

# APC 2008 Spring Forum Survey

## Boston, MA

Of the 25 member attendees, 21 responded to this survey.

### 1. Please give your overall impression of the Boston Forum:

Answer Options	Agree	Neutral	Disagree	Response Count
My expectations for the conference were met	18	3	0	21
I was satisfied with the opportunities to participate	19	2	0	21
The conference has stimulated my thinking	19	2	0	21
I was satisfied with the location	20	1	0	21
I was satisfied with the hotel services (e.g. food, meeting rooms)	20	1	0	21

### 2. What suggestions do you have for the next APC Forum in Portland, OR November 6-8, 2008?

I would like yogurt or some kind of protein with each breakfast.
Greater opportunities for colleagues to share experiences and expertise with one another and to apply our knowledge to presenters' information.
Probably use the same general program components.
Definitely continue the Velocity Dialogues!
It is imperative that we relate topics, trends and information directly to our work. For example our Friday speakers had their lens to tightly focused on human services nonprofits that receive government or foundation funding--which is not the mainstay of most of our practices. I think we would have been better served by getting them to open the aperture on their lens of expertise.
Follow similar format to Boston format in terms of schedule; dining options, and possible entertainment options/venues.
Always looking for a good balance between the theoretical and the practical.
Continue to have speakers that challenge us with big picture issues; continue the velocity dialogues; in the Forum booklet, have a good marketing piece on the APC Library (not simply a reminder about using it) but something that will drive people to look at it; have a member presentation on logic models.
Please continue having one restaurant meal and one casual meal/reception. This contributes toward being able to visit with more colleagues over the two-day forum.
The Boston Forum was very expensive. The hotel was nice but not worth the discounted rate of \$239 per night. The cost of the Forum for me was nearly \$2,000 including registration and air. I expect expenses will become an increasing factor in attendance at future Forums. We should consider future locations and accommodations accordingly.
great to have academics who can stretch our visions and horizons, especially ones who appreciate APC.

## Velocity Dialogue Sessions

3. **How can consultants effectively provide counsel and support in the management and direction of feasibility studies and capital campaigns organizations with limited or no development staff?**

Answer Options	Response Percent	Response Count
Excellent	26.7%	4
Good	53.3%	8
Satisfactory	20.0%	3
Poor	0.0%	0

4. **Could we benefit from engaging a life coach? What can/should we expect?**

Answer Options	Response Percent	Response Count
Excellent	40.0%	6
Good	46.7%	7
Satisfactory	13.3%	2
Poor	0.0%	0

1. **A continuation of feasibility/planning assessment discussion, and the variety of ways they are conducted. Why consultants conduct them as they do? What works for clients?**

Answer Options	Response Percent	Response Count
Excellent	53.3%	8
Good	33.3%	5
Satisfactory	13.3%	2
Poor	0.0%	0

2. **Trends in Making the Ask?**

Answer Options	Response Percent	Response Count
Excellent	35.7%	5
Good	64.3%	9
Satisfactory	0.0%	0
Poor	0.0%	0

**7. How can we quickly and accurately identify and address the source of organizational dysfunction that impacts fundraising? (Organizational Assessment).**

Answer Options	Response Percent	Response Count
Excellent	42.9%	6
Good	42.9%	6
Satisfactory	14.3%	2
Poor	0.0%	0

**8. Ideas for future Velocity Dialogue topics:**

Response Text
Tips on maintaining good client relations? How and with whom at the client? Exploring consulting collaborations among member firms. will think about this!
1. A case study: how financial advisors might guide a charitable gift; 2. Leveraging a partnership between the public, private, and nonprofit sectors for a capital project; 3. When politics meets philanthropy: Using a tax referendum to launch a capital project; 4. Using gift planning tools to leverage capital resources
Staff/management issues Verbal sales pitches - what do you say when people ask who you are and what does your company do? To website or not to website...
establishing boundaries re our services to a client; i.e., accommodating their needs whilst not being taken advantage of
As one of the leaders, I didn't participate in all the dialogues. Format works for those who do participate
Issues in organizational strategic planning -- current trends, successes with direct mail and internet fundraising, building endowment - trends in the marketplace
How important is the strategic planning process in fun raising.
Continue them - they tap our knowledge and sharing of expertise.
CEO/Board leadership sharing and balance of power; more on feasibility studies and organizational readiness for a campaign

**9. On a scale of 1-5, 5 being the best, please rate the speakers:**

Answer Options	1	2	3	4	5
Ruth McCambridge	1	0	6	6	8
Deborah Linnell	0	4	4	7	5
Phil Mirvis	1	1	1	1	17
Kathy Bella	1	1	5	10	3

## 10. Suggestions for future Forum speakers and topics:

1. Governance & accountability: Will the Senate push harder?; 2. The "Haves & the Hav-nots" - how the growing disparity is affecting mission; 3. Social Entrepreneurship: is it changing the face of philanthropy?
Offering advice and guidance in areas other than fundraising...when the client needs some ideas/help. Human resource issues...with our clients. Fundraising as a lagging indicator - will we see a ripple effect from the bad economy, and how do we work with our clients to mitigate that.
(had some ideas at the conference which I didn't write down. Will send them along if they surface again!) Might be a reason to have SOME sort of hard copy evaluation form available at the Forum, even if it's recognized as temporary or intermediate.
I would have enjoyed hearing more specifics (show and tell) from Kathy about how she markets herself and structures agreements, etc. She spent a lot of time defining coaching - and from I took away, most of my projects could be considered coaching.
I'd love to know that the write ups from the velocities and these presentations are in the library

## 11. Was there ample time for these meetings?

12 Yes Answers
Yes. About right. Good balance.
Yes; and they should remain as the closing part of Forum schedule
Yes. By the end of the day we are pretty worn out.
yes; I would still like to get Phil Mirvis' presentation as a Powerpoint.
Yes - liked having board meeting over lunch. this is something we should continue.
I felt that there was too much time allotted for the McCambridge and Linnell sessions as a lot of what they were addressing did not seem that helpful to me and my consulting business.
Yes - but see suggestion below that would extend time back to mid-afternoon end time.

## 12. What do you like most about the Boston Forum?

Being with my APC pals; learning new things; getting re-charged and inspired
Pace, involvement, program.
opportunity to be with colleagues in a stimulating environment
Overall, the forum was FANTASTIC. A superb theme, well versed speakers, lots of participation by members, a great city to be in and a wonderful hotel. Loved the lighter fare at the Thursday dinner. The reception was a great way to get us all together on Friday night.
Outstanding caliber of speakers; inter-active nature of working sessions; venue
The opportunities to explore capacity building as a subject matter and to network with colleagues and get their ideas as I expand the scope of my firm's services.
As always, the most important part of the FORum is the chance to talk with other APC members, continue to build in adequate time for this; I also liked that people were told to (and did) randomly attend the velocity dialogues giving us chances to hear from one another
The other APC members' seasoned perspectives and collegial personalities.
Philip Mirvis presentation
Intellectual stimulation, pragmatics about building and improving our practices, camaraderie with fellow attendees

I enjoyed the casual evening at the museum - minus a planned dinner. Particularly enjoyed Dr. Phil Mirvis presentation.
How the sessions were scheduled
Lots of good opportunities to talk with fellow members. Very good staffing by our new association group.
Hearing from stellar presenters who are leaders in the nonprofit sector.
Seeing good friends.
agenda with breathing room!
being with colleagues
That we had all our meals together, no cliques that 'left'

### 13. What suggestions do you have for future Forums?

Perhaps once a year utilizing a non-urban retreat location.
Hold the retreat in a rural setting, like a retreat center in a fabulous place. Robin and I spoke about Blue Mountain Center in Blue Mountain Lake in NY's Adirondack Mountains or Silver Bay on Lake George. We have never had a retreat outside of a city. I also think we can do more to build relationships by doing some more "retreat" focused work together.
Generally pleased with current format and strongly urge for continued use of an over-arching theme to drive forum content and speakers.
Move the board meeting back to its original place or really communicate that we will end with the board meeting so people will make their travel arrangements accordingly. We need some energy snacks in the middle of the day on Friday. Perhaps a little more protein choices at breakfast. We need a few more people. We need to market to more people and get some member prospects or other interested consultants in the room. It will help with the finances and with increasing the diversity of the conversation when we have new/additional voices in the room. These forums work best when there are about 30-35 active participants.
see first page
Ask the presenters to make their presentations available UP FRONT to head off obsessive notetakers like me from writing everything down only to find out that the Powerpoint is being handed out.....
I like having a tour of a successful nonprofit in the area that may be pertinent to our work, or a tour of a local attraction -- museum or other
Possibly collaborate with another similar organization for one of our annual forums - saving on planning energy and expense.
Perhaps finding a way to get quick summaries of the meetings / decisions / concerns documented at the meeting and shared with the entire membership - including those who did not attend. I was unable to attend and think that the members of my committee who are excellent are now heavily involved in work so find it hard to come up for air to fill me in on the conversation and the decisions. This makes it a little hard to "coordinate", organize committee work and member recruitment. Which also leads to not having a list of who attended... So for those who were not present, how do we get the board agenda and report?
Return to mid-afternoon end time to accommodate an APC panel to respond to, stimulate general discussion, wrap up and give closure to "take-aways" from all presenters. This would have been the "icing on the cake" and only improvement I could offer. Please do not reduce the number of presenters or their time allotment to accomplish this - simply add to Saturday afternoon. Great forum!!!
Partner with other professional organizations and their meetings to share speakers, big thinking events

**Make travel arrangements early for the Fall 2008  
ForumPortland, OR November 6-8, 2008!**