



STRATEGIC PLAN FOR 2018 - 2020

Mission

To maximize philanthropy throughout Minnesota for the public good by providing education and programming that advances the knowledge and value of gift planning.

Strategic Initiatives 2018-2020

- 1) Integrate Membership Across Everything We Do
- 2) Focus on Revenue (Membership Revenue and Non-Dues Revenue)
- 3) Refresh/Restructure Educational Program Offerings

Conference

- Convert 10 non-members or first time conference attendees who are not members to MPGC members annually
- Convert 5 of conference attendees to MPGC volunteers
- In tandem with Development Committee, remain focused on sponsorships as key revenue for the conference
- Refresh the conference to keep engagement high
 - Must be revenue neutral or positive
 - Consider new location with stability in mind
 - Consider 1.5 day vs. 2 full days
 - Consider national speakers, programs that will perk up interest

Brisk Walk

- Convert 3 brisk walk attendees or their “connectors” (people who register attendees or people who help connect a person to Brisk Walk) to MPGC conference attendees annually.
 - Consider new registration process to secure names and contact information of Brisk Walk attendees
- Convert 5 of brisk walk conference attendees to members
- Conduct 5 Brisk Walk’s annually and ensure the income/expenses is reflected in annual budget
- Refresh and tweak Brisk Walk
 - Consider adding in soft skills
 - Examples
 - Why and how to introduce a philanthropy conversation with your client
 - Team-building questions or exercises
 - Consider tweaks for targeted segments (Colleges/Universities, Healthcare, Greater MN, Allied professionals)

- Consider expanding Brisk Walk offerings and begin drafting business plan for Brisk Walk – Planned Giving 101
 - 101 half-day program – focus on “why gift planning”, marketing and efficient inclusion in existing efforts

Membership

- Adding Value – focus for Membership Committee
 - Clear communication of value of membership
 - Networking that highlights members (i.e. TPT happy hour)
 - Support member outreach of all committees
 - Hargroves Mentor Program
 - More structure
 - Fellows program for luminaries
- Assess tiered or promotional membership fees to expand membership
- Target Segments
 - Traditional member focus and senior leaders
 - Allied professionals
 - Build pipeline for younger members
- Engage with other member groups: AFP, MCN, CAP
- Pathways to membership
 - Brisk Walk
 - Regional outreach & Leave a Legacy
 - Membership promotion is a duty of each committee

Breakfast and Educational Programs

- Convert 1 person or 10% of breakfast/educational program non-member or guest attendees to members annually.
 - Promote membership at every breakfast/educational meeting.
 - Follow-up after programs by email with guests / non-members to invite them to become members.
 - Assess continued partnership with FPA as member benefit.
- Consider restructuring breakfast/educational programs (i.e. one program vs. two) without destabilizing revenue or networking
 - Assess financials – what would the cost be for one program?
- Consider new ways to leverage breakfast speakers and/or technology
 - With affinity groups following programs (i.e. 30 minutes with speaker afterward – could be tied to fee or tiered membership)
 - After program “table talks” or ethics discussion, or sector related discussions
 - Test a webinar offering for local attendees?
 - Zoom videoconferencing software

MPGC Development Committee (Sponsorships)

- Leverage member connections to help with revenue sources/annual and conference sponsorship asks
- Focus on non-dues revenue as it relates to annual and conference sponsorships. Partner with Brisk Walk, Hargroves Mentorship, Edu & Breakfast, Conference and LAL chairs as needed.
- Diversify appeals

- Consider different kind of ask to some sponsors (i.e. help MPGC because serves nonprofits/Help fund Hargroves Mentorship Program/ Help fund Brisk Walk/ Help fund technology needs)
- Consider annual appeal to members to help meet budget gap at end of year?
- Board continue to be responsible for MPGC revenue success
 - Consider development committee chair also being a board member
- Grow Development Committee to involve more key stakeholders
 - Integrate LAL-MN and MPGC sponsorship asks

Leave A Legacy Minnesota

- Convert 5 of LAL-MN people to MPGC conference attendees
- Convert 5 of LAL-MN people to MPGC members annually
- Continue outreach to greater MN and programming for this important network
 - Help MPGC determine how to better support LAL-MN regional groups. One idea is offering regional group landing webpages. Determine annual revenue sources to support webpage hosting. LAL-MN regional groups would be responsible for any costs related to changing or updating their landing page
- Develop case for how MPGC/LAL-MN demonstrate value of working together
- Invite LAL-MN steering committee chair to speak at board meeting in 2018 about what LAL-MN is/does.
- Revisit sustainable strategic plan for LAL-MN in partnership with MPGC now that the program is launched.

Communication Committee

- Put together annual plan to promote membership in partnership with Membership Committee
 - Launch member testimonials via video series for emails and website in 2018 or later
- Create a general MPGC marketing piece that can be a leave behind for Brisk Walk/ LAL-MN/ Edu & Breakfast program attendees (consider expense needs for this piece as part of budget)
- Integrate communications across various technology needs
- Coordinate communication with other committees
- Could communications committee help take the lead with drafting an overall communications plan for MPGC?