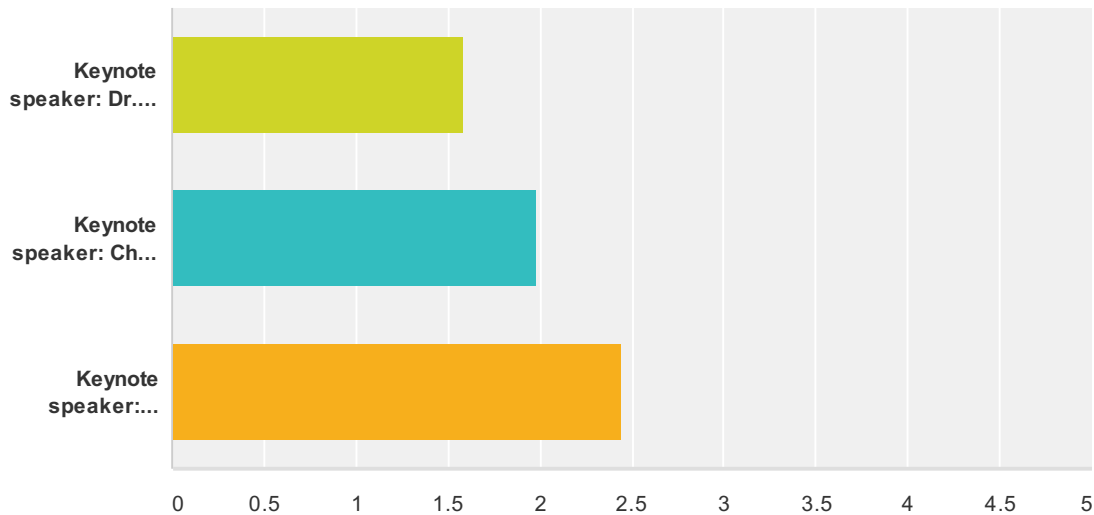


**Q1 Tell us about our General Session
Keynote Presenters: Were they dynamic
and easy to listen to? Was their content
useful and informative? Did you learn
something new, find inspiration, or find
that they started you thinking along a new
approach to your work?**

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

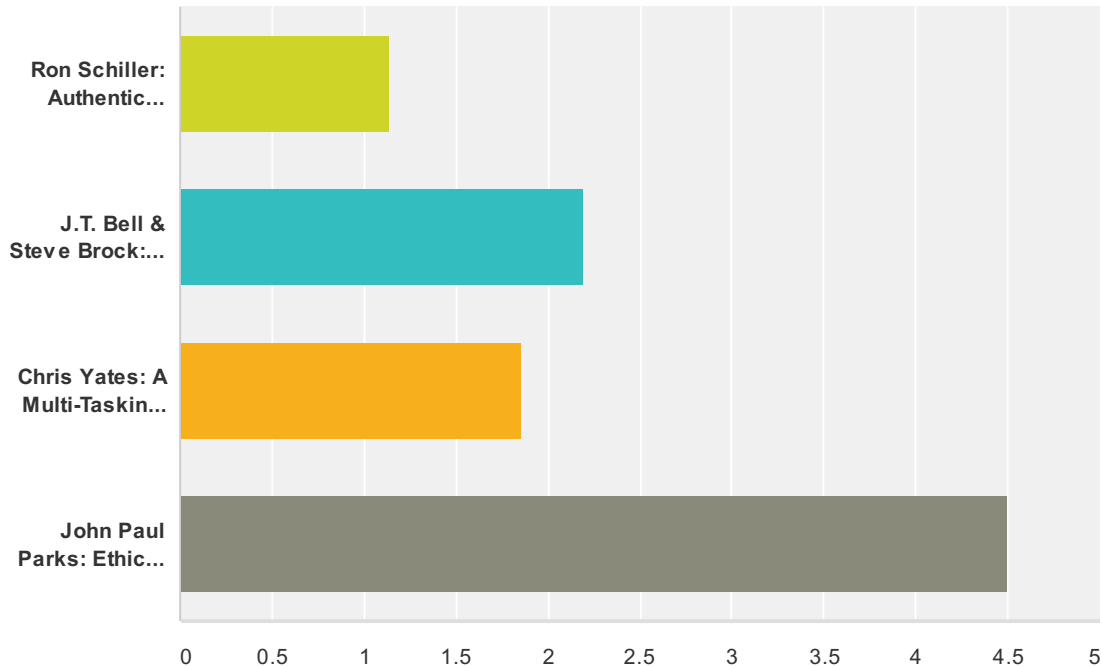
#	What more/else would you like to share?	Date
1	Did not attend	6/11/2014 11:20 AM
2	Ron Miller was unable to attend the PGRTAZ 2014 Summer Forum. An employee of the Phoenix Art Museum attended in Ron's place. Please remove this email contact, jan.nesburg@phxart.org, from your list. Thank you. Julia 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

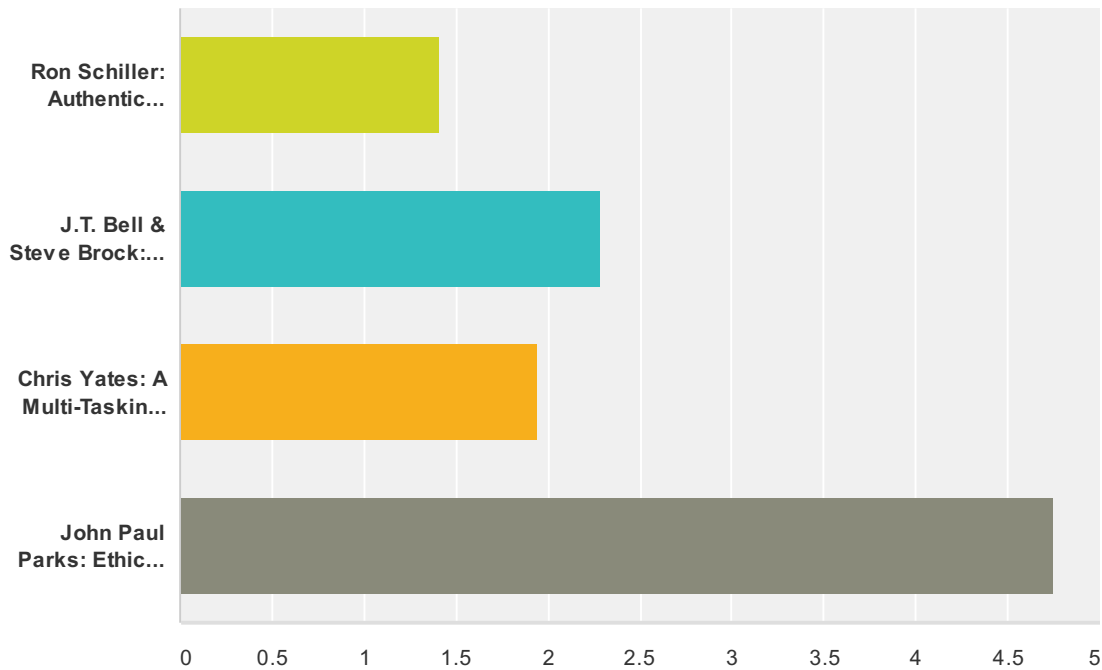
#	What more/else would you like to share?	Date
1	Ron Miller was unable to attend the PGRTAZ 2014 Summer Forum. An employee of the Phoenix Art Museum attended in Ron's place. Please remove this email contact, jan.nesburg@phxart.org, from your list. Thank you. Julia Ramult, Interim Assistant to Ron Miller, 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

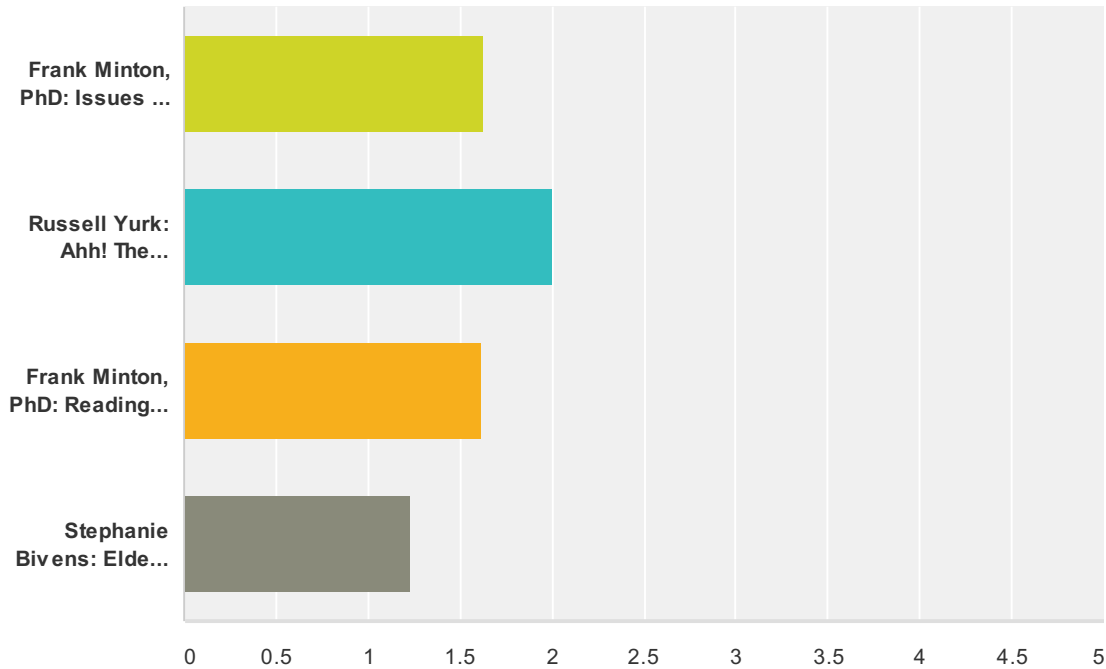


	Excellent	Above Average	Average	Below Average	Poor	N/A	Total	Average Rating
Ron Schiller: Authentic Conversation	35.85% 19	11.32% 6	1.89% 1	1.89% 1	0.00% 0	49.06% 26	53	1.41
J.T. Bell & Steve Brock: Charitable Giving Through Life Insurance	20.83% 10	6.25% 3	16.67% 8	0.00% 0	6.25% 3	50.00% 24	48	2.29
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
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

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

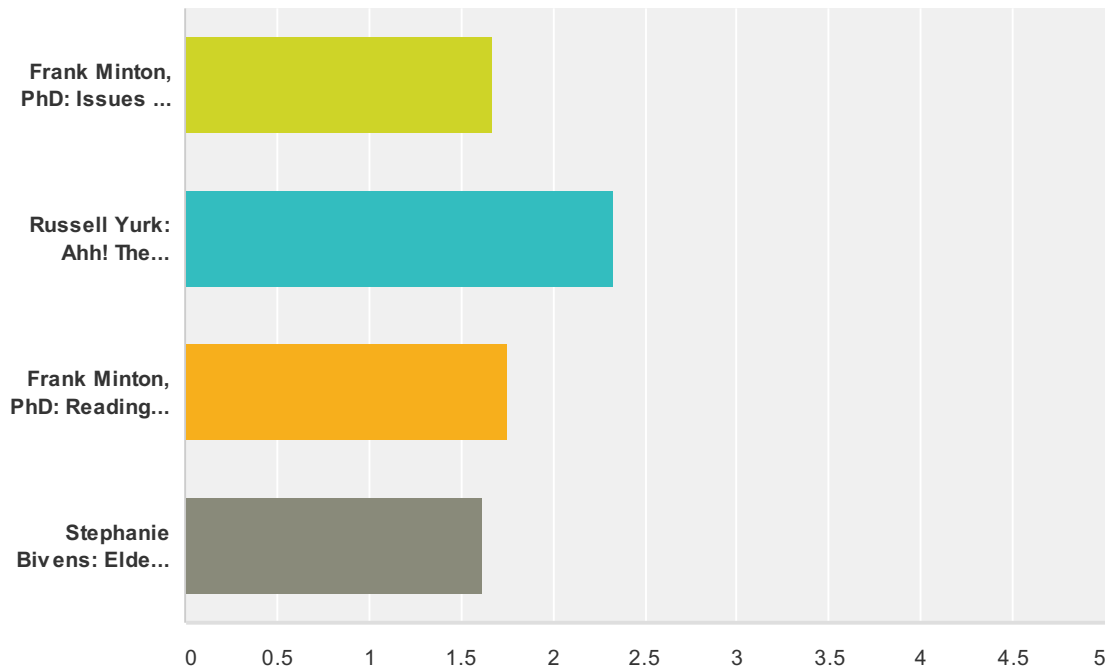
#	What more/else would you like to share?	Date
1	Ron Miller was unable to attend the PGRTAZ 2014 Summer Forum. An employee of the Phoenix Art Museum attended in Ron's place. Please remove this email contact, jan.nesburg@phxart.org, from your list. Thank you. Julia Ramult, Interim Assistant to Ron Miller,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



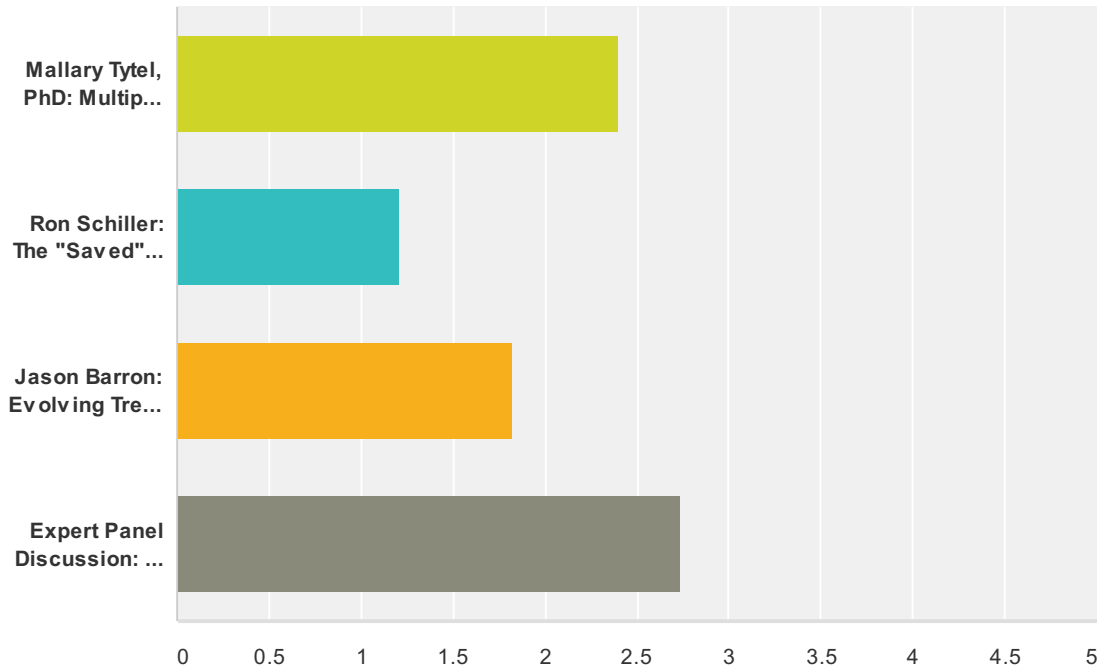
	Excellent	Above Average	Average	Below Average	Poor	N/A	Total	Average Rating
Frank Minton, PhD: Issues and Development Regarding Gift Annuities	19.61% 10	7.84% 4	7.84% 4	0.00% 0	0.00% 0	64.71% 33	51	1.67
Russell Yurk: Ahh! The Pitfalls! (of Joint Representation)	2.13% 1	0.00% 0	4.26% 2	0.00% 0	0.00% 0	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
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	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

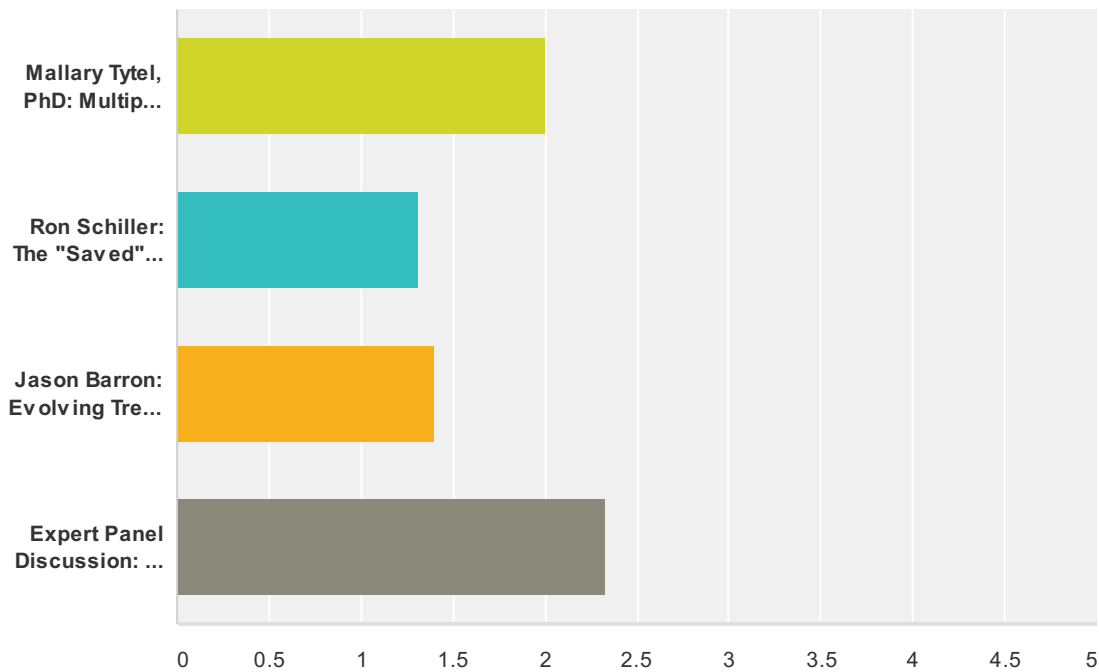
#	What more/else would you like to share?	Date
1	Ron Miller was unable to attend the PGRTAZ 2014 Summer Forum. An employee of the Phoenix Art Museum attended in Ron's place. Please remove this email contact, jan.nesburg@phxart.org, from your list. Thank you. Julia Ramult, Interim Assistant to Ron Miller, Chief Development Officer	6/10/2014 9:49 AM

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

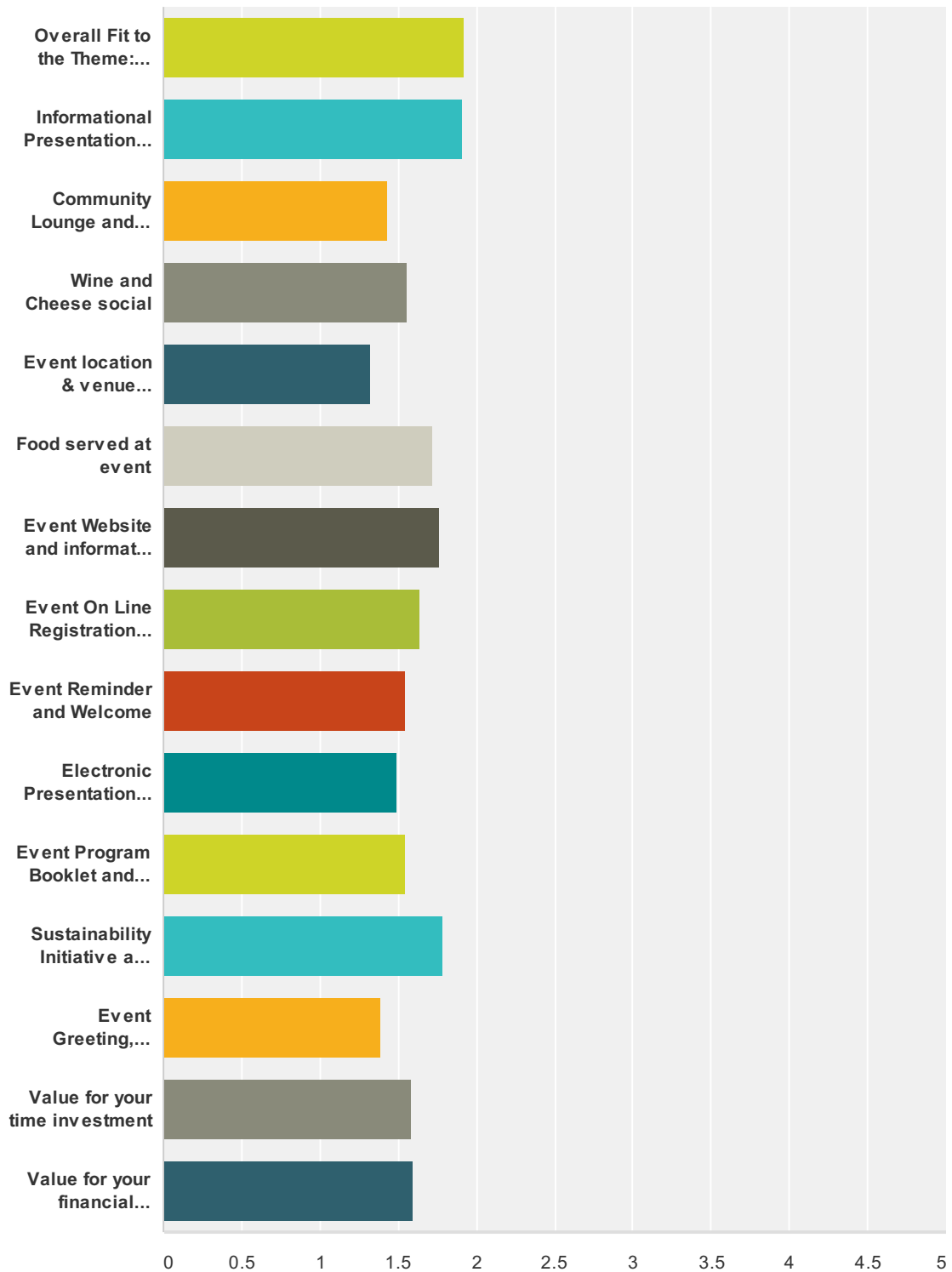
#	What more/else would you like to share?	Date
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2	Excellent information and discussion about how and why to target and care about funders in their 70s and 80s.	6/7/2014 12:02 PM

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

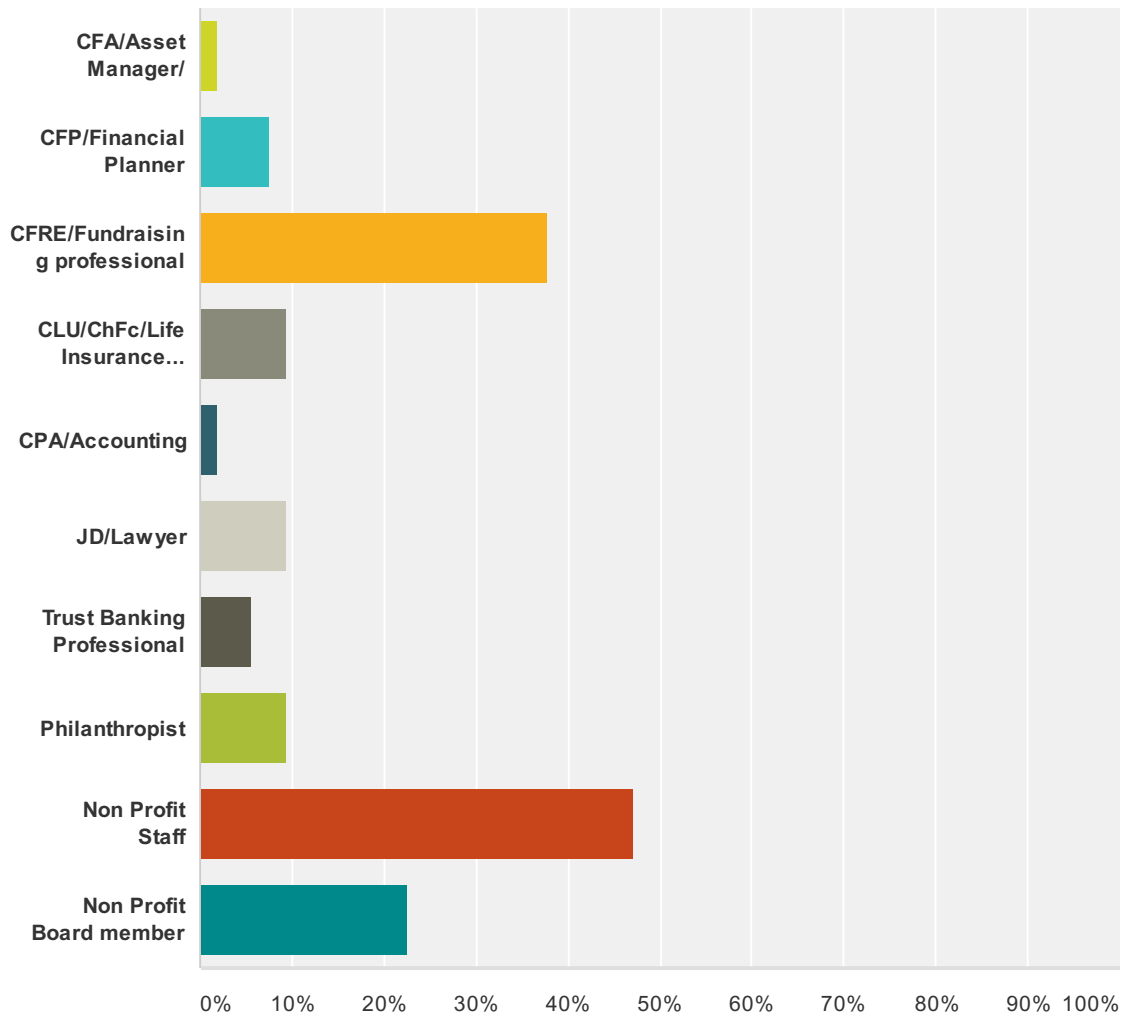
#	Responses	Date
1	all of the form does not show up on my computer	6/11/2014 11:20 AM
2	Ron Miller was unable to attend the PGRTAZ 2014 Summer Forum. An employee of the Phoenix Art Museum attended in Ron's place. Please remove this email contact, jan.nesburg@phxart.org, from your list. Thank you. Julia 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



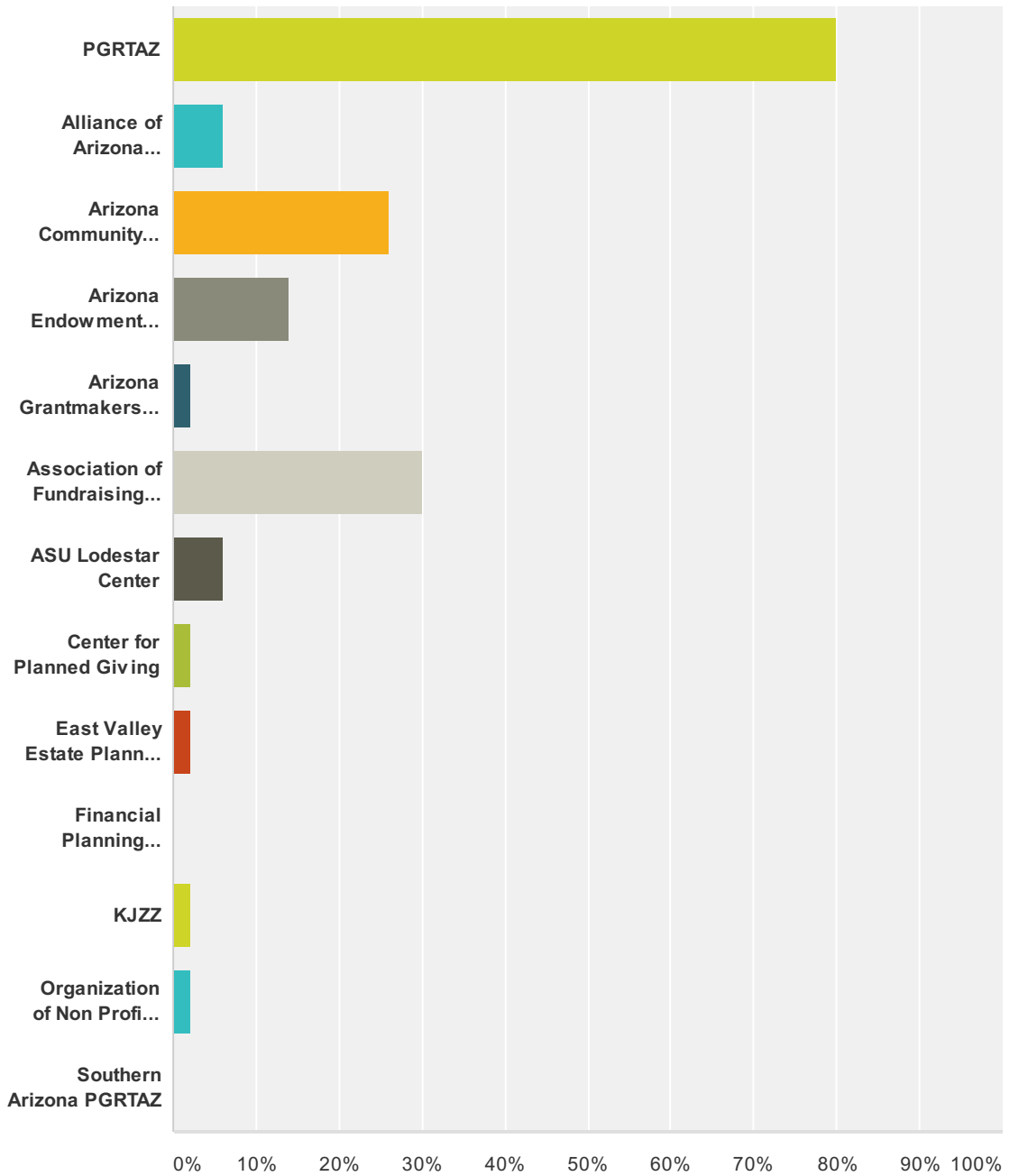
Answer Choices	Responses
CFA/Asset Manager/	1.89% 1
CFP/Financial Planner	7.55% 4
CFRE/Fundraising professional	37.74% 20
CLU/ChFc/Life Insurance Professional	9.43% 5
CPA/Accounting	1.89% 1
JD/Lawyer	9.43% 5
Trust Banking Professional	5.66% 3
Philanthropist	9.43% 5
Non Profit Staff	47.17% 25
Non Profit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

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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

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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

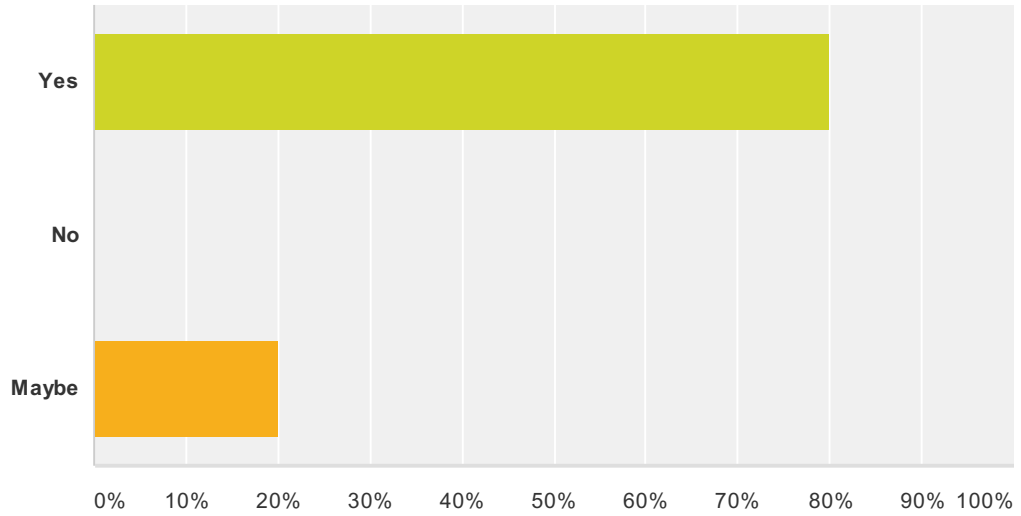
Q13 Do you have any suggestions for improving this event?

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	Count
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