Was their content useful and informative? Did you learn something new, build a skillset or identify a professional development need, or find that you started thinking along a new approach to your work?

Answered: 55 Skipped: 9



	Excellent	Above Average	Average	Below Average	Poor	N/A	Total	Average Rating
Frank Minton, PhD: Issues and Development Regarding Gift Annuities	20.00% 10	12.00% 6	6.00% 3	0.00% 0	0.00% 0	62.00% 31	50	1.63
Russell Yurk: Ahh! The Pitfalls! (of Joint Representation)	2.22% 1	2.22% 1	2.22% 1	0.00% 0	0.00% 0	93.33% 42	45	2.00
Frank Minton, PhD: Reading the Tea Leaves	23.53% 12	13.73% 7	1.96% 1	0.00% 0	1.96% 1	58.82% 30	51	1.62
Stephanie Bivens: Elder Law & Planning for Incapacity	21.28% 10	6.38% 3	0.00% 0	0.00% 0	0.00% 0	72.34% 34	47	1.23

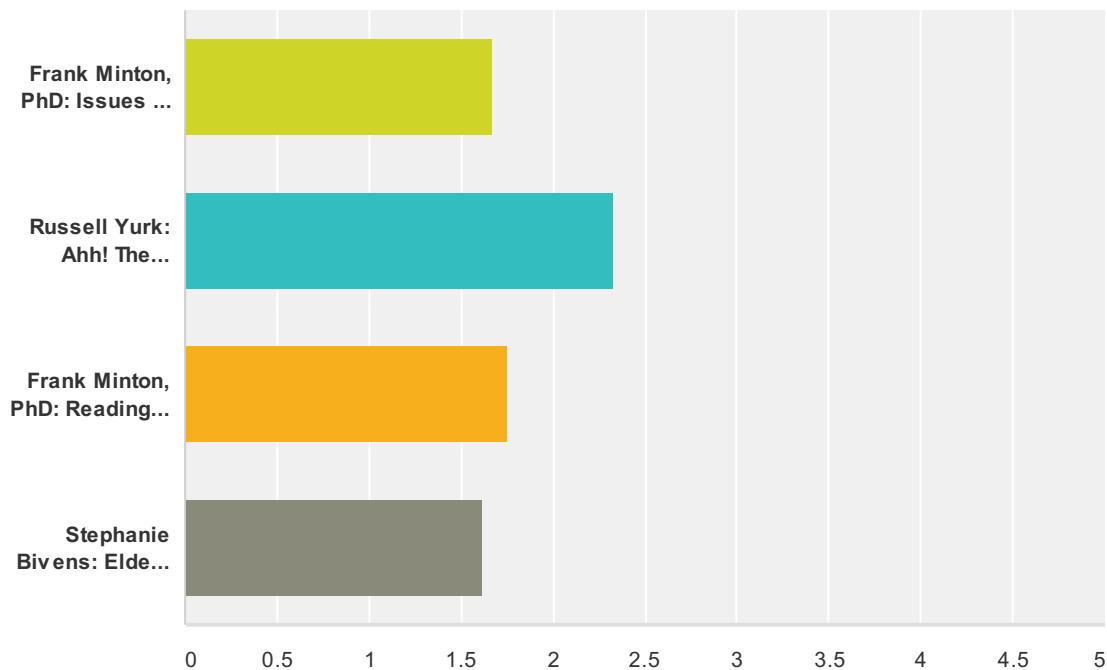
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2	I particularly liked Stephanie Bivens and her content was excellent. We should have more senior issues addressed at conferences, both legal and health issues.	6/6/2014 11:53 AM

PGRTAZ 2014 Summer Forum: Nurturing Philanthropy Across Generations

3	good learned that there was a lot that I don't know...would have liked some kind of take away....and I have not looked at the flash drive	6/6/2014 10:58 AM
4	Bivens was the only one I was able to attend.	6/5/2014 9:46 AM
5	Both sessions were relevant and well-prepared. Stephanie is an especially-engaging speaker.	6/5/2014 9:40 AM
6	The gift annuities presentation was VERY advanced....and difficult to digest.	6/4/2014 12:03 PM
7	Russell Yurk did an excellent presentation, however he thought his audience was going to be all lawyers and geared his presentation to that. So, there was a disconnect somewhere in the pre-event communication with him and I was the only lawyer in the room. Also, it was poorly attended. It could be because of the topic or it could be because of the other programs in that timeslot.	6/4/2014 9:25 AM

Q5 Learner Centric Programming: We challenged each of our presenters in their engagement letter to deliver their message in ways that purposefully integrated and welcomed audience engagement, participation, tailoring, and input. Did our our Professional Development presenters bring your objectives, your questions, your requests, into their program delivery?

Answered: 56 Skipped: 8



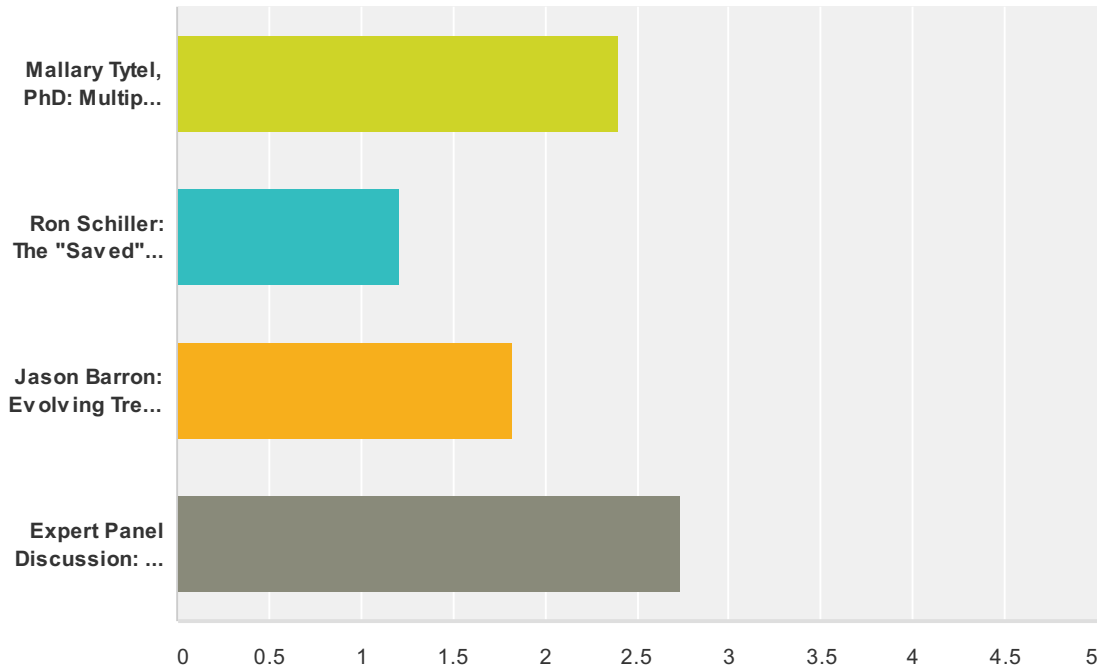
	Excellent	Above Average	Average	Below Average	Poor	N/A	Total	Average Rating
Frank Minton, PhD: Issues and Development Regarding Gift Annuities	19.61% 10	7.84% 4	7.84% 4	0.00% 0	0.00% 0	64.71% 33	51	1.67
Russell Yurk: Ahh! The Pitfalls! (of Joint Representation)	2.13% 1	0.00% 0	4.26% 2	0.00% 0	0.00% 0	93.62% 44	47	2.33
Frank Minton, PhD: Reading the Tea Leaves	21.15% 11	9.62% 5	5.77% 3	0.00% 0	1.92% 1	61.54% 32	52	1.75
Stephanie Bivens: Elder Law & Planning for Incapacity	14.29% 7	8.16% 4	4.08% 2	0.00% 0	0.00% 0	73.47% 36	49	1.62

#	What more/else would you like to share?	Date
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2	handled questions from the audience well....tied that into teaching points	6/6/2014 10:58 AM

3	Very knowledgeable.	6/4/2014 4:44 AM
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Q6 Tell us about our Leadership Breakout Sessions: Were they dynamic and easy to listen to? Was their content useful and informative? Did you learn something new, identify program assessment tools or needs analysis ideas, or find that you started thinking along a new approach to your leadership and philanthropic efforts?

Answered: 58 Skipped: 6



	Excellent	Above Average	Average	Below Average	Poor	N/A	Total	Average Rating
Mallery Tytel, PhD: Multiple Truths	10.42% 5	0.00% 0	4.17% 2	4.17% 2	2.08% 1	79.17% 38	48	2.40
Ron Schiller: The "Saved" Gift	40.74% 22	11.11% 6	0.00% 0	0.00% 0	0.00% 0	48.15% 26	54	1.21
Jason Barron: Evolving Trends in Social Investing: Aligning Your Investments with Your Philanthropy	4.17% 2	6.25% 3	2.08% 1	0.00% 0	0.00% 0	87.50% 42	48	1.83
Expert Panel Discussion: The Dilemma of Abundance	7.84% 4	15.69% 8	15.69% 8	5.88% 3	5.88% 3	49.02% 25	51	2.73

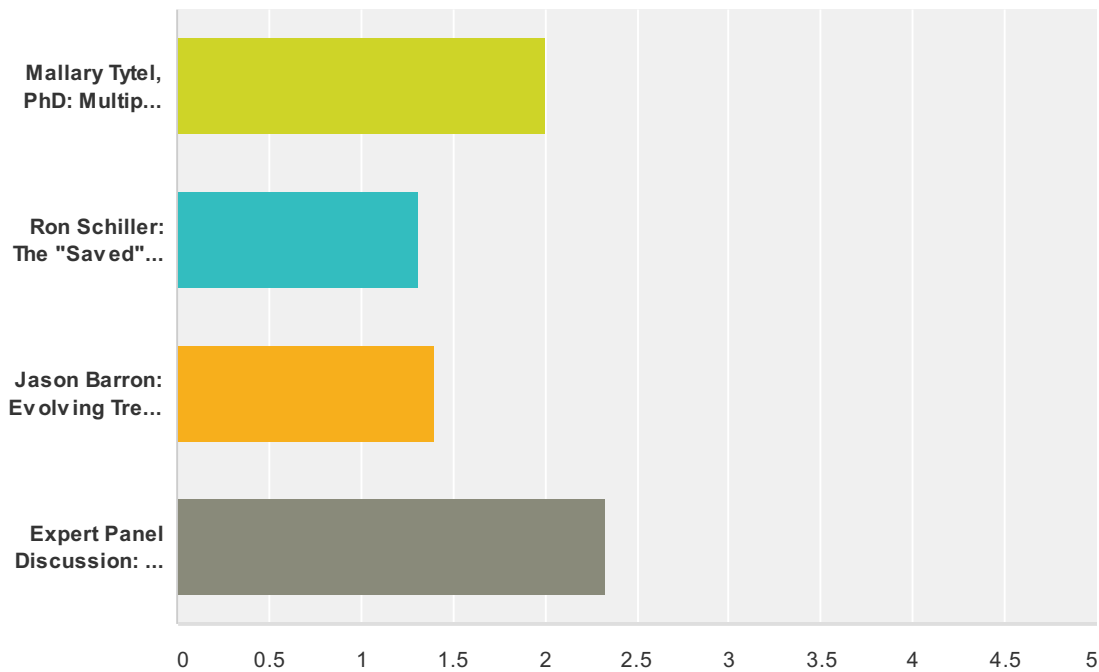
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PGRTAZ 2014 Summer Forum: Nurturing Philanthropy Across Generations

2	Mallary was a very credible presenter/facilitator and great conversation all throughout her presentation about "truths." Jason is just plain brilliant. Couldn't get a word or question in really, but that didn't matter all that much. He shared high level info and was able to quote lots of info and stats right off the top of his head. Amazing. The panel discussion was not as good as it could have been, but I appreciated the panel and what I learned, regardless. It was a little too loose and probably too elementary for many of us in the audience for it to have been in the Leadership Session. Still valuable.	6/7/2014 12:02 PM
3	Mallary Tytel was fabulous in her Multiple Truths workshop both in content and inclusive interaction with the audience. I've mentioned her materials at two meetings since and have forwarded it to one.	6/6/2014 12:22 PM
4	Both of Ron's sessions were excellent, informative and I learned much.	6/6/2014 11:53 AM
5	never really moved this topic forward...good work drawing the audience out	6/6/2014 10:58 AM
6	Didn't see any.	6/5/2014 9:46 AM
7	Ron's session was by far the most impactful of what I attended. As a fund raiser, the topic of 'how to credit the gift' has always been fraught with complexity, but Ron put a longer-range perspective on the entire stewardship approach, and the reasons why. That dialogue within our profession will be a game-changer for charities.	6/5/2014 9:40 AM
8	The panel was scattered and not very valuable.	6/4/2014 12:03 PM
9	Excellent opportunity to "think" and share. Great topic; talented facilitator with a soft touch. Nice use of diverse resources.	6/4/2014 4:44 AM
10	Excellent opportunity to "think" and share. Great topic; super presenter. Nice surprise!	6/4/2014 4:37 AM

Q7 Learner Centric Programming: We challenged each of our presenters in their engagement letter to deliver their message in ways that purposefully integrated and welcomed audience engagement, participation, tailoring, and input. Did our our Leadership presenters bring your objectives, your questions, your requests, into their program delivery?

Answered: 58 Skipped: 6



	Excellent	Above Average	Average	Below Average	Poor	N/A	Total	Average Rating
Mallery Tytel, PhD: Multiple Truths	8.70% 4	4.35% 2	4.35% 2	2.17% 1	0.00% 0	80.43% 37	46	2.00
Ron Schiller: The "Saved" Gift	33.33% 17	15.69% 8	0.00% 0	0.00% 0	0.00% 0	50.98% 26	51	1.32
Jason Barron: Evolving Trends in Social Investing: Aligning Your Investments with Your Philanthropy	6.25% 3	4.17% 2	0.00% 0	0.00% 0	0.00% 0	89.58% 43	48	1.40
Expert Panel Discussion: The Dilemma of Abundance	12.24% 6	14.29% 7	18.37% 9	2.04% 1	2.04% 1	51.02% 25	49	2.33

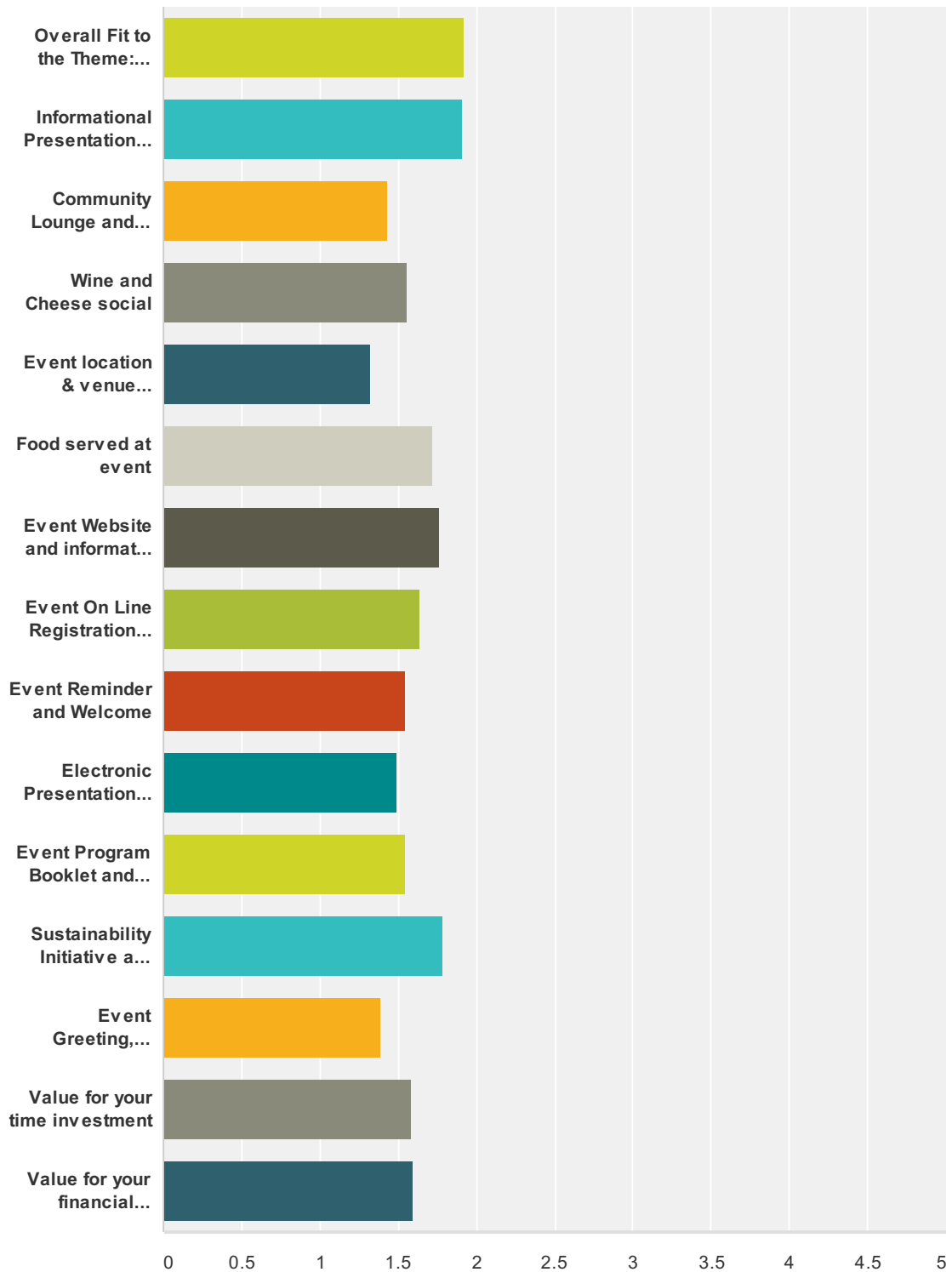
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2	Excellent information and discussion about how and why to target and care about funders in their 70s and 80s.	6/7/2014 12:02 PM

PGRTAZ 2014 Summer Forum: Nurturing Philanthropy Across Generations

3	The Expert Panel does deserve an Excellent for bringing audience participation into the workshop though unfortunately, it seemed two individuals in particular hijacked the conversation to the point that we learned very little from the guest panel.	6/6/2014 12:22 PM
4	Panel discussion was someone dominated by some of the audience members.	6/4/2014 5:45 PM
5	Excellent facilitation and group skills. Very engaging. Gave us a chance to think, share, and learn.	6/4/2014 4:44 AM
6	Excellent facilitation and group skills.	6/4/2014 4:37 AM

Q8 How was our overall Planning?

Answered: 61 Skipped: 3



	Excellent	Above Average	Average	Below Average	Poor	N/A	Total	Average Rating
Overall Fit to the Theme: Nurturing Philanthropy Across Generations	36.07% 22	42.62% 26	9.84% 6	6.56% 4	1.64% 1	3.28% 2	61	1.92

PGRTAZ 2014 Summer Forum: Nurturing Philanthropy Across Generations

Informational Presentations contained what you expected	32.20% 19	44.07% 26	13.56% 8	5.08% 3	0.00% 0	5.08% 3	59	1.91
Community Lounge and Networking opportunities	55.00% 33	41.67% 25	0.00% 0	0.00% 0	0.00% 0	3.33% 2	60	1.43
Wine and Cheese social	31.58% 18	17.54% 10	7.02% 4	0.00% 0	0.00% 0	43.86% 25	57	1.56
Event location & venue (parking, daylighting, personal comfort)	66.67% 40	33.33% 20	0.00% 0	0.00% 0	0.00% 0	0.00% 0	60	1.33
Food served at event	50.00% 30	30.00% 18	18.33% 11	1.67% 1	0.00% 0	0.00% 0	60	1.72
Event Website and information sources	44.83% 26	34.48% 20	10.34% 6	3.45% 2	1.72% 1	5.17% 3	58	1.76
Event On Line Registration Process	53.45% 31	27.59% 16	12.07% 7	3.45% 2	0.00% 0	3.45% 2	58	1.64
Event Reminder and Welcome	54.24% 32	32.20% 19	10.17% 6	0.00% 0	0.00% 0	3.39% 2	59	1.54
Electronic Presentation Delivery format: Flash memory	68.42% 39	19.30% 11	8.77% 5	1.75% 1	1.75% 1	0.00% 0	57	1.49
Event Program Booklet and access to Handouts	57.63% 34	32.20% 19	8.47% 5	1.69% 1	0.00% 0	0.00% 0	59	1.54
Sustainability Initiative and Plan	38.89% 21	31.48% 17	16.67% 9	1.85% 1	0.00% 0	11.11% 6	54	1.79
Event Greeting, Wayfinding, and Welcoming Atmosphere	69.49% 41	23.73% 14	5.08% 3	1.69% 1	0.00% 0	0.00% 0	59	1.39
Value for your time investment	54.24% 32	33.90% 20	10.17% 6	1.69% 1	0.00% 0	0.00% 0	59	1.59
Value for your financial investment	54.24% 32	32.20% 19	8.47% 5	3.39% 2	0.00% 0	1.69% 1	59	1.60

Q9 Additional Comments:

Answered: 25 Skipped: 39

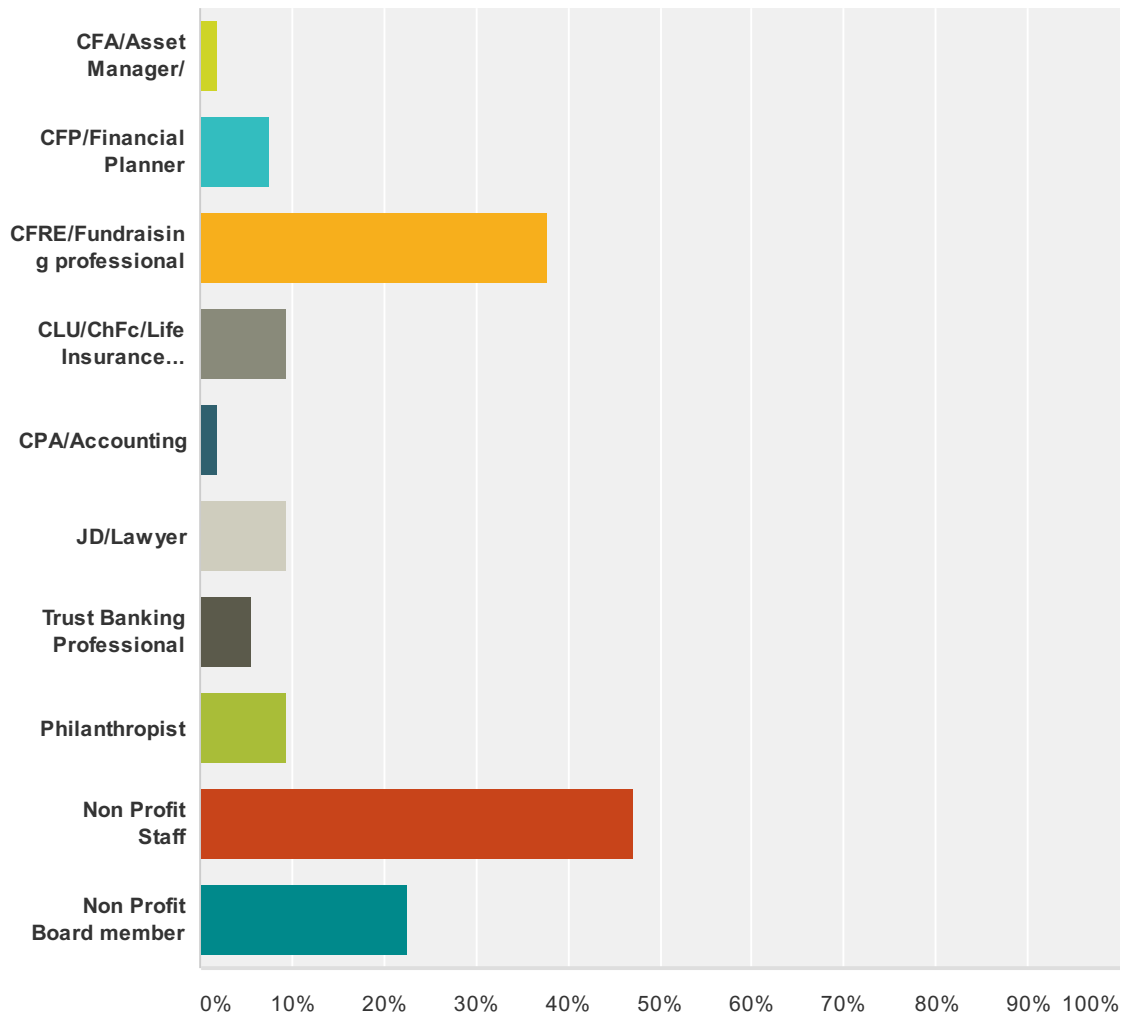
#	Responses	Date
1	all of the form does not show up on my computer	6/11/2014 11:20 AM
2	Ron Miller was unable to attend the PGRTAZ 2014 Summer Forum. An employee of the Phoenix Art Museum attended in Ron's place. Please remove this email contact, jan.nesburg@phxart.org, from your list. Thank you. Julia Ramult, Interim Assistant to Ron Miller, Chief Development Officer	6/10/2014 9:49 AM
3	This was my first time attending. I will definitely be back. The sessions and the networking were very valuable. I think the PGRTAZ website does not reflect in any way the level of this program and organization. It's quite outdated and clunky--should be redesigned and updated to be credible in the philanthropic space. Thank you very much!	6/7/2014 12:02 PM
4	Breaks were definitely too short to have any kind of conversations with people. One hour sessions were also too short. 1 hour 15 would be better. Takes people a few minutes to get to room and settled down. Session content was only about 50 minutes. I did enjoy the day and I think you had very respected speakers. Frank Minton is the best!	6/6/2014 11:53 AM
5	Always a superb job! Really appreciated the quality of workshops to choose from. Love the format, location -- please continue this for a few years, at least. It's relaxing, yet professional with close quarters for getting back and forth to classes. LOVE being at PCC. There were some noise challenges in the one room however. Always wonder why the chairs are put side by side, without a little room between, so when a larger person sits next to you, you should not have to be uncomfortable with bottoms, cheek to cheek - know what I mean? A little space between chairs when theatre seating would be nicer. . . . that's a real detail, but that's what we do when there is an event. Food was delicious, elegant and plenty of it. Nice breaks and the community room is the best, especially with all of the furniture from Goodwill - -great idea! Thanks for all of the hard work -- it was a great day!	6/6/2014 11:02 AM
6	first event that I attended...good	6/6/2014 10:58 AM
7	Excellent!	6/5/2014 8:00 PM
8	This event was geared more towards the experienced planned giving professional. There might have been some value in offering one of the sessions on "Planned Giving 101" that would explain some of the basics.	6/5/2014 12:39 PM
9	The slides would have been better in PowerPoint format. WiFi would have been greatly appreciated. Perhaps we could get more advanced topics for fundraisers who have been in the "game" for a longer period of time. I felt there were many rookie fundraisers in a few of the sections. Perhaps two tracks - one for veterans and one for less experienced. Overall, the event was nicely done	6/5/2014 11:08 AM
10	I could registrar on line, had to call your office and Emily did a good job.	6/5/2014 11:05 AM
11	Although I enjoyed having the flash drive to bring back to the office, I did not use it as I have a tablet that does not support USB port. Knowing there was no Wi-Fi, I downloaded the documents from your website the night before.	6/5/2014 11:01 AM
12	The community lounge has a relaxed informal atmosphere. This is good. Having said that, it gets crowded and difficult for attendees to navigate around the room and visit all of the sponsors. It is also challenging for the sponsors to present a vibrant display of their literature. Optimally, I would like to consider not having all of the mish-mash of furniture brought in, but instead have a larger open floor plan. Sponsors can then set up their own tables, along the walls, with enough space for all relevant handouts and room to comfortably talk to interested attendees. More in a mini trade show fashion.	6/5/2014 9:46 AM
13	Well-organized, professional, friendly, helpful -- time well-spent!	6/4/2014 9:20 PM
14	Great tone - everyone very friendly	6/4/2014 5:45 PM

PGRTAZ 2014 Summer Forum: Nurturing Philanthropy Across Generations

15	This was my first PGRT experience and I enjoyed it very much. I might suggest a more elementary track or presentation for next year for those of us who are brand new in this area. Something with the basics like glossary of terms, brief overview of the different options, etc. so that some of the other sessions would make more sense.	6/4/2014 12:03 PM
16	Not many of the presentations addressed generations or shifts in demographics. I thought it would be more dedicated to the how changes in our society have affected different generations. It also seemed that the content was more dedicated to charities than advisors or both groups. (except the Yurk presentation that was seemed dedicated to only attorneys.)	6/4/2014 11:08 AM
17	I appreciate the sustainability initiative, but it is very difficult to carry around a coffee cup to the sessions, particularly to the rooms where there was no table to set them on. Coffee mugs that are deeper with flat bottoms would have helped.	6/4/2014 9:25 AM
18	Please consider starting the conference at 9:30 or 10am. For those not living in Phoenix, it is an extra expense to come the night before to spend the night to start at 7:00 am.	6/4/2014 8:54 AM
19	well done.	6/4/2014 4:44 AM
20	well done.	6/4/2014 4:37 AM
21	1) Include room assignments in the program 2) Should provide audience with working access to WiFi 3) Should be easier to find the sponsors for the Passport signatures - maybe limit the signatures to the ones who actually have tables in the community lounge. Because it was so hard to find them, many folks didn't even bother which actually defeats the purpose. 4) Overall - fabulous event. Loved the networking opportunities and the program. Great job!	6/3/2014 9:01 PM
22	Excellent presenters! Very valuable and inspiring!!	6/3/2014 8:56 PM
23	The booklet was a nice size but it may it a little challenging to read the various break out session because the print was small - especially the print in red. It could be my age but I don't typically have a hard time reading. Everything was wonderful overall though.	6/3/2014 7:39 PM
24	The entire day was an outstanding opportunity for networking and growing relationships. The breakout sessions were very informative and thought provoking!	6/3/2014 6:47 PM
25	much of the day was feel good topics - not meaty "how to's"	6/3/2014 6:02 PM

Q10 Please check all that apply:

Answered: 53 Skipped: 11



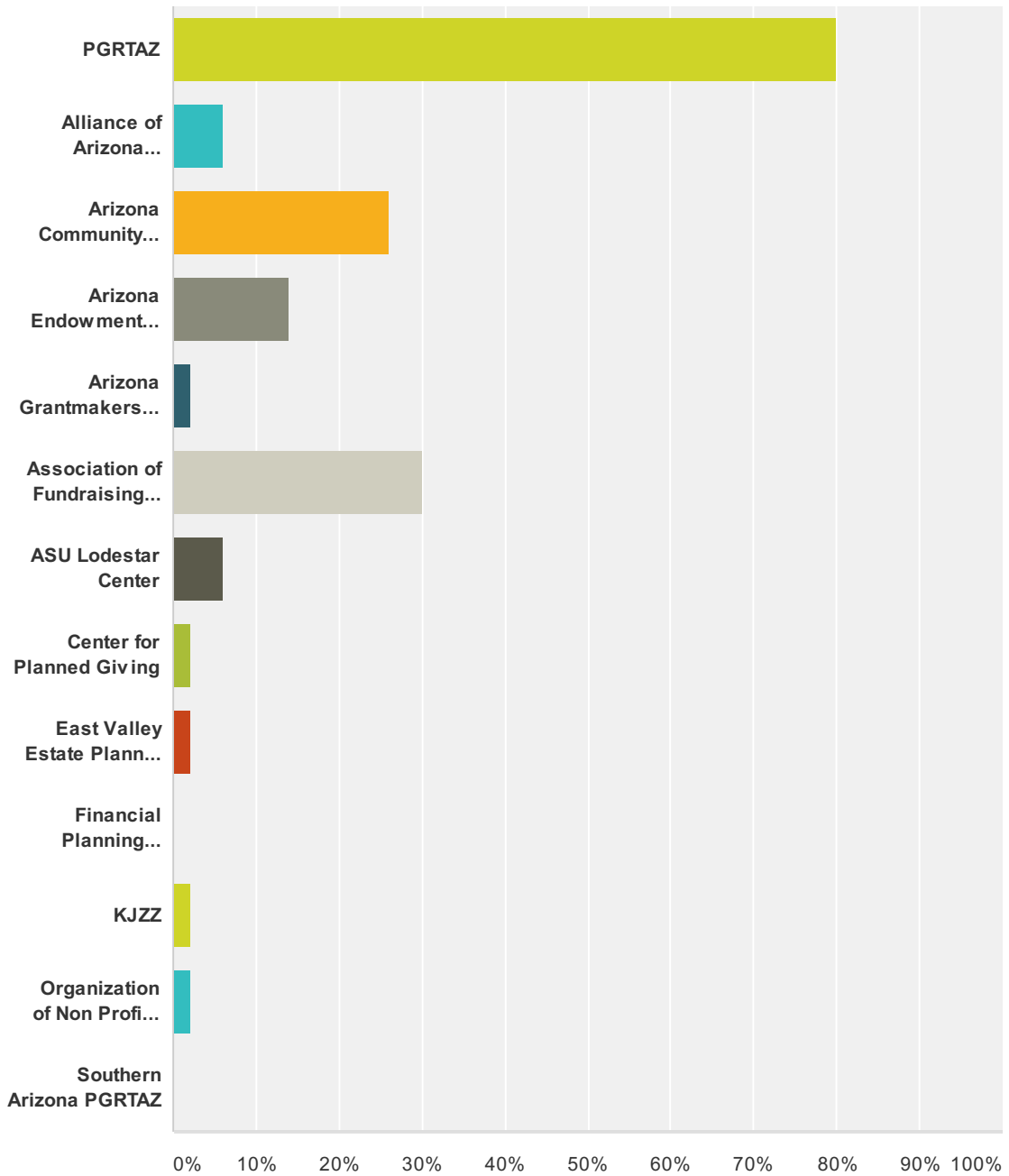
Answer Choices	Responses	Count
CFA/Asset Manager/	1.89%	1
CFP/Financial Planner	7.55%	4
CFRE/Fundraising professional	37.74%	20
CLU/ChFc/Life Insurance Professional	9.43%	5
CPA/Accounting	1.89%	1
JD/Lawyer	9.43%	5
Trust Banking Professional	5.66%	3
Philanthropist	9.43%	5
Non Profit Staff	47.17%	25
Non Profit Board member	22.64%	12
Total Respondents: 53		

PGRTAZ 2014 Summer Forum: Nurturing Philanthropy Across Generations

#	Other (please specify)	Date
1	Wealth Management Professional at Multi Family Office	6/9/2014 11:34 AM
2	For profit organization that serves nonprofits	6/7/2014 12:07 PM
3	Consultant	6/6/2014 4:40 PM
4	nonprofit consultant	6/6/2014 2:38 PM
5	Shriners Hospitals for Children Fundraiser	6/5/2014 11:05 AM
6	Executive Director/Consultant	6/4/2014 9:22 PM
7	consultant	6/4/2014 6:40 AM

Q11 How/from whom did you hear about this event?

Answered: 50 Skipped: 14



Answer Choices	Responses
PGRTAZ	80.00% 40
Alliance of Arizona Non-Profits	6.00% 3
Arizona Community Foundation	26.00% 13
Arizona Endowment Building Initiative	14.00% 7
Arizona Grantmakers Forum	2.00% 1

PGRTAZ 2014 Summer Forum: Nurturing Philanthropy Across Generations

Association of Fundraising Professionals	30.00%	15
ASU Lodestar Center	6.00%	3
Center for Planned Giving	2.00%	1
East Valley Estate Planning Council	2.00%	1
Financial Planning Association	0.00%	0
KJZZ	2.00%	1
Organization of Non Profit Executives	2.00%	1
Southern Arizona PGRTAZ	0.00%	0
Total Respondents: 50		

#	Other (please specify)	Date
1	Mike King from Gammage and Bumham invited Friendly House to participate	6/10/2014 12:02 PM
2	Colleague who recommended	6/7/2014 12:07 PM
3	A colleague.	6/6/2014 11:58 AM
4	stumbled across it online	6/4/2014 6:40 AM

Q12 What did you enjoy or value the most about this event?

Answered: 33 Skipped: 31

#	Responses	Date
1	Ken Shiller's Authentic Conversation presentation	6/10/2014 12:02 PM
2	The Keynote Speakers	6/9/2014 11:34 AM
3	Ron Schiller's presentations	6/9/2014 11:22 AM
4	Both the sessions and the valuable networking. The meals and snacks were also excellent. And I very much appreciated the people in the hallways either welcoming us or showing us which way to go to a session.	6/7/2014 12:07 PM
5	As a sponsor, the lounge was the most valuable. The networking is excellent and the event is exceptionally well-managed.	6/6/2014 4:40 PM
6	Connecting with others and discussing the interesting ideas being presented.	6/6/2014 12:24 PM
7	Quality of the speakers and selection of topics.	6/6/2014 11:58 AM
8	All the programs I attend gave me the info and help I needed. except Ethics-Issue spotting	6/6/2014 11:40 AM
9	Great workshops -- we can always network elsewhere and at other PGRT times. It's about having value in learning so the speakers and topics are essential. All of the other is the icing - -but without the cake, no icing is needed.	6/6/2014 11:05 AM
10	As a planner it was good to hang out with lots of 501c3 people	6/6/2014 11:00 AM
11	Ron Schiller's presentations	6/6/2014 9:40 AM
12	Networking opportunities with very caring and professional group.	6/5/2014 8:04 PM
13	Good information	6/5/2014 12:41 PM
14	The subjects covered were the knowledge I needed to help me in raising funds	6/5/2014 11:05 AM
15	Several of the speakers gave thought to my development department plan. Networking was great!	6/5/2014 11:03 AM
16	Opportunity to connect with peers and learn from professionals.	6/5/2014 10:04 AM
17	Chocolate covered potato chips	6/5/2014 9:59 AM
18	I loved the coffee bar (especially the whip cream), but in terms of value - I enjoyed all the sessions I attended because it gave me new insight (and allowed me to spawn new ideas) into planned giving and how we can structure or implement guidelines for a new campaign we are looking to start.	6/5/2014 9:56 AM
19	Networking; receiving 'credits' toward CFRE.....And Ron's "Saved Gift" session.	6/5/2014 9:48 AM
20	Networking opportunity and excellent education/inspirational sessions	6/4/2014 5:46 PM
21	Great speakers and topics! Learned some new things.	6/4/2014 3:40 PM
22	Top quality speakers, the lounge and mingling with the attendees	6/4/2014 12:22 PM
23	Best conference food I have EVER had. And lots of it which is another huge plus.	6/4/2014 12:04 PM
24	The general sense of knowledge base expansion from the event and networking.	6/4/2014 11:11 AM
25	I think the morning speaker set the tone for the entire day. Excellent selection.	6/4/2014 9:32 AM
26	Sessions by Mr. Schiller and Mr. Minton	6/4/2014 8:21 AM
27	Opportunity to meet people	6/4/2014 6:40 AM

PGRTAZ 2014 Summer Forum: Nurturing Philanthropy Across Generations

28	Was provided with opportunities to learn, share and think. Loved that we had planned networking time and could follow up with questions and ideas. Well planned, well executed. Very committed team of experts and diversity.	6/4/2014 4:47 AM
29	Networking and learning.	6/3/2014 9:03 PM
30	The speakers were excellent.	6/3/2014 8:58 PM
31	The session helped me to focus on me - be authentic and honest. All traits I value but it was nice to hear it is really ok to do in development.	6/3/2014 7:40 PM
32	Networking	6/3/2014 6:48 PM
33	many contacts!	6/3/2014 6:03 PM

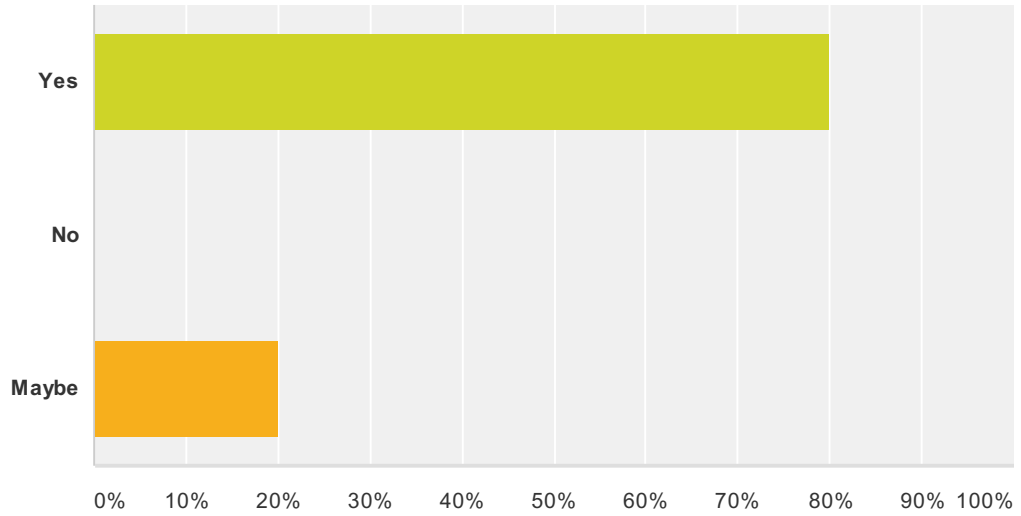
Q13 Do you have any suggestions for improving this event?

Answered: 20 Skipped: 44

#	Responses	Date
1	I understand it is geared towards mostly nonprofit professionals, I just had a hard time relating to some of the breakout sessions as it was specifically geared to those individuals. However, some of the sessions could have been addressed to a broader audience and then applied in more specific situations.	6/9/2014 11:34 AM
2	The vendors for the passport were difficult to find and talk to at various times. I WANTED to talk to them, but they weren't always available or it wasn't always clear who was the person vending at that location. The passport exercise and drawing was a bit unfair, I think, even though you allowed for 3 missing vendors. I would improve that for next time.	6/7/2014 12:07 PM
3	Both last year and this year, the lunchtime speakers were a bit "soft" and what was presented was not as well-integrated into the theme as could be. A shorter talk at lunch would be nice, leaving a bit of time for visiting around the table. Perhaps a local philanthropist who could give a personal perspective on giving?	6/6/2014 4:40 PM
4	Is there a way to set up MCLE credits? All or most of your speakers have spoken at other conferences where MCLE's for lawyers were available.	6/6/2014 11:58 AM
5	Put signs on the Doors with the name of the Class	6/6/2014 11:40 AM
6	it would have interesting if the speakers stayed "on message" ie philanthropy across generations	6/6/2014 11:00 AM
7	This was geared more towards the experienced planned giving professional. I would suggest that you offer at least one session on "planned Giving 101" that would cover the basics of planned giving and some of the vehicles used in planned giving.	6/5/2014 12:41 PM
8	Have all Speakers use the clip on Mike, The audio system was very good so all could hear the Speaker	6/5/2014 11:05 AM
9	See previous comments regarding community lounge	6/5/2014 9:59 AM
10	I loved the community lounge and the networking and I understand that it's a fairly packed and strict schedule, I'd like to see more time for networking opportunities.	6/5/2014 9:56 AM
11	Well, if that fantastic artist is going to do her thing another time (which was fun, but distracting when the keynote was speaking), have those speaking at the end (weren't they supposed to wrap up main thoughts of the day??) should have gone beyond just referring to the "drawing behind me" to actually using it to re-iterate the points. The ending looked like they were unprepared and winging it; their motivation needed to be to send attendees off with something tangible to remember. (Last year's gal may have said things controversial to some, but it got people thinking....well beyond the Forum.)	6/5/2014 9:48 AM
12	Liked the Phx Country Club location. The luncheon food was not that good.	6/4/2014 3:40 PM
13	Possibly have one less breakout session, since a lot of people leave early, make sessions a little longer, have longer breaks (maybe 20 minutes) and add some time for people to eat and talk at their tables before starting the programs	6/4/2014 12:22 PM
14	More community lounge time.	6/4/2014 11:11 AM
15	It was extremely well run. Bravo!	6/4/2014 9:32 AM
16	Room signage, opportunity for potential new members to join there	6/4/2014 6:40 AM
17	N/A	6/4/2014 4:47 AM
18	See previous comments	6/3/2014 9:03 PM
19	Not at this time.	6/3/2014 7:40 PM
20	more how to's	6/3/2014 6:03 PM

Q14 Will you attend this event again next year?

Answered: 55 Skipped: 9



Answer Choices	Responses	
Yes	80.00%	44
No	0.00%	0
Maybe	20.00%	11
Total		55

**Q15 Please add any further comments
about this event or ideas for future events.
Who else should know about this event?**

Answered: 12 Skipped: 52

#	Responses	Date
1	Check in was fast and easy.	6/6/2014 11:58 AM
2	I will think about this and let you know next week	6/6/2014 11:40 AM
3	Possible reach out to religious leaders for program inclusion	6/5/2014 8:04 PM
4	Survey is too long. Mike	6/5/2014 12:22 PM
5	Signs on the doors telling the Topic that would be in this room. I feel that the program was very well done and everyone was very helpful the PGRTAZ FOLKS AND THE PHOENIX C.C. PERSONAL.	6/5/2014 11:05 AM
6	As a sponsor, I would like to receive an email list of the attendees so that my company can personally thank each and every one of them. As a sponsorship committee member, I would like to know who to possibly contact. Within the next week, I would like to send a blast email to attendees asking for sponsorships for next year's summer forum. I would like to do this while they are still emotionally charged from this year's event. I would like to really hit on the \$500 - \$750 sponsorships. I would like a goal of 20 donations at this level. The email blast could also ask each attendee for one referral - someone they think should attend next year's summer forum. This could all be addressed during the upcoming debriefing.	6/5/2014 9:59 AM
7	I think it would be really valuable not only for our board and committee members, but also for people who are considering planned gifts.	6/5/2014 9:56 AM
8	Much hard work goes into the Summer Forum, year-round, and all the volunteers have the undying gratitude of attendees for putting this together. Thank you.	6/5/2014 9:48 AM
9	Make clear the timeframe for registration and when the breakfast and program starts	6/4/2014 12:22 PM
10	Having organized this event years ago and after being away for several years and now rejoining, I am so impressed with the growth of the event and the level of programming, speakers, networking opportunities and the community feel to the event. Kudos on an excellent job everyone!!!	6/4/2014 9:29 AM
11	Thank you to everyone who planned a great day for us.	6/4/2014 8:55 AM
12	Thanks to all the sponsors. Everyone seemed interested in answering my questions.	6/4/2014 4:47 AM

2014 Summer Forum Event Success Metrics Results

PGRTAZ Board Expectations from the event:

1. Maintain the size/scope of event
 - a. similar pricing points (for registrations and sponsors)-**Met**
 - i. in order to support the membership goals for the event, the non-member pricing is slightly increased from last years' event. Member pricing is unchanged. Collaborator pricing is unchanged.
 - b. Offer 3 education tracks: beginning planners, advanced planners, philanthropic leadership-**Met**
 - c. 3 key note (plenary) speakers – nationally recognized-**Not met for closing plenary**
2. \$6,000 in profit **met: \$8449 w/ inkind; \$4449 w/o inkind**
3. Suggested membership impact is a net goal of 20 (including renewed/new members – tracked via coupon)
 - a. *This number should be confirmed/adjusted by the membership committee – metric assessed throughout the remainder of 2014*
4. Repeat/Expand the sustainability thread
 - a. Enhanced focus on accurate/early/better messaging
 - b. Add/Improve metrics
5. In the process of marketing for SF sponsors, also seek 2 new annual PGRTAZ sponsors – **Not met**
 - a. E-Newsletter
 - b. Website Sponsor
 - c. Marketing Collaborators Joint Calendar
 - d. Active Job Bank
6. Add (net) 2 new marketing collaborators –bringing collaborator total to 13 **not met**
7. Improved/expanded volunteer tracking hours mechanism – **Met: our volts**

Summer Forum Committee Success Metrics (suggested)

1. Identify incoming Summer Forum Chair (replace the Interim) - **Met**
 - a. Roughly 150 hours of time from November through July: 15 hours/mo, roughly 4 hours/wk
2. Meet all of the PGRTAZ Board metrics in producing this event – **Not met**
3. Retain at least 75% of last year's volunteers on the committee (we had 9; **retain 7**) –**not met: 6 on 2014 committee from 2013**
4. Add 5 more active SF committee members/volunteers (total active **committee of at least 12**) - **Met**
5. Final Budget, Precise Event Theme, and Graphic style- agreed upon /affirmed by **Dec 9th** Committee Call **Met**
6. 75% of all prior years' sponsors retained as current sponsors by Jun 3 (we had 20, **retain15**) **Not met**
7. 50% of sponsorship funds committed by Nov 25th (target of \$40,000, have **\$20,000 in commitments**) **Not met**
8. Recruit at least 15 Social Media Bloggers/Reporters by Feb 28th, to both - **Not met**
 - a. plan to attend the event on a media pass for reporting on their experience,
 - b. but also to start hyping the event and sharing the committee's work and buzz in March, April, and May.
9. Identify and share/support one Summer Forum objective from/for every other PGRTAZ active committee **Not met**
 - a. Special Focus: Coordinate/Support the Sponsorship Committee within the SF Event Planning Committee Efforts **Met**
10. Introduce Learner Centric programming to our presenters and attendees: reframing the presenter requests, and the survey evaluations, to focus on the audience and not the presenter or the topic **Met**