



Minnesota Planned Giving Council
Strategic Plan – 2007 through 2009
FINAL – May 1, 2007

Mission

The mission of the Minnesota Planned Giving Council is to promote philanthropy through planned giving.

Value Proposition

Through our activities we promise to enhance the professional and personal self-worth of our members.

Goals

- A clear understanding of the needs of the field and how an increased emphasis on current major giving is impacting our practice in order to ensure our purpose and service offerings are aligned with how the field of philanthropy is evolving.
- An MPGC brand recognized as the top planned giving resource in the region.
- Broaden and deepen MPGC membership and programming in order to increase our impact on charitable capital in the community.

Key Outcomes

- New Revenue
 - Increased Participation
 - Increased Awareness
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INVENTORY

Accomplishments – Last Three Years

- 30th annual conference: demonstrates quality and longevity of MPGC.
- Revitalization of Brisk Walk
 - Stronger tool to reach, engage and orient the beginning level professional in planned giving.
 - Helps increase diversity of planned giving industry.
 - Important point of entry to the organization.
- Expansion of what MPGC does
 - Expanded market place.
 - Reframing the message of how people perceive what planned giving is; putting planned giving in a context to see the philanthropic value of it.
- Budget reserve
 - Expanded sponsorships at Conference.
 - Sponsorships are accurately priced.
 - Consistency in expenses.
 - Breakfast meetings are no longer running a deficit.
 - Improved financial management: implemented strategies to improve long-term investments.
- Expanded geographic reach.
 - Solid *Leave a Legacy* effort.
 - Conscious effort of the Board to reach a larger geographic audience.
 - Better marketing to MPGC membership.
 - Webcast offered to reach Greater Minnesota and beyond.
 - National reach in marketing.
- Partnerships
 - Developed partnerships with AFP.
- Consistent education session and breakfast meeting.
 - Quality steadily improves.
 - Helped enhance the Breakfast Meeting and Educational Session.
 - Increased professional competence.
 - Allows Greater Minnesota members to attend because there is more substance to the offering.
- Improved/strengthened recognition of MPGC as educational provider in the philanthropic community.
 - Coordinated effort to tie in educational curriculum around the Conference, the Breakfast meetings, the Educational seminars and tying it all to NPGC.
- Strong volunteer structure.
 - Recognition of volunteer service.
 - Volunteer program helps with board recruitment.

Unfinished Business

- Grow membership and increase diversity. How do we reach more nonprofits: smaller and mid-size organizations as well as professional advisors?
- Implementation of the communications plan.
- *Leave a Legacy*: what is MPGC's role ?

- Going deeper into Greater Minnesota
- Define partnerships/stakeholder groups; how to form meaningful partnerships with regional hubs?
- Increasing and diversifying revenue sources
- Plan to invest surplus revenue.
- Mentorship program.

Capabilities

- Expertise -- access to local experts.
- Success and accomplishments to draw upon.
- Consistency, continuity and longevity of volunteer involvement.
- Field credibility.
- Willingness to evaluate processes and systems.
- Relationship with National Council on Planned Giving
- Minnesota chapter viewed as leader among other planned giving councils.
- Minneapolis, St. Paul and Minnesota a leader in philanthropic giving.
- Budget surplus

Challenges

- Membership development
 - How do we grow the membership without losing our mission focus?
- Planned Giving – how do we fit in the changing world?
 - Convergence of planned giving and major giving
 - Shift from tax expertise to mission expertise; what then is the value of planned giving?
- Mission clarification: is the reason why MPGC exists in the first place still relevant in light of the shift in the industry?

WORK PLAN

Goal: A clear understanding of the needs of the field and how an increased emphasis on current major giving is impacting our practice in order to ensure our purpose and service offerings are aligned with how the field of philanthropy is evolving.

<u>Action</u>	<u>Delegate</u>	<u>Budget/Resources</u>	<u>Completion Timeframe</u>
Create taskforce to define what we wish to research about the field.	Executive Committee		Q2 - 2007
Review evaluation tools to determine effectiveness at understanding member satisfaction.	Conference & Education Committees in consultation with Communications		Q2 - 2007
Develop survey and interview tools.	Taskforce		Q3 - 2007
Implement research, analyze results, and write white paper on findings.	Taskforce		Q2 – 2008
Present findings to Board of Directors, and make recommendations regarding adjustments to mission, name, and focus of key MPGC programs.	Taskforce		Q2 - 2008
Determine specific indicators that will track alignment of services with field needs.	Executive Committee		Q3 - 2008
Share findings with membership and the field-at-large.	Communications Committee		Q3 - 2008

Evaluation Indicators: (See Page 7)

- Membership Growth
- Conference Attendance Growth
- Education Program Attendance Growth

Goal: An MPGC brand recognized as the top planned giving resource in the region.

<u>Action</u>	<u>Delegate</u>	<u>Budget/Resources</u>	<u>Completion Timeframe</u>
Review communications plan, prioritize key messages, and determine how they will be implemented.	Communications Committee		Q2 - 2007 – ongoing
Review all print and electronic communications to ensure that value proposition is conveyed through key messages. Revise as needed.	Communications Committee		Q3 - 2007
Develop e-newsletter	Communications Committee		Q3 - 2007
Revise MPGC’s web site to ensure that value proposition is conveyed through key messages.	Communications Committee		Q3 - 2008
Develop a list of media contacts and build relationships with them in order to be recognized as a “media resource.”	Communications Committee		Q4 - 2009 – ongoing
Ensure communications are consistent with findings regarding the needs of the field.	Communications Committee and Taskforce		Q2 - 2008

Evaluation Indicators: (See Page 7)

- Conference Attendance Growth
- Conference Revenue Growth
- Education Program Attendance Growth
- Education Program Revenue Growth
- # of Media Contacts
- # of Unique Visitors to Website
- Open/Click Thru Rate for Email Newsletter
- # of Communications with Audience

Goal: Broaden and deepen MPGC membership and programming in order to increase our impact on charitable capital in the community.

<u>Action</u>	<u>Delegate</u>	<u>Budget/Resources</u>	<u>Completion Timeframe</u>
Strengthen operational systems that track members and guests in order to identify where member cultivation time and resources need to be directed on a regular basis.	Executive and Membership Committee		Q2 - 2007
Continue to offer strong programs and networking opportunities; use the membership to help communicate the value the programs create.	Education, Conference, and Membership Committees		Q4 - 2007 (with ongoing annual evaluations)
Make programming recommendations that are targeted at more advance members as well as programs targeted at professional advisors.	Education Committee		Q4 - 2007
Explore, develop, and make recommendations on a mentorship program.	Membership Committee		Q4 - 2008
Focus <i>Leave a Legacy</i> as a resource targeted at small nonprofit organizations and professional advisors.	Leave a Legacy Committee		Q4 - 2007/ongoing
Seek Board approval on programming recommendations and begin implementation	Board of Directors		Q1 - 2008 (with ongoing annual evaluation)

Evaluation Indicators: (See Page 7)

- Membership Revenue Growth
- Conference Revenue Growth
- Education Program Revenue Growth
- # of New Members per Month/Year
- Renewal Rate per Month/Year
- # of Lapse Members per Month/Year
- Conversion of Guests to Members