
**Planned Giving Group of
New England
(PGGNE)**

Strategic Plan, 2011-2016

Planned Giving Group of New England (PGGNE) Strategic Plan, 2011 - 2016

PGGNE Strategic Plan Overview

Mission: PGGNE educates, connects, and inspires New England gift planning professionals in the advancement of philanthropy.

Strategic Directions

- Direction 1** PGGNE will be the model regional planned giving council, providing innovative educational programs for a diverse membership and profession.
- Direction 2** PGGNE will strengthen its commitment to building a supportive community of gift planning professionals that provides value to all members, from planned giving specialists to generalists.
- Direction 3:** PGGNE will be an advocate for the importance of planned giving as part of an overall development program.
- Direction 4:** PGGNE will continue to make prudent decisions regarding its organizational and financial resources to ensure the long-term sustainability of the organization.

PGGNE Strategic Plan

Introduction

The Planned Giving Group of New England (PGGNE) was started in the early 1970s by a group of gift planning professionals who met to discuss topics of common interest. By the early 1980s PGGNE was formed as a non-profit organization, with the purpose of providing a forum for the education and professional development of members in all aspects of planned giving. PGGNE's membership includes gift planning and development professionals representing the New England states of Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont.

Today, PGGNE includes just over 300 members, of whom just under 250 are non-profit members. It offers a variety of successful programs, focused on monthly educational luncheon meetings and an all-day conference in May. PGGNE is governed by a thirteen-member Board of Directors, and administrative support is provided by the Center for Association Management Inc. (CAMI), of Waltham, MA.

PGGNE's previous strategic plans provided good guidance for the association. The 2011 Board recognized the value of planning and decided to prepare a new plan to serve PGGNE in today's environment. To create this plan, the Board worked with Jane Fisher, planning consultant from Cambridge Concord Associates (CCA). CCA first interviewed all Board members, to get their sense of the challenges and opportunities facing PGGNE, and their ideas about future priorities. Board members then conducted interviews with a random selection of members and also held three focus groups with members, to bring a breadth of perspectives to the process. CCA interviewed representatives of other planned giving groups, both in New England and across the country, as well as the Partnership for Philanthropic Planning (PPP).

The process culminated in a meeting of the Board, supplemented by four past presidents/senior members, to focus on the future of the association and develop the actual plan. During the meeting the group considered PGGNE's current situation, reviewed its mission, and identified strategic priorities for the future. This plan summarizes the key decisions made and provides guidance for moving ahead.

PGGNE's Current Situation

PGGNE is widely recognized for the **quality** of its **educational programs**. Both the monthly meetings and the annual conference are highly regarded by members. Education is central to PGGNE's mission, and based on the interviews and focus groups, PGGNE is doing an outstanding job of providing high quality education.

PGGNE also provides excellent opportunities for **networking** and **connecting** with colleagues, and these are highly valued. Opportunities to learn what others are doing and to ask and answer questions are of great importance to PGGNE members.

But PGGNE offers more than networking opportunities. It provides professionals in the broad field of gift planning with a **community** of peers. Members past and present feel a strong sense of belonging when at PGGNE and a sense of "being home." This community is a strength upon which PGGNE can build.

The **consistency and reliability** of PGGNE programming is also identified as a strength. Fixed meeting times allow people to plan for their participation, and consistent quality is also seen as a plus. Knowing that there are regular opportunities to come together with your peers is highly valued and distinguishes PGGNE from other organizations, whose programming is more sporadic.

Challenges facing PGGNE include the trend away from planned giving specialists in favor of more **blended jobs**. Continuing to serve the needs of planned giving specialists, while also attracting and educating professionals for whom gift planning is only a part of their job, requires PGGNE to understand their differing needs and focus programs accordingly. In addition, **economic pressures** affecting not-for-profit employers have caused some to reduce or eliminate their PGGNE memberships. Since it is not always immediately measurable, planned giving may be given a **lower priority** than other more pressing projects. Many development directors or other senior managers may not appreciate the value and contributions of planned giving, and therefore not encourage their staff to participate in PGGNE.

The **aging population** creates great potential for planned giving, although changing **tax laws and legislation** also impact this potential. Staying on top of trends and changes, and educating members about these changes, are important ways for PGGNE to provide value.

Trends in membership and meeting attendance have shown a decline in recent years, most likely as a result of economic pressures and job consolidation. As PGGNE moves forward with its strategic plan, it needs to be constantly aware of these trends and address them to ensure the organization's future.

PGGNE Mission Statement

Following a review of the mission, the consensus was to reaffirm the existing mission statement as a concise description of PGGNE's purpose:

PGGNE educates, connects, and inspires New England gift planning professionals in the advancement of philanthropy.

Strategic Directions and Strategies

The strategic directions and strategies form the heart of this strategic plan. The **strategic directions** identify those major areas of emphasis for PGGNE in the next three to five years. They are broad and interdependent, and all have been identified as critical priorities during this process. The **strategies** suggest how PGGNE might begin to move forward on these directions. Over time, strategies may be adjusted or changed, and new strategies added, to meet changing needs.

Direction 1: PGGNE will be the model regional planned giving council, providing innovative educational programs for a diverse membership and profession.

Rationale: *PGGNE is already known for providing high quality educational programs. However, as the field of planned giving changes and more people are charged with handling gift planning as a part of their responsibilities, there may be a need for new and different types of programs. Maintaining and strengthening its reputation for quality education will be key to PGGNE's success moving forward.*

An ongoing challenge is how to continue to engage members across the continuum of their careers, from new entrants to senior experienced members. Understanding the needs of members who bring different levels and types of experience is critical to ensuring that programs match those needs.

Possible strategies:

- Utilize the findings of existing and future member surveys and focus groups to inventory PGGNE's various audiences and identify their specific needs, and to determine the characteristics of successful programs to meet different needs.
- Consider ways to expand the annual conference and increase its impact. This might include expanding the conference to two days; partnering/reaching

out to other New England planned giving groups; or investing more to ensure the best possible speakers.

- Assess the current offerings geared to beginners and generalists and explore opportunities for expansion. This might include a review of the Basics track as well as exploring the creation of a one or two day Fundamentals course.
- Assess the needs and wants of senior members and determine the best ways to engage and serve them. Options might include:
 - Continue to offer and expand the availability of sessions that allow more senior members to share their knowledge by serving as speakers and content experts in PGGNE's training programs.
 - Determine the need and feasibility of a "Master's Track" program to attract and retain senior members.
 - Offer webinars for seniors designed to minimize the time commitment and maximize the value.
- Continue to use technology to expand PGGNE's reach and provide programming to more distant members, through webinars and other means.
- Initiate conversations with other New England planned giving groups to explore possibilities for greater collaboration or partnership in programming.

Direction 2: PGGNE will strengthen its commitment to building a supportive community of gift planning professionals that provides value to all members, from planned giving specialists to generalists.

Rationale: *PGGNE is acknowledged as an excellent source of networking and contacts in the field of gift planning. Many individuals cite the ability to interact with others in their field, and members' willingness to help others, as major strengths of the organization. But PGGNE provides more than individual networking: it is a community of professionals who share common interests, issues, and needs. It is uniquely positioned to build this sense of community, both for traditional members and for those whose roles may have evolved to include gift planning. This sense of belonging can lead to a greater commitment to the profession and to the success of PGGNE as an organization. Of equal importance is the opportunity to use technology to enhance how members relate to PGGNE and to each other. Facilitating connections and communication can help PGGNE better serve its members and fulfill its mission.*

Possible strategies include:

- Create a PGGNE task force to address the question of what community means for PGGNE and how it can be enhanced.
- Consider new types of programming, such as cocktail parties, evening events, and outings, which will provide opportunities for people to connect in different settings and build relationships.
- Provide opportunities for subgroups of PGGNE members to connect in smaller groups. This might include:
 - Explore additional ways in which to connect with newcomers, to allow them to meet PGGNE leaders and others new to the field.
 - Arrange for a few designated affinity tables at luncheons, so that people can sit with others from the same industry, level of experience, or other criteria.
 - Identify specific networking times, within the current programming schedule or just before, to encourage people to connect with others. Some could be open forums, while others could be focused on a specific topic with a facilitator.
- Enhance the use of technology, and in particular social media, to connect with members and help them feel part of the PGGNE community.

Direction 3: PGGNE will be an advocate for the importance of planned giving as part of an overall development program.

Rationale: As the premier organization in New England providing planned giving education and training, PGGNE is positioned to expand our role to serve as a more vocal advocate for the importance of planned giving in a successful development program. Most non-profits with planned giving programs show a significant and positive bottom-line impact from those efforts. Despite this, recent trends—including a shift away from the pure gift planning specialist and toward development generalists; budget constraints on planned giving marketing and promotion efforts; and a greater emphasis on immediate funding—present obstacles to the realization of gift planning’s potential contribution to the overall development programs of charitable organizations.

These trends suggest that stronger promotion of the value of planned giving to development leadership is needed. PGGNE can fill this void by reaching out to vice presidents and senior managers to help them better understand the potential of planned giving for their organization and the need for staff to be knowledgeable and conversant in this area. This direction expands PGGNE's traditional role to go beyond its members and reach out to their organizational leaders, helping a broader audience understand the importance of planned giving.

Possible strategies include:

- Compile data and information in order to make a compelling case for the importance of planned giving as part of an overall development approach. This could include testimonial letters from senior professionals and others who have benefited from PGGNE's professional development; white papers/fact sheets that present the data about the importance of planned giving; and case studies of the impact of planned giving on fund raising.
- Initiate a dialogue with VPs and senior development professionals about the merits of planned giving and potential strategies for expanding and promoting planned giving within their operation.
- Explore new opportunities to engage charitable organizations in PGGNE training, mentoring, and networking programs, particularly for staff members that are new to the field or development generalists.

Direction 4: PGGNE will continue to make prudent decisions regarding its organizational and financial resources to ensure the long-term sustainability of the organization.

***Rationale:** As membership has declined and expenses have increased, PGGNE needs to address its financial viability and ensure that appropriate plans are in place to support the organization as it moves forward. At the same time, as an organization that is largely volunteer managed, it needs to ensure that it has appropriate levels of volunteer leadership and involvement, and that it is using the resources of its management company at sustainable levels.*

Possible strategies include:

- Review and evaluate PGGNE's dues structure, including policies on sending substitutes to meetings, conference fees, the number of programs, and the possibility of a reduced dues structure for smaller organizations. Determine whether changes might be made that would support PGGNE's financial position, while not having a negative impact on members and the sense of community.
- Continue to explore ways to build and expand sponsorships for PGGNE programs and events.
- Explore new sources of revenue that might reduce costs and allow for outreach to broader audiences.

- Review the services CAMI provides and determine if there are any new or enhanced services that might facilitate implementation of this plan.

Implementation

This plan is designed to provide guidance to PGGNE for the next several years. The directions and strategies should provide a focus for Board meetings and discussions. As PGGNE moves into implementing some of the recommended strategies, it will also be important to identify milestones and measures to evaluate progress.

The strategic plan can also become a focus for the membership, allowing them to better understand the organization's priorities and how members may become involved with PGGNE. It is an active tool for PGGNE, one that will evolve over time as some strategies are implemented and new ones are identified. Continuous evaluation of progress and reports to the membership on milestones and results will help keep members informed and engaged.