

Practical Planned Giving Conference 2022

Carolyn M. Appleton
Navigating the Future
“Technologies for Effective Capital Campaigns”
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Articles and
Reports for
Follow-up

Lilly Family School of Philanthropy, “The Giving Environment: Understanding How Donors Make Giving Decisions” (January 2022)

- <https://scholarworks.iupui.edu/bitstream/handle/1805/27562/UnderstandingHowDonors2022.pdf>

National Philanthropic Trust, “The 2021 Annual Report”

- <https://www.nptrust.org/annual-reports/the-2021-annual-report/> and
- <https://www.nptrust.org/philanthropic-resources/charitable-giving-statistics/>

Wealth Screening | Kindful: A Bloomerang Product

- <https://kindful.com/nonprofit-glossary/wealth-screening>

Wealth-X, “Preservation and Success: Family Wealth Transfer 2021”

- <https://www.wealthx.com/about-us/press-news/2021/worlds-wealthiest-individuals-will-transfer-more-than-18-trillion-over-the-next-decade>

Tools to Explore

Altrata | Intelligence with Impact (<https://altrata.com/>)

- Wealth Engine (<https://www.wealthengine.com/>) – Maxwell Pamphile
- Wealth-X (<https://www.wealthx.com/>) – sign up for research updates by email!

Crescendo Interactive | Integrated Marketing for Planned Gifts (<https://www.crescendointeractive.com/>)

Giving Docs (<https://www.givingdocs.com/>)

Instrumentl | The Smarter Way to Win Grants

- 14-day free trial: <http://instrumentl.com/r/appleton> (link for PPGC 2022 attendees)
- Guide to grants: <https://www.instrumentl.com/freebies/grant-writing-resources-collection>
- Upcoming free virtual workshops: <https://lu.ma/instrumentl/events>
- My contact is Karen Lee

Real Experiences from Carolyn’s Nonprofit Blog | Research Section (main menu)

- High Tech Research Worth the Investment (<https://carolynmappleton.com/high-tech-research/>)
- A Brief Account: “This is the Best D--- Thing” or Donor Screening Saves the Day (<https://carolynmappleton.com/a-brief-account-this-is-the-best-thing/>)
- Googling Your Guests (<https://carolynmappleton.com/googling-your-guests/>)
- YouTube (<https://www.youtube.com/user/CarolynAppleton/>)

PRACTICAL PLANNED GIVING CONFERENCE SPEAKER EVALUATION

Date: _____ Speaker: _____

Name (optional): _____

Please rate the following:

	Excellent	Good	Neutral	Fair	Poor
I. OVERALL	5	4	3	2	1
Were your major objectives for this session met? Was the content of the session vital, timely, substantive?					
Comments: _____					

II. RELEVANCE	5	4	3	2	1
Was the subject matter directly related to the requirements of your job?					
Comments: _____					

III. VALUE	5	4	3	2	1
Do you believe the benefits of this session were worth the time, effort and cost?					
Comments: _____					

IV. SPEAKER	5	4	3	2	1
How was their presentation style? Did the session move along at the right pace? Did they have appropriate knowledge on the topic?					
Comments: _____					

V. MATERIALS	5	4	3	2	1
Were the materials clear and organized and appropriately helpful for the session?					
Comments: _____					

Vi. What did you like the most about the session?

VI. Any suggestions to improve future sessions?

XII. How many years of gift planning experience do you have? _____