

GIFT PLANNER PROFILE 7



The Gift Planner Profile survey is PPP's long-term project to track the demographics of the gift planning community. Because PPP represents all types of charitable organizations, from the smallest community-based nonprofits to the largest national organizations, we have a unique perspective on developments in the work life of charitable planners.





Gift Planner Profile 7

In October of 2014, the Partnership for Philanthropic Planning launched the seventh Gift Planner Profile survey. The survey invitation was delivered via e-mail to all active members of PPP and to members of affiliated planned giving councils for whom PPP has contact information. The field of philanthropic planning is very broad, and we do not attempt to construct a representative sample of all the professions involved in the gift planning process. Through the years, this survey has tracked professional characteristics and common practices of people whose commitment to charitable planning leads them to join their local planned giving council and/or the national PPP organization.

	2014	2011	2002	1992
Population Surveyed	4980	5775	7,488*	600**
Response Received	707 (14%)	1279 (22%)	1711 (23%)	398 (66%)

* The National Committee on Planned Giving (now PPP) began accepting individual members in 2001. The survey population in 2002 was 100% of people for whom NCPG had valid, working e-mail addresses--roughly 75% of the organization's entire database of individual members. This is the first year that the survey was conducted electronically.

** In 1992, NCPG had no individual members, and all data on individuals was supplied by local planned giving councils. The mail-in survey was sent to a random sample of council members.

Key Findings

The seventh Gift Planner Profile provides a snapshot of conditions for charitable planners as giving in the US approaches pre-recession levels. In 2014, Fundraising Effectiveness Report from the Association of Fundraising Professionals and the Urban Institute showed the fourth consecutive year of small positive increases in donor retention and repeat giving. This is mirrored in the 2014 Giving USA Annual Report which also projects that while certain categories of charity have recovered better than others, overall

giving by Americans is up by 4%, the fourth consecutive year of increase after individual giving dipped in 2008 and 2009.

Planned gift commitments are increasing: Among nonprofit respondents to the survey, 65% said the planned gift commitments had increased at their organization in the past three years, and an additional 30% reported that commitments were staying “about the same.” Since 1992, PPP members in the nonprofit sector have increasingly worked at large organizations. In 2014, the largest group of survey respondents (28%) worked for employers with annual revenue budgets over \$100M, and 24% work in development operations that employ more than 50 people. These organizations are somewhat more likely than smaller organizations to report an increase in planned gift commitments. However, a substantial number of smaller organizations also report increased commitments. 43% of nonprofit survey respondents also report that blended gift commitments are increasing. Blended strategies--such as “virtual endowments” that treat a series of current gifts as the spending on the testamentary pledge of the full endowment amount—are expected to be attractive to younger donors and entrepreneurial philanthropists who want to support specific initiatives. We expect that this approach to planned giving will increase in the future.

Turnover continues to be high, but job changers are finding opportunities to ‘do’ more gift planning: Nearly half of nonprofit survey respondents (49%) and 16% of for-profit respondents report that they have been in their current position for three years or less. Nearly 1 in 5 nonprofit respondents have been in their position less than one year. Most of those who took a new job in the past three years report that they moved to a new organization. The most common reason cited for a career move was the desire for “different responsibilities--more challenges, better fit with my skills, etc.” Two-thirds of nonprofit job changers say they have more duties related to gift planning in their new positions.

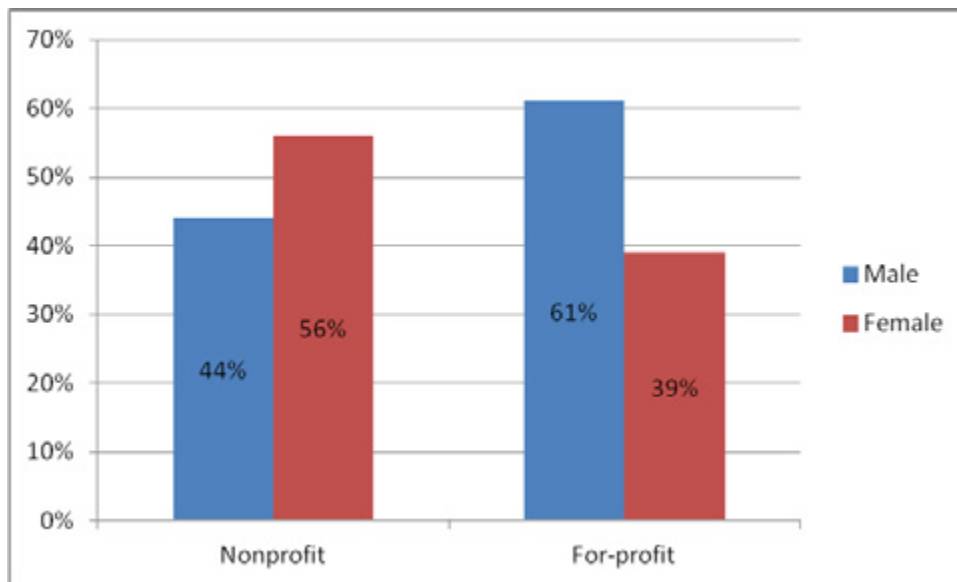
PPP advisors start the conversation: 40% of PPP members in the for-profit professions say they ask 100% of their clients about charitable giving, up from 22% in 2011. It’s no surprise that PPP members would be more proactive than advisors in general. (In the 2013 US Trust Study of the Philanthropic Conversation, HNW donors said they were more likely than their advisors to initiate a discussion of charitable giving.) At the same time, PPP advisors report no increase in their clients’ decision to notify charity of their gifts. For many years, the majority of for-profit respondents to the Gift Planner Profile survey report that less than half of their clients notify the charitable beneficiary. When so many planned gifts are established with no input from charity, the advisor community’s knowledge about and support of philanthropic strategies is crucial.



Gift planners are walking the talk: the number of PPP members who have established their own planned gifts has steadily increased over the years, from 46% in 1994 to 69% in 2014. Members working the for-profit professions are more likely to have created planned gifts.

General Characteristics of PPP Members

The percentage of women in PPP’s membership remains at 55%, after steadily increasing from an initial 35% when the first Gift Planner Profile survey was conducted in 1992. Men continue to outnumber women in the for-profit sector.



The median age of PPP members is in the 50 to 59-year range. In the nonprofit sector, 30% of respondents are age 60 or older, and in the for-profit sector, 24% are age 60 or older. Only 14% of the nonprofit respondents and 16% of for-profit respondents expect to retire in the next five years.

PPP members have the following academic and professional credentials.

	Nonprofit	For-profit
BA/BS	75%	68%
MA/MS	24%	20%
MBA	9%	14%
Masters degree in nonprofit administration or related specialty	7%	0%
JD	22%	46%

PhD	2%	2%
Certified Specialist in Planned Giving (CSPG)	4%	10%
Certified Gift Planning Associate	1%	0%
CFRE/ACFRE	15%	6%
Chartered Advisor in Philanthropy (CAP)	4%	12%
CPA	2%	14%
CHFC	1%	2%
CLU	1%	2%
AEP	0%	6%
CFP	5%	12%
Other	10%	20%

There is no nationally recognized independent certification program for gift planners, and the Gift Planner Profile has shown relatively constant numbers in most of the related academic degrees and credentials over the years. The number of PPP members who are JDs has increased since 2011 (then, 18% in the nonprofit sector and 35% in the for-profit sector), as has the number in the for-profit sector who have earned the CAP designation (up from 7% in 2011).

Gift Planners in the Nonprofit Sector

Most PPP members (91%) work in the nonprofit sector. Higher education (36% of respondents) and healthcare organizations (16% of respondents) and are the dominant employers, as they have been since the first Gift Planner Profile survey in 1992.

Hospital/Health Care Organization or Foundation	17%
Public University	16%
Private University	14%
Social Services Organization	11%
Community Foundation or Community Trust	8%
Religious Organization	7%
Other	6%
Small College	6%
Museum, Symphony, Arts/Cultural Organization	4%
Environmental or Animal Welfare Group	3%
Academy/Private School	3%
International Aid/Education Organization	2%
Continuing Care Community/Facility	2%



Community/Junior College	1%
Public Broadcasting	1%

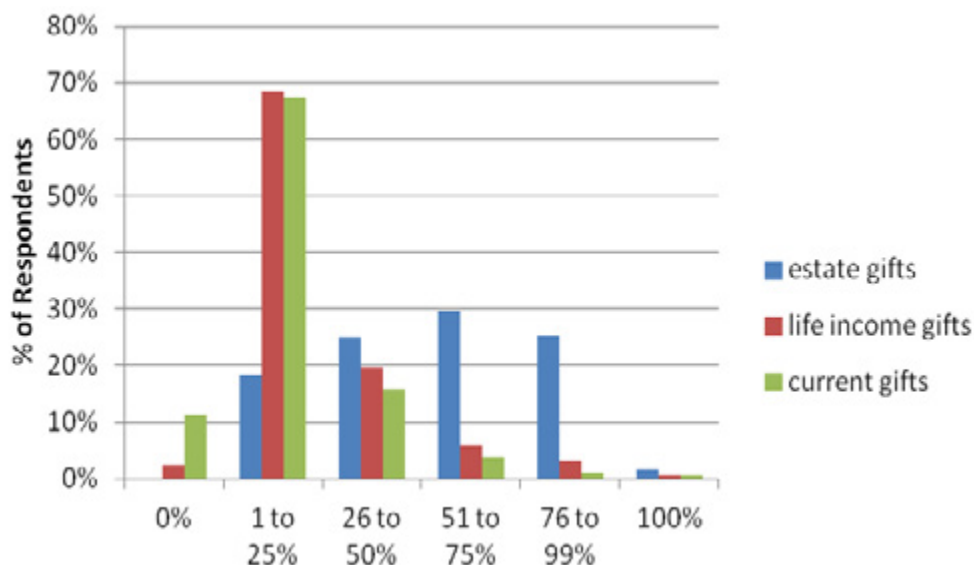
These five job titles account for slightly more than three-quarters of PPP members:

- Director of Gift Planning or Planned Giving (40%)
- Director of Development (12%)
- Vice President (10%)
- Gift Planning or Planned Giving Officer (9%)
- Director of Major and Planned Giving (7%)

In 2014, 12% of survey respondents had titles that included both major and planned giving (unchanged since 2011). Titles that combine major and planned gifts are most likely to be found in arts and social service organizations. Those with titles combining major and planned giving are *not* more likely to report that blended gift commitments have increased in the past three years (38%, vs. 43% of all nonprofit respondents). However, 48% of those with the titles “Director of Planned Giving/Gift Planning” or “Planned Giving/Gift Planning Officer” DO report that blended gifts are increasing. In 2014, less than 1% of respondents had titles that included principal giving.

Just 7% of PPP members work on planned gifts full time; virtually all members spend at least some time cultivating outright gifts. As the nonprofit titles suggest, many are in charge of the general development effort for their organizations. In both nonprofit and for-profit sectors, most survey respondents report spending 25% or less of their work time on charitable gift planning. Less than 10% of PPP members spend 75% or more of their time on cultivating/soliciting/designing/administering bequests and various types of split interest gifts. Even those with the titles “Director of Planned Giving/Gift Planning” or “Planned Giving/Gift Planning Officer” spend a substantial part of their time on current/major gifts.

% Time Allocated by Planned Giving Officers and Directors to Raising...



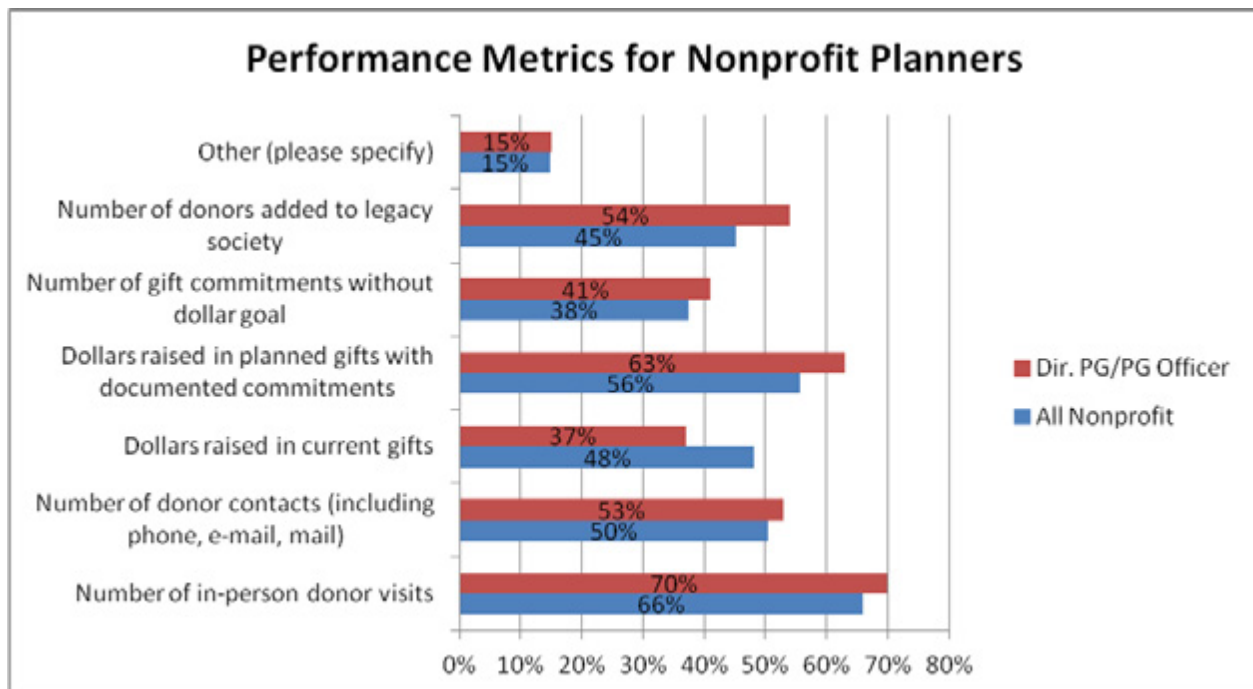
Among all nonprofit respondents, 25% report that their organizations state a public goal for planned gifts raised (either in a campaign, or as an annual goal). 31% of those with Planned Giving/Gift Planning titles report that they state a separate goal for planned gifts.

How are charitable gift planners evaluated?

Since many “planned” gifts are deferred, it is difficult to set dollar goals for this type of fundraising. In its Guidelines for Reporting and Counting Charitable Gifts, PPP recommends setting goals and counting deferred gifts based on face value at the time the gift is committed, if this value is known. When the face value of a gift is not known, PPP recommends counting the number of commitments.

In practice, nonprofit planners report various approaches to setting goals for their work.





Among nonprofit planners, when asked how many personal visits they have with donors each month, the most common response is one to five. However, more than half of nonprofit planners with the title Director of Gift Planning or Gift Planning Officer report that they have six or more personal visits with donors each month.

Other performance metrics mentioned by nonprofit respondents include:

- Increases in number of gifts over previous year

- Number of planned gift proposals/asks

- Planned gifts at a specific percentage of overall giving

- Number of public seminars

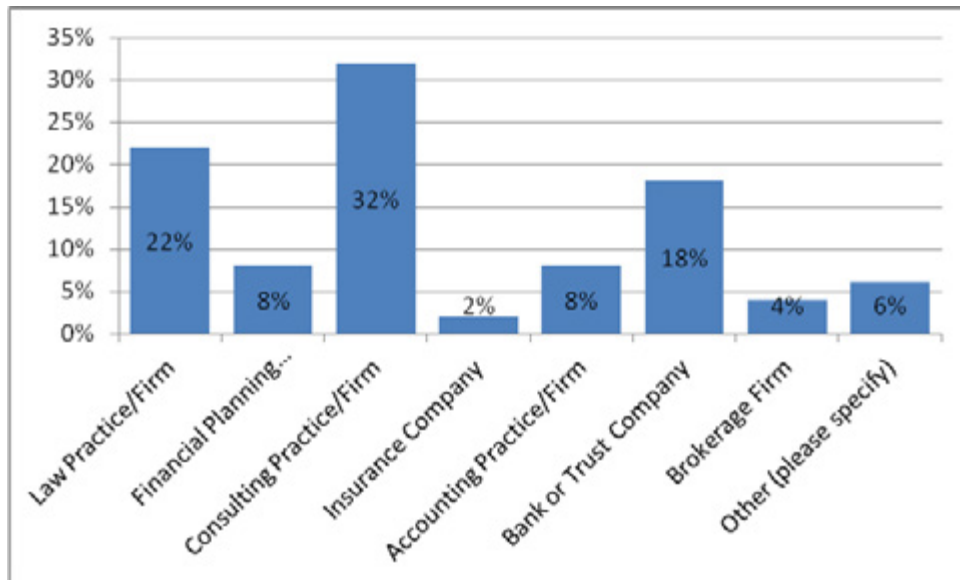
The most common “other” response was that the planner had no specific performance goals

Nonprofit planners were also asked what percentage of donors who have made bequests or other planned gifts (including trusts, charitable gift annuities, insurance gifts, etc.) also make regular annual gifts. 43% of respondents said that more than three-quarters of planned gift donors are regular annual donors.

Gift Planners in the For-profit Sector

PPP’s members in the for-profit sector work in the following professional domains.





As in the nonprofit sector, for-profit advisors also commonly spend about a quarter of their time on charitable planning, although 18% report that they spend 100% of their working time on charitable planning. When for-profit planners were asked how frequently they themselves raised the issue of charitable planning with their clients, responses were as follows:

I raise the issue of charitable giving with...	
100% of clients	40% (up from 22% in 2011)
76 to 99% of clients	26%
51 to 75% of clients	12%
26 to 50% of clients	5%
1 to 25% of clients	12%
0% of clients	5%

For-profit planners were also asked what percentage of their clients who are engaged in charitable planning were referred by charitable organizations. One-third reported no referrals from charitable organizations, and 48% reported that a quarter or less of their clients came from nonprofit referrals. When asked how many of their clients had notified the charitable recipient of a planned gift, three-quarters of for-profit planners indicated that 50% or fewer of their clients have made such a notification.



How many of your clients have notified the charitable recipient of their planned gift?	
100% have notified the charitable recipient	1.9%
76 to 99% have notified the charitable recipient	5.6%
51 to 75% have notified the charitable recipient	16.7%
26 to 50% have notified the charitable recipient	20.4%
1 to 25% have notified the charitable recipient	51.9%
0% have notified the charitable recipient	3.7%

As in previous Gift Planner Profile surveys, for-profit planners report that bequests are the type of gift they discuss most frequently with clients. Other leading topics of discussion, in order of frequency, are:

Charitable gift annuities

Charitable distributions from qualified retirement plans

Charitable remainder unitrusts

Starting a gift planning program

Evaluating an existing gift planning program

What do charitable gift planners earn?

Note: regional profiles that analyze salaries by job title, type of organization, years of experience and other variables can be ordered from PPP. Click [here](#) for an order form.

Median nonprofit salary range

1992	\$45,000-\$54,999
2002	\$55,000-\$64,999
2011	\$80,000-\$89,999
2014	\$90,000-\$99,999

(Because of inflation, \$90,000 in 2014 has about the same buying power as \$53,000 in 1992.)

At the end of 2014, the median salary range for PPP members working in the nonprofit sector was \$90,000 to \$99,999. Survey respondents in the for-profit professions reported a median salary range of

\$120,000 to \$129,999. (Because there are relatively few respondents from each advisor profession, we do not analyze salaries by profession.) Two-thirds of nonprofit planners and 39% of for-profit planners reported that their salaries had increased in 2014. Nonprofit planners earning above the median range were more likely to:

- be male
- have more than 10 years of gift planning experience
- have JD
- work on the west coast
- work for healthcare organizations
- work for an organization with an annual budget of \$100M or more
- hold the title Vice President

In both sectors, men tend to earn more than women. However, men also tend to be older than women and have more years of gift planning experience, and in both sectors, these characteristics are correlated with higher salaries.

Complete response data is available in the Appendix. For more information about the Gift Planner Profile, please contact Barbara Yeager, PPP Director of Operations, at byeager@pppnet.org.



Appendix: Detailed survey responses

How many years has your work included charitable gift/estate planning duties?..... 13

Have you personally made a planned gift to one or more charitable organizations? 13

Please select the region in which you live. 14

Is your primary employer..... 14

What is your gender? 15

How old are you? 15

How do you describe your racial or ethnic identity? 16

What was your total compensation for 2010, including all cash compensation but excluding fringe benefits?..... 17

Which of the following academic degrees or professional credentials do you hold?..... 19

To which of the following professional groups do you or your organization belong? 20

What do you think you will most likely be doing in five years? 21

Nonprofits Only: Which of the following types of organizations is your primary employer? 22

Nonprofits Only: What was the annual revenue of your primary employment organization in the latest completed fiscal year? 23

Nonprofits Only: What was your primary employment organization's annual budget in the latest completed fiscal year for charitable gift planning, excluding salaries and fringe benefits of staff? 24

Nonprofits Only: What is your job title?..... 25

Nonprofits only: *Approximately how many people work in fundraising/development positions at your organization?*..... 25

Nonprofits Only: Approximately what percentage of your time is spent on the following? 26

Nonprofits Only: Approximately how many contacts do you have with planned or major gift donors/prospects each month? 27

Nonprofits Only: Approximately what percentage of donors who have made bequests or other planned gifts (including trusts, charitable gift annuities, insurance gifts, etc.) to your organization also make regular annual gifts? 28

Nonprofits Only: Does your organization state a public goal for planned gifts raised (either in a campaign, or as an annual goal)? 28

Nonprofits Only: Do you report the following data on known gift expectancies to your manager and/or trustees?..... 28

For-Profits Only: Which of the following types of organizations is your primary employer? 29

For-Profits Only: Approximately what percentage of your individual or organizational clients are engaged in charitable planning? 29

For-Profits Only: If you advise individuals, how frequently do YOU raise the issue of charitable giving with your clients? 30

For-Profits Only: Approximately what percentage of your time do you spend on work related to charitable gift or charitable estate planning? 30



For-Profits Only: If you advise individuals, approximately what percentage of your clients who are engaged in charitable gift and/or charitable estate planning have been referred to you by charitable organizations? 30

For-Profits Only: To the best of your knowledge, approximately what percentage of individual donors have notified the charity of their gift? 31

All respondents: In the past year, has your annual salary or income... 32

If you HAVE changed positions in the past three years, is your new position...? 33

All respondents: What was the reason for your most recent job change? 34



How many years has your work included charitable gift/estate planning duties?

	Nonprofit Organization	For-profit primarily advising individuals	For-profit primarily advising charitable organizations	
0	0%	0%	0%	1
< 1	3%	0%	5%	20
1 to 3	11%	4%	0%	69
4 to 6	9%	0%	0%	61
7 to 10	18%	14%	5%	124
11 to 15	21%	18%	10%	143
16 to 20	15%	11%	29%	108
> 20	23%	54%	52%	173
Totals	100%	100%	100%	699

Have you personally made a planned gift to one or more charitable organizations? (Including, but not limited to, establishment of charitable trusts, bequests, gift annuities, pooled income funds, beneficiary designations on life insurance policies, donor advised funds, and major outright gifts of cash, securities, real estate, qualified retirement assets or other assets.)

Response	2014	2011	2002	1994 (first occurrence of this question)
Yes	69%	68%	62%	46%
No	31%	32%	38%	54%



Please select the region in which you live.

	Nonprofit organization	For-profit business, practice or firm primarily advising individuals	For-profit business, practice or firm primarily advising charitable organizations	Total
Northeast (CT, MA, ME, NH, NY, RI, VT)	74 11.4%	2 6.9%	1 4.8%	77
Mid-Atlantic (DC, DE, MD, NJ, PA, WV)	90 13.8%	1 3.4%	2 9.5%	93
South (AL, AR, FL, GA, KY, LA, MS, NC, SC, TN, VA)	102 15.7%	4 13.8%	2 9.5%	108
Midwest (IA, IL, IN, KS, MI, MN, MO, ND, NE, OH, SD, WI)	209 32.2%	7 24.1%	4 19.0%	220
Mountain West (CO, ID, MT, NV, UT, WY)	18 2.8%	2 6.9%	0 0.0%	20
Southwest (AZ, NM, OK, TX)	52 8.0%	5 17.2%	3 14.3%	60
Pacific West (AK, CA, HI, OR, WA)	105 16.2%	8 27.6%	9 42.9%	122
Totals	650 100%	29 100%	21 100%	700

Is your primary employer...

Response	2014	2011	2002	1992
Nonprofit organization	92%	91.1%	85.3%	71%
For-profit business, practice or firm primarily advising individuals	4%	4.3%	9.7%	29%
For-profit business, practice or firm primarily advising charitable organizations	3%	4.6%	5.0%	



What is your gender?

	Nonprofit organization	For-profit business, practice or firm primarily advising individuals	For-profit business, practice or firm primarily advising charitable organizations
Female	55% (640)	33% (18)	29% (17)
Male	46% (518)	67% (37)	71% (42)

How old are you?

	Nonprofit organization	For-profit business, practice or firm primarily advising individuals	For-profit business, practice or firm primarily advising charitable organizations	Total
How old are you?				
< 20	0 0.0%	0 0.0%	0 0.0%	0
20 to 29	11 1.7%	0 0.0%	0 0.0%	11
30 to 39	71 10.9%	1 3.4%	1 4.8%	73
40 to 49	135 20.7%	4 13.8%	2 9.5%	141
50 to 59	232 35.6%	9 31.0%	7 33.3%	248
60 to 69	191 29.3%	11 37.9%	7 33.3%	209
70 to 79	10 1.5%	3 10.3%	3 14.3%	16
80+	1 0.2%	1 3.4%	1 4.8%	3
Totals	651 100%	29 100%	21 100%	701



How do you describe your racial or ethnic identity?

	Nonprofit organization	For-profit business, practice or firm primarily advising individuals	For-profit business, practice or firm primarily advising charitable organizations	Total
White/non-Hispanic	608 94.1%	26 92.9%	20 95.2%	654
Hispanic	9 1.4%	1 3.6%	0 0.0%	10
African American	7 1.1%	0 0.0%	0 0.0%	7
American Indian or Alaskan Native	0 0.0%	0 0.0%	0 0.0%	0
Asian or Pacific Islander	10 1.5%	1 3.6%	1 4.8%	12
Mixed origin	12 1.9%	0 0.0%	0 0.0%	12
Totals	646 100%	28 100%	21 100%	695



What was your total compensation for 2010, including all cash compensation but excluding fringe benefits?

Overall: Median = (\$90,000 to \$99,999); Mode =

Nonprofit: Median = (\$80,000 to \$89,999); Mode =

Nonprofit Females: Median = (\$90,000 to \$99,999); Mode =

Nonprofit Males: Median = (\$100,000 to \$119,999); Mode =

For-profit: Median = (\$120,000 to \$129,999); Mode =

	Nonprofit organization	For-profit business, practice or firm primarily advising individuals	For-profit business, practice or firm primarily advising charitable organizations	Total
Under \$30,000	2 0.3%	0 0.0%	1 4.8%	3
\$30,000 to \$39,999	6 0.9%	1 3.7%	0 0.0%	7
\$40,000 to \$49,999	15 2.3%	1 3.7%	0 0.0%	16
\$50,000 to \$59,999	36 5.5%	0 0.0%	0 0.0%	36
\$60,000 to \$69,999	57 8.7%	2 7.4%	0 0.0%	59
\$70,000 to \$79,999	69 10.6%	2 7.4%	1 4.8%	72
\$80,000 to \$89,999	71 10.9%	0 0.0%	2 9.5%	73
\$90,000 to \$99,999	80 12.3%	3 11.1%	2 9.5%	85
\$100,000 to \$109,999	87 13.3%	1 3.7%	3 14.3%	91
\$110,000 to \$119,999	52 8.0%	0 0.0%	4 19.0%	56
\$120,000 to \$129,999	43 6.6%	1 3.7%	1 4.8%	45
\$130,000 to \$139,999	32 4.9%	1 3.7%	2 9.5%	35
\$140,000 to \$149,999	32 4.9%	2 7.4%	0 0.0%	34
\$150,000 to \$159,999	18 2.8%	2 7.4%	1 4.8%	21
\$160,000 to \$169,999	12 1.8%	2 7.4%	0 0.0%	14
\$170,000 to \$179,999	9 1.4%	0 0.0%	0 0.0%	9
\$180,000 to \$189,999	11 1.7%	0 0.0%	0 0.0%	11



\$190,000 to \$199,999	6 0.9%	0 0.0%	0 0.0%	6
\$200,000 to \$209,999	3 0.5%	1 3.7%	0 0.0%	4
\$210,000 to \$219,999	2 0.3%	0 0.0%	0 0.0%	2
\$220,000 to \$229,000	1 0.2%	1 3.7%	1 4.8%	3
\$230,000 to \$239,999	2 0.3%	2 7.4%	0 0.0%	4
\$240,000 to \$249,999	2 0.3%	0 0.0%	0 0.0%	2
\$250,000 or greater	4 0.6%	5 18.5%	3 14.3%	12
Totals	652 100%	27 100%	21 100%	700



Which of the following academic degrees or professional credentials do you hold? (Choose all that apply.)

	Nonprofit organization	For-profit business, practice or firm primarily advising individuals	For-profit business, practice or firm primarily advising charitable organizations	Total
BA/BS	482 75.3%	20 69.0%	14 66.7%	516
JD	141 22.0%	14 48.3%	9 42.9%	164
MA/MS	153 23.9%	6 20.7%	4 19.0%	163
CFRE/ACFRE	94 14.7%	1 3.4%	2 9.5%	97
Other (please specify)	66 10.3%	8 27.6%	2 9.5%	76
MBA	60 9.4%	4 13.8%	3 14.3%	67
Masters degree in nonprofit administration or related specialty	43 6.7%	0 0.0%	0 0.0%	43
CFP	29 4.5%	6 20.7%	0 0.0%	35
Certified Specialist in Planned Giving (CSPG)	28 4.4%	2 6.9%	3 14.3%	33
Chartered Advisor in Philanthropy (CAP)	26 4.1%	6 20.7%	0 0.0%	32
CPA	10 1.6%	5 17.2%	2 9.5%	17
PhD	12 1.9%	0 0.0%	1 4.8%	13
Certified Gift Planning Associate	9 1.4%	0 0.0%	0 0.0%	9
CHFC	5 0.8%	1 3.4%	0 0.0%	6
CLU	5 0.8%	1 3.4%	0 0.0%	6
AEP	0 0.0%	3 10.3%	0 0.0%	3
FAHP	2 0.3%	0 0.0%	0 0.0%	2
Totals	640 100%	29 100%	21 100%	690



To which of the following professional groups do you or your organization belong? (Choose all that apply.)

	Nonprofit organization	For-profit business, practice or firm primarily advising individuals	For-profit business, practice or firm primarily advising charitable organizations	Total
Local planned giving council	464 74.0%	21 75.0%	19 95.0%	504
AFP--Association of Fundraising Professionals	292 46.6%	5 17.9%	8 40.0%	305
Local estate planning council	202 32.2%	16 57.1%	8 40.0%	226
ACGA--American Council on Gift Annuities	209 33.3%	2 7.1%	8 40.0%	219
CASE--Council for Advancement and Support of Education	196 31.3%	1 3.6%	2 10.0%	199
Other (please specify)	96 15.3%	8 28.6%	4 20.0%	108
ABA--American Bar Association and local associations	59 9.4%	8 28.6%	3 15.0%	70
AHP--Association for Healthcare Philanthropy	63 10.0%	1 3.6%	0 0.0%	64
APRA--Association of Professional Researchers for Advancement	27 4.3%	0 0.0%	0 0.0%	27
FPA--Financial Planning Association	18 2.9%	8 28.6%	0 0.0%	26
NEAPC-- National Association of Estate Planners and Councils	18 2.9%	5 17.9%	0 0.0%	23
AiP--International Association of Advisors in Philanthropy	8 1.3%	3 10.7%	1 5.0%	12
ACTEC--American College of Trust and Estate Counsel	3 0.5%	5 17.9%	1 5.0%	9
SFSP--Society of Financial Service Professionals	3 0.5%	2 7.1%	0 0.0%	5
NAIFA--National Association of Insurance and Financial Advisors (formerly NALU)	2 0.3%	2 7.1%	0 0.0%	4
Giving Institute	2 0.3%	1 3.6%	0 0.0%	3
AAA-CPA--American Association of Attorney-CPAs	2 0.3%	0 0.0%	0 0.0%	2
Totals	627	28	20	675



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What do you think you will most likely be doing in five years? (Choose one only.)

	Nonprofit organization	For-profit business, practice or firm primarily advising individuals	For-profit business, practice or firm primarily advising charitable organizations	Total
Charitable gift planning in the nonprofit sector (including major gift planning or leadership/principal gifts)	361 55.2%	0 0.0%	2 9.5%	363
Nonprofit executive management (director level or above)	112 17.1%	0 0.0%	1 4.8%	113
Retirement	94 14.4%	5 17.2%	3 14.3%	102
Not sure	44 6.7%	2 6.9%	3 14.3%	49
Independent consulting related to charitable gift planning	22 3.4%	2 6.9%	8 38.1%	32
Financial or estate planning as part of a for-profit business or firm (law, financial planning, accounting, etc.)	5 0.8%	17 58.6%	1 4.8%	23
Charitable fundraising that does not include gift planning	8 1.2%	0 0.0%	0 0.0%	8
Other nonprofit work (program/service work)	5 0.8%	0 0.0%	1 4.8%	6
Gift administration and/or trust management for a bank or other business	1 0.2%	2 6.9%	2 9.5%	5
Other for-profit work (professional practices or entrepreneurial ventures not related to charitable planning)	2 0.3%	1 3.4%	0 0.0%	3
Totals	654 100%	29 100%	21 100%	704



Nonprofits Only: Which of the following types of organizations is your primary employer? Please select only one and answer subsequent questions as they apply to that employer.

	Count	Percent
Hospital/Health Care Organization or Foundation	108	16.5%
Public University	105	16.1%
Private University	92	14.1%
Social Services Organization	69	10.6%
Community Foundation or Community Trust	49	7.5%
Religious Organization	48	7.4%
Other (please specify)	42	6.4%
Small College	37	5.7%
Museum, Symphony, Arts/Cultural Organization	26	4.0%
Environmental or Animal Welfare Group	22	3.4%
Academy/Private School	19	2.9%
International Aid/Education Organization	15	2.3%
Continuing Care Community/Facility	12	1.8%
Community/Junior College	4	0.6%
Public Broadcasting	4	0.6%
Technical School	1	0.2%
Private/Family Foundation	0	0.0%



Nonprofits Only: What was the annual revenue of your primary employment organization in the latest completed fiscal year?

	Count	Percent
\$100,000 or under	1	0.2%
\$100,001 to \$500,000	13	2.0%
\$500,001 to \$1,000,000	14	2.2%
\$1,000,001 to \$5,000,000	64	9.9%
\$5,000,001 to \$10,000,000	55	8.5%
\$10,000,001 to \$20,000,000	59	9.1%
\$20,000,001 to \$50,000,000	111	17.1%
\$50,000,001 to \$100,000,000	88	13.6%
Over \$100,000,000	183	28.2%
Do not know	61	9.4%

Response	2014	2011	2002	1992
\$1M or less	4.4%	4.2%	12%	33.3%
Over \$100M	28.2%	26.9%	23%	13.9%



***Nonprofits Only:* What was your primary employment organization's annual budget in the latest completed fiscal year for charitable gift planning, excluding salaries and fringe benefits of staff?**

	Count	Percent
No separate gift planning budget	96	14.7%
\$25,000 or under	63	9.7%
\$25,001 to \$50,000	69	10.6%
\$50,001 to \$100,000	65	10.0%
\$100,001 to \$200,000	61	9.4%
\$200,001 to \$300,000	16	2.5%
\$300,001 to \$400,000	8	1.2%
\$400,001 to \$500,000	10	1.5%
\$500,001 to \$600,000	10	1.5%
\$600,001 to \$700,000	7	1.1%
\$700,001 to \$800,000	2	0.3%
\$800,001 to \$900,000	6	0.9%
\$900,001 to \$1,000,000	9	1.4%
more than \$1,000,000	115	17.6%
Do not know	115	17.6%



Nonprofits Only: What is your job title? Choose the option that most closely matches your title, or the title that seems equivalent to your job.

	Count	Percent
Director of Gift Planning or Planned Giving	261	40.2%
Director of Development	81	12.5%
Gift Planning or Planned Giving Officer	69	10.6%
Vice President	62	9.6%
Director of Major and Planned Giving	49	7.6%
Executive Director	37	5.7%
Major and Planned Giving Officer	32	4.9%
Development Officer	16	2.5%
President/CEO	15	2.3%
Philanthropy Advisor	12	1.9%
Donor Relations/Alumni Relations/Stewardship Director or Manager	5	0.8%
Director of Principal Gifts	4	0.6%
Estate or Trust Manager/Administrator	4	0.6%
Finance Manager/CFO	2	0.3%
Annual Gifts Officer	0	0.0%

Nonprofits only: Approximately how many people work in fundraising/development positions at your organization? Please estimate the number of full-time equivalents, not the number of individuals. Consider all professional positions related to development, including research, cultivation/solicitation, stewardship and administration. Do not include students/interns, contractors or temporary staff.

	Count	Percent
0 to 1	37	5.7%
2 to 5	152	23.4%
6 to 10	102	15.7%
11 to 20	89	13.7%
21 to 50	115	17.7%
More than 50	156	24.0%



Nonprofits Only: Approximately what percentage of your time is spent on the following?

Outright/major gifts

	Count	Percent
0%	48	7.4%
1 to 25%	366	56.2%
26 to 50%	125	19.2%
51 to 75%	70	10.8%
76 to 99%	38	5.8%
100%	4	0.6%

Estate gifts

	Count	Percent
0%	8	1.2%
1 to 25%	254	39.0%
26 to 50%	157	24.1%
51 to 75%	126	19.4%
76 to 99%	98	15.1%
100%	8	1.2%

Life income gifts

	Count	Percent
0%	75	11.6%
1 to 25%	437	67.3%
26 to 50%	100	15.4%
51 to 75%	21	3.2%
76 to 99%	14	2.2%
100%	2	0.3%



Nonprofits Only: Approximately how many contacts do you have with planned or major gift donors/prospects each month?

	0	1 to 5	6 to 10	11 to 15	16 to 20	More than 20	Responses
Personal Visits	5.9% 38	41.6% 269	30.1% 195	14.4% 93	5.7% 37	2.3% 15	647
Events	17.1% 103	65.1% 393	8.9% 54	4.3% 26	1.5% 9	3.1% 19	604
Telephone Conversations	2.4% 15	19.6% 124	23.7% 150	19.1% 121	15.9% 101	19.4% 123	634
Personal Letters	4.0% 25	32.1% 203	27.8% 176	14.9% 94	8.4% 53	12.8% 81	632
Electronic Mail	3.7% 23	17.6% 111	21.1% 133	14.9% 94	12.2% 77	30.4% 191	629

Nonprofits Only: Do your performance criteria include specific goals in the following areas?
(Respondents were allowed to choose **multiple** responses)

	Count	Percent
Number of in-person donor visits	388	65.9%
Number of donor contacts (including phone, e-mail, mail)	297	50.4%
Dollars raised in current gifts	283	48.1%
Dollars raised in planned gifts with documented commitments	328	55.7%
Number of gift commitments without dollar goal	221	37.5%
Number of donors added to legacy society	266	45.2%
Other (please specify)	87	14.8%



Nonprofits Only: Approximately what percentage of donors who have made bequests or other planned gifts (including trusts, charitable gift annuities, insurance gifts, etc.) to your organization also make regular annual gifts?

	Count	Percent
0%	15	2.4%
1 to 25%	95	15.1%
26 to 50%	91	14.4%
51 to 75%	154	24.4%
76 to 99%	250	39.7%
100%	25	4.0%

Nonprofits Only: Does your organization state a public goal for planned gifts raised (either in a campaign, or as an annual goal)?

	Count	Percent
Yes	162	25.3%
No	478	74.7%

Nonprofits Only: Do you report the following data on known gift expectancies to your manager and/or trustees?

	Count	Percent
number of gifts	547	90.4%
face value of gifts	466	77.0%
discounted present value of gifts	172	28.4%
types of gifts	470	77.7%



For-Profits Only: Which of the following types of organizations is your primary employer?

	Count	Percent
Law Practice/Firm	11	22.0%
Financial Planning Practice/Firm	4	8.0%
Consulting Practice/Firm	16	32.0%
Insurance Company	1	2.0%
Accounting Practice/Firm	4	8.0%
Bank or Trust Company	9	18.0%
Brokerage Firm	2	4.0%
Other (please specify)	3	6.0%

For-Profits Only: Approximately what percentage of your individual or organizational clients are engaged in charitable planning? (Including, but not limited to, establishment of charitable trusts, bequests, gift annuities, pooled income funds, beneficiary designations on life insurance policies, donor advised funds, and major outright gifts of cash, securities, real estate, qualified retirement assets or other assets.)

	Count	Percent
0%	0	0.0%
1 to 25%	20	40.0%
26 to 50%	10	20.0%
51 to 75%	4	8.0%
76 to 99%	7	14.0%
100%	9	18.0%



For-Profits Only: If you advise individuals, how frequently do YOU raise the issue of charitable giving with your clients?

	Count	Percent
100% of clients	17	40.5%
76 to 99% of clients	11	26.2%
51 to 75% of clients	5	11.9%
26 to 50% of clients	2	4.8%
1 to 25% of clients	5	11.9%
0% of clients	2	4.8%

For-Profits Only: Approximately what percentage of your time do you spend on work related to charitable gift or charitable estate planning? (This includes meetings with clients, research and study, networking and professional development, trustee duties, etc.)

	Count	Percent
0%	0	0.0%
1 to 25%	20	40.0%
26 to 50%	11	22.0%
51 to 75%	4	8.0%
76 to 99%	6	12.0%
100%	9	18.0%

For-Profits Only: If you advise individuals, approximately what percentage of your clients who are engaged in charitable gift and/or charitable estate planning have been referred to you by charitable organizations?

	Count	Percent
0%	13	33.3%
1 to 25%	19	48.7%
26 to 50%	5	12.8%
51 to 75%	0	0.0%
76 to 99%	1	2.6%
100%	1	2.6%



For-Profits Only: To the best of your knowledge, approximately what percentage of individual donors have notified the charity of their gift?

	Count	Percent
100%	1	2.3%
76 to 99%	3	6.8%
51 to 75%	6	13.6%
26 to 50%	12	27.3%
1 to 25%	20	45.5%
0%	2	4.6%

How often do you advise clients on the following types of gifts or administrative activities?

	Very Frequently	Somewhat Frequently	Occasionally	Never	Responses
Charitable Bequests	62.5% 30	20.8% 10	16.7% 8	0.0% 0	48
Charitable Remainder Unitrusts	29.8% 14	42.6% 20	23.4% 11	4.3% 2	47
Charitable Remainder Annuity Trusts	11.1% 5	31.1% 14	46.7% 21	11.1% 5	45
Charitable Lead Trusts	6.8% 3	25.0% 11	56.8% 25	11.4% 5	44
Charitable Gift Annuities	39.1% 18	28.3% 13	17.4% 8	15.2% 7	46
Charitable Gifts Involving Life Insurance	4.3% 2	39.1% 18	47.8% 22	8.7% 4	46
Special Needs Trusts with Charitable Component	4.3% 2	17.0% 8	44.7% 21	34.0% 16	47
Charitable Distributions from Qualified Retirement Plans	31.1% 14	24.4% 11	35.6% 16	8.9% 4	45
Any Type of Charitable Gift Involving Real Estate	19.6% 9	30.4% 14	37.0% 17	13.0% 6	46
Any Type of Gift Involving Personal Property (Art, Collections, etc.)	11.4% 5	20.5% 9	43.2% 19	25.0% 11	44
Establishment or Operation of a Private Foundation	17.0% 8	23.4% 11	44.7% 21	14.9% 7	47
Starting a Gift Planning Program	25.5% 12	27.7% 13	25.5% 12	21.3% 10	47
Hiring Gift Planners or Other	4.5%	15.9%	29.5%	50.0%	44



Fundraising Staff	2	7	13	22	
Developing Gift Planning Policies/Procedures	20.0% 9	31.1% 14	26.7% 12	22.2% 10	45
Evaluating an Existing Gift Planning Program	23.4% 11	31.9% 15	19.1% 9	25.5% 12	47
Planning Capital Campaigns	9.3% 4	11.6% 5	34.9% 15	44.2% 19	43

All respondents: In the past year, has your annual salary or income...

	Nonprofit organization	For-profit business, practice or firm primarily advising individuals	For-profit business, practice or firm primarily advising charitable organizations	Total
Increased	429 66.0%	10 34.5%	9 45.0%	448
Decreased	19 2.9%	1 3.4%	4 20.0%	24
Stayed about the same	202 31.1%	18 62.1%	7 35.0%	227
Totals	650 100%	29 100%	20 100%	699

How many years have you been in your current position?

	Nonprofit organization	For-profit business, practice or firm primarily advising individuals	For-profit business, practice or firm primarily advising charitable organizations	Total
< 1	103 15.8%	0 0.0%	1 4.8%	104
1 to 3	215 33.0%	5 17.2%	2 9.5%	222
4 to 6	106 16.3%	4 13.8%	2 9.5%	112
7 to 10	120 18.4%	3 10.3%	3 14.3%	126
11 to 15	62 9.5%	3 10.3%	6 28.6%	71
16 to 20	24 3.7%	3 10.3%	4 19.0%	31
> 20	22 3.4%	11 37.9%	3 14.3%	36
Totals	652 100%	29 100%	21 100%	702



If you HAVE changed positions in the past three years, is your new position...?

	Nonprofit organization	For-profit business, practice or firm primarily advising individuals	For-profit business, practice or firm primarily advising charitable organizations	Total
In the same organization or business as your previous position.	93 32.4%	1 20.0%	0 0.0%	94
In a new organization or business.	194 67.6%	4 80.0%	3 100.0%	201
Totals	287 100%	5 100%	3 100%	295

If you HAVE changed positions in the past three years, does your current position involve...

	Nonprofit organization	For-profit business, practice or firm primarily advising individuals	For-profit business, practice or firm primarily advising charitable organizations	Total
More charitable gift/estate planning work than your previous position.	194 66.2%	1 20.0%	1 33.3%	196
Less charitable gift/estate planning work than your previous position.	35 11.9%	2 40.0%	2 66.7%	39
The same amount of charitable gift/estate planning work as your previous position.	64 21.8%	2 40.0%	0 0.0%	66
Totals	293 100%	5 100%	3 100%	301



All respondents: What was the reason for your most recent job change? (Choose all that apply.)

	Nonprofit organization	For-profit business, practice or firm primarily advising individuals	For-profit business, practice or firm primarily advising charitable organizations	Total
I was seeking higher compensation.	159 25.6%	8 28.6%	4 19.0%	171
I was seeking better benefits.	65 10.5%	0 0.0%	4 19.0%	69
I was seeking different responsibilities--more challenges, better fit with my skills, etc.	319 51.3%	9 32.1%	7 33.3%	335
I needed/wanted to relocate geographically.	90 14.5%	1 3.6%	2 9.5%	93
I was laid off when my organization cut resources for gift planning.	38 6.1%	2 7.1%	0 0.0%	40
I wanted to move from a nonprofit position to a for-profit position.	1 0.2%	2 7.1%	3 14.3%	6
I wanted to move from a for-profit position to a nonprofit position.	46 7.4%	0 0.0%	0 0.0%	46
I was seeking a less stressful position.	67 10.8%	4 14.3%	2 9.5%	73
I was seeking a position that required less travel.	37 5.9%	2 7.1%	1 4.8%	40
I was promoted.	115 18.5%	2 7.1%	0 0.0%	117
Retirement or semi-retirement.	9 1.4%	1 3.6%	3 14.3%	13
Other	107 17.2%	8 28.6%	8 38.1%	123
Totals	622 100%	28 100%	21 100%	671





MISSION: The Partnership for Philanthropic Planning is the source for education, research and advocacy for professionals who have a role in designing and implementing donors' philanthropic plans.

Originally created in 1988 as the National Committee on Planned Giving (NCPG), the Partnership for Philanthropic Planning (PPP) is a 501(c)(3) public charity whose mission is to help people and organizations create charitable giving experiences that are the most meaningful in achieving both charitable mission and the philanthropic, financial, family and personal goals of the donor.

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