

# Shared Intelligence for the Greater Good: Plan for 2017-2021





# **Giving Institute and Giving USA Foundation Strategic Plan**

#### **ASSUMPTIONS**

- Membership grows steadily over 5 years: grow from 50 members 8/1/16 to 63 by 7/31/21
- National economy continues on uneven recovery; modest recession in next five years
- Stead Challenge is met late spring '16, additional challenges secured in next 36 months
- Programs for members expand and are well received
- Giving USA publications meet with increased market acceptance
- Member retention improves to 94% by 2018/2019 from 92% in 2015/2016
- Association management is retained

#### STRATEGIC CONTEXT

The Giving Institute (Institute) and Giving USA Foundation (Foundation) create shared intelligence for the greater good. They work together to provide a growing voice in philanthropy nationally, to convene thoughtful practitioners and others on important issues and to grow appreciation for and best practice of philanthropy for a better society.

The Institute will create a stronger membership experience and value proposition for its current members and will achieve greater recognition in the philanthropic sector for its contributions of information and expertise, and for the Foundation's growing impact through research in the field.

The Institute will refine its business operations so that it achieves financial stability (defined as yearly growth in a fiscal reserve equal to 50% of the annual operating budget) by 2021 while also generating funds for expanded member programs and branding/marketing. Financial stability is built upon steady membership growth, improved member retention and increased revenue through sponsorships and earned income.

The Foundation will raise funds for and publish Giving USA publications and other research, promote events and additional initiatives that advance the public understanding of philanthropy. The publications and programs will achieve growing acceptance and earned revenue and enhance the brand of both the Foundation and Institute.

All of this aims to make philanthropy stronger and more robust in challenging times.





# KEY STRATEGIC ELEMENTS/CROSSOVER GOALS

<u>Marketing and Brand</u>: The Giving Institute and Giving USA Foundation will actively expand their marketing and brand through a combination of advertising, earned media and marketing offerings. Some of these will promote the Institute, and its educational offerings, while others will promote Giving USA. We will operate with an understanding that an increased profile for the Institute helps Giving USA and vice versa.

- a) <u>Secure an ongoing relationship with The Chronicle of Philanthropy</u> for joint research and/or thought leadership (sponsorship similar to Giving Days).
- b) Secure editorial presence in The Chronicle of Philanthropy on an ongoing basis.
- c) Grow advertising and marketing to increase monthly exposure.
- d) Grow partnerships with AFP, Guidestar and others to reach industry practitioners.
- e) <u>Be a voice for philanthropy</u> in the public sector by participating as a member of the Charitable Giving Coalition and pursuing additional advocacy efforts.

<u>Revenue</u>: The Institute will grow its financial base and reserves through expanded membership and increased sponsorship support. The Foundation will raise increased levels of private gift support and earned revenue to support its goals and build its reserves.

### **Fundraising:**

The Foundation will:

- a. Meet requirements of Stead Challenge in FY '16 and <u>seek subsequent challenge opportunities</u> in the next 36 months.
- b. Identify funding initiatives and sponsorship opportunities.
- c. Establish annual goals for fundraising.
- d. Create a persuasive Case for Support for programs of the Institute and Giving USA Foundation.
- e. <u>Cultivate and engage small group</u> (n=10 in FY '17?) of prospective individuals, corporations, organizations and foundation prospective donors.
- f. <u>Establish a Legacy Society and increase the number of planned gift intentions.</u>

The Institute and Foundation will work together on the following:

- a. <u>Work with the Foundation</u> to determine how to improve volunteer support to members so fundraising and sponsorship activity can expand.
- b. Encourage all members to participate in donor engagement activities.
- c. <u>Develop and pursue a list of organizations</u> that may have interest in providing sponsorship support.

**Earned income:** Additional revenue will be earned through expanded sales of Giving USA products and efficient marketing and sales functions.





# KEY STRATEGIC ELEMENTS/GIVING INSTITUTE

# <u>Professional Development</u>: The Institute will provide high-quality programs that help individuals from member firms grow professionally and enhance how they manage their firms

- a) Offer high-quality in-person educational programming at board meetings aimed at the leaders of member firms and their staff.
- b) <u>Host a high-quality, annual Summer Symposium</u> designed both for member firms and leaders in philanthropy to share ideas, learn and make deeper connections, which earns an overall satisfaction score of at least 4.0 on a 5 point scale.
- c) Offer a regular e-learning series aimed at providing educational content for additional representatives of member firms who cannot attend events in person.
- d) <u>Host special gatherings</u> (on our own and in partnership with other national and international bodies) on key topics of interest to members and the industry, convening leaders both from within the Institute and from the broader philanthropic sector.
- e) <u>Offer a regular consultant training program</u> to develop staff of member firms who are new to the profession and to encourage mentoring opportunities among members of the Institute.

# <u>Membership</u>: The Institute will recruit new member organizations and retain a higher percentage of its current members.

#### Recruit:

- a) Expand outreach to prospective members by current member representatives (Golden tickets to Summer Symposium will be offered to a minimum of 20 prospective members per year, to feed actual member growth goal.
- b) <u>Achieve net annual member growth of 3 firms</u> (minimum) from 2016-2018 and 2 firms (minimum) from 2019-2021, with a stretch goal of 5 firms each year.
- c) Offer an <u>attractive value proposition</u> (high-quality networking, Giving USA/thought leadership, and 3rd-party endorsement of member firms' brand in the industry) with an attractive annual dues structure.
- d) <u>Leverage Summer Symposium</u> as a key recruiting tool, incorporating potential members as speakers as appropriate.
- e) <u>Launch a pilot "affiliate member" program</u> balancing the value new members bring to the organization with the value we offer them (launch 12-month pilot in 2016, work with pilot group to determine next steps).

#### Retain:

- a) Provide <u>excellent customer service to members</u>, managing their "functional" relationship with the Giving Institute (renewals, regular communications, event management/experience, networking, blogging opportunities, etc.) (Metric = Minimum 4.0 satisfaction rating (on a 5 point scale) in annual assessment or call).
- b) <u>Engage member firm leaders as active participants on committees</u> (building our leadership pipeline and increasing opportunities for networking), in educational sessions and representatives of the group externally in their communities.





- c) Keep those unable to attend meetings updated on activity, as well as following up with those who do attend to keep connection strong.
- d) <u>Contact each member firm annually</u> to seek input on experience and encourage involvement.
- e) Maintain 94% of members year over year.

## KEY STRATEGIC ELEMENTS/GIVING USA FOUNDATION

<u>Research</u>: The Foundation will advance the research, education and public understanding of philanthropy through thought leadership, programs and other efforts.

- a) <u>Publish Giving USA</u>, providing strategic leadership on the project as well as practitioner expertise/input educating the sector and increasing public understanding of philanthropy (annually through Editorial Review Board).
  - i. <u>Advance Giving USA methodologies</u> in partnership with the Giving USA researcher (five-year priorities and costs identified).
  - ii. <u>Publish Giving USA Spotlights, featuring new giving research</u>/new interpretations, adding to the education and public understanding of philanthropy (2-4 reports annually).
  - iii. Enter into a new agreement prior to January 2020 with the research partner for Giving USA.
- b) <u>Develop collaborative partnerships</u> to advance research objectives (partnerships underway for 2016 are Nonprofit Research Collaborative, Growth in Giving and Leading Age).
- c) Promote practitioner professional development by investing restricted fund support for scholarships.
- d) <u>Host educational events for national audiences on Giving USA research and emerging and/or advanced topics</u> in philanthropy, including the Gurin Forum (every 2-3 years).