

Planned Giving Round Table of Arizona

Speaker: Robert Hopkins

Topic: "Once You've Seen One, You've Seen

Date: August 16, 2011

	(Unsatisfactory)					(Very Satisfactory)		Avg	Responses
	1	2	3	4	5	Total			
Materials clear and complete	2	1	7	5	2	55	3.2		17
Oral Presentation clear and on point	1	5	6	5	2	59	3.1		19
Material/Topic Relevant to your Practice	1	1	7	8	2	66	3.5		19
Speaker Knowledgeable	1		8	6	4	69	3.6		19
Level of Presentation	1	4	6	6	2	61	3.2		19
Hear this speaker again	5	7	3	2	2	46	2.4		19
Location	1	1		6	9	72	4.2		17
Facilities	2		1	6	7	64	4.0		16
Comments									5

Difficult to hear. Please use a mike - would love to hear all that the presenter has to share. Was great information that the speaker presented. Noise from the adjacent room.

Could not hear most of the remarks because of the noise from the room north of us. We should ask speakers to use a microphone. The group behind our room was really loud - use a microphone.

Pre-workshop coordination/planning to assist speaker with technical part of presentation would ensure better flow.. Too much noise from other room makes it hard to hear the presentation.

Great

Meeting next door very loud

Too anidiotial-no clear message or teachings

Hard to hear but rest was great-including food and friendliest of audiences-appreciate handouts

RSVP Count	34
Guaranteed	34
Acutally Set	39
At The Door	6
No Shows	1
Membership Total	79

Planned Giving Round Table of Arizona

Speaker:

Brenda Blunt

Topic:

Practical Considerations for Non-Profit Board Members

Date:

20-Sep-11

	1	2	3	4	5	Total	Avg	Responses
Materials clear and complete				5	14	90	4.7	19
Oral Presentation clear and on point				2	17	93	4.9	19
Material/Topic Relevant to your Practice			2	4	13	87	4.6	19
Speaker Knowledgeable				1	18	94	4.9	19
Level of Presentation				3	16	92	4.8	19
Hear this speaker again				2	17	93	4.9	19
Location			1	4	14	89	4.7	19
Facilities			1	4	14	89	4.7	19
Comments								3

Very engaging and approachable. Would be a good addition to the program for June.

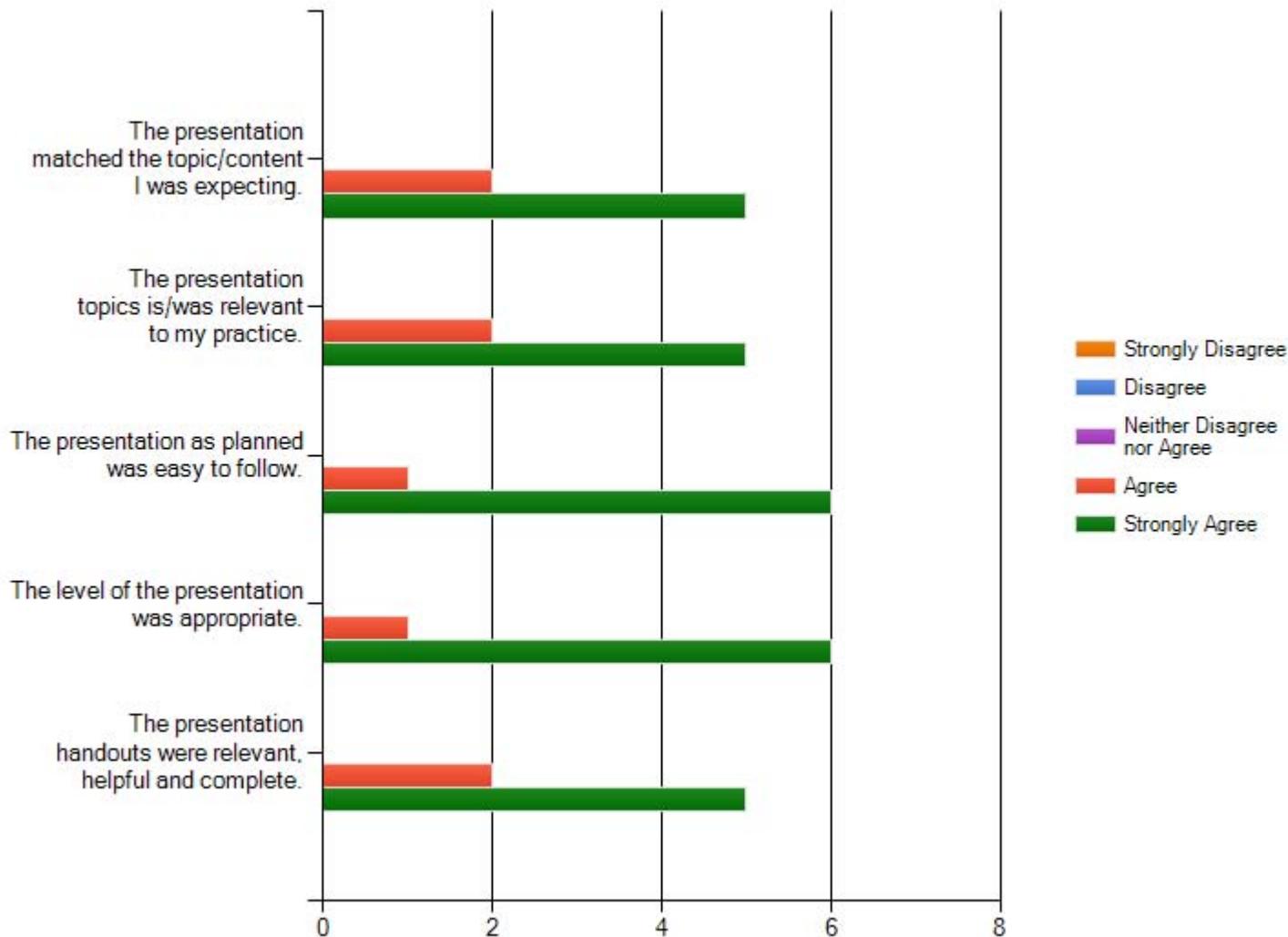
Brenda brough humor to a very taxing topic. Great info.

Excellent presentation. One of the best and very useful for my organization.

Attendance:

RSVPs	Grntee	Sat	Notes
38	40	34	2 ATD/6 NS

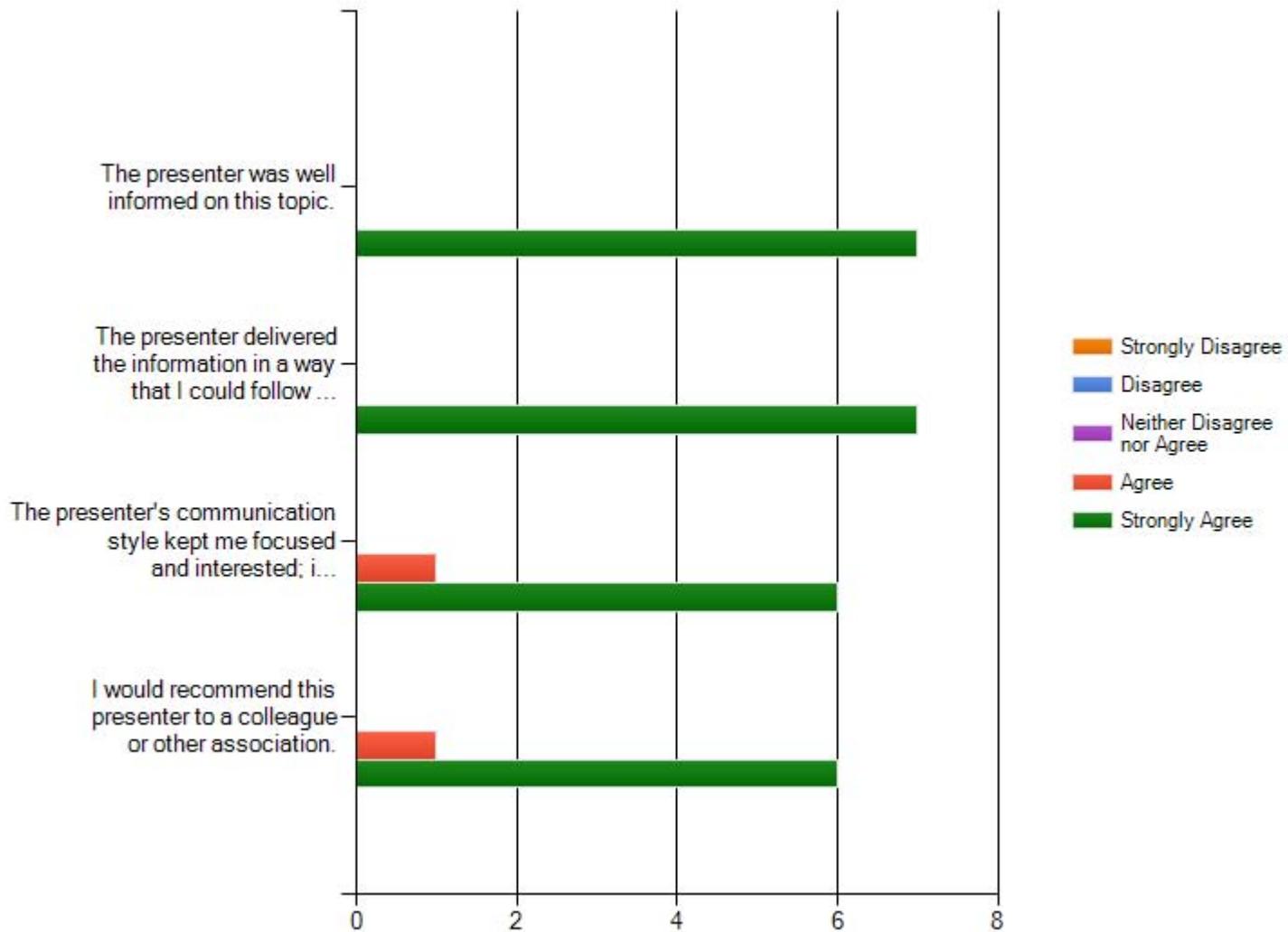
Did we select the right topic?



Page 1, Q1. Additional comments on the presentation topic or suggestions for future topics

- | | | |
|---|---|-----------------------|
| 1 | very well done | Sep 20, 2011 10:50 PM |
| 2 | Brenda is a great speaker - it was a great idea someone had to bring their board members to the presentation. | Sep 20, 2011 10:10 AM |

Did we get the right presenter?

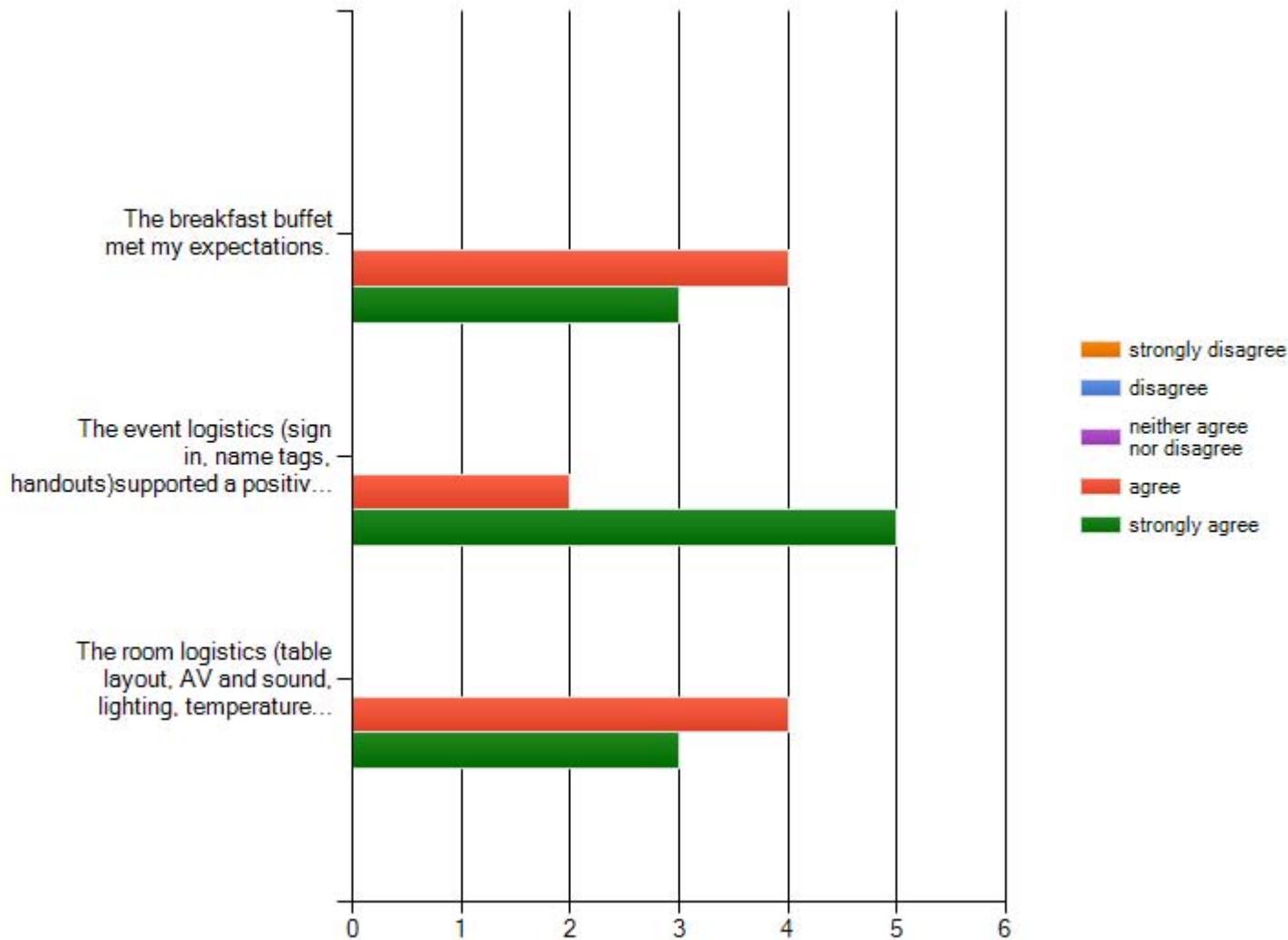


Page 2, Q1. Additional comments on the presenter or other presenters you'd like to see.

1 excellent knowledge and info...great job

Sep 20, 2011 10:51 PM

Please tell us about the venue and logistics experience.



Page 3, Q1. Additional comments on the venue and logistics:

1 I wish the meals could be purchased online via a credit card.

Sep 20, 2011 1:11 PM

Planned Giving Round Table of Arizona

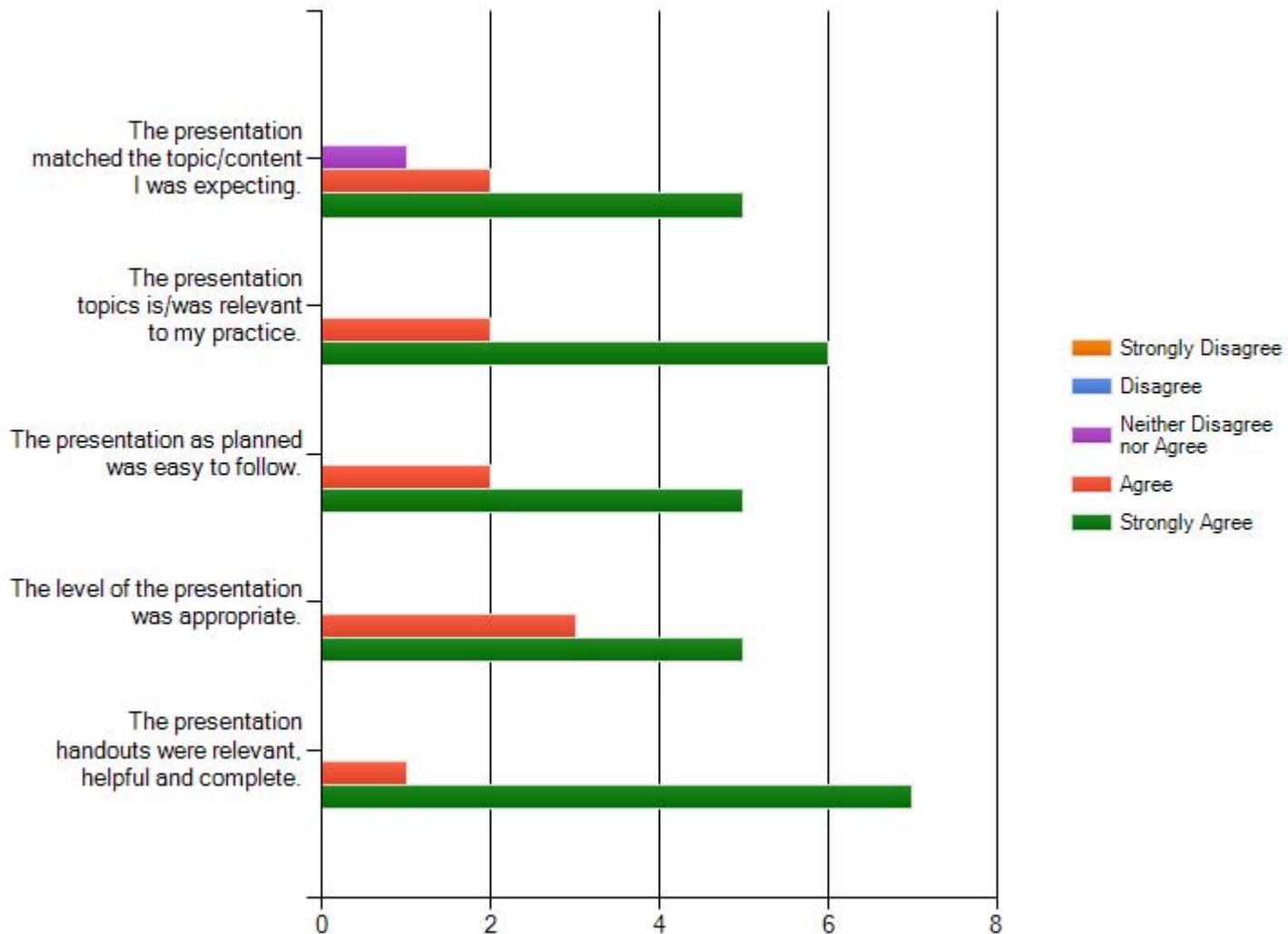
Speaker: Thomas Dietrich

Topic: Shades of Gray: Issues Affecting An .

Date: October 18, 2011

	(1=Unsatisfactory)				(5=Very Satisfactory)		Responses
	1	2	3	4	5	Total	Avg
Materials clear and complete		9	12		96	4.6	21
Oral Presentation clear and on point		6	15		99	4.7	21
Material/Topic Relevant to your Practice		7	13		93	4.7	20
Speaker Knowledgeable		2	19		103	4.9	21
Level of Presentation		7	14		98	4.7	21
Hear this speaker again	2	5	19		121	4.7	26
Location	2	4	11		77	4.5	17
Facilities	2	5	14		96	4.6	21
Comments					0		0
Excellent Speaker							
Very well done!							
Great. Would love to hear him speak on more topics							
"Social Media" as used in Planned Givning Marketing?							
Wonderful speaker and presentation							
Great program and speaker							

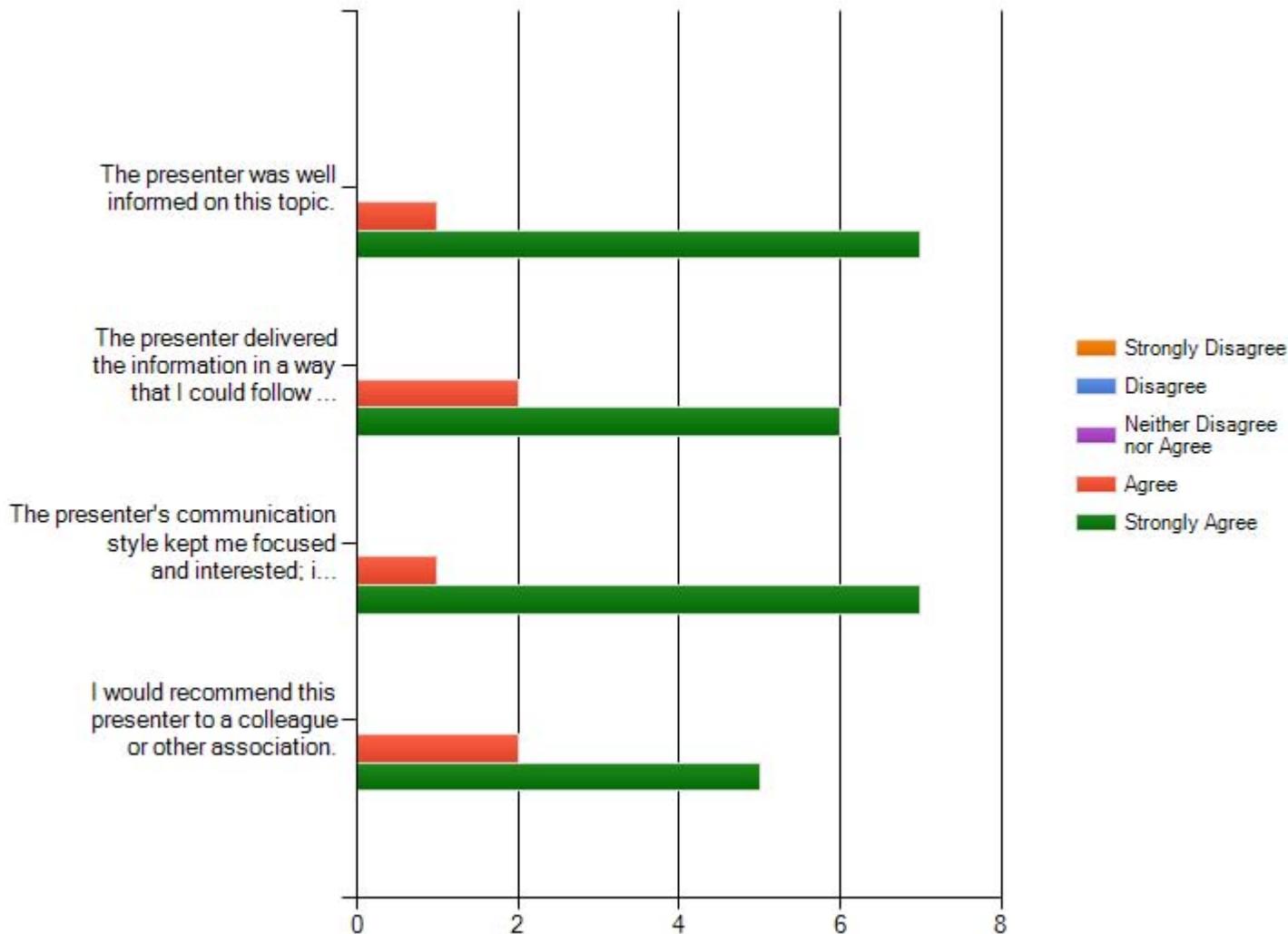
Did we select the right topic?



Page 1, Q1. Additional comments on the presentation topic or suggestions for future topics

- | | | |
|---|--|-----------------------|
| 1 | GREAT TOPIC AND VERY RELEVANT! | Oct 19, 2011 11:04 AM |
| 2 | Depressing topic but useful in directing target marketing. | Oct 19, 2011 10:31 AM |

Did we get the right presenter?

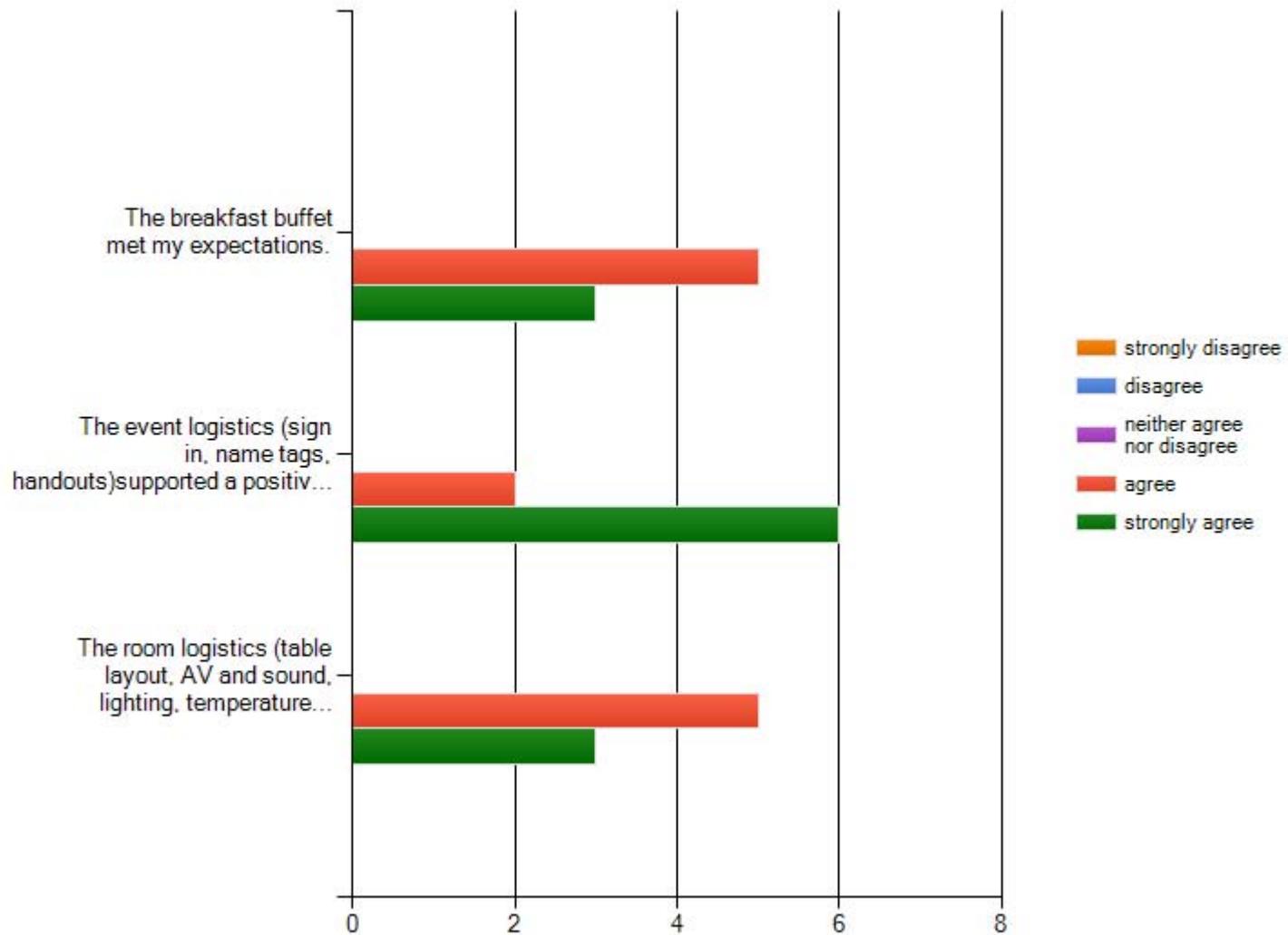


Page 2, Q1. Additional comments on the presenter or other presenters you'd like to see.

1 WHAT A FABULOUS SPEAKER HE WAS. I THOROUGHLY ENJOYED IT.

Oct 19, 2011 11:04 AM

Please tell us about the venue and logistics experience.



Page 3, Q1. Additional comments on the venue and logistics:

1	Party next door was loud. Lunch buffet (not breakfast)	Oct 19, 2011 2:38 PM
2	GREAT LUNCH	Oct 19, 2011 11:04 AM

Planned Giving Round Table of Arizona

Speaker:

Rob Leslie

Topic:

Reviewing Non-Profit Financials: Identifying Red Flags

Date:

15-Nov-11

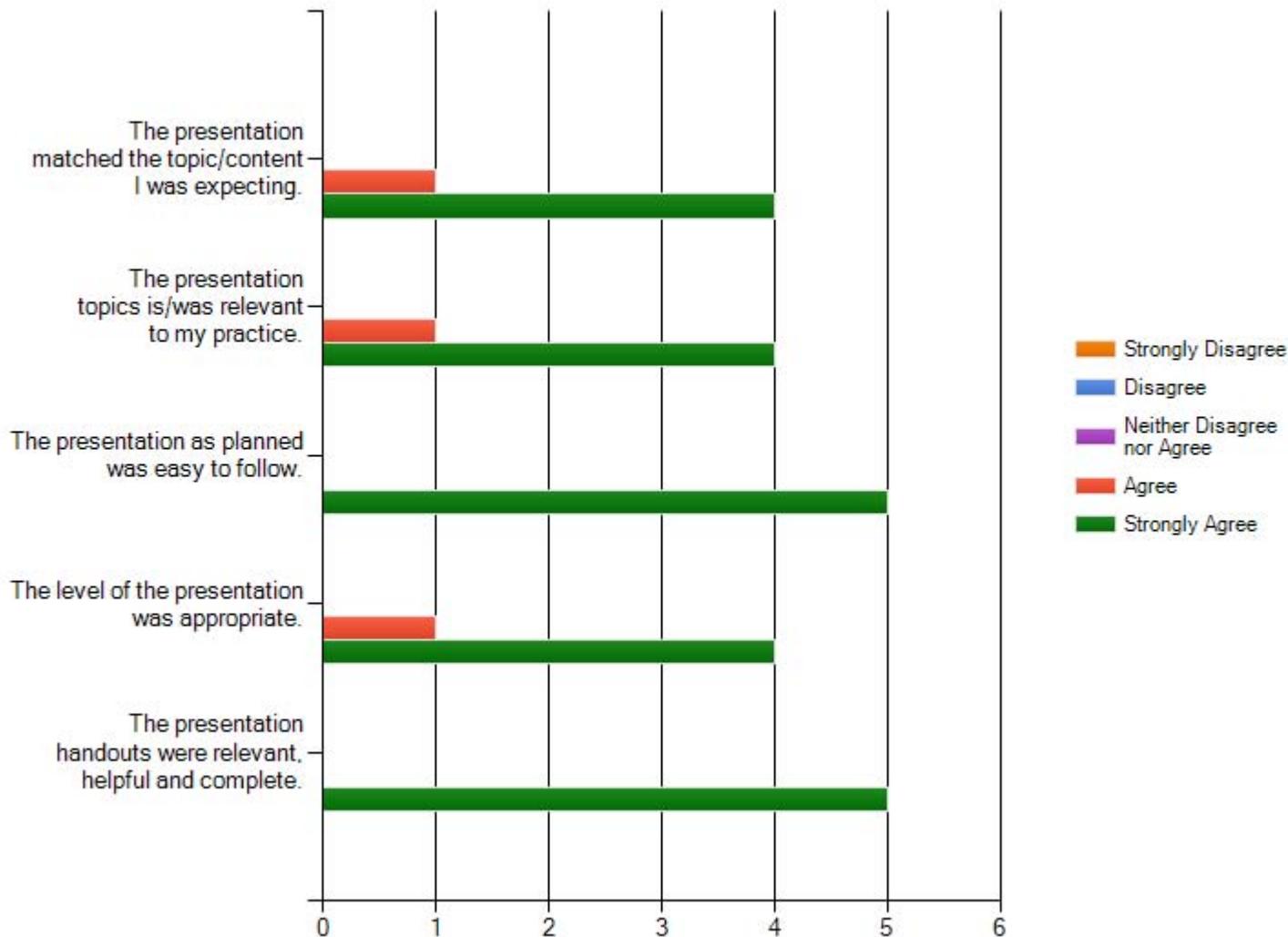
	1	2	3	4	5	Total	Avg	Responses
Materials clear and complete				3	20	112	4.9	23
Oral Presentation clear and on point				1	22	114	5.0	23
Material/Topic Relevant to your Practice	1		5	17		108	4.7	23
Speaker Knowledgeable				23		115	5.0	23
Level of Presentation				4	19	111	4.8	23
Hear this speaker again	1			22		113	4.9	23
Location			5	17		105	4.8	22
Facilities	1		5	16		103	4.7	22
Comments								3

Great reminder! Well done - complicated topic. Great program. Excellent speaker - consider having him at Summer Forum. We need more of his caliber! Very informative.

Excellent, understandable presentation. May have been complex for some attendees.

This is the best I've heard in a long time!

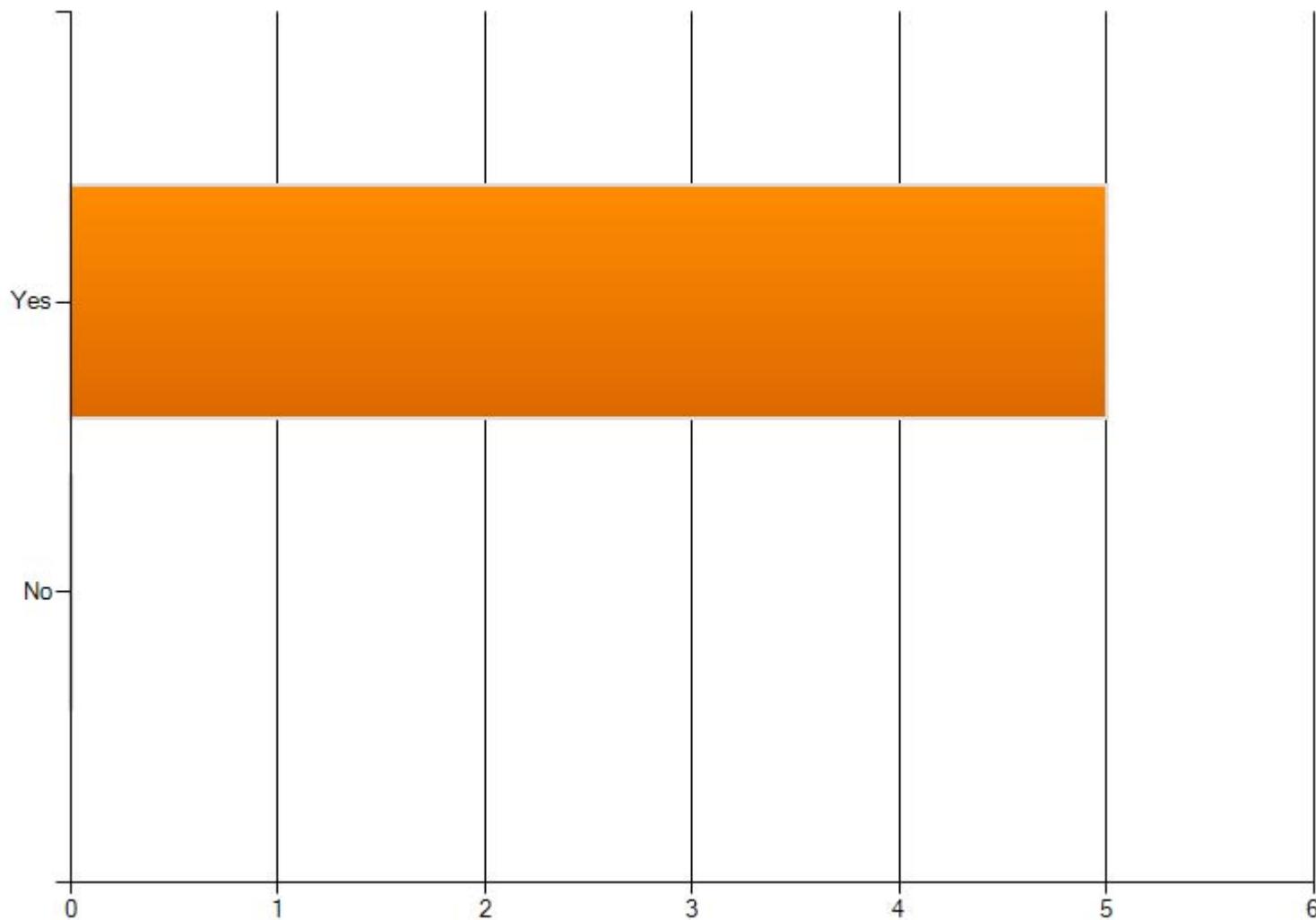
Did we select the right topic?



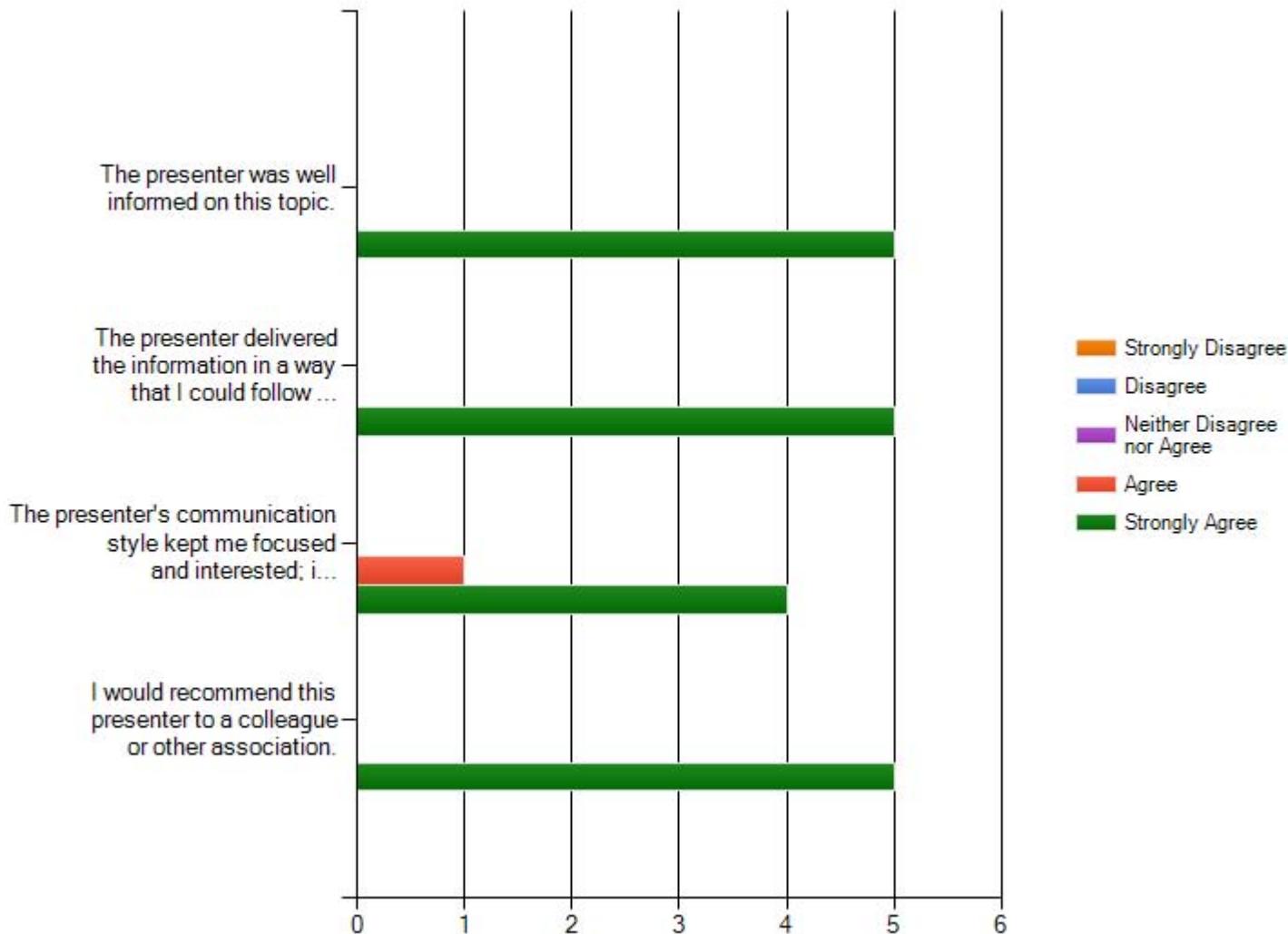
Page 1, Q1. Additional comments on the presentation topic or suggestions for future topics

- | | | |
|---|--|----------------------|
| 1 | Can the presentation be sent via email? I would be interested in reading a visable copy of the financials. | Nov 16, 2011 4:46 AM |
| 2 | presenter knew his subject & presented very well | Nov 15, 2011 8:35 PM |

I learned at least one useful or new thing at this month's meeting



Did we get the right presenter?

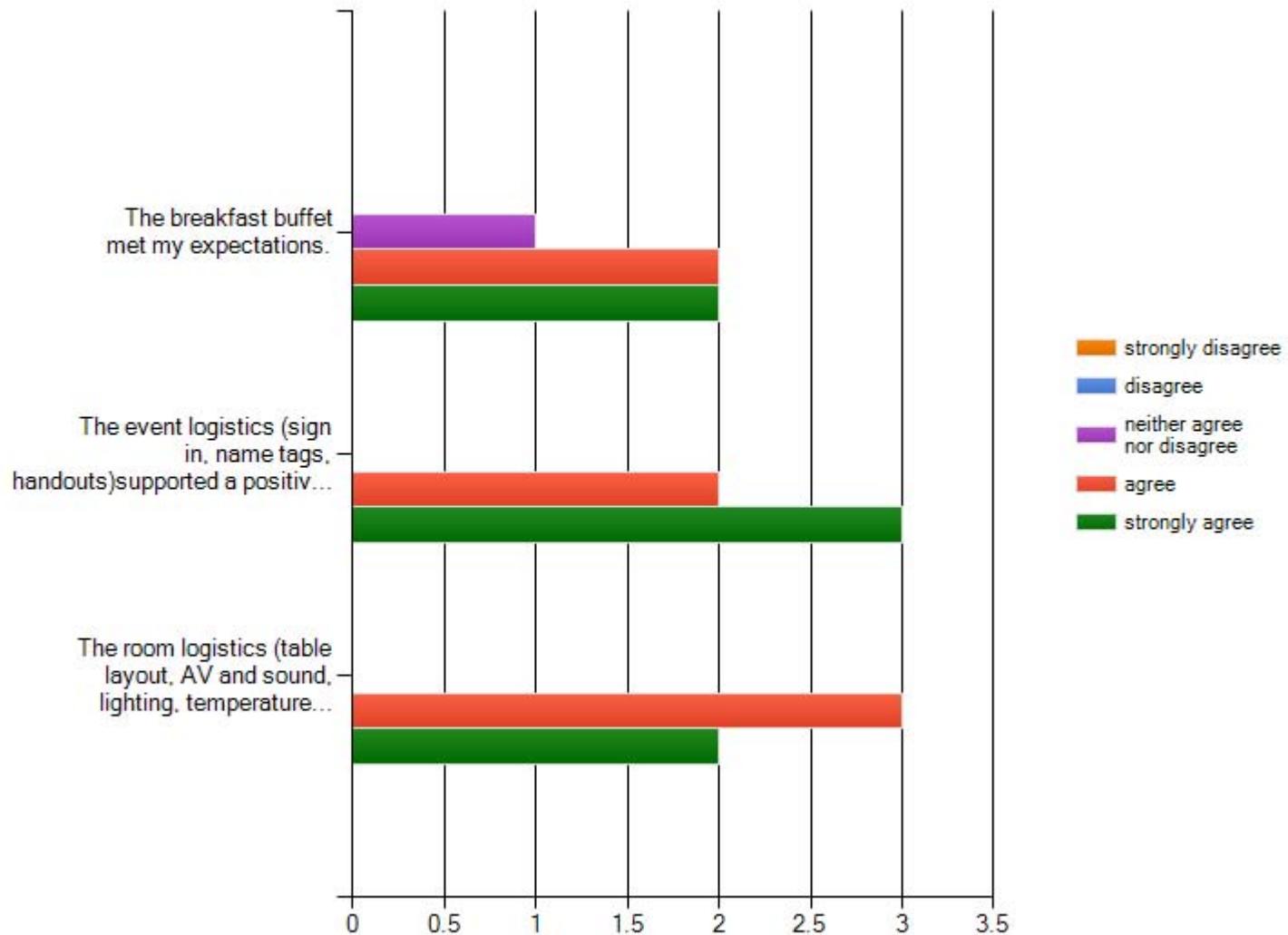


Page 2, Q1. Additional comments on the presenter or other presenters you'd like to see.

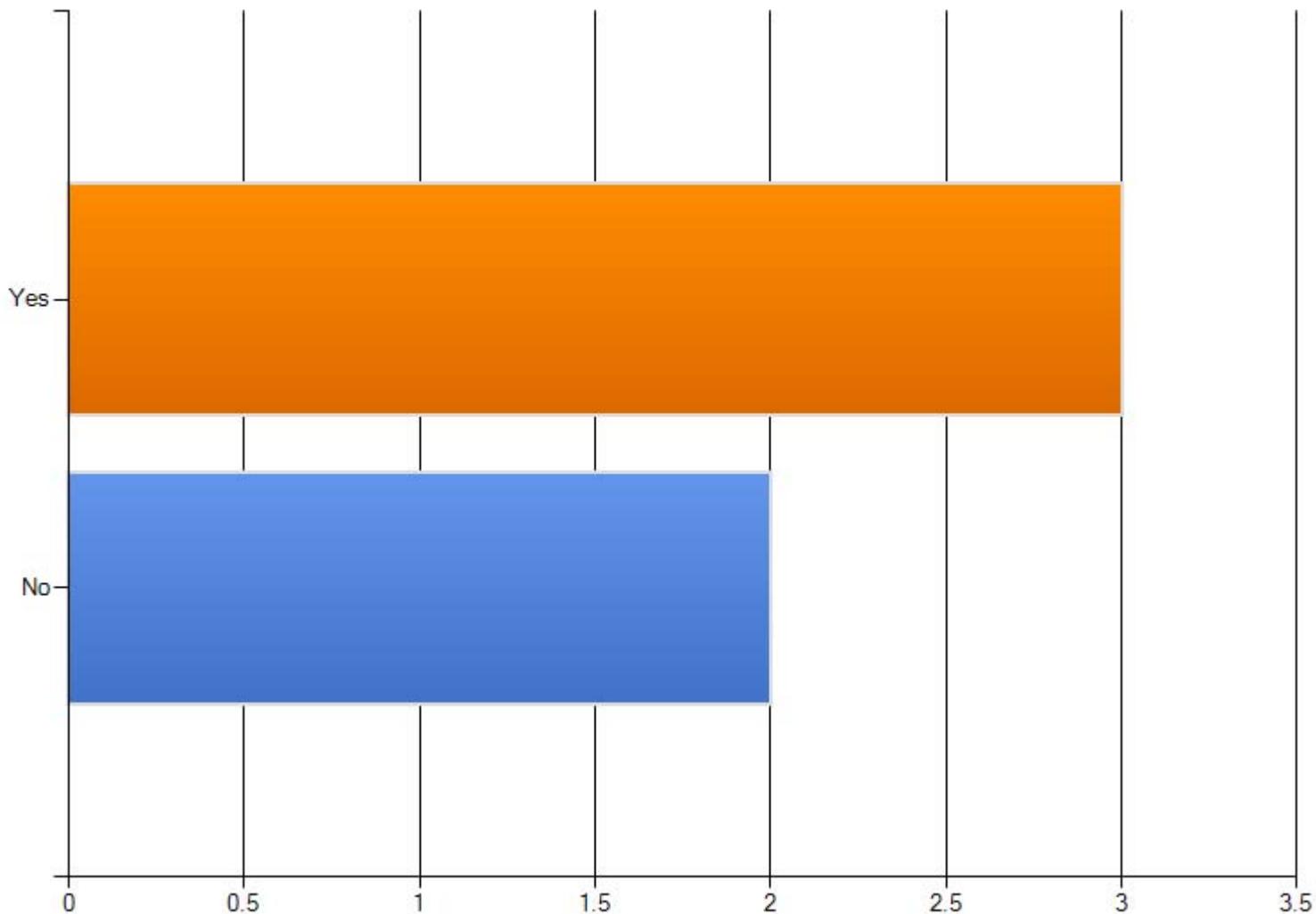
1 just a little bit rushed at the end.

Nov 16, 2011 7:32 AM

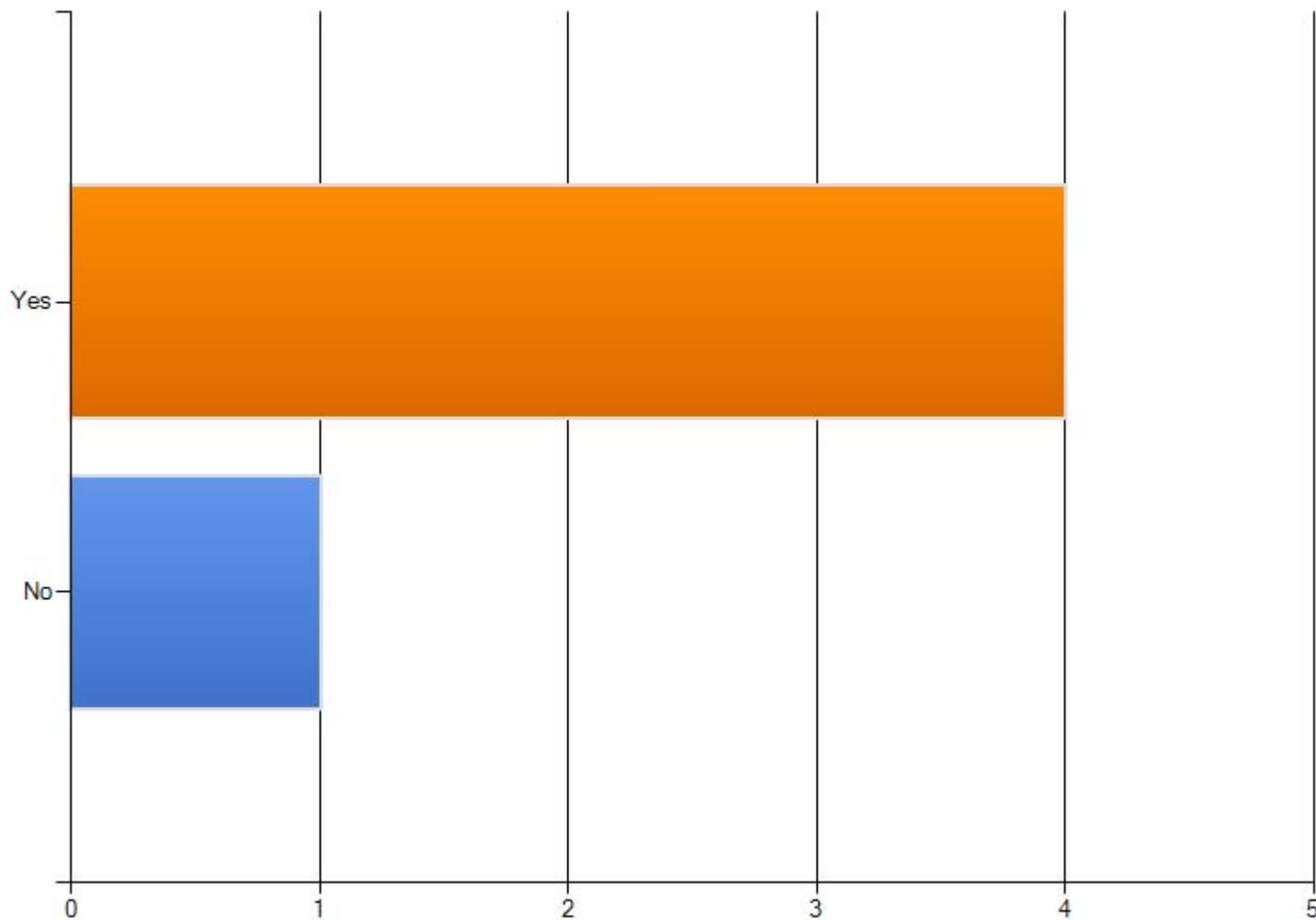
Please tell us about the venue and logistics experience.



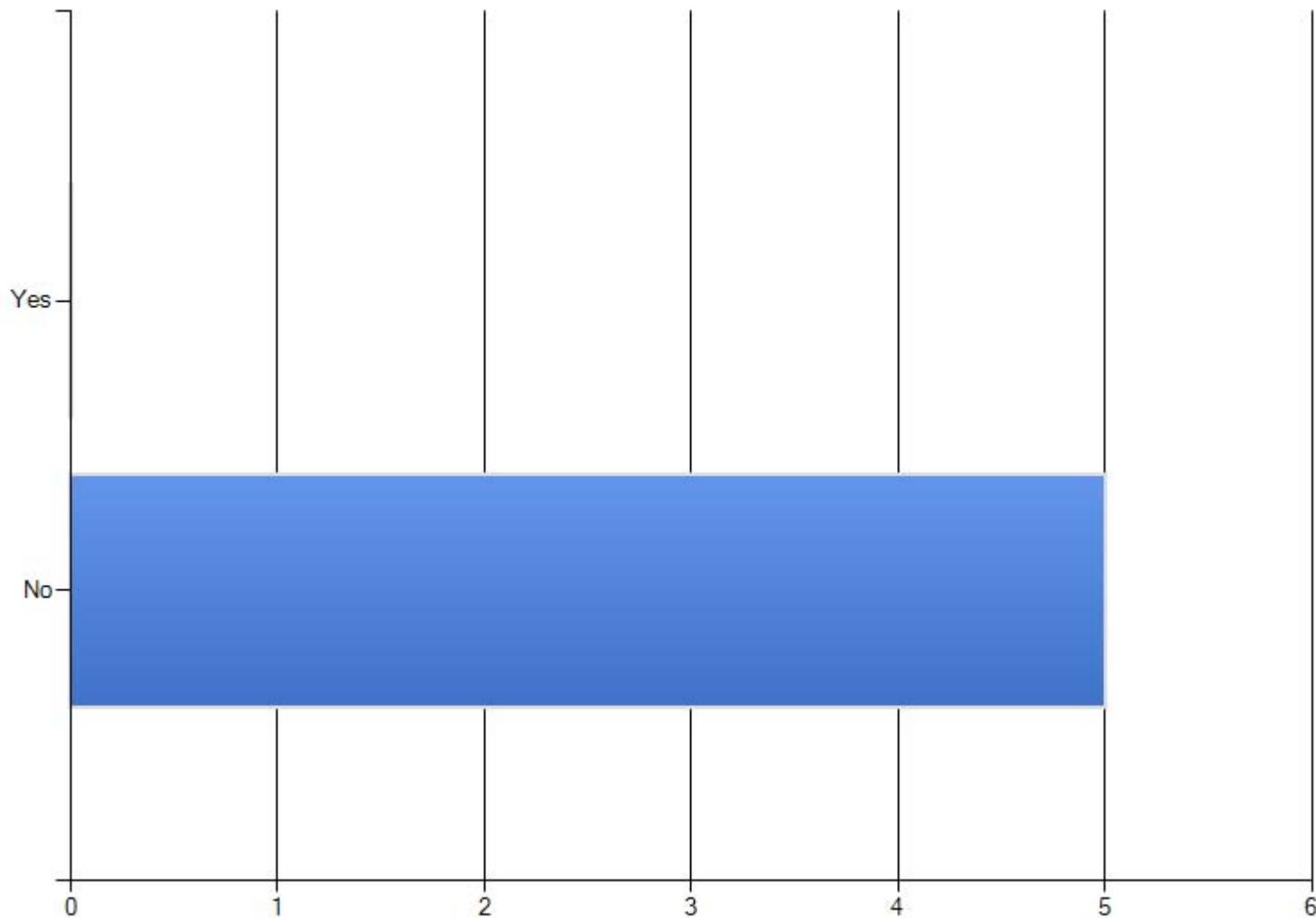
I met at least one new gift planner at this month's meeting



I was able to connect with someone at the meeting I needed to see.



I either received, or made, a referral to/from a fellow gift planner at this month's meeting.



Planned Giving Round Table of Arizona

Speaker:

Maryglenn Boals

Topic:

Date:

Planned Giving and Long Term Care Planning: Collaboration or Competition?

(1=Unsatisfactory) (5=Very Satisfactory)

1 2 3 4 5 Total Avg Responses

RSVP count	Guaranteed	Actually set	Notes	+/- RSVP	Members
37	37	37	3 ATD/3 NS	0	79

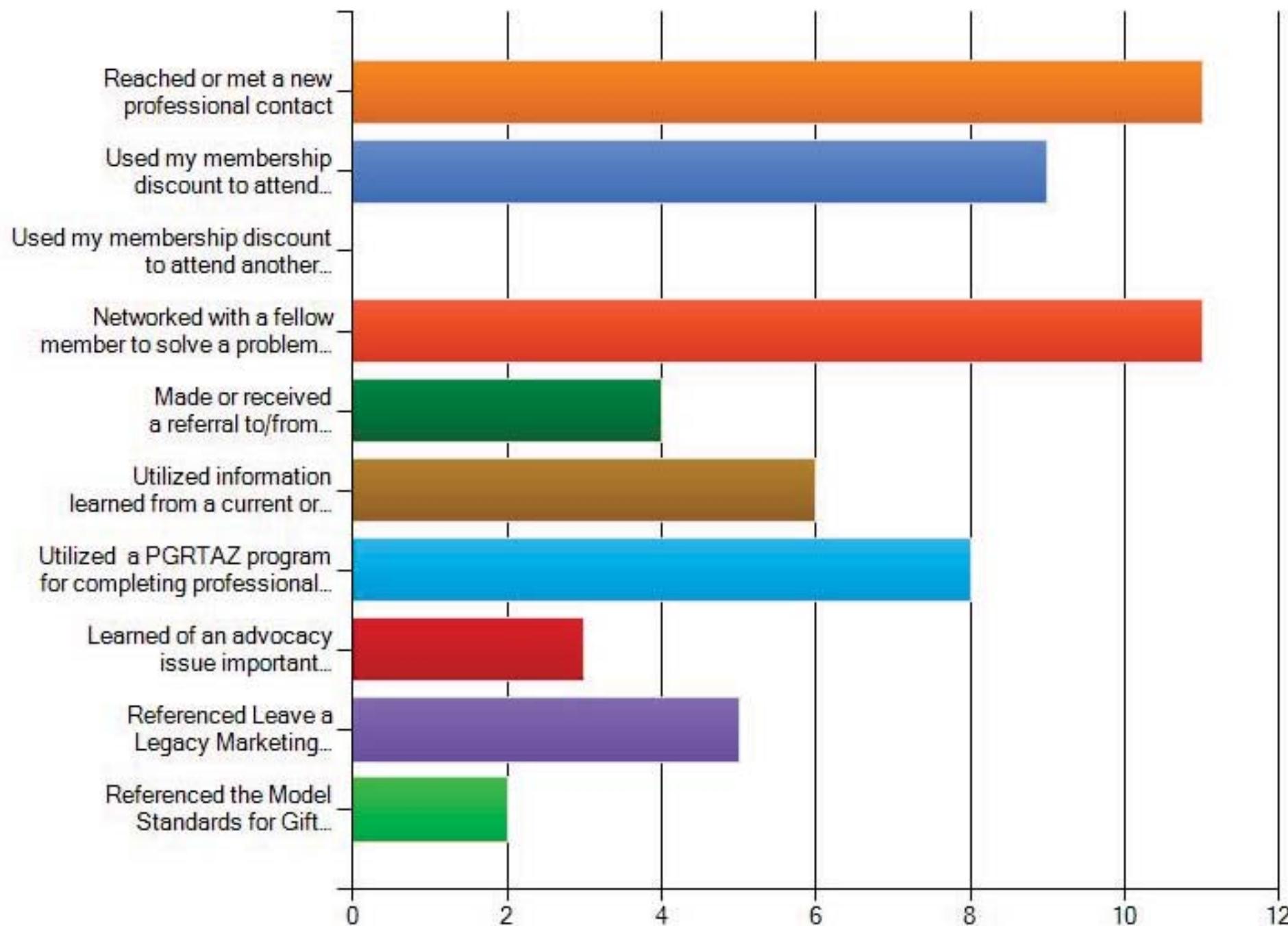
Materials clear and complete			5	10	70	4.7	15
Oral Presentation clear and on point		1	4	10	69	4.6	15
Material/Topic Relevant to your Practice		4	7	3	55	3.9	14
Speaker Knowledgeable			2	13	73	4.9	15
Level of Presentation		1	3	10	65	4.6	14
Hear this speaker again	1	2	5	7	63	4.2	15
Location		1	4	8	59	4.5	13
Facilities			4	9	61	4.7	13
Comments					0		0

Eggs were awfully rubbery

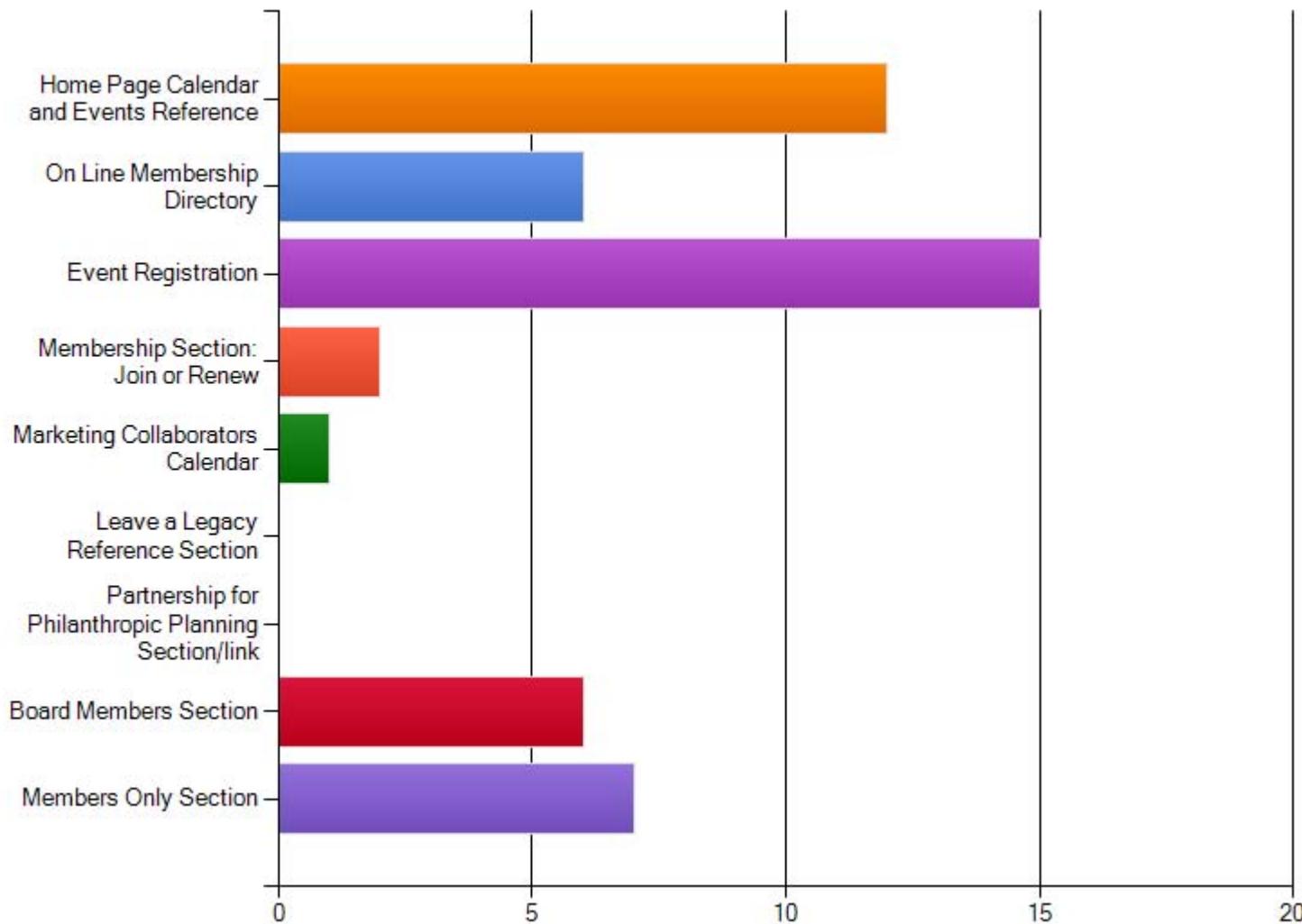
Well done-important topic

Go through sign up for LTC policy-cost=how long effective-what happens to maoney unused in policy?

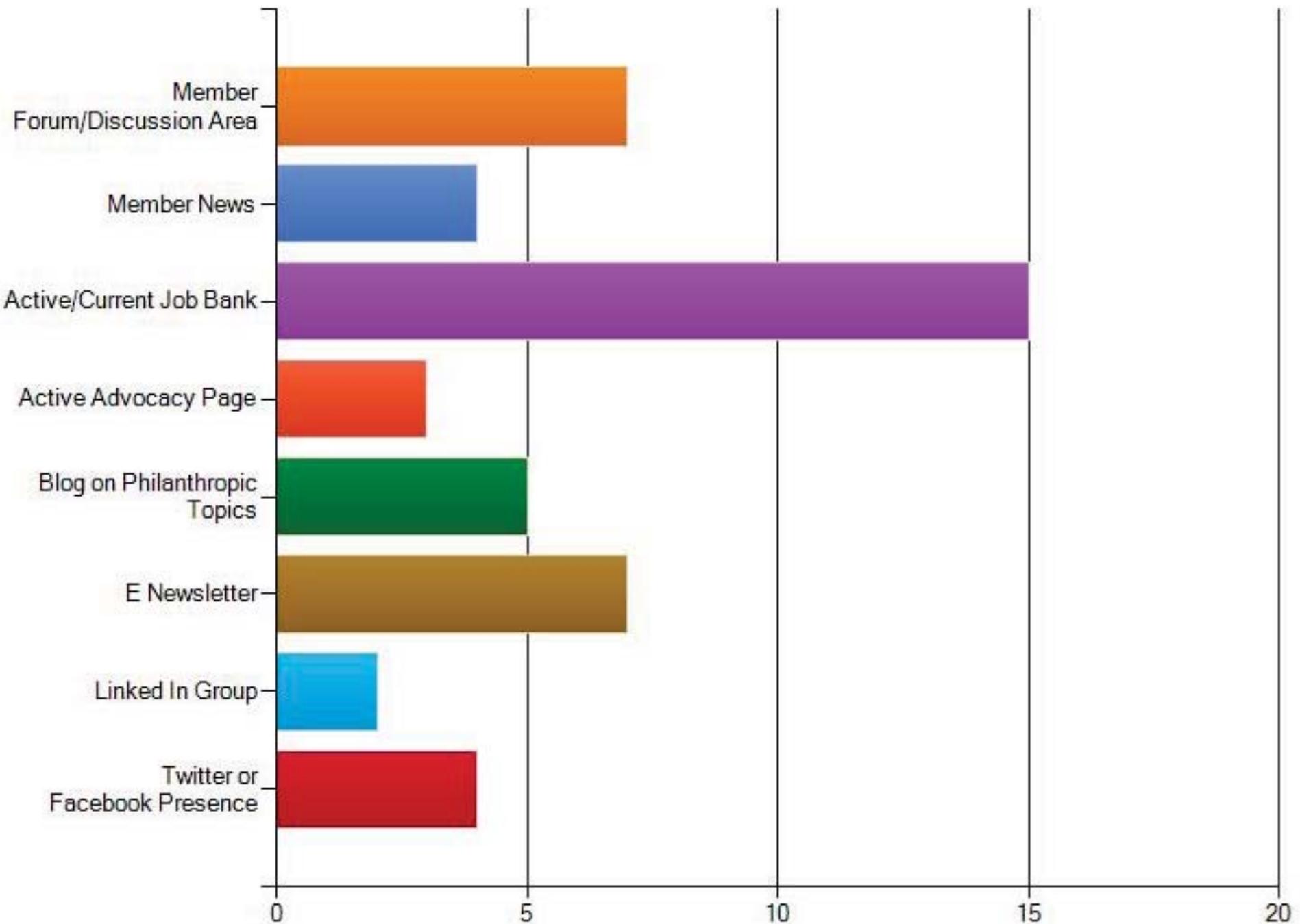
Recent PGRTAZ Membership Impacts



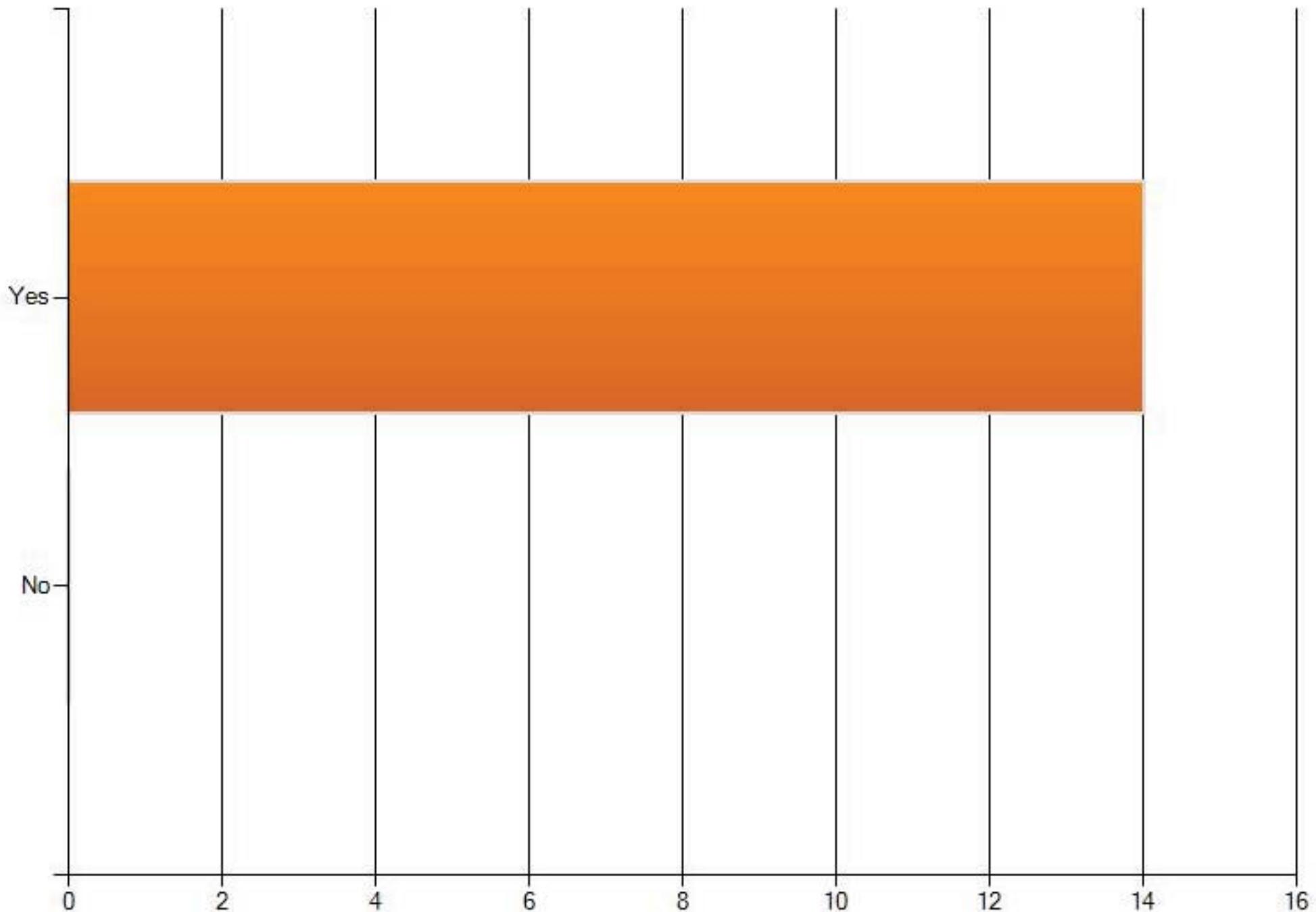
PGRTAZ Website Services I used/referenced this month:



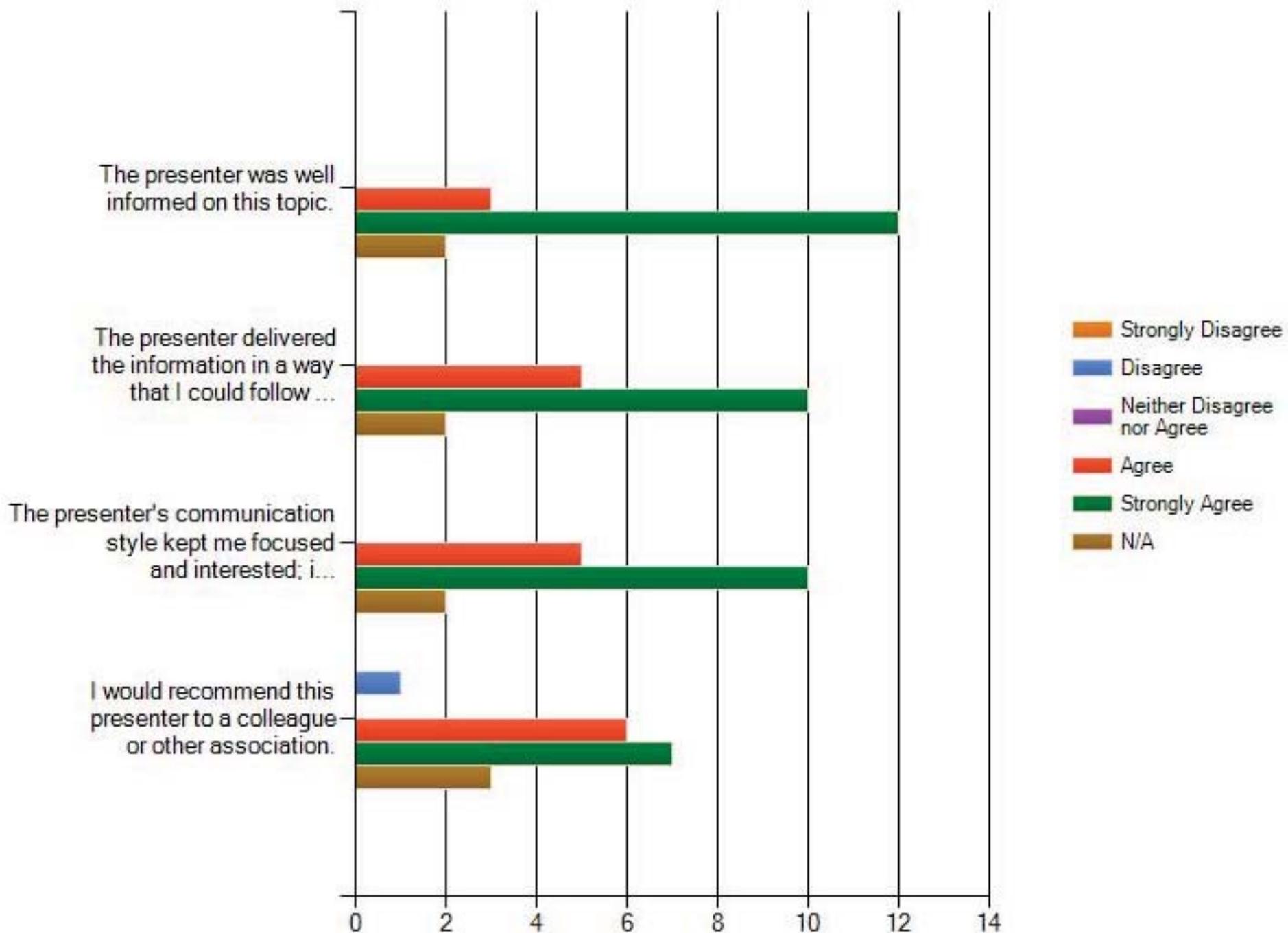
Website Features I would like to see added next:



I learned at least one useful or new thing at this month's meeting



Did we get the right presenter?

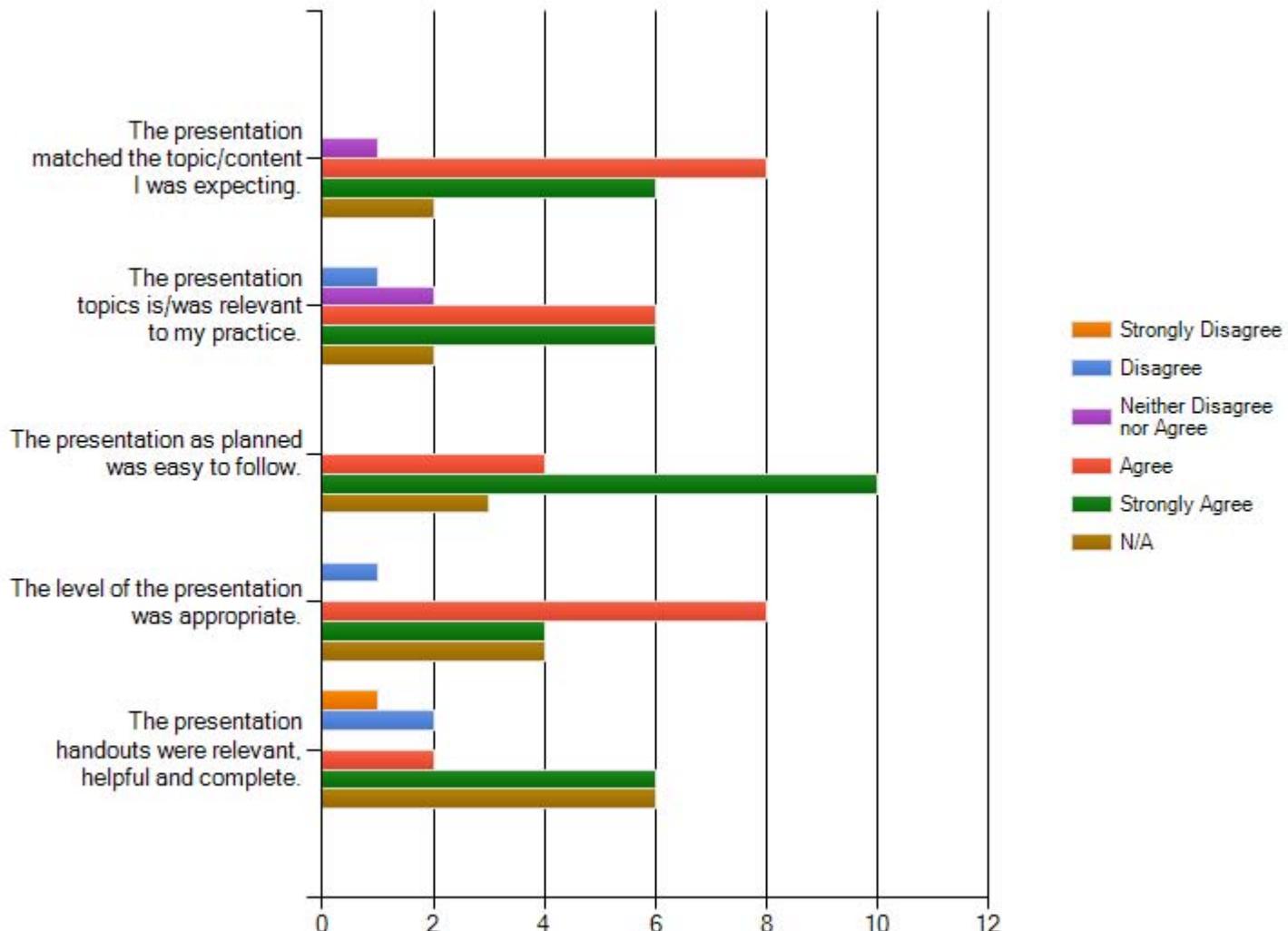


PGRTAZ Monthly Member Survey: January 2012

Additional comments on the presenter or other presenters you'd like to see.

I would like to know how we could or even if we could more closely tie Long term care issues to philanthropy. She was very professional and knowledgeable.

Did we select the right topic?



PGRTAZ Monthly Member Survey: January 2012

Additional comments on the presentation topic or suggestions for future topics

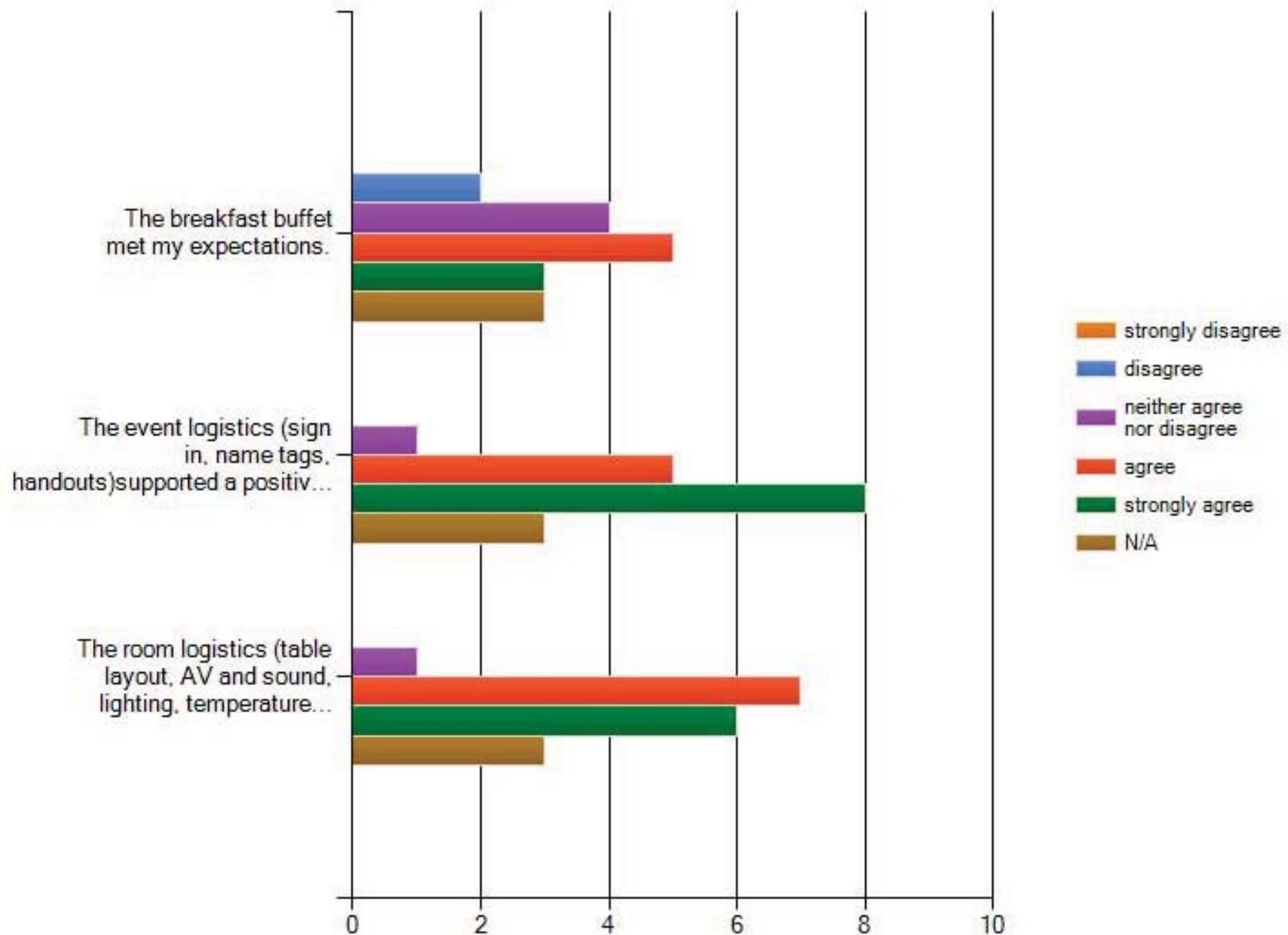
I found the presentation interesting on a personal levek and it also helped to provide a deeper understanding of our target donor audience. Still, it might have been better if we could have connected it more to gift planning concepts.

This was a unique topic for our group. I am wondering if there is any evidence to show that people depleting their assets because of the need for long term care is having an impact on planned giving or just philanthropy?

This topic was not only helpful in my job and also personally.

I think sales people can be great presenters, as long as they know they cannot use an educational format as a sales tool.

Please tell us about the venue and logistics experience.



PGRTAZ Monthly Member Survey: January 2012

Please tell us about the venue and logistics experience.

Phoenix Country Club is a great venue for the meetings.

The sun glared in my eyes around the window shades for the last 30 minutes which was uncomfortable.

glad the presenter used the lavalier, especially when the background noise picked up.

the buffet is not very substantial for those with food allergies and for the price.

PGRTAZ Monthly Member Survey: January 2012

If you were unable to join this month's meeting, or if you have other items
for board consideration that would keep your membership value high,

Was unable to attend meeting.
unable to attend this time.
I live in Flagstaff and have other commitments this month

Planned Giving Round Table of Arizona

Speaker:

Robert F Sharpe, Jr.

Topic:

New Approaches for Today's Realities

Date:

21-Feb-12

(1=Unsatisfactory) (5=Very Satisfactory)

	1	2	3	4	5	Total	Avg	Responses
Materials clear and complete	3	11	18			143	4.5	32
Oral Presentation clear and on point	1	7	24			151	4.7	32
Material/Topic Relevant to your Practice	3	12	17			142	4.4	32
Speaker Knowledgeable	1		31			158	4.9	32
Level of Presentation	3	8	21			146	4.6	32
Hear this speaker again		2	30			158	4.9	32
Location	2	6	19			125	4.6	27
Facilities	2	18	17			163	4.4	37
Comments						0		0

Handouts with only 2 slides per page would be more helpful-many slides on handout too small

Excellent-knowledgeable

Fast pace

Great speaker

Great speaker! Bring him back!

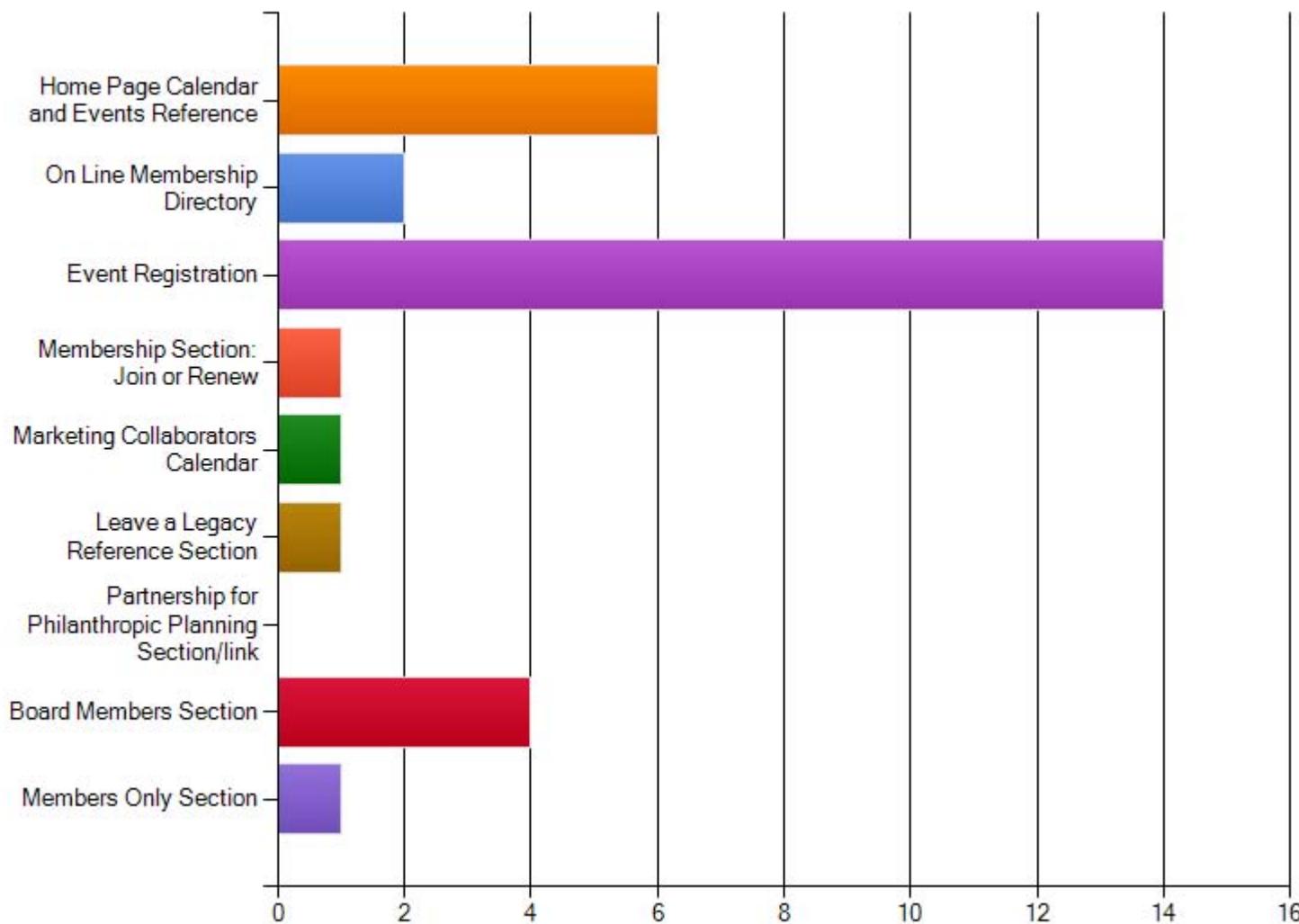
Great! Hard to see specifics on slides & handouts. 2 up is nicer

Three slides per page made it difficult to read many of them

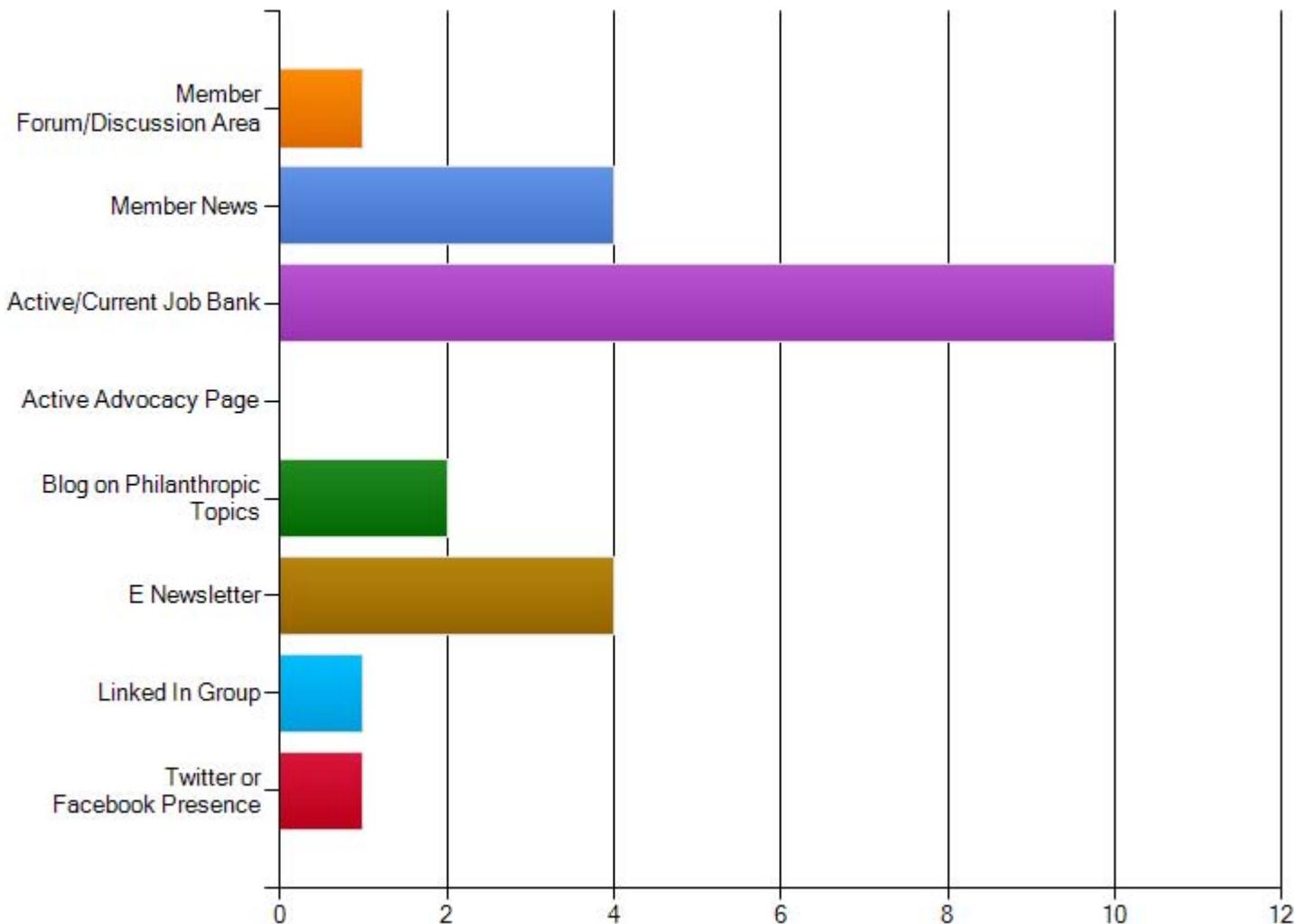
Great presentation

Room too small for this size group

PGRTAZ Website Services I used/referenced this month:



Website Features I would like to see added next:

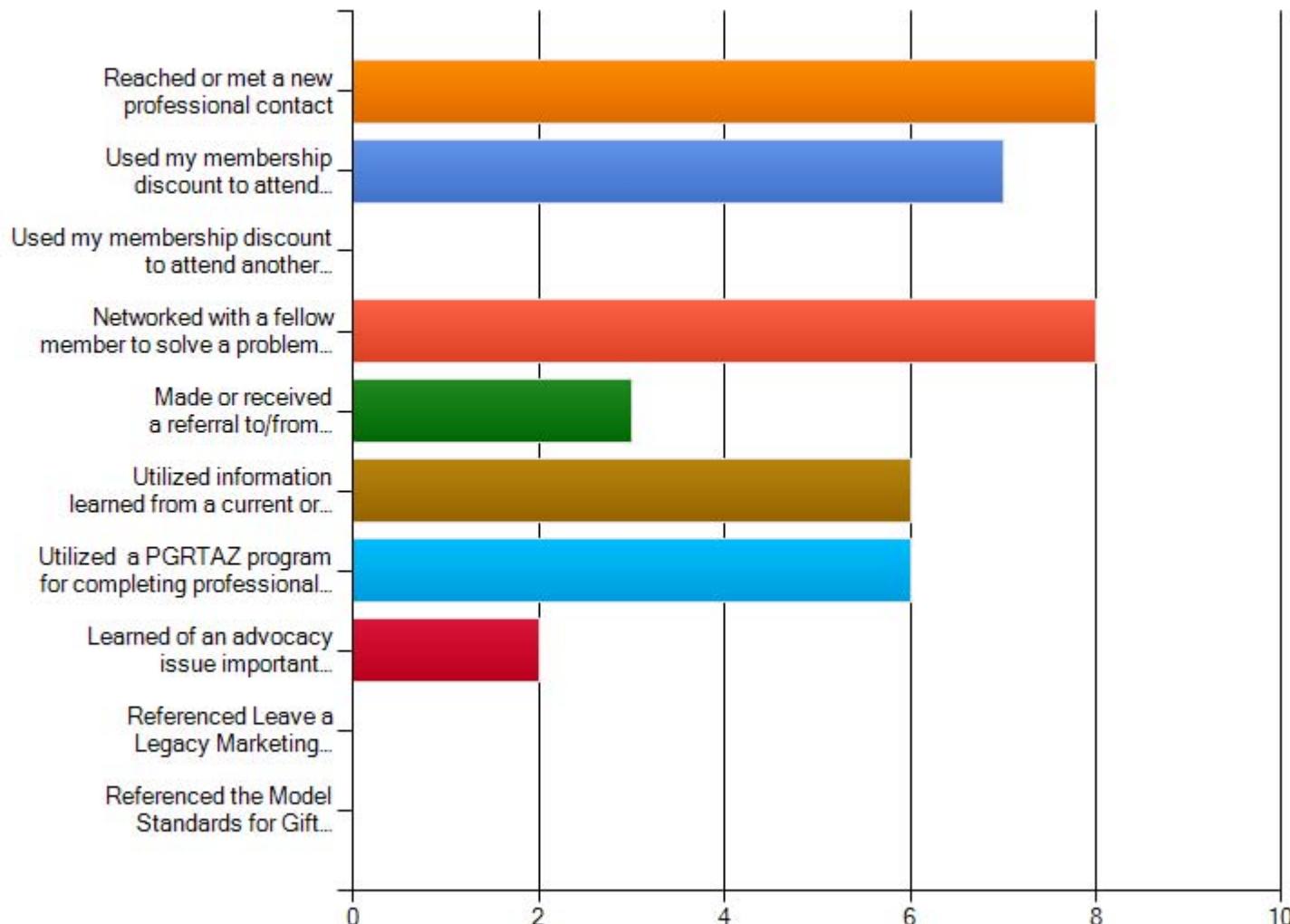


PGRTAZ Monthly Member Survey: February 2012

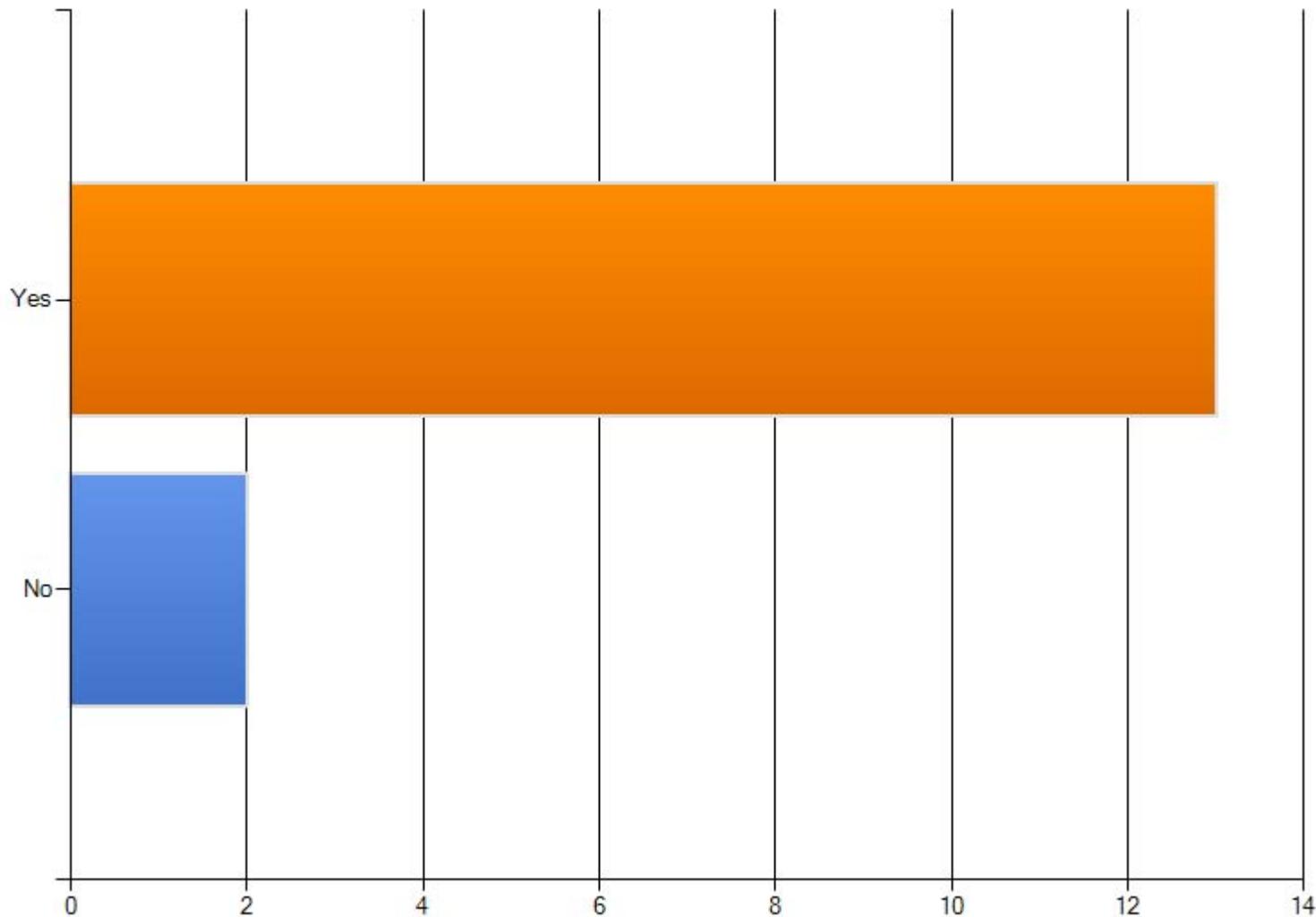
Website Features I would like to see added next:

Reference or sample documents

Recent PGRTAZ Membership Impacts



I learned at least one useful or new thing at this month's meeting



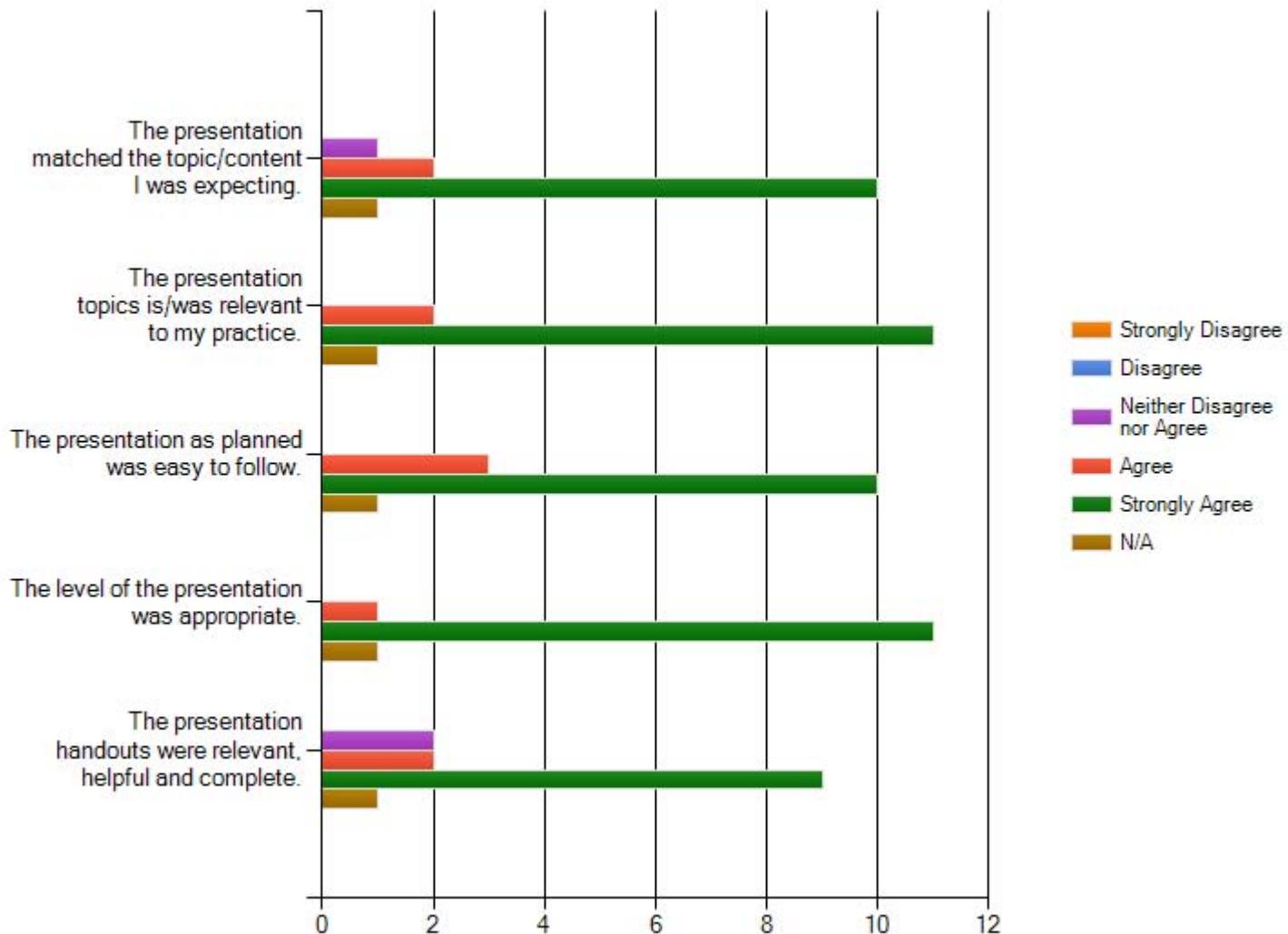
PGRTAZ Monthly Member Survey: February 2012

If you were unable to join this month's meeting, or if you have other items for board consideration that would keep your membership value high, please let us know here.

I was ill this past meeting and unable to attend.

Unable to attend because of special event scheduled that evening.

Did we select the right topic?



PGRTAZ Monthly Member Survey: February 2012

Did we select the right topic?

I did not attend

Did not attend

the print was too small on the outline

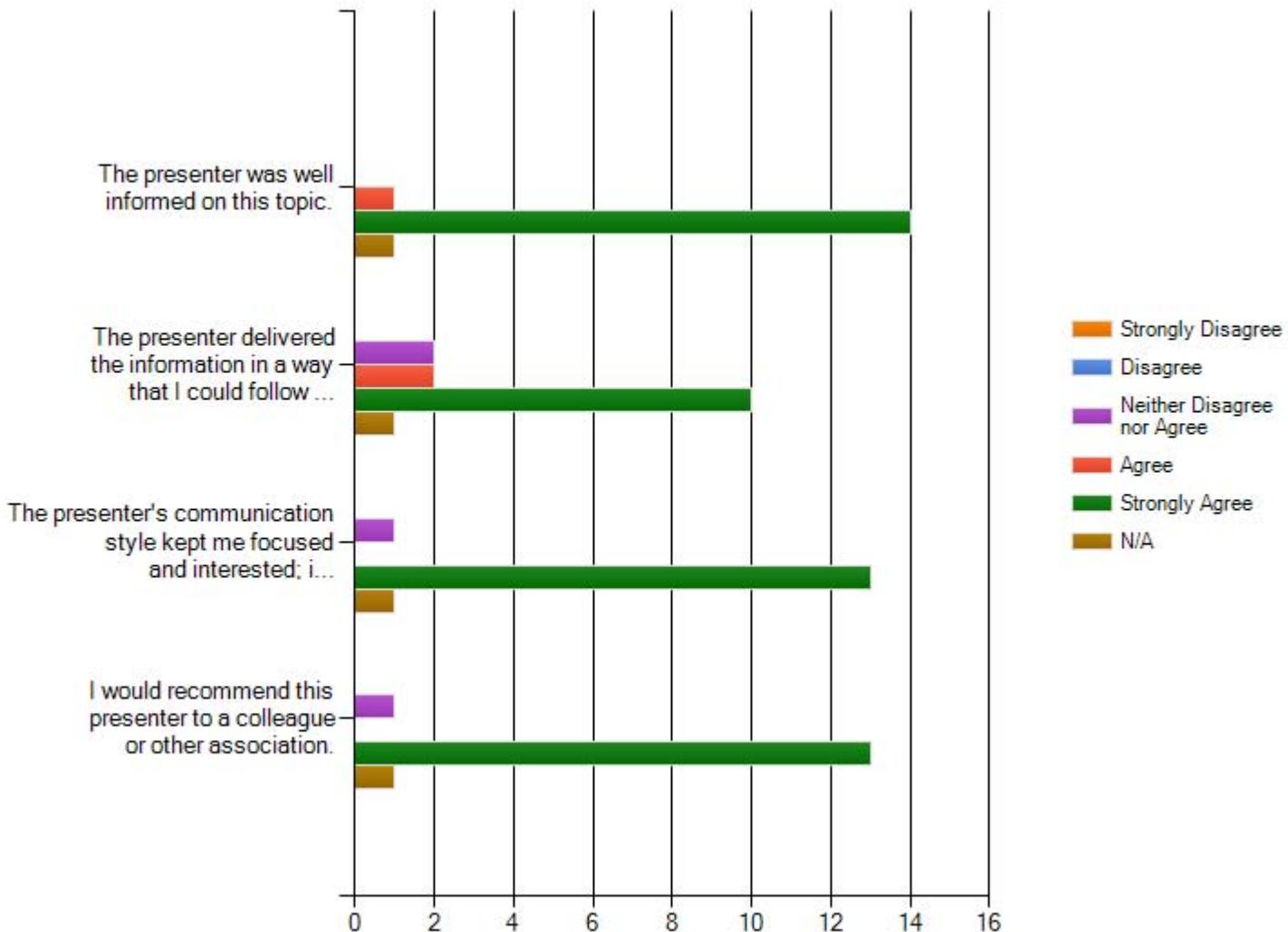
It would be great to be able to download them before the meeting and have them available on our website for a period of time for reference later.

PGRTAZ Monthly Member Survey: February 2012

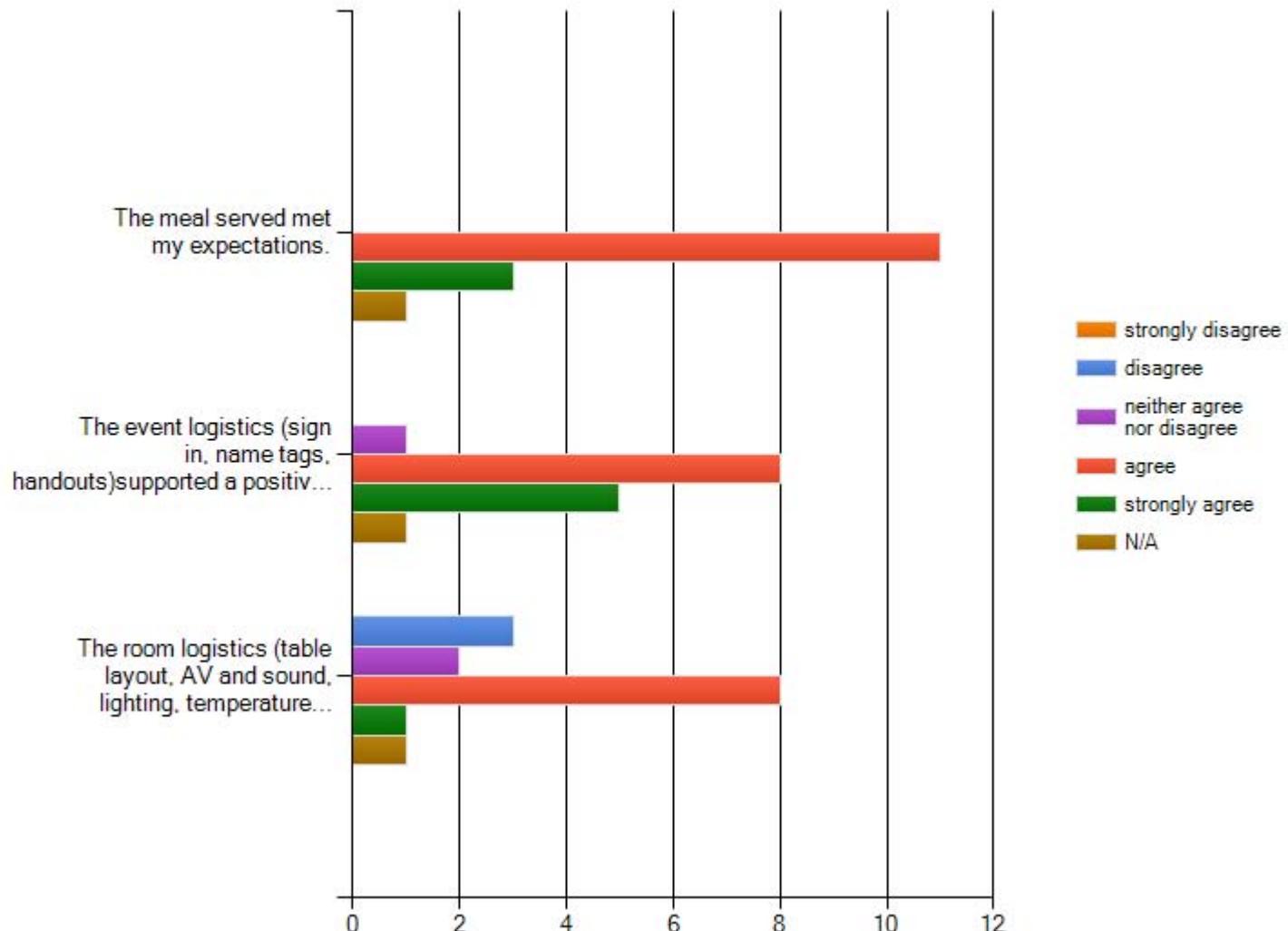
Additional comments on the presentation topic or suggestions for future topics

The material was not as substantive as I'd hoped -- too much emphasis on humor rather than substance.

Did we get the right presenter?



Please tell us about the venue and logistics experience.



PGRTAZ Monthly Member Survey: February 2012

Please tell us about the venue and logistics experience.

I did not attend

An invitation to partake of the dessert offering would have been good.

Did not attend

obviously the room was too small to accomodate the crowd.

The room was very small for our group, I also had to sit with my back to the screen due to room layout.

For online registration, is it possible to give dietary restrictions (gluten free, dairy free, etc.).

Today's meal choices did not have a protein that was gluten free. It would be nice to have the option for those with allergies.

very crowded and a bit warm as it always is in that room.

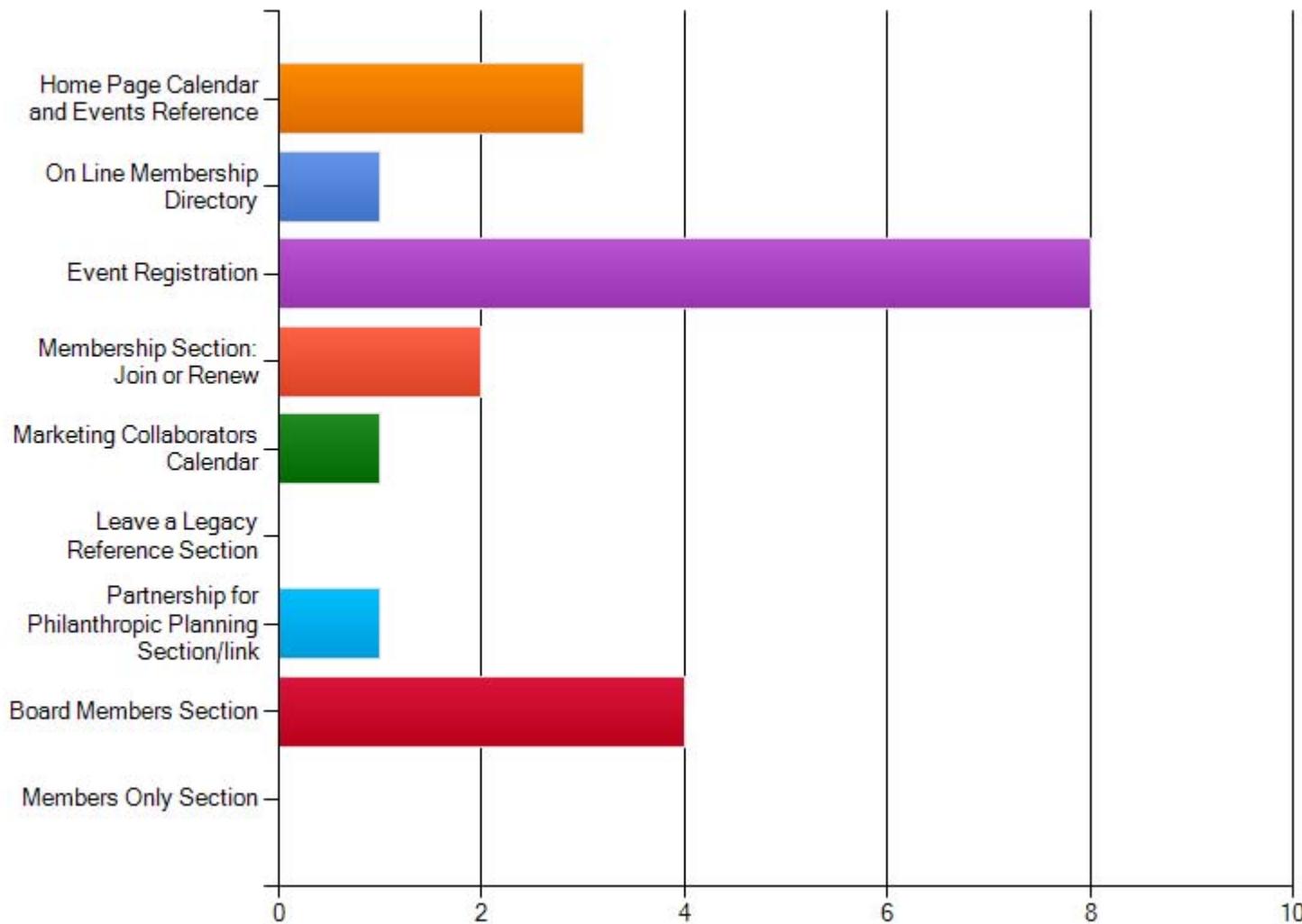
Planned Giving Round Table of Arizona
Speaker: Chris Heldman
Topic: A New Market for Planned Giving
Date: March 20, 2012

	(1=Unsatisfactory)				(5=Very Satisfactory)		Responses
	1	2	3	4	5	Total	Avg
Materials clear and complete	1	3	21		120	4.8	25
Oral Presentation clear and on point		3	22		122	4.9	25
Material/Topic Relevant to your Practice	2	6	17		115	4.6	25
Speaker Knowledgeable		1	24		124	5.0	25
Level of Presentation	1	4	20		119	4.8	25
Hear this speaker again	4	3	17		109	4.5	24
Location	2	8	15		113	4.5	25
Facilities	2	7	16		114	4.6	25
Comments					7		0

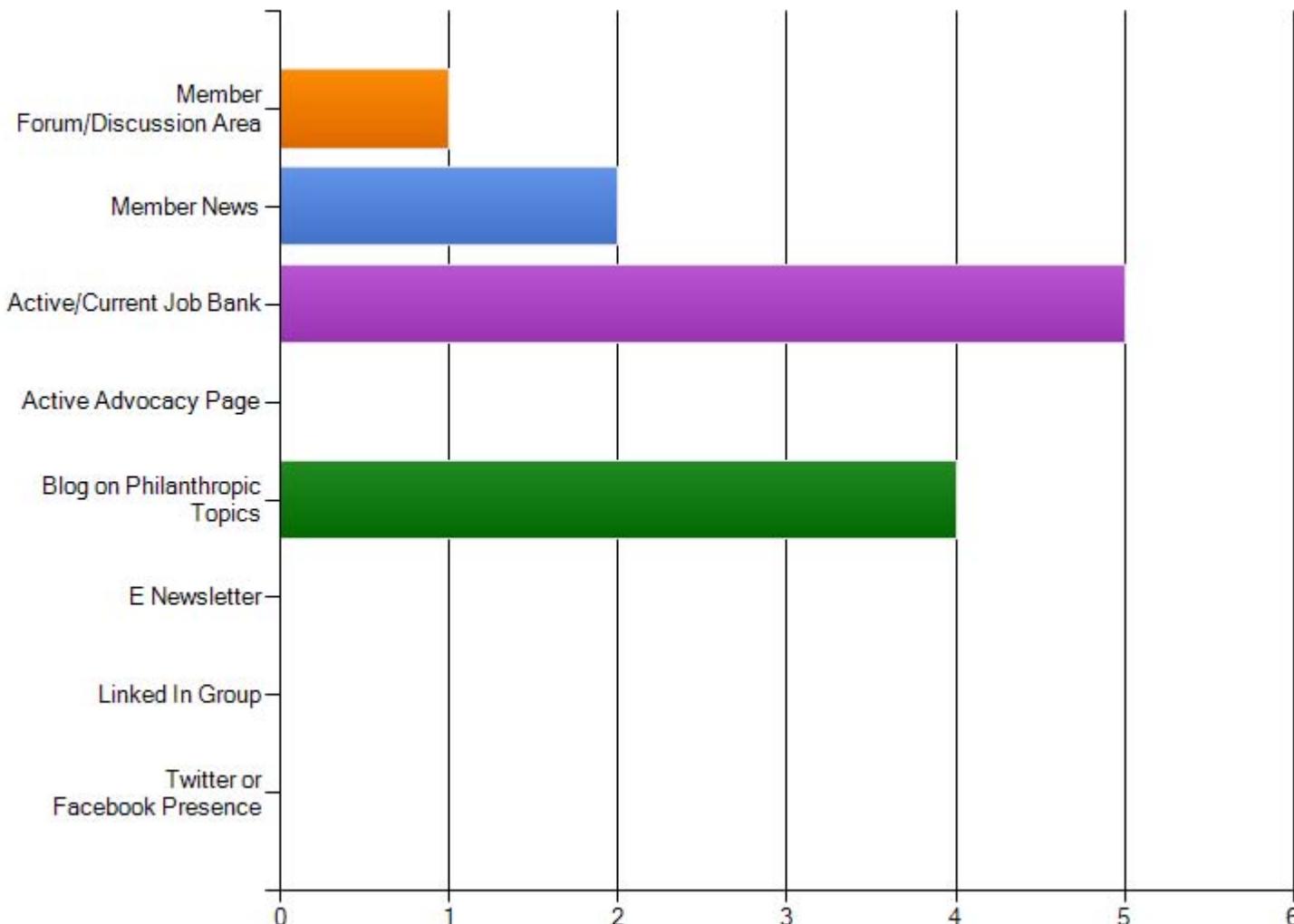
Outstanding! Great Presentation! Good Presentation/Good Ideas. Encouraging - thanks!

One of the best programs ever. This was quite a lot of statistic information and became pretty boring - I was lost. A follow up presentation regarding specific successes of Chris' campaign would be interesting.

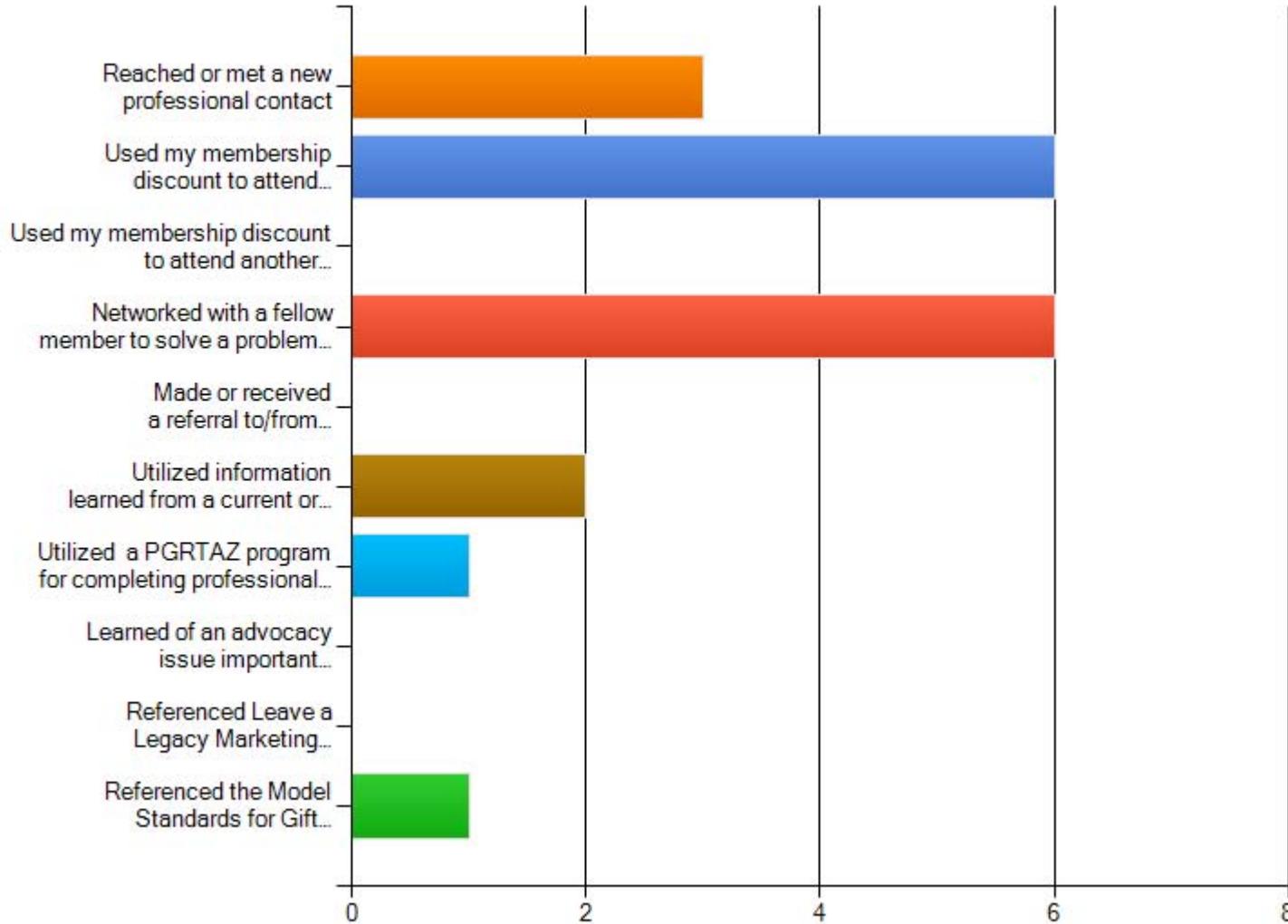
PGRTAZ Website Services I used/referenced this month:



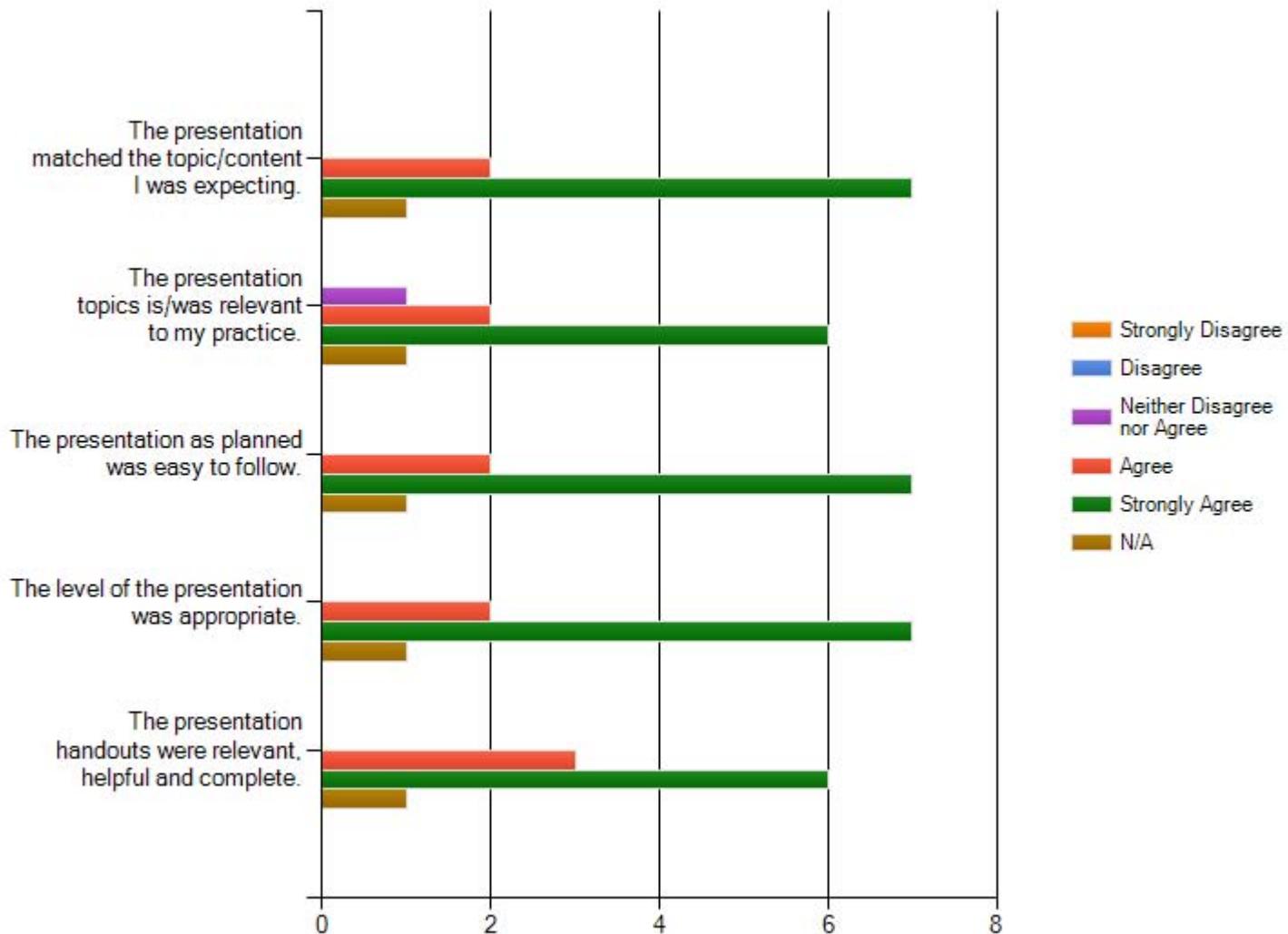
Website Features I would like to see added next:



Recent PGRTAZ Membership Impacts



Did we select the right topic?



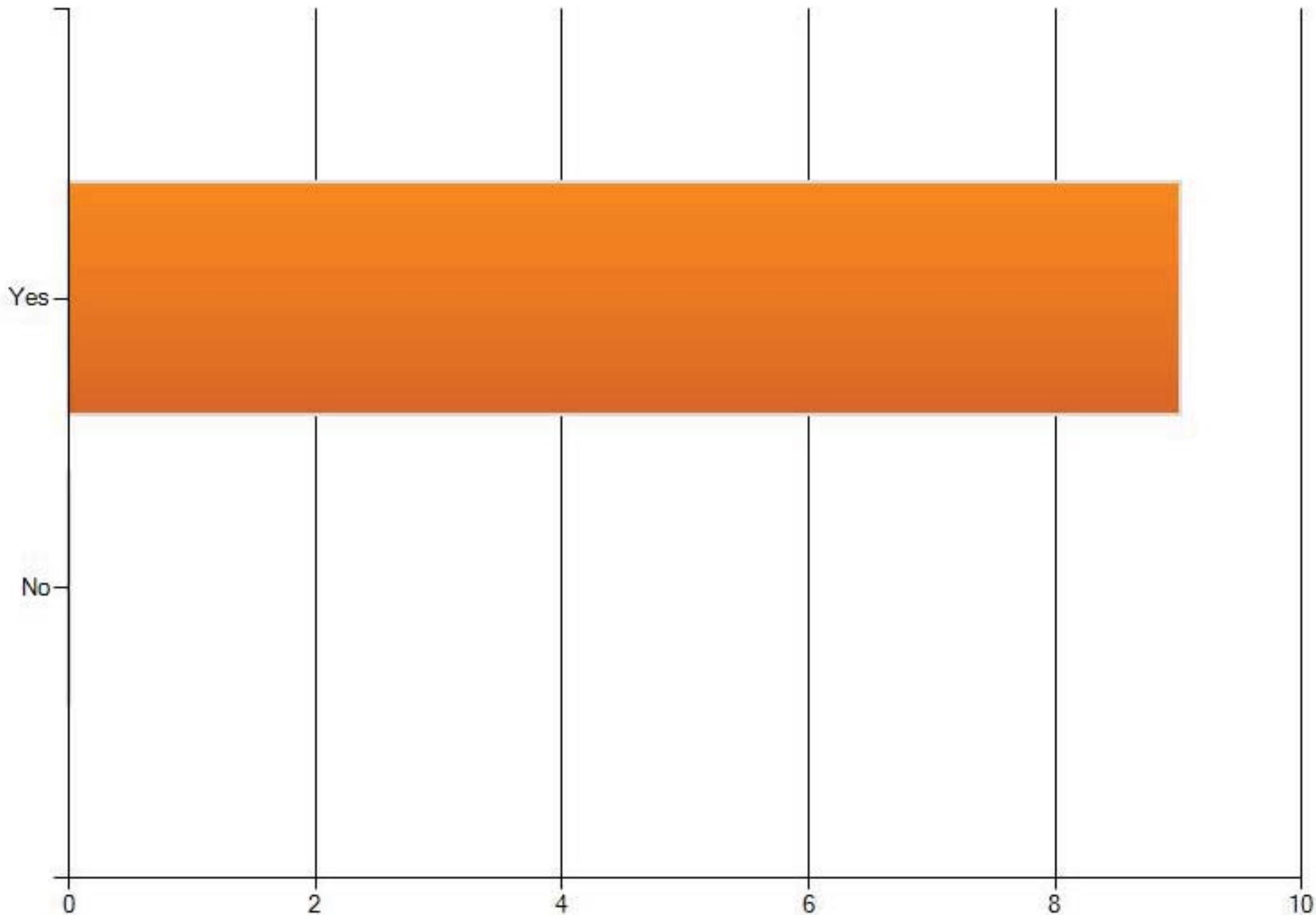
PGRTAZ Monthly Member Survey: March 2012

Did we select the right topic?

Color printing is expensive, but handouts with slides showing more than 2 lines of color cannot be differentiated and easily followed in black/white copies

Too lengthy

I learned at least one useful or new thing at this month's meeting



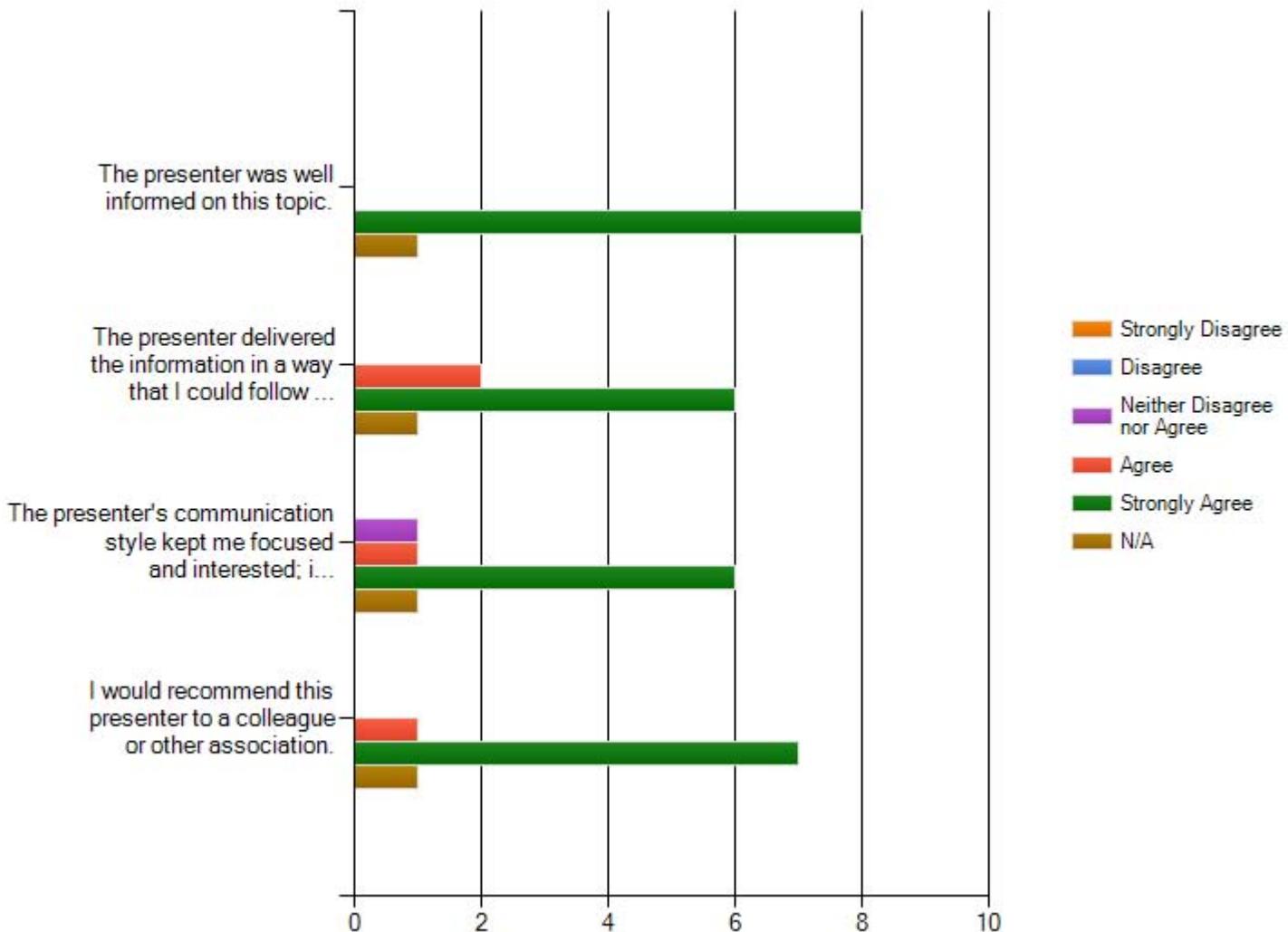
PGRTAZ Monthly Member Survey: March 2012

Additional comments on the presentation topic or suggestions for future topics

Very Helpful

very statistical; leading to be boring

Did we get the right presenter?

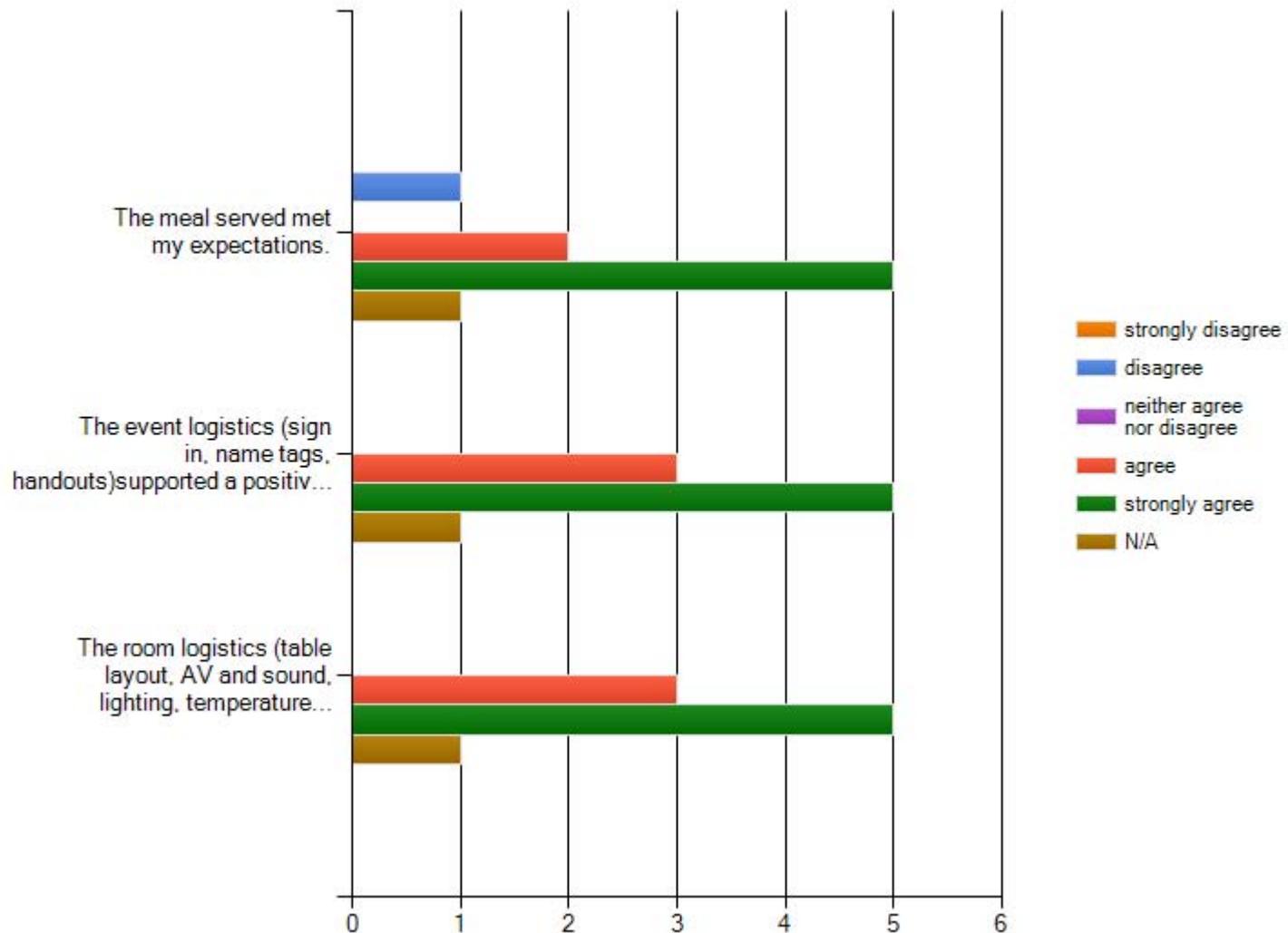


PGRTAZ Monthly Member Survey: March 2012

Did we get the right presenter?

Good info, just alot of stats to absorb in hour

Please tell us about the venue and logistics experience.



PGRTAZ Monthly Member Survey: March 2012

Please tell us about the venue and logistics experience.

The downstairs room worked well for this small group, but is too small when we have larger attendance numbers.

Planned Giving Round Table of Arizona

Speaker: John Scibek

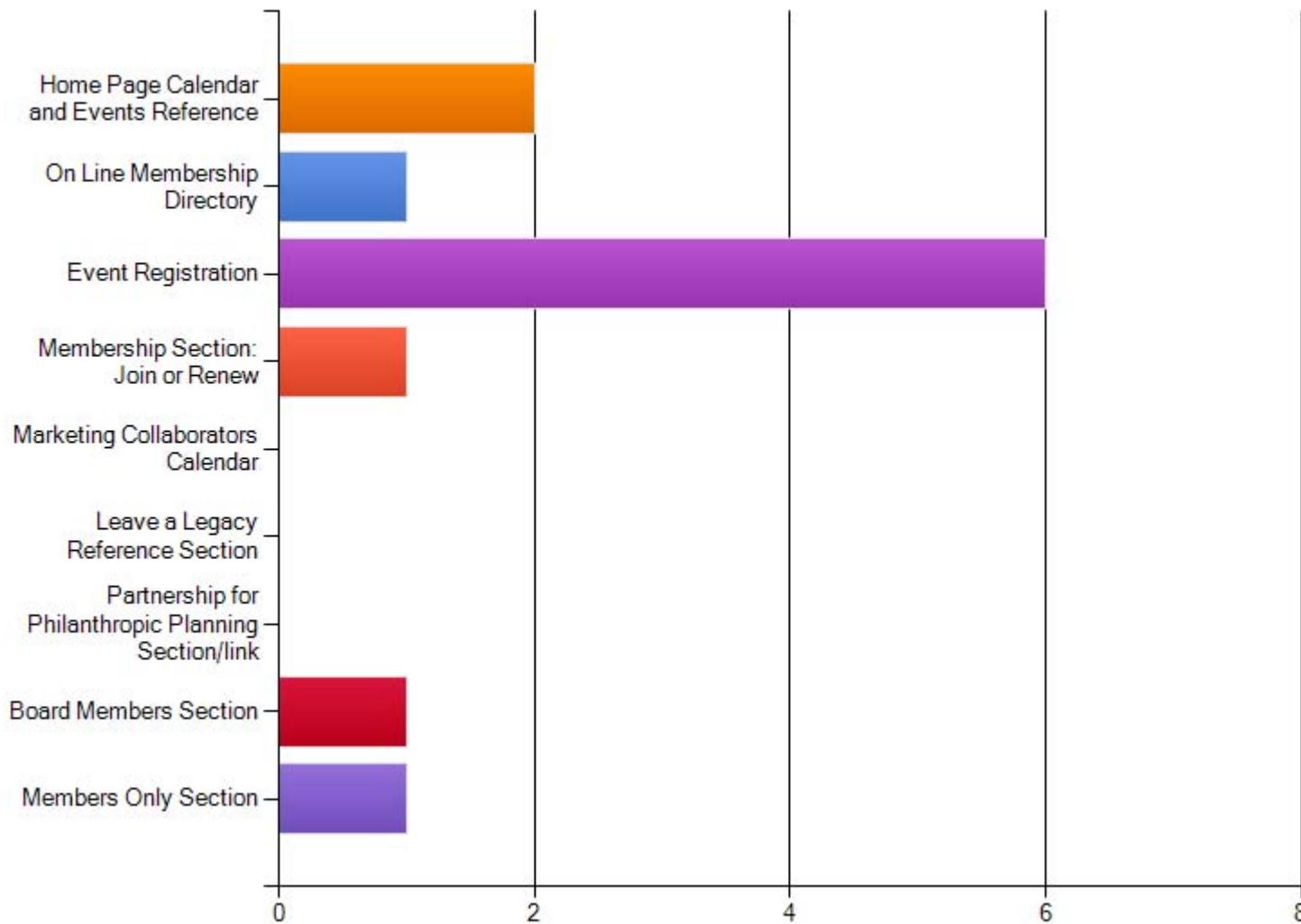
Topic: Uncover Your Hidden Planned Giving |

Date: April 17, 2012

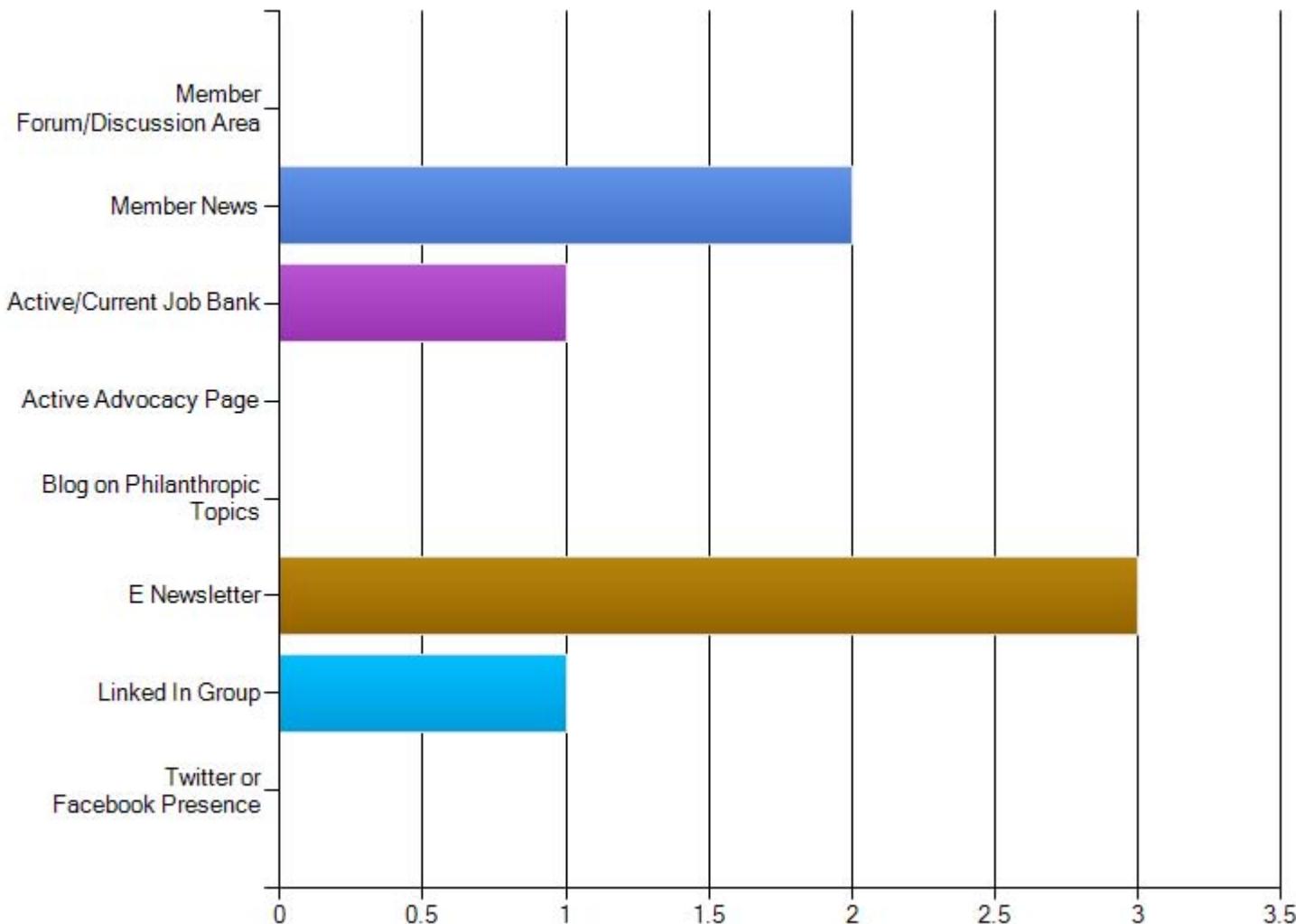
	(1=Unsatisfactory) (5=Very Satisfactory)					Avg	Responses
	1	2	3	4	5		
Materials clear and complete	1	9	18	129	4.6	28	
Oral Presentation clear and on point	1	7	20	131	4.7	28	
Material/Topic Relevant to your Practice	6	6	16	122	4.4	28	
Speaker Knowledgeable	1	5	22	133	4.8	28	
Level of Presentation	4	6	17	121	4.5	27	
Hear this speaker again	6	11	10	112	4.1	27	
Location	1	2	9	14	114	4.4	26
Facilities	1	2	9	14	114	4.4	26
Comments					11		0

Too much on electronic communications, telemarketing and social media - unlikely relevant approach for prospective donors who are over 70 years old. Room was very warm! It was great to hear from John.
Excellent presentation, pertinent info, articulate & knowledgeable presenter. Very well done and very
Very good! Nicely done. Too noisy with birthday celebration next door. Well done! Great topic speaker
It was very basic - but I probably should have read the invitation more thoroughly.

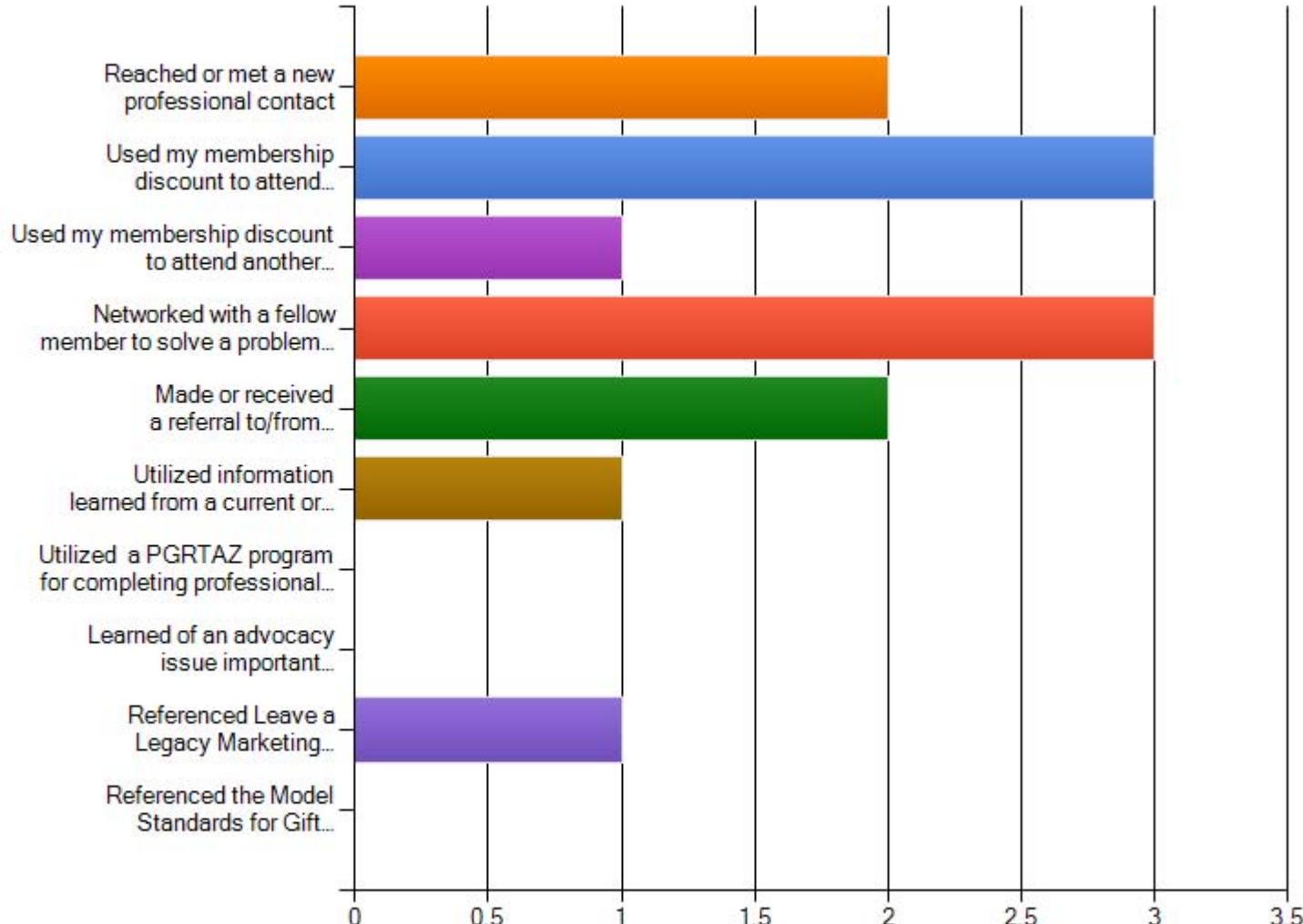
PGRTAZ Website Services I used/referenced this month:



Website Features I would like to see added next:



Recent PGRTAZ Membership Impacts



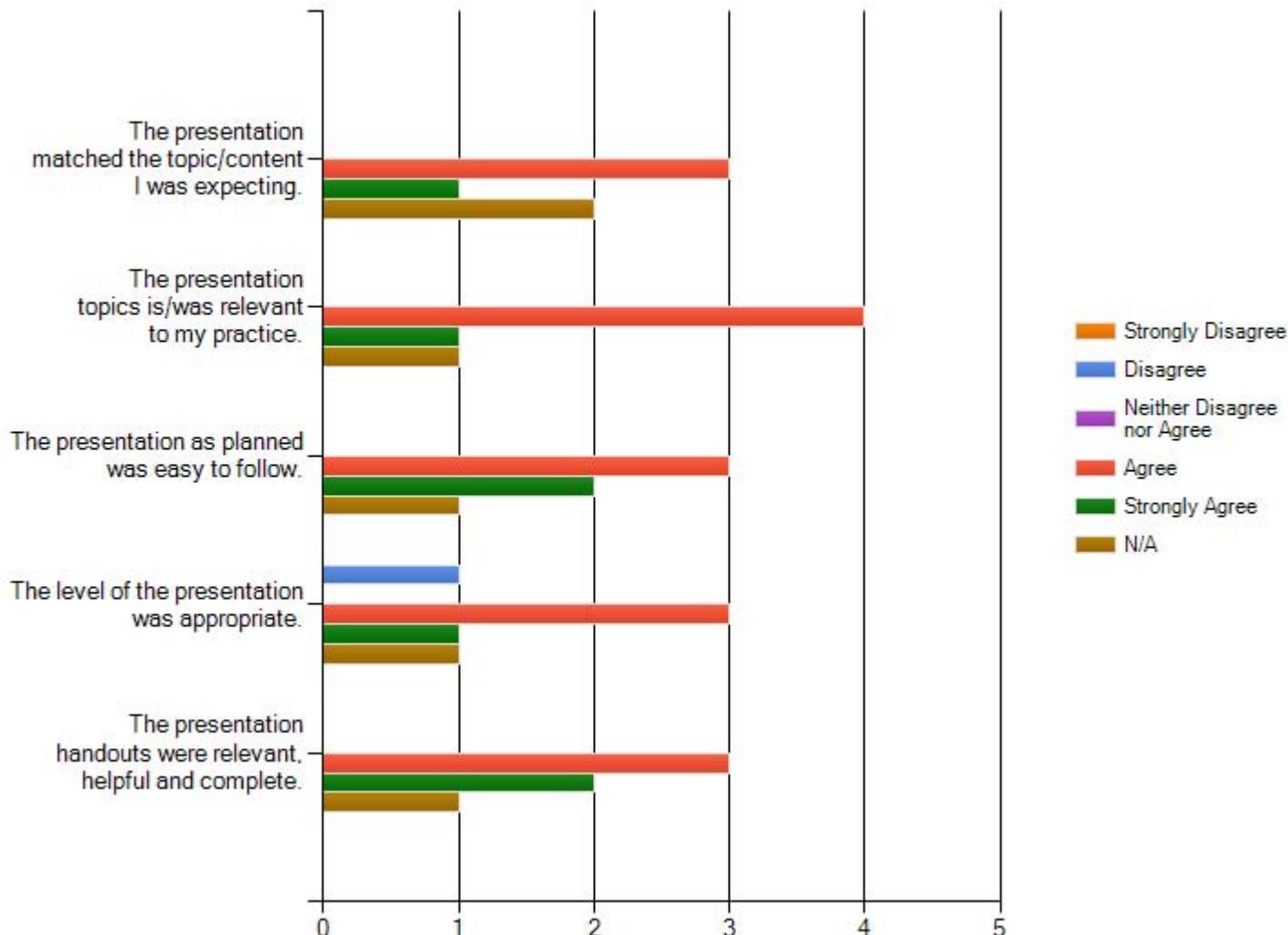
PGRTAZ Monthly Member Survey: April 2012

If you were unable to join this month's meeting, or if you have other items for board consideration that would keep your membership

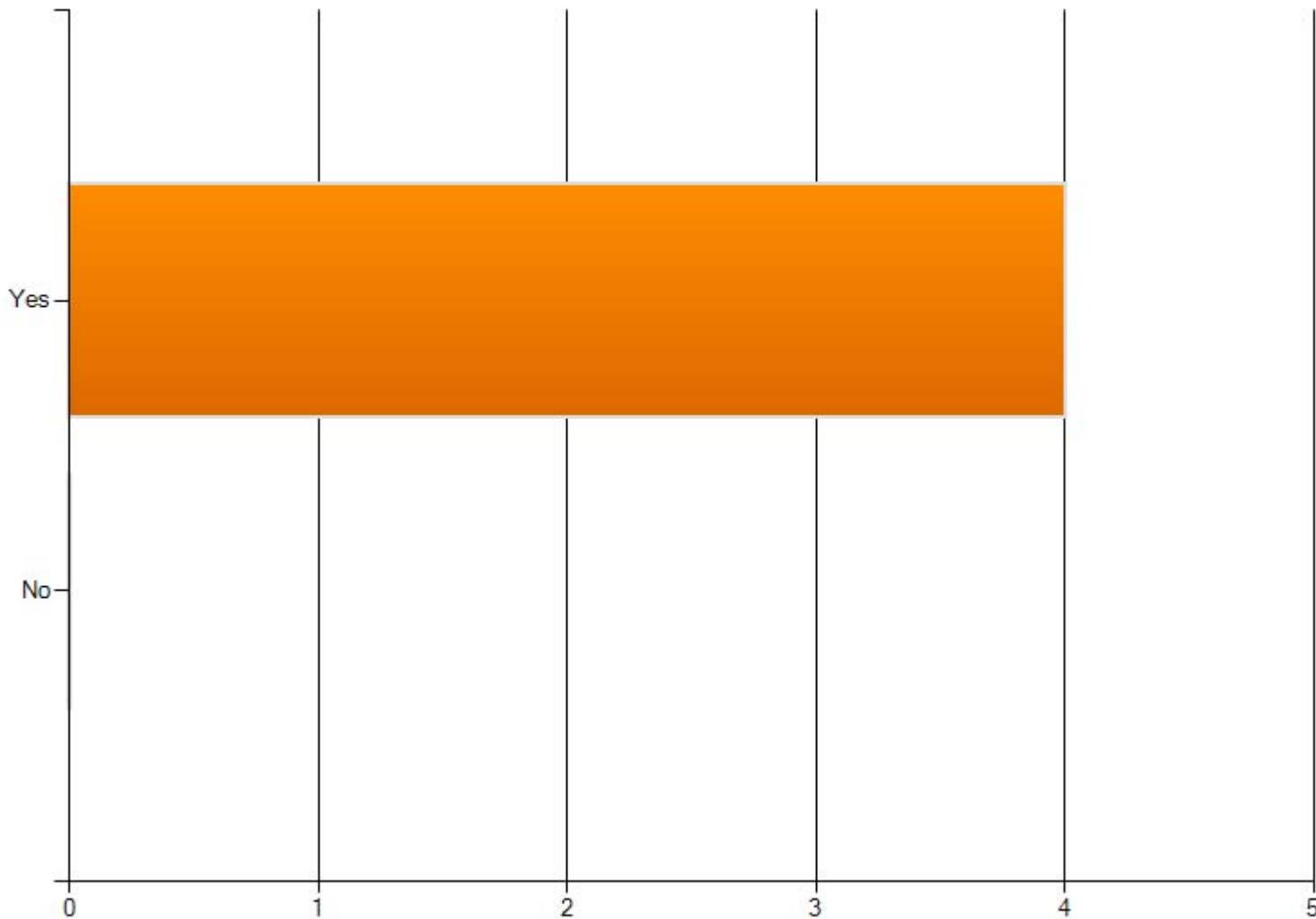
Loo

PGRT has too many surveys and emails. We completed surveys at the meetings, now online, and it seems we are sent many copies of the surveys. Is all this survey work helping the organization? I was unable to attend the Lunch meeting due to work requirements.

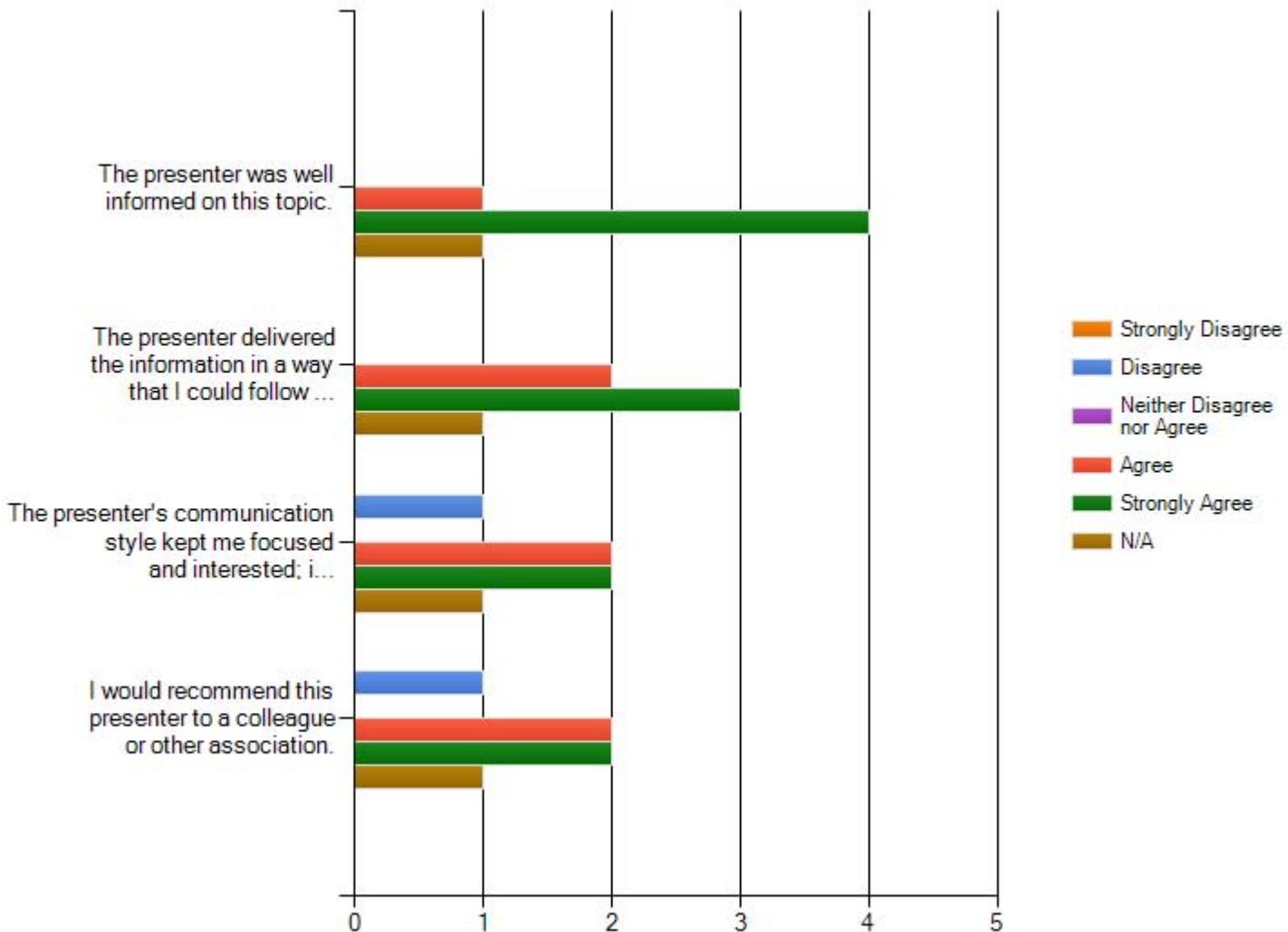
Did we select the right topic?



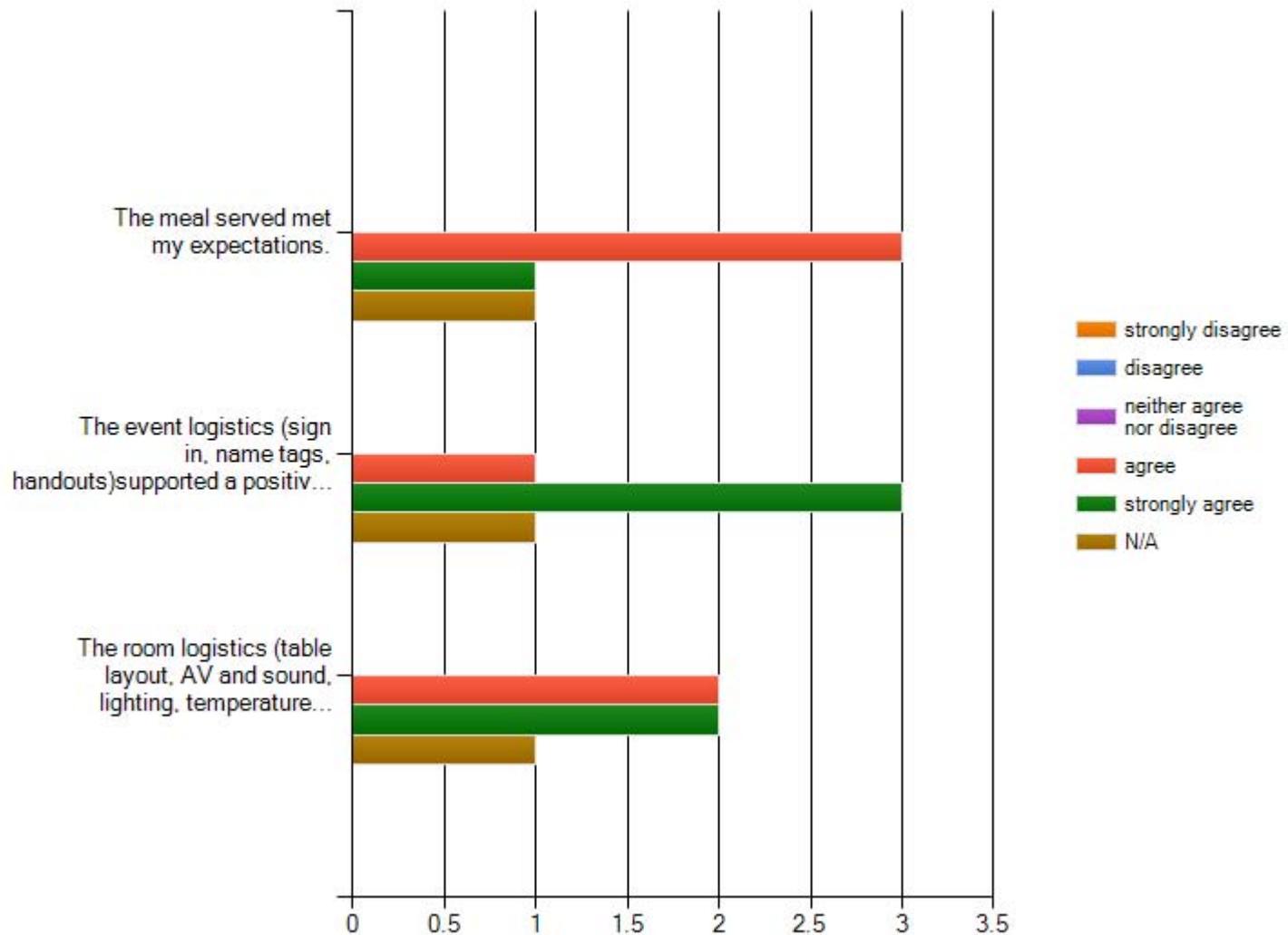
I learned at least one useful or new thing at this month's meeting



Did we get the right presenter?



Please tell us about the venue and logistics experience.



Planned Giving Round Table of Arizona

Speaker:

Ed Knight and Ken Davis

Topic:

Life Insurance Strategies to Support Charity

Date:

15-May-12

(1=Unsatisfactory) (5=Very Satisfactory)

	1	2	3	4	5	Total	Avg	Responses
					7			
Materials clear and complete	1	10	7	78	4.3	18		
Oral Presentation clear and on point	4	7	7	75	4.2	18		
Material/Topic Relevant to your Practice	3	6	9	78	4.3	18		
Speaker Knowledgeable		3	14	82	4.8	17		
Level of Presentation	2	7	8	74	4.4	17		
Hear this speaker again	4	7	5	65	4.1	16		
Location		9	8	76	4.5	17		
Facilities	1	9	7	74	4.4	17		
Comments				0		0		

Co-presenter format very uncomfortable. Might have been better presented as a panel rather than
2nd presenter recessed behind 1st. Did not appear inclusive to both presenters.

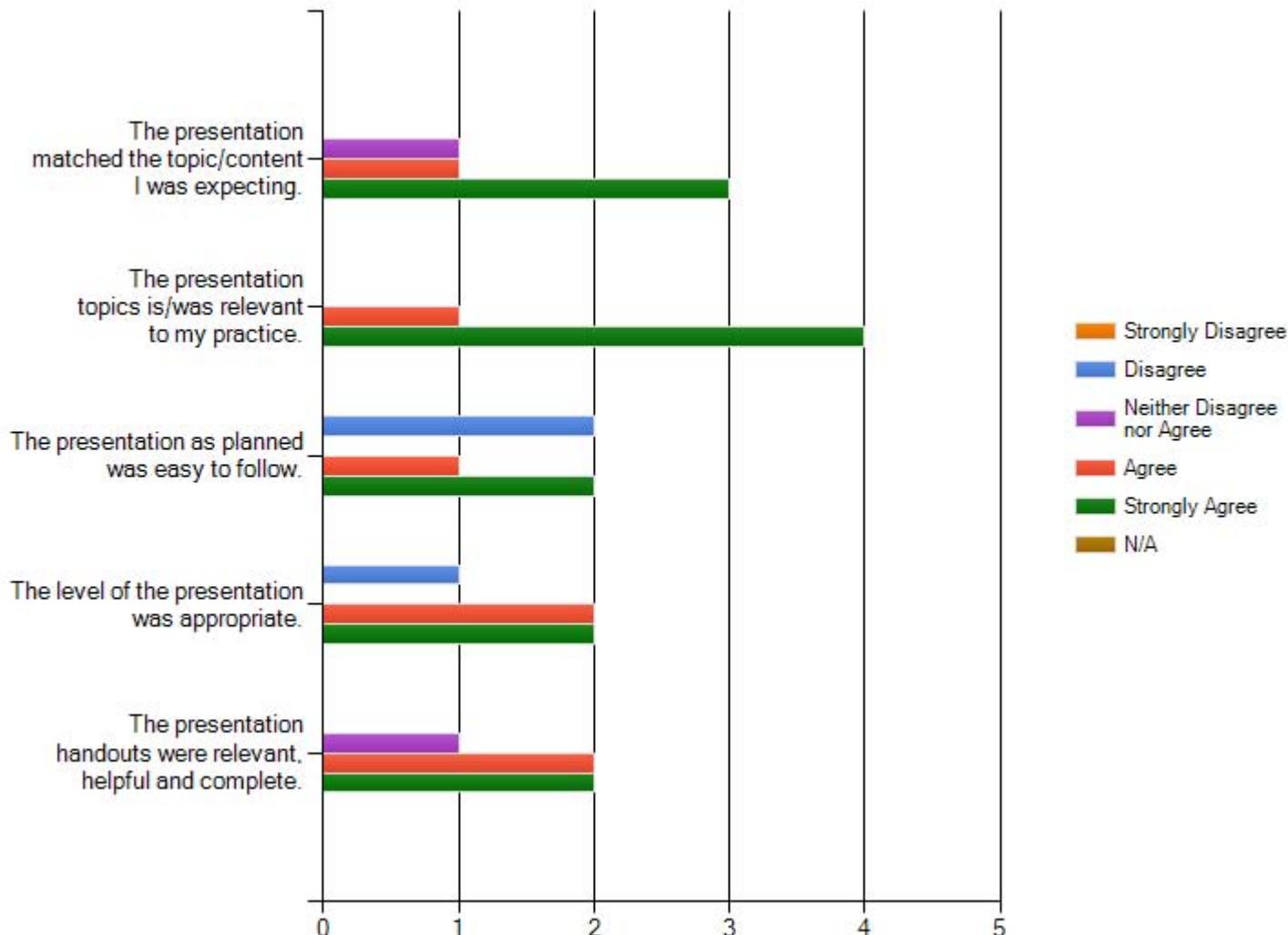
Should have incorporated both speakers more. Awkward

The format was not what it could have been! Overall, it should have been much better!

Needed to get into some of the more esoteric areas

While both Ed & Ken are very knowledgeable, Ken dominated the talk and referred to Ed as a
chauffer and side kick. One speaker at a time; have them work together ahead of time

Did we select the right topic?



PGRTAZ Monthly Member Survey: May 2012

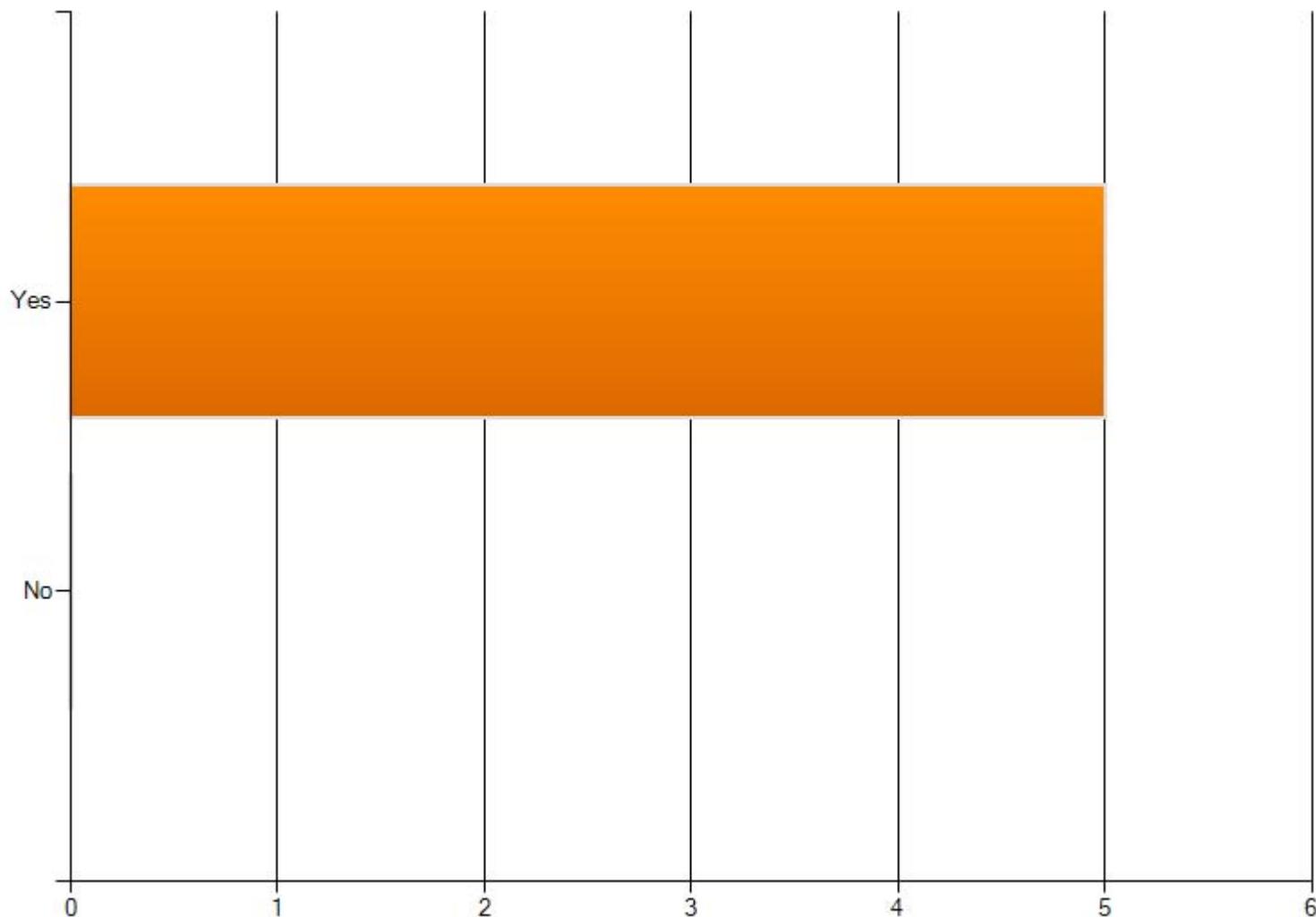
Did we select the right topic?

Was hoping to hear more about life insurance donations from the charity organization's perspective.

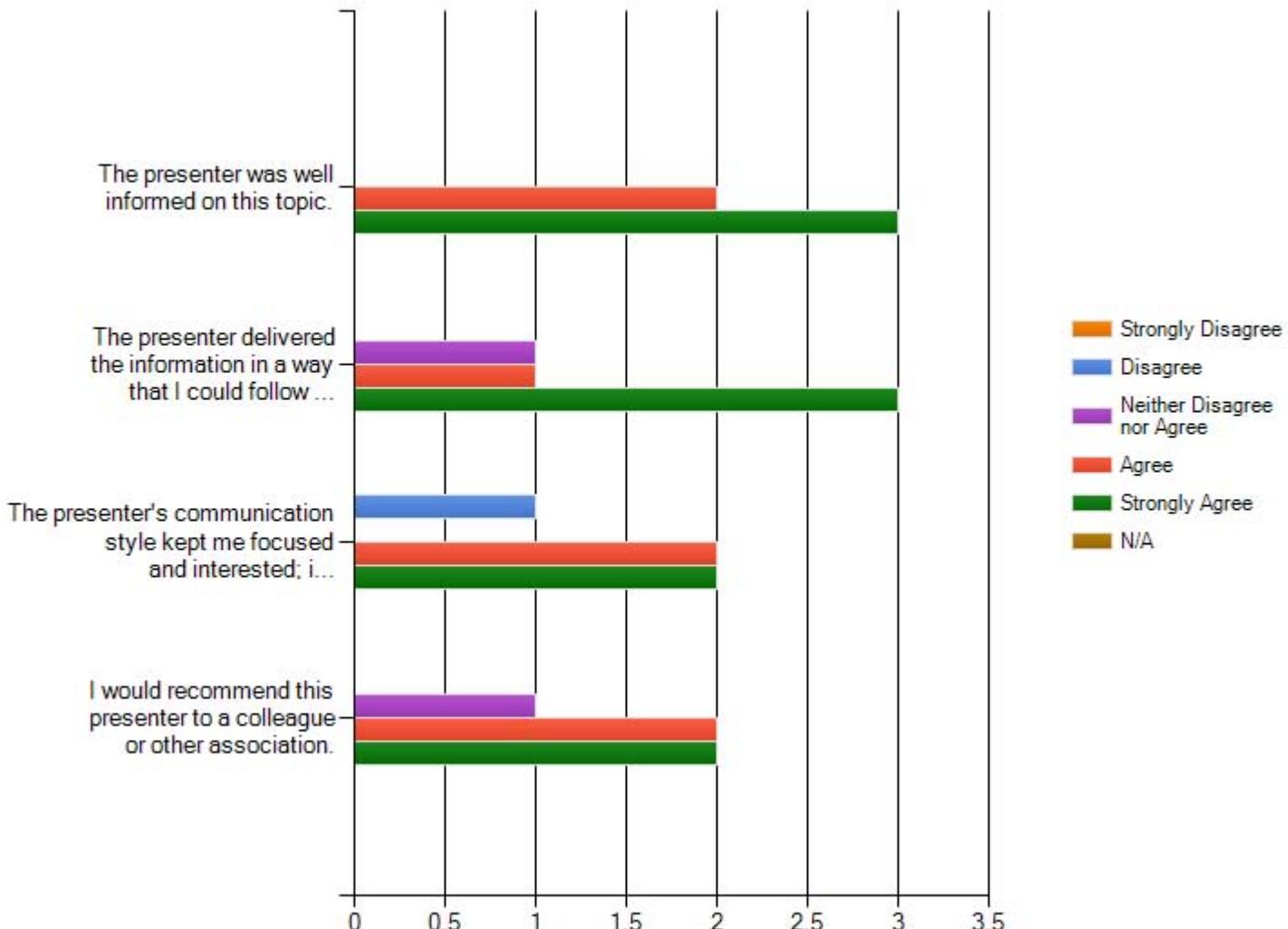
It appeared that the presenter representing AZ Community Foundation was not given equal opportunity to share.

The platform for the two presenters seemed awkward. I wondered if the other guests were feeling it as much as some at my table.

I learned at least one useful or new thing at this month's meeting



Did we get the right presenter?



PGRTAZ Monthly Member Survey: May 2012

Did we get the right presenter?

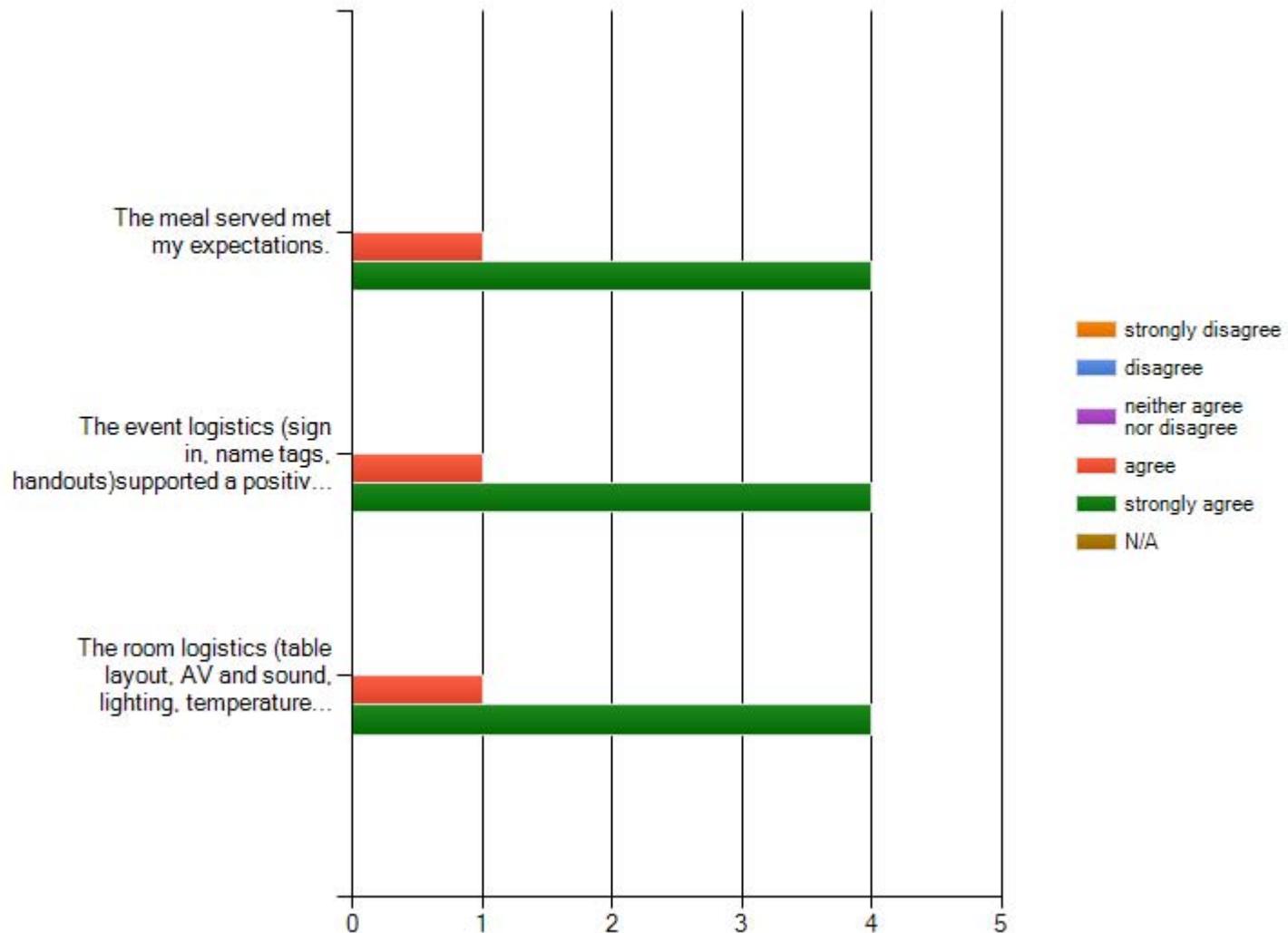
I refer to Ken Davis as the presenter. I would recommend him only as an individual speaker.

I was interested in the information he shared but very distracted by the awkwardness of the unbalanced platform opportunities.

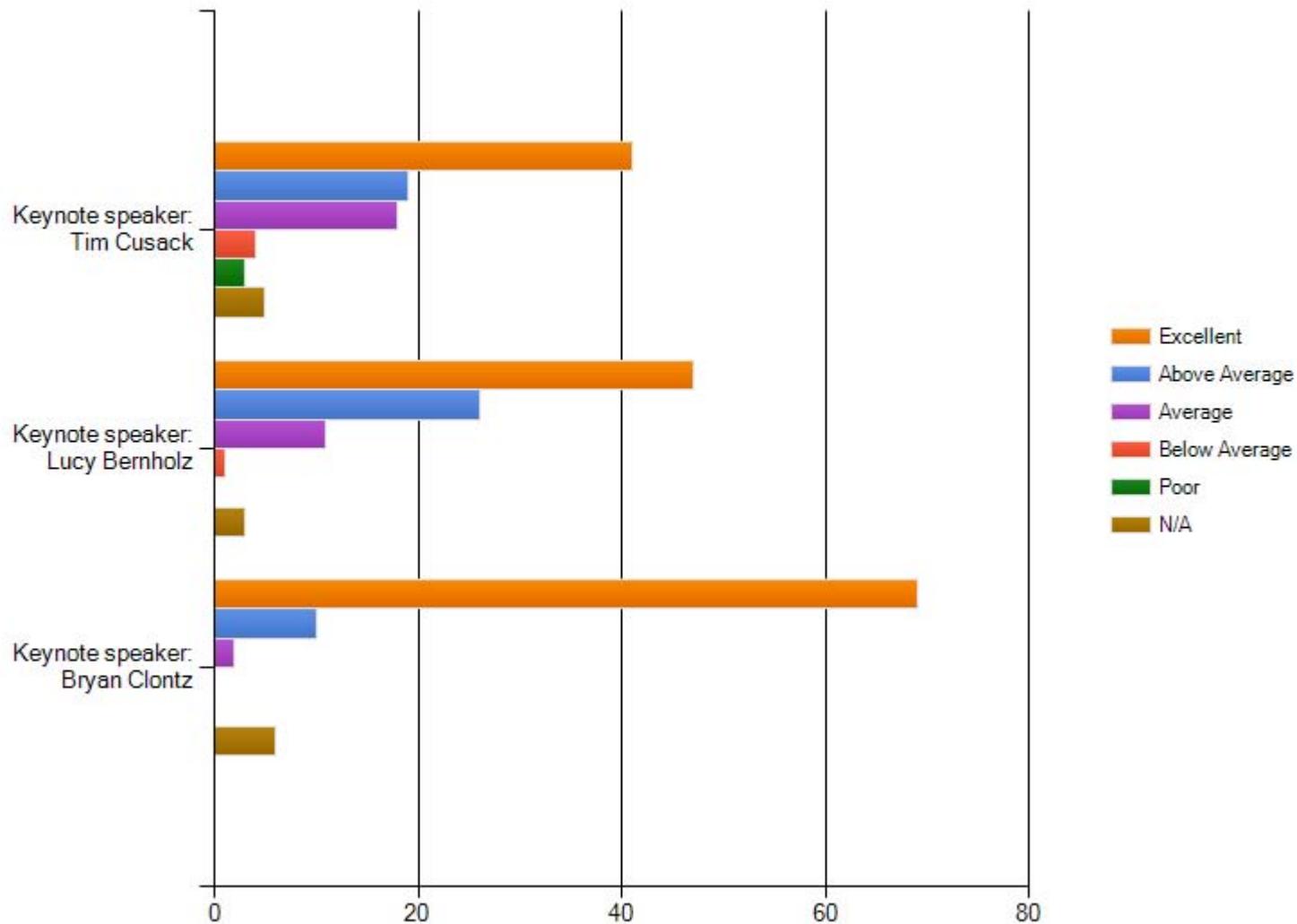
Would be a hard topic to make interesting. I think he tried to do that. Felt the other speaker was correcting too much, and that they were not together on their presentation.

Felt it could have been a lot stronger . . .

Please tell us about the venue and logistics experience.



Tell us about our General Session Keynote Presenters:



PGRTAZ 2012 Summer Forum

Tell us about our General Session Keynote Presenters:	Page 1 of 2
I found Tim to not be motivational as all. I had hoped he would jump start the day for me and it did not happen. Bryan on the other hand is amazing.	
Bryan was the perfect choice to be the final keynote speaker. Wasn't too impressed with Tim, though.	
I was a little shocked by Tim Cusak's presentation as could not draw any meaningful relationship between his talk and the conference topic in any way whatsoever.	
I was extremely impressed by the quality of all the Keynote Presentations!!	
Tim was interesting -- not quite a tie-in to planned giving. Lucy had great info (I had heard her before), but less than dynamic style -- particularly for a mealtime speaker. Bryan was fabulous -- heard him 3 times that day.	
all excellent speakers and very inspirational	
I saw Bryan Clontz speak in several sessions and enjoyed his presentations very much.	
Especially loved Tim Cusack!	
great variety of speakers	
I wasn't quite sure how his presentation fit in but he was extremely entertaining.	
I was moved by Tim Cusack (and entertained) and it did put us in a great mindset for the rest of the day, but was expecting something a little different and little more substantive. Mixed feelings about the effectiveness. Would love to know what others thought. I couldn't stay for all of Lucy's talk - so it's difficult to judge. Bryan was terrific - lots of information in a short time frame and extremely entertaining style.	
Brian Clontz is amazing. I just wish we could clone him. I am SO glad I got to attend the forum!	
Tim was a great beginning of the day and really set the tone with humor and high energy!	
Lucy had interesting material but could have been presented in a more exciting fashion. Also it seemed to champion all the new innovations in fundraising which haven't really gained a large percentage of the market and didn't seem to apply to planned giving strategies. Not nearly as much 'significance' as the other keynotes. Brian Clontz was most impactful and good insights into why/how we can help families leave their legacy. Tim Cusack was wonderfully inspiring...might have been able to better tie it to fundraising and directly remind us that helping prospective donors see possibilities and to inspire THEM is so important in the fundraising relationship. He is right...we don't pause enough to take stock of all the good we experience	
Breakfast and lunch were delicious	
Cusack didn't work for me. More subjective	
All were excellent speakers on topics extremely pertinent to the lives and work of fundraisers.	
While Tim was entertaining, I was sure he presentation prepared me for the day or the theme of the event. Lucy is very intelligent and share great information...not sure she was the best choice for a luncheon speaker...even though her topic did touch all three tracks.	
Bryan was entertaining and informative...a great way to end the day. i enjoyed mr. cusak's speaking; however, i didn't feel it had much direction and was more a collection of stories on various things he's done than actually promoting one message relevant to the event as a whole.	

Tell us about our General Session Keynote Presenters:

Page 2 of 2

Comedians don't work! Tim was more unprepared than he was inspirational.

Bryan was wonderful all three presentations that I attended.

Would have been nice to have a bit shorter lunch presentation to network a bit more with others at the lunch table!

The selection of Bryan was excellent. I attended 3 of his presentations and they could not have been more informational and engaging. Thank you

While Mr. Cusack more or less achieved what was described in the event booklet, I didn't find that he offered anything substantive or related to the subject matter. If his responsibility was to encourage people to think outside of their comfort zone, I would have to question event organizers as to why they believed this was necessary. Presumably, everyone in attendance was there because they were already willing to learn about and consider ideas outside of their individual boxes.

The session with Lucy Bernholz was most illuminating. Overall the Keynote speakers were solid and fit well into a day filled with so much information. Great forum!

This was one of the best conferences I've been to!

no time at tables for networking at either breakfast or lunchtimes.

Bryan is an excellent presenter. I enjoyed all of his sessions that I attended. He would be great to have back again.

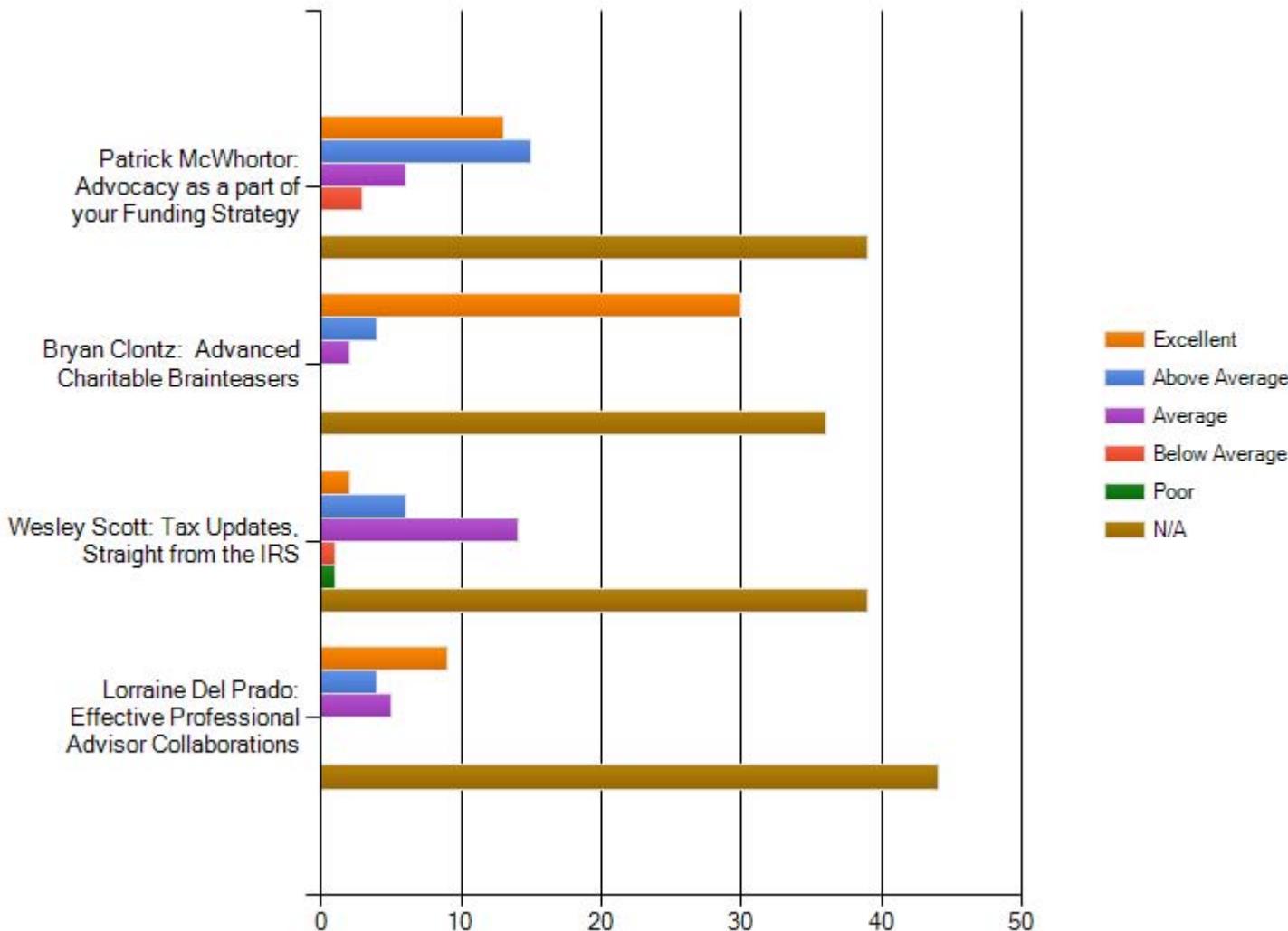
Best keynotes since I have been attending conference for the past six years

I was impressed by the caliber of speakers that you were able to obtain for this event. They all were fantastic!

Fantastic!

Room dark

Tell us about our Seasoned Planner Breakout Sessions:



PGRTAZ 2012 Summer Forum

Tell us about our Seasoned Planner Breakout Sessions:

Patrick -- He is so knowledgeable and really presents the information in an easy-to-understand manner. Appreciated his "5 Tips".

Bryan -- What a pleasure! I always enjoy true case study sessions, rather than the hypothetical. I may never encounter similar situations, but I feel great knowing I am armed with the knowledge of resources to whom I can turn.

Lorraine -- I very much enjoyed her presentation. I gathered many easy-to-implement ideas on how to work with advisors in ways other than through a traditional Planned Giving Advisory Committee.

The rooms were very dim.

The advocacy session was surprisingly basic for the seasoned track.

did not attend these

I was disappointed that Patrick's presentation was not more advanced.

Wesley's presentation was good, but there were not many tax matters to update us on.

W Scott spent too much time on law changes over the last 3-5 years. Presentation should have presented current law, how it might change, and what do these mean for planning. IRS does not know planning; they specialize in enforcement. This group needs planning ideas, so I would be in favor of not inviting him back.

Bryan Clontz's presentation was top-notch. His case study approach is very good. He is funny, engaging & a terrific presenter!

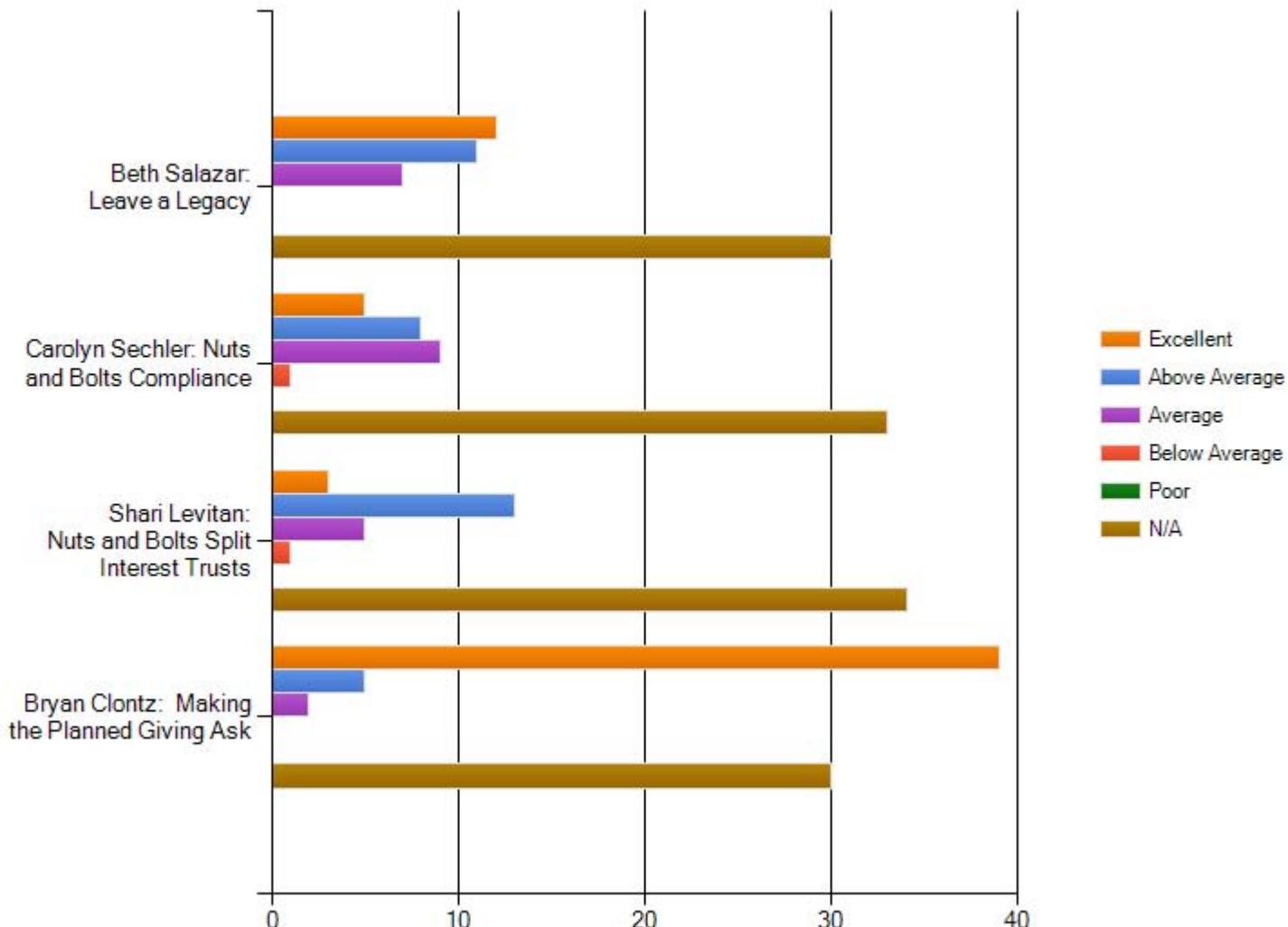
The level, content and style of Bryan Clontz's presentation was right on. So happy with the case study format. Since his time was short for all of the cases he had, he only did 3 of 8. Next time, maybe offer 2 sessions, so folks who want more of these could keep going and those who couldn't attend, could have the chance to learn from him.

Lorraine Del Prado was OUTSTANDING!

I'm sure that Wesley was a good speaker I just ended up in the wrong session and was completely lost with the topic.

Clontz' use of various real-life Case Studies was fantastic. Its always good to focus on actual case examples and what to look for in our practices to mimic those solutions

Tell us about our Basic Breakout Sessions:



PGRTAZ 2012 Summer Forum

Tell us about our Basic Breakout Sessions:

Shari and Carolyn did the best they could with topics that are by nature dry. Bryan was engaging and energized

Just fantastic!

strong informational sessions. well prepared and thorough

Although I only have a few clients with split-interest trusts, this presentation gave me some insights into issues that can cause big problems. Very good handout materials. Shari obviously knows her stuff & is good at explaining the technical stuff.

I loved what Brian had to say about how the "ask" is a simple matter...we make it too difficult.

This is a hard track to balance for the person who knows the basics, but is not in an organization with dedicated staff - great variety here!

The split interest trust session seemed to be higher level complexity than a basic course to me. Lots of detail that didn't seem to apply unless you were the designated planned giving officer at your org. Compliance was more about non profit organization law and didn't really apply to fundraising. It wasn't what I thought it was based on the description.

I hoped he would share some suggested approaches to speaking in person with donors on making planned gifts. He was excellent nonetheless and is undeniably knowledgeable.

Beth started her presentation with a story which made it easy for me to understand what she wanted us to learn from her presentation...the body of her presentation was informative and interesting...she ended with a clever song to ensure we would remember the information from her presentation.

The Split Interest Gifts session was WAY too over my head. It would have been nice to get a little more basic information, especially for session in the "basic" track.

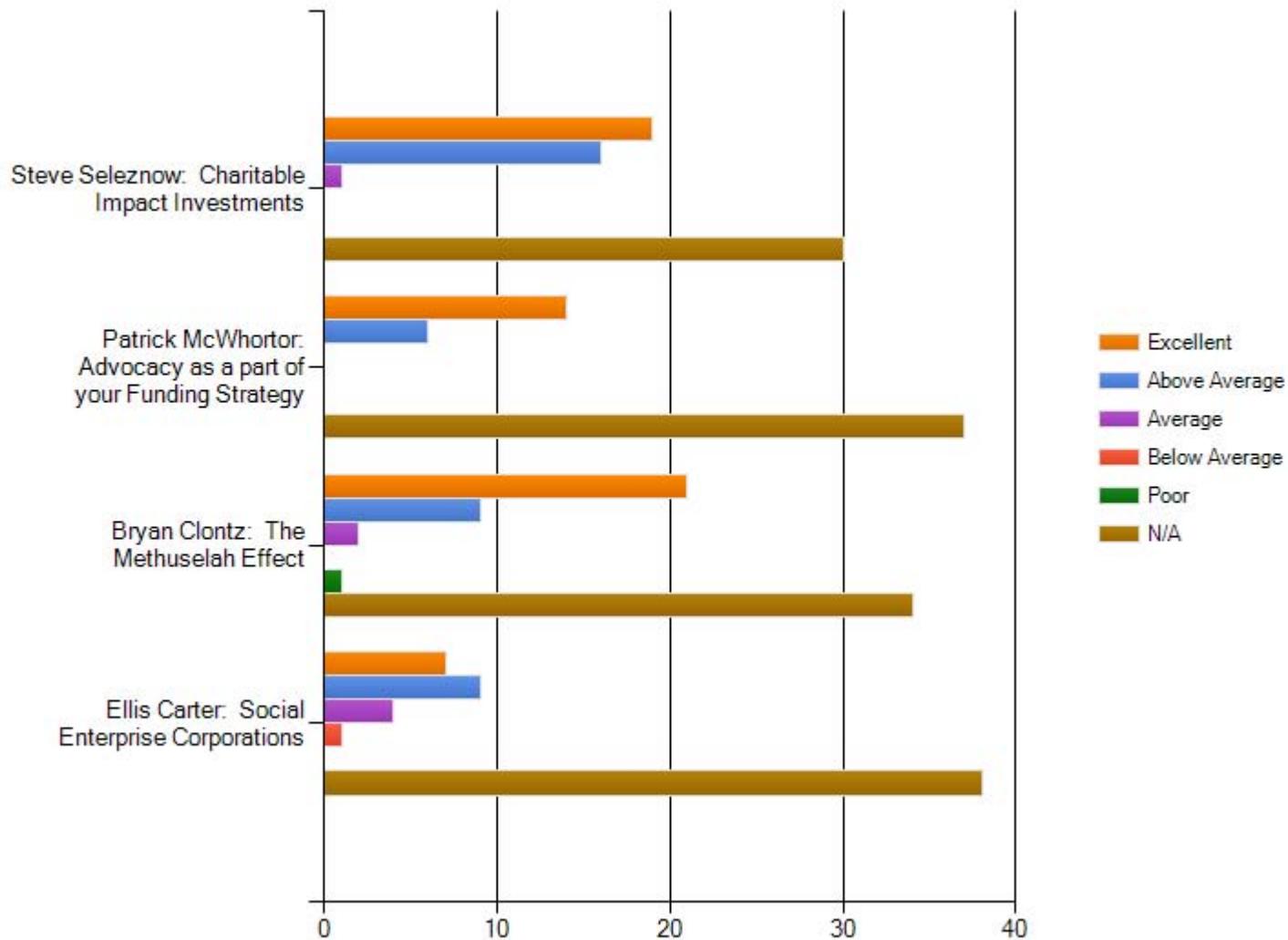
I would have liked to hear more about fundraising requirements and limitations, compliance, and related organizational policies, not so much about how to create a 501(c)(3)-(7) and which 99 or 990 to file. On the topics that were covered, more detail might have been beneficial. Ms. Sechler did appear to be very knowledgeable on the topics she presented and I would be interested in attending a future session of hers.

I thought the Nuts and Bolts Compliance session would provide insight and information related to planned giving. Instead it was about starting a nonprofit and the 990 informational return. The session was interesting as there is always something to learn about basic nonprofit tax and auditing standards however, I think information related to planned giving would have been more on point.

Beth's session was very helpful and I was able to take away many good ideas.

Only attended Bryan

Tell us about our Leadership and Philanthropy Breakout Sessions:



PGRTAZ 2012 Summer Forum

Tell us about our Leadership and Philanthropy Breakout Sessions:

Clontz did a great job of making a dry topic compelling to a non-specialist!

Learned something wonderful at each of Bryan's sessions/
did not attend these

I regret that I wasn't able to see Steve Seleznow's presentation.
very informative and inspiring for change.

Ellis Carter knows what's new across the country, and did a nice job of summarizing and presenting relevant info.

The social enterprise corporations were all new to me!

Bryan did a great job with a dry topic

Patrick is clearly passionate about the importance of advocacy and, given the political climate, his suggestions were excellent.

Bryan is a terrific speaker and an engaging personality. Sometimes he speaks a little too quickly.

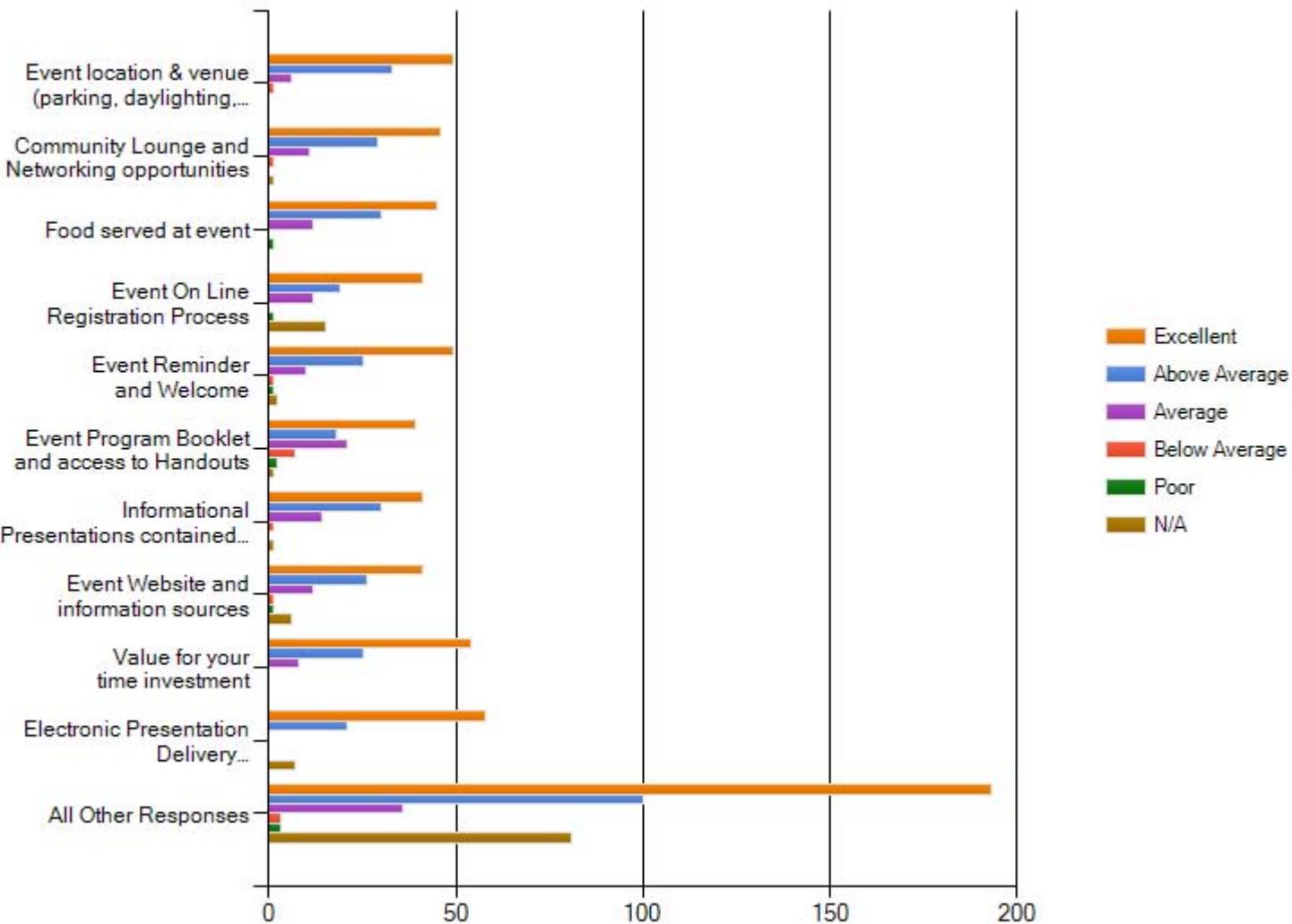
Mr. Seleznow's presentation was a nice introduction to the potential of impact investing, and he was able to share enough of his and ACF's experience to date on some of the mechanisms that I have a basic understanding of the concepts, potential and pathways.

Ms. Carter's presentation was, again, a good introduction. Personally, I have to question some of her conclusions. It will be interesting to see how the ideas about and tools of social enterprise corporations continue to develop.

When all said and done, not sure of the advantage of this type of entity vs the current.

Fantastic!!!

How was our overall Planning?



PGRTAZ 2012 Summer Forum

Additional Comments:	Page 1 of 2
The booklet font was too small for my eyesight.	
This was by far one the most valuable philanthropic training events which I have attended, so thank you! I am fired up for fund development!	
I did experience some hic-cups with technology issues--I traveled Tuesday day to attend the event and thus could not access the presentation download for printing in any way which met my needs. I also could not find any directions or venue information on the PGRT event website--which was again a challenge for those of us traveling from outside Phoenix. But all my effort was well worth it! Great event and thank you again!	
It was a very well put together event with valuable information in each session I attended.	
Booklet -- ok, not great; cumbersome hanging around neck; odd place for name tag; badges should have Company Affiliation. Website -- was not easy to navigate for conference session information; would have liked a one sheet format with synopsis of presentations; would have liked ability to print handouts much earlier in the process. Didn't realize Poll Everywhere instructions in booklet; never had time to read it. Wine & Cheese social -- not so much -- mostly those wanting to win a prize. Liked previous year better when held in final session room. Would have liked more time for networking; by the time I left a session, checked phone messages and went to restroom, had no time for community lounge or to network before running to next session. Would have liked time during lunch to visit with those at table.	
well done. thoroughly enjoyed the event.	
I don't eat meat and when I requested meals without meat the staff seemed unprepared. They were able to throw something together for me though.	
Great Seminar...thank you!	
by far the best sponsor dollars we have ever spent. Absolutely got ROI for our partnership with PGRTAZ. The community lounge set up was genius.	
Your keynote speakers made it!	
Stephanie Weadock was incredibly helpful! Same for Denise McClintic	
The flash memory stick for the handouts is brilliant because I have everything electronically now. But the booklet was too small & hard to read (aging eyes). Also it was awkward having it hanging around my neck.	
Breakfast was a little too heavy (maybe omelette instead of quiche?, maybe yogurt with granola as an option?). Otherwise food was terrific. Loved that there were healthy options in the community lounge. Difficult for folks with computers to access materials on flash drive with the room set up, i.e., at the plenaries with food, hard to open up computer too and in the breakouts without tables. Well done and thank you to everyone for a fantastic day!	
Fabulous, informative day. I will use what I learned. I gave poor marks to the wine & cheese event only because so few attended that I felt it was not worth the effort. People seemed to simply want to get home after a long day, rather than to relax and network at the end of the sessions.	
Booklet was too small to read...	
Awesome!~ This was by far the best summer forum I have attended! Congrats for a job well done! Bet we will grow our membership from this event!	
The program booklet was kind of cumbersome. Also, I found it very difficult to find some of the sponsors. Otherwise an fantastic day!	

Two of the presentation rooms had terrible lighting and the dividing walls did not block enough sound from other rooms. When there was laughter from the other room or the presenter next door got loud it made it difficult to accurately hear the presenter in my room. Great introductions at each presentation and announcement of sponsors.

Thank you for well crafted conference.

Very well organized

location was a challenge - double duty of the ballroom for plenary, breakout session and meals.

Worth the price of admission and time spent: Steve Seleznow and Lucy Bernholz

The ideas of the 3 tracks were great, so were the workshops but it was difficult to read the material the way it was put together.

This was just the best ever. Thank you so much because it was obvious you put a lot of work into the seminar.

If meals are not buffet, vegetarian options should always be offered.

The program booklet was too small and difficult to read.

Food was great, but probably overkill! Didn't need near that much food/snacks. Could probably save a little \$\$ on the budget that way.

A little confusion at the registration table about the lanyards and name tags

Perhaps a track for "newbies" or people who are JUST getting started in gift planning would be beneficial.

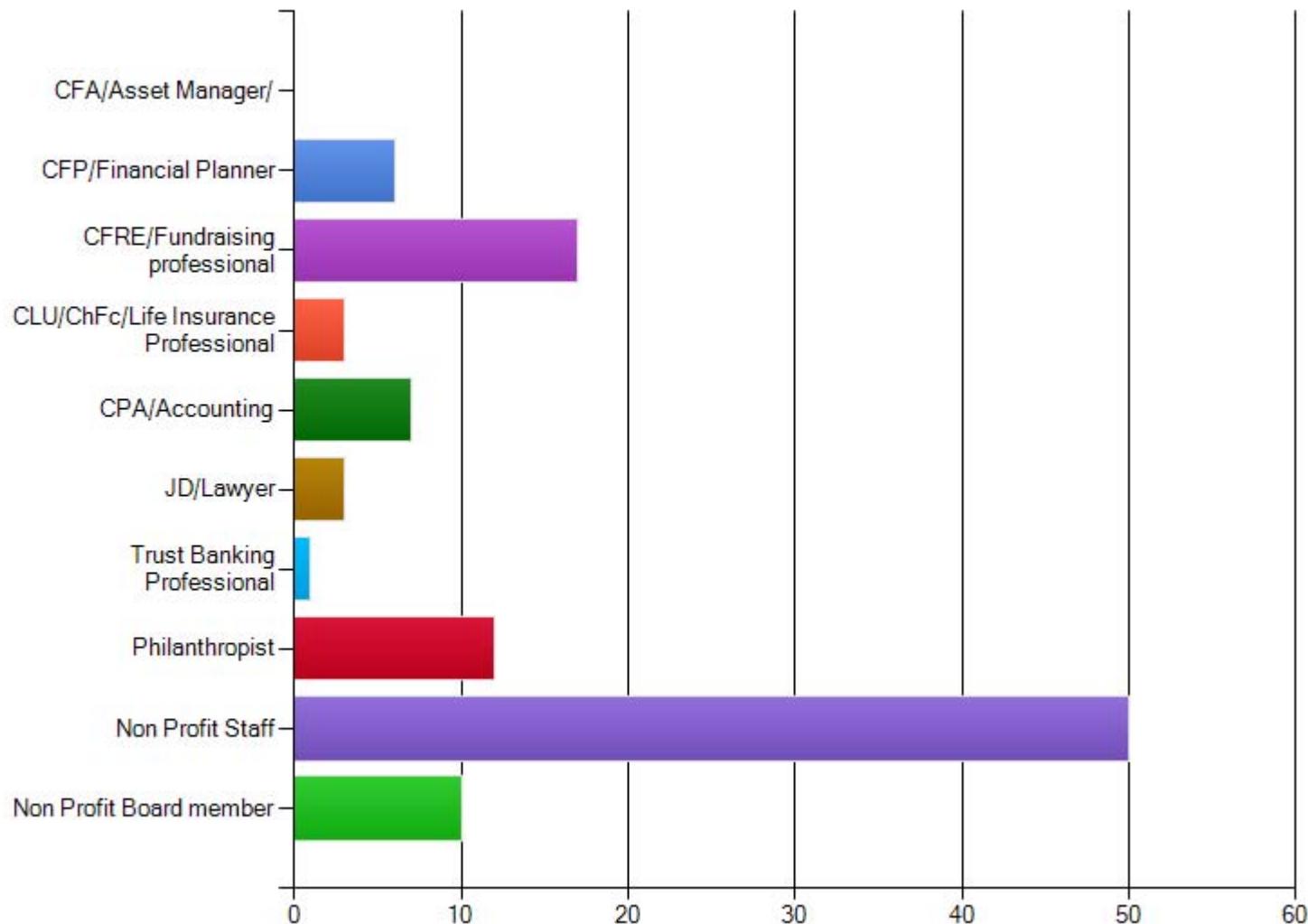
I have not looked at the e-presentation data (flash memory).

The name badges being on the program were a bit awkward, many complained they kept falling off, as did mine. Small detail that was quickly forgotten as the day was a great success!

As the leader of a nonprofit focused on recycling I applaud the event goal to reduce the footprint and utilize environmentally friendly techniques. I appreciate having all of the information on the jump drive. Two thoughts; the event booklet was too cumbersome to wear around your neck and unfortunately it was the only way to utilize the name tag. Possibly it would be more effective to use name tags and recycle the plastic after the event for future use. Also, the booklet was so small it was difficult to read much of the information especially the logos on the page of sponsors.

Program book: little hard to read, small typeface.

Please check all that apply:



PGRTAZ 2012 Summer Forum

Attendee Background:

Foundation Staff

Enrolled Agent

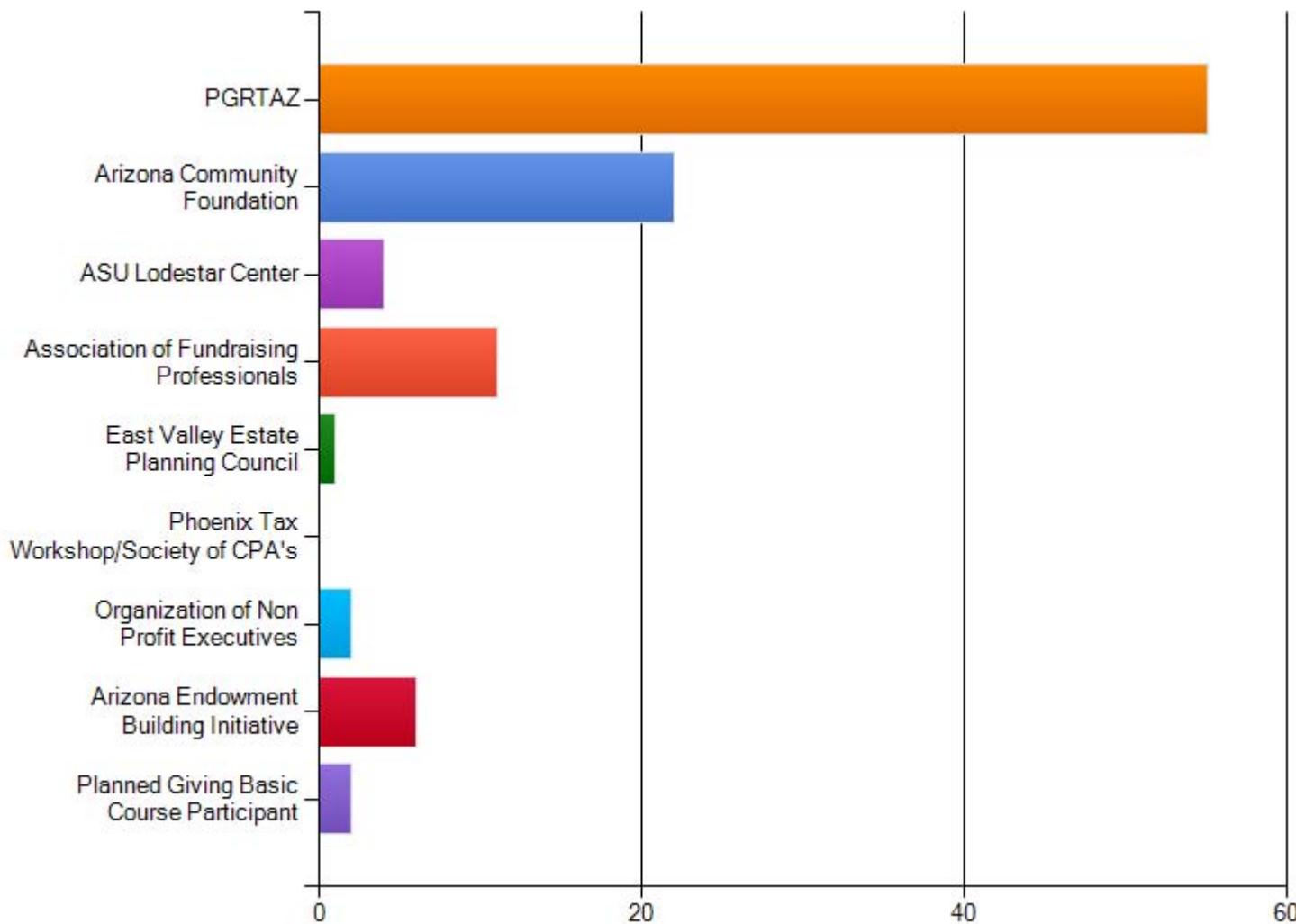
Wealth Management Advisor

Director of Development

donor

CSPG

How/from whom did you hear about this event?



PGRTAZ 2012 Summer Forum

How/from whom did you hear about this event?

St. Joseph's Hospital Foundation

My Boss was invited to attend and asked me to come

Arizona Society of CPA'S

Kim Kur

Through work

Board meetings

Kathy Kramer

colleague

My colleague - Alan Knoblach

ONE

Kim Kurr

Melissa Kemp

co-worker

Current PGRT Pres

Russ Goldstein/US Trust

PGRTAZ 2012 Summer Forum

What did you enjoy or value the most about this event?	Page 1 of 2
The classes that I chose were excellent and it is always great to be able to meet and greet both old and new friends.	
The networking opportunities.	
presentation content	
The first speaker Tim Cusack really helped set the tone and put me in a great mind frame to absorb all the information I was about to receive. Lucy Bernholz offered so much valuable information and insight. I found her presentation to be most meaningful to me professionally.	
klontz was great in message and delivery	
concentration of resources; speakers	
The speakers were GREAT!	
All of it! Especially morning speaker!	
interaction in the community lounge	
Networking, all 3 keynote speakers, and Ellis Carter	
All of Bryan C and the Lunchtime Presentation!	
Bryan Clontz's presentation on Advanced Brainteasers; Steve Seleznow's presentation on charitable impact investing (had not heard of this before); meeting new people whom I had heard about, but not acutally met	
Keynote speakers were exceptional	
Quality of the presentations	
Brainteaser session with Bryan Clontz	
Great section on Planned Giving Ask - lots of take-aways	
I always enjoy the technical sessions	
Bryan Clontz	
Excitement it generated (great step for our community)	
Networking	
The friendliness and welcoming atmosphere; the excellence of Brian Clontz.	
cost/benefit unusually positive	
Speakers who understood how to make this topic humorous!	
great intro information for a novice in this area. The speakers, especially Brian had great energy.	
The Speakers and the opportunity to network	
The opportunity to network with others.	
The speakers were interesting and gave fantastic information. Learned a lot	
The thumb drive instead of handouts, learning more about the changing atmosphere of philanthropy and how we can be part of the change.	
Inspiration from clontz and Cusack as well as a few new ideas. Enjoyed connecting and reconnecting with a few colleagues	
Plenty of time for networking	
Steve Seleznow and Lucy Bernholz	
The speakers were excellent and they provided information that will be helpful.	
The speakers, the food, the topics, the friendliness of the volunteers. It was really a special conference.	
The quality of the educational presentations.	
The quality and substance of the speakers	
Learning about ACF and partners	
Content from presentations & networking opportunities	
The variety of topic areas, and levels	
Brainteaser session made me stretch my brain.	

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

Page 2 of 2

The quality of the presenters

Keynote speakers, the emphasis on networking opportunities. The focus on forward thinking that was central to the forum and was solidified with Lucy Bernholz' fantastic presentation.

The general introduction to the concept of planned giving and the opportunity to meet other attendees.

I appreciated the organization of sessions into different tracks. I thoroughly enjoyed the keynote speakers, very informative, engaging and entertaining.

Great information and speakers

Networking opportunities

plenary speakers/excellent.

Bryan/most practical

Price breaks were really good.

Great atmosphere, good speakers, food choices were outstanding

The information shared was of utmost value and I gained knowledge and quotes that I will use daily.

The speakers and the networking

I enjoyed Lucy's talk during lunch. She shared some very interesting and new information. I also enjoyed Tim's session during breakfast. Normally I'm not a fan of "motivational" speakers but he is one of the best I've heard.

Session were the best

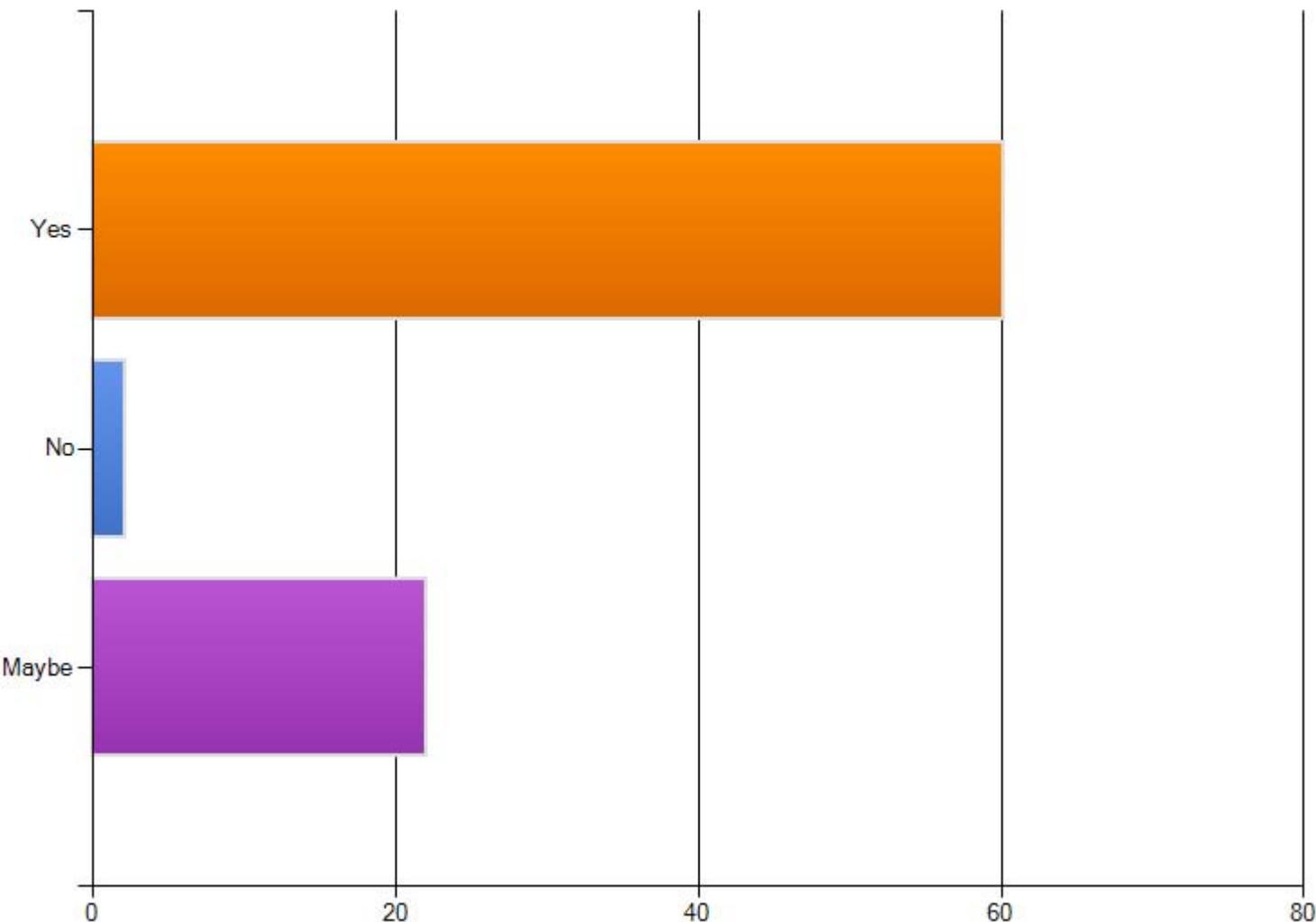
really Liked one hour sessions.

Luncheon speaker

PGRTAZ 2012 Summer Forum

Do you have any suggestions for improving this event?
I think the committee did a fantastic job. I can't think of anything that they did not cover.
more outreach to outlying areas throughout the state--there are few opportunities of the type and quality!
No.
No
I really enjoy spending time chatting with my peers and although I did feel like we got enough time between sessions I would have liked to skipped the lecture during lunch. The lecturer was great, just would have liked time to chat with the people around me.
More time for networking and discussion.
continued growth and push for top talent speakers
Include a short bio of each speaker in the program.
Best Practices with Social Media
maybe have a 8 1/2 by 11 handout of the schedule that is easier to read.
Know the importance of staying green, but feel the use of nametags is essential - many people commented on missing them.
Brochure print was too small. Needed to have a larger poster board version that was easily accessible, or perhaps on the screen behind registration
Program booklets were rather useless- writing very small and hard to read. Remind participants to bring a device that can use the flashdrive.
See comments on previous screen.
Very few other than that you could probably save the money spent on the wine and cheese reception.
At lunch there needs to be time to talk with your table - it's networking and it's hearing about other sessions that you did not get to be in!
You already have the formula for an excellent event
The lunch was sort of gross.Having an option of salmon instead of chicken would have been good.
Better rooms (lighting particularly) for presentations . A good presentation provides bright screen and a flood/spot light on the presenter (or presenter area) Chairs spaced a little farther apart would be appreciated in the breakout rooms.
this was the best planned and attended summer forum that I have attended in Phoenix
Can't think of a thing that could have made it better overall.
n/a
expand the community lounge a bit to better allow fostering of discussions. better communication to sponsors about aspects of the community lounge.
really none....except skip the comedian/celebrity idea
Phoenix Country Club space is so cramped and would like to have more access to outside for breaks.
Melissa did a fantastic job!
Review all the feedback for weeks and adjustments but keep the staff as they were responsible for such a great day!
Not at this time.
Provide more input on sessions up front. Navigating could have been more simple.
Perhaps do wine and cheese again in the final session ballroom, transition may of caused us to loose a few people, do half of the raffle at lunch.
Appeal to a broader audience so the networking will be enhanced.
I don't have any. As someone who has planned many events, I was impressed with how organized this large event was.
Name tags not on books

Will you attend this event again next year?



PGRTAZ 2012 Summer Forum

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

Panel discussion with key donors about their insights and desires (i.e., how to engage donors as told by donors)

Case studies by successful nonprofits re: problem solving in endowment building with BOD participation

I found this event to be extremely valuable as an advisor, and think it is very prudent for Non-profit organizations to gain the insights offered at this event!

I'm just learning about planned giving so am not in a position to critique or make suggestions

Moving to Prescott AZ next year!

So well done and organized. A complete joy to attend.

Ask that the chapter administrator for PGRT of Southern Arizona distribute info to its members via email. Contact Gerry Oldenski gerry@dynasetaz

Best forum that I have attended

The Family Love Letter....happy to present next year with Donna Pagano and Jeff Scroggin. familyloveletter.com

Nothing wrong with traditional nametags- other approach is ok, but there is a need for them. More technical sessions would be helpful for me.

Congratulations; the event was fabulous.

Awesome!!! I would suggest having Tim Cusack again--his opening motivational plenary set the theme for a memorable day!

Thank You

Loved the title.

Crescendo might be a potential sponsor/presenter/Vendor to attract since they are located in southern California. I wonder if a good keynote or presenter from Higher Ed would attract more ASU, UofA, NAU or other local higher ed fundraising staff? would have been nice to have a roster of all attendees included on the jump drive.

Barry Azmus, local AZ economist might be great speaker (very inspirational)

<http://barryasmus.com/>

All financial planners in the valley could/should be invited including Banking financial advisors

The iPad drawing was especially clever, and seems to have drawn more sponsors, perhaps due to knowing that people would actually be required to come around and visit them! Well done.

Premium Organization did an outstanding job of organizing and running the event

As a donor, this was not an appropriate event for me but I truly appreciated all the people I met and the level of professionalism and the quality of the presentations.

I think you covered the waterfront on attendees!

Perhaps engaging some of the charitable divisions of large entities in Arizona such as US Air, Apollo Group, etc. to give insight into corporate giving. Also, what about the young professional organizations in Arizona.

While wifi was readily accessible, I was unable to connect to the internet. Others were able to do so, however, so there is a good chance that the cause was a computer and not a service issue.

Overall, I enjoyed the event and benefited from attending. Thanks!

Best ever Summer Forum.

Thanks to all for the great planning. I know that these events are so hard to orchestrate and I do appreciate the great work that you all did!