

Who are We

Page 1 - - Give us your best answer; after clicking "submit" you can't go back.

1. Category of your non-profit:
 - Higher education
 - Private school
 - Arts and culture (symphony, museum, zoo, parks, etc.)
 - Healthcare (hospitals, assisted care, etc.)
 - Health-related (Heart Association, Muscular Dystrophy, ALS, etc.)
 - Relief Organization (Red Cross, Samaritan's Purse, Save the Children, etc.)
 - If other, please specify
2. What are your main responsibilities as a fundraiser?
 - Oversee mostly planned giving activities
 - Oversee mostly major gifts
 - Oversee mostly annual giving activities
 - I wear many hats
3. What profession were you in before you entered fundraising?
 - Financial field (insurance, advisor, broker)
 - Banking
 - Sales and/or marketing in the for-profit sector
 - Law
 - Ministry
 - It was my first job
 - If other, please specify
4. Do you contribute financially to charity? (Do not include small cash donations at Girl Scout stands, Kiwanis jars, etc.)
 - No
 - No, but I plan to as I get my goals/finances together
 - Yes, less than 2% of my income
 - Yes, averaging between 2% and 5 % of my income
 - Yes, averaging between 6% and 10% of my income
 - If other, please specify
5. If you need answers to planned giving questions, what is your *primary* source of information?
 - A colleague
 - A paid consultant
 - A list-serve like Gift-PL or online electronic bulletin board
 - Planned giving publications or websites
 - Local planned giving council
 - This question does not apply to my situation
6. Last fiscal year, what was your organization's overall fundraising revenue?
 - Less than \$1 million
 - Between \$1 and \$5 million

- Between \$5 and \$10 million
- Between \$10 and \$50 million
- \$50 million plus

7. Are you a member of any fundraising groups? (mark all that apply)

- No, I am not
- NCPG (National Committee on Planned Giving)
- AFP (Association of Fundraising Professionals)
- AHP (Association of Healthcare Philanthropy)
- CSA (Christian Stewardship Association)
- If other, please specify

8. Your geographic location:

- New England
- Mid-Atlantic
- Southeast
- South
- Mid-West
- Southwest
- Northwest
- Hawaii or Alaska
- Canada
- If other, please specify

9. What is your income from your current job (per year)?

- \$0 - Volunteer
- \$25,000 - \$35,000
- \$36,000 - \$45,000
- \$46,000 - \$55,000
- \$56,000 - \$65,000
- \$66,000 - \$75,000
- \$76,000 - \$85,000
- \$86,000 - \$95,000
- \$96,000 - \$105,000
- \$106,000 +

10. What is your age?

- 20-30
- 31-40
- 41-50
- 51-60
- 61+

Page 2 - - Caution: a few spicy questions ahead.

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11. What is the operating budget of your organization?
- Less than \$1 million
 - Between \$1 and \$5 million
 - Between \$5 million and \$15 million
 - Between \$15 million and \$100 million
 - Over \$100 million
12. What was your major in college?
- Humanities (Languages, Philosophy)
 - Social Sciences (Economics, Sociology, Psychology, Political Science)
 - Science/Math (Biology, Chemistry, Physics)
 - Communications
 - Business (Finance, Marketing, Management)
 - If other, please specify
13. How many *fundraisers* work in your non-profit?
- 1
 - 2
 - 3
 - 4
 - 5 plus
14. How many full-time *planned giving officers* work in your non-profit?
- None
 - 1
 - 2
 - 3
 - 4
 - 5 plus
15. Do you appeal to the Spanish-speaking community for financial support?
- Yes
 - No
 - We are planning to in the near future
16. Your non-profit organization has a policy that strictly limits any personal gifts to staff from donors. You like your job and the benefits, but you know you're being underpaid. You discover that a favorite prospect who recently died left you \$100,000 in her will, in addition to a one million dollar gift to your institution. You would:
- Disclaim/refuse the gift being given to you personally. It will go into the residue of the estate and will be paid to your prospect's heirs, others, etc.
 - Accept the money, which is tax-free, donate it to your organization, and get a tax-deduction (perfectly legal).
 - Accept the money, which is tax-free, donate it to your organization, and refuse to claim a deduction with the IRS, because any personal gain from a donor is unethical.
 - Since it is **not** against the law, take the money and quit your job.
 - Since it is **not** against the law, take the money and don't tell your boss.
 - I cannot really answer this question since I have not been tempted like this yet.
17. Let's say you disclaimed the donor's gift to you in the previous question (whether you answered that first choice or not): would you let your boss know about your action? (Remember, whether you think you're doing the right thing or not, you're still cutting your organization short by \$100,000.)
- Yes
 - No
 - Depends on my boss
18. How did your budget for *marketing* planned gifts change this past year?
- Increased
 - Decreased
 - Remained the same
 - We do not have a budget to market planned gifts although we take planned giving seriously

We do not have a budget to market planned gifts because we do not take planned giving seriously

19. How did your budget for your *overall* planned giving program change this year?

Increased

Decreased

Remained the same

We do not have a budget for planned giving although we take planned giving seriously

We do not have a budget for planned giving because we do not take planned giving seriously

20. Your gender:

Male Female

Page 3 - - We hope you're enjoying the survey...

21. Do you maintain a planned giving advisory committee?
- Yes
 - No
 - We did, but found it unhelpful to our fundraising efforts
 - I do not know what this is
22. What is your title?
- VP or Director of Advancement or Development
 - Director of Major Gifts (only)
 - Director of Annual Giving
 - Director of Planned Giving (or Gift Planning)
 - Director of Planned Giving and Major Gifts (or Gift Planning and Major Gifts)
 - If other, please specify
23. What is the title of the person at your institution to whom you report?
- President/CEO
 - Director (or VP) of Development/Advancement/Major Gifts
 - Board
 - If other, please specify
24. Do you plan for your next day ahead of time?
- Yes, in writing and notes
 - Yes, in my head
 - No, no need to. Events just happen and fall into place.
 - Not at all. I am somewhat chaotic.
25. Planned giving is not an important component of fundraising.
- Strongly Agree
 - Agree
 - Neutral
 - Disagree
 - Strongly Disagree
26. Are you left handed or right handed?
- Left handed
 - Right handed
 - I am ambidextrous
 - I do not know
27. Do you have minimum call-quotas or gift-goals that you must meet?
- Yes
 - No
 - I do not know
28. How many personal donor/prospect visits did you make last year?
- 0 - 20
 - 21 - 40
 - 41 - 60

- 61 - 80
- 81 - 100
- 101 plus

29. Based on the previous question, choose one of the following that you best agree with.

- I visited enough donors
- I could have visited more but my time did not allow
- I could have visited more but my budget did not allow
- I could have visited more but my boss did not allow
- I really do not need to visit more donors. The money just comes in.
- It's not in my job description to visit donors.

30. Do you count outright transfers from IRA's (Rollover Act) in your planned giving totals, or are they added to major-outright totals?

- Planned giving totals
- Major-outright totals
- It depends on how my monthly planned giving totals are looking
- I really do not understand the question
- We did not pursue these types of gifts seriously

Page 4 - - You're over 50% done.

31. This survey is beginning to give me a headache (check all that apply).
- Agree
 - Disagree
 - It's fun so far
 - I am bored today so I am doing you a favor
 - It is a unique survey. I like your approach and would take another one.
 - I can't wait to see the results.
32. What percentage of your organization's planned gift and major gift totals in the past fiscal year was composed of outright, lifetime IRA transfers encouraged by the Rollover Act?
- Less than 5%
 - Maybe between 5% and 15%
 - Definitely over 15%
 - We did not keep track
 - I really do not understand the question
33. Do you think the IRA Rollover will significantly affect your bottom line as well as other gift plans can?
- Yes
 - No
 - I am not sure
 - I do not understand the question
34. What was the approximate median age of the donors who told you last year that they had included your organization in their wills?
- 40-45
 - 46-50
 - 51-55
 - 56-60
 - 61-65
 - 66-70
 - 71-75
 - 76+
 - I do not know
35. What was the approximate median age of the donors who closed a life-income gift benefitting your organization last year?
- 40-45
 - 46-50
 - 51-55
 - 56-60
 - 61-65
 - 66-70
 - 71-75
 - 76+
 - I do not know
36. Do you think your salary is comparable to other fundraisers in your same field in your area?

- Yes, I get paid just right or even more
- No, I am underpaid
- I am not sure
- I really do not care because this is my passion

37. At the end of the day I would prefer

- A Pabst Blue Ribbon
- An unassuming but surprising lively '02 Cotes du Rhone
- A dry Belvedere martini, 3 olives
- A Starbuck's Cinnamon Dolce Latte with Sugar-Free Syrup
- No thanks, it's time for my tai-chi in the back yard

38. My political leanings are

- Mostly conservative
- Mostly liberal
- I really don't care
- I really don't know

39. My diet consists of

- Mostly junk food
- I am a vegetarian or a vegan
- I am not selective but eat well
- I really can't say
- If other, please specify

40. Do you feel earning a CFRE is important for your career?

- Yes
- No
- Somewhat
- I do not know what a CFRE is

Page 5 - - You're almost there.

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41. Has a prospective employer ever asked you whether you hold a CFRE certification?
- Yes No
42. My religion is
- Protestant
- Catholic
- Jewish
- Muslim
- Buddhist/Hindu
- Agnostic / Atheist
- If other, please specify
-
43. Although this survey is guaranteed to be 100% confidential, you are asking some questions that are just too sensitive for some people to answer honestly.
- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
44. Most of my colleagues in planned giving tend to be too technical in their approach to gift planning and therefore should be more people-friendly instead.
- Agree Disagree It's mostly 50-50 I do not know
45. If I had a choice, my favorite game to watch would be
- Tennis
- Football
- Baseball
- Soccer
- Hockey
- I do not like to watch sports
46. Only about 5% of this nation's wealth is in cash.
- Agree.
- Disagree. Most of our wealth is in cash.
- Disagree. It's more like 50-50 between cash and other assets.
47. Annual giving, plus funds raised from special events, will almost always bring in more dollars than planned giving can.
- Agree Disagree I don't know
48. Planned giving is the future of fundraising.
- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
49. Your organization should be investing more effort into pursuing planned gifts.
- Strongly Agree

- Agree
- Neutral
- Disagree
- Strongly Disagree

50. Planned gifts take a long time to mature, often as long as 15 years.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

Page 6 - - Thank you... your last question plus optional feedback.

51. Does your CEO or boss support or hinder your efforts to close planned gifts?

- Helps
- No special influence (negative or positive)
- Hinders

52. Your turn. What did we miss? What questions should have been clearer or more detailed? What else would you like to know about your colleagues, personally and professionally? This block will take up to 2,000 words. Go!

