

STRATEGIC PLAN:
2020-2024



**Indiana
Philanthropy
Alliance**

Champion. Support. Connect.



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ABOUT

In November 1983, Lieutenant Governor John Mutz and Alan Shusterman, executive director of the Indiana Humanities Council, convened representatives from more than 70 foundations and corporate giving programs in Indianapolis to discuss the future of the state's philanthropic sector. Based on the success of that first meeting, the planning committee agreed to continue holding the event and formed a steering committee to complete the task. That group called itself Indiana Donors Alliance (IDA). After several years of growing interest and participation in the collaborative conversations, IDA was incorporated in 1990. As IDA hired staff, elected trustees, and recruited members, it grew into the full-service membership association that is now doing business as Indiana Philanthropy Alliance.

INDIANA PHILANTHROPY ALLIANCE FOUNDATION (IPAF)

IPAF is a Type I Supporting Organization to Indiana Philanthropy Alliance, organized and operated exclusively for the benefit of the Alliance, its goals and its functions.

MISSION

Champion, support, and connect members as we transform Indiana through effective philanthropy.

VISION

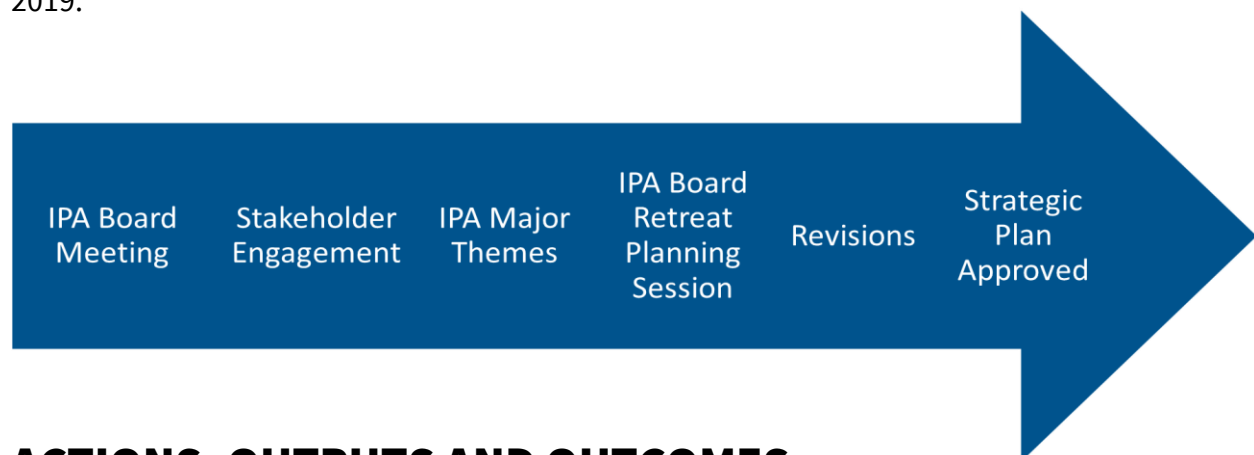
As a recognized leader, Indiana has a collaborative and effective philanthropic sector that makes a positive difference in the lives of people and their communities.



DEVELOPING THE IPA STRATEGIC PLAN

As part of the strategic planning process IPA hired 3rd party consulting firm, Thomas P. Miller & Associates (TPMA), to conduct focus groups, interviews, and a survey of current and prospective members. This stakeholder input addressed philanthropic organizations’ current challenges, topics of interest, potential roles for IPA, and vision for creating a thriving philanthropic sector in the state. Additionally, independent research was conducted about trends in the field nationally. Findings from IPA’s Strategic Planning research are available in a separate document entitled *IPA Strategic Planning 2019 Research Findings*.

Upon conclusion of the research described above, the IPA Board held an all-day retreat to review research findings and begin goal setting. A follow-up board discussion was held on September 13, 2019. A data-informed approach was used to create the 2020-2024 Strategic Plan based off board conversation and rooted in field and stakeholder research. The strategic plan then underwent extensive review by IPA leadership, the strategic planning taskforce, and the full IPA board. The plan was approved by the full IPA board and adopted on December 6, 2019.



ACTIONS, OUTPUTS AND OUTCOMES

Action items and their corresponding output and outcome measures will be determined annually by IPA staff and updates on progress will be shared regularly with the board.

ANNUAL STRATEGIC GOAL MONITORING

TPMA recommends that the IPA board annually monitor progress towards the five-year goals identified in this document. This includes setting up the first year of data collection as a benchmark, then if desired, setting specific numerical goals starting in Y2 (e.g. maintain 94% satisfaction, increase members who rate their organization as innovative to 12% overall, etc...).

OVERVIEW OF IPA'S FIVE STRATEGIC GOALS 2020 – 2024

The first two goals of IPA's Strategic Plan are based around the impact the organization intends to have on its members over the next five years.

1. **Inspire** forward thinking **innovation and action** by curating, modeling, and sharing effective practices.
2. **Empower** members to engage in effective philanthropy by providing comprehensive high-quality **education and training** that meets their needs.

IPA's second two strategic goals are based around IPA's relationship with the Indiana communities that member organizations serve and with the philanthropic sector itself in the state.

3. **Engage** members & communities through **collaboration and convening to address key, common, and regional issues** that affect their work.
4. **Amplify** the **voice of Indiana's philanthropic sector** by promoting the impact of philanthropy, as well as advocating for and engaging members in public policy issues of importance to the sector and the communities it serves.

The final goal of IPA's Strategic Plan faces inwards, recognizing that the other four goals in the plan, and indeed the mission of the organization, cannot be fulfilled without IPA itself being a strong and sustainable organization.

5. **Enhance IPA's capacity and effectiveness** to achieve its mission.

The following five pages provide an in-depth description of each of the goals above, and provide background information about why the goal was chosen and what might be possible to achieve in terms of long-term success with each goal

1.

INSPIRE FORWARD THINKING INNOVATION & ACTION

Inspire forward thinking **innovation and action** by curating, modeling and sharing effective ideas and practices.

Background: In a world where members feel overwhelmed with information and data, stakeholders requested IPA target and curate information for them that directly relates to the interests and operations of philanthropic organizations. They also discussed wanting IPA to lead the way and support them in staying up-to-date on important trends and topics in the field. Member organizations saw this thought leadership as a way for IPA to encourage them to continuously grow and improve their practices. Overall, stakeholders believe that IPA should be the leading organization that people in Indiana's philanthropic field go to when they want to become more responsive, sustainable, and proactive organizations.

Vision: Members are inspired by IPA to innovate and to stay current with the most cutting-edge trends in the field of philanthropy. IPA elevates its own practices and encourages members through programming and information sharing to embrace new forms of grantmaking and to address community issues in new ways.

In five years, success might look like:

- Members are engaged in innovative work.
- Members rate their organization's level of innovation as high.
- IPA staff share stories about members being engaged in innovative work.
- Members report high levels of agreement about whether IPA inspired them to be innovative.
- Members are satisfied with IPA's sharing of effective practices.

2.

EMPOWER MEMBERS THROUGH EDUCATION & TRAINING

Empower members to engage in effective philanthropy by providing comprehensive high-quality **education and training** that meets their needs.

Background: Stakeholder input indicated that members wanted IPA to continue to be an educator but desired a broader range of services that would be beneficial at every phase of their development. This encompasses having a spectrum of opportunities for involvement from youth interested in learning what philanthropy is, to seasoned leaders in the field who need advanced training on incorporating complex ideas into their organizations' operations. IPA's educational offerings should be specifically tailored to the needs of members. Stakeholders see IPA's role in education as being the "go-to place" to help members develop the skills necessary to thrive in their careers, and also as a place for member organizations to contribute to a thriving philanthropic sector in Indiana.

Vision: IPA is a premier training provider for the philanthropic sector and IPA's professional development offerings address the training needs of members at all stages of their careers.

In five years, success might look like:

- IPA is known as a premier training organization.
- Members attend IPA's education and training opportunities.
- Members self-report being satisfied with IPA's education and training opportunities.
- IPA provides education and training opportunities that address findings from a survey of member needs.
- Anecdotes arise about individuals in other states asking to attend or bring IPA education and training opportunities to their states.

3.

ENGAGE MEMBERS & COMMUNITIES AROUND KEY ISSUES

Engage members & communities through **collaboration and convening to address key, common, and regional issues** that affect their work.

Background: Stakeholders reported struggling to collaborate with each other and with organizations in other sectors. Current and potential members reported wanting to engage with other organizations in diverse ways, including structured meetings or affinity groups around issues or regions of interest, as well as through less formal networking opportunities between peers. Stakeholder input also indicated that IPA has a unique role to play in convening organizations of all types in conversations about issue areas of interest to the field of philanthropy in the state. Overall, member and nonmember organizations were excited about the leadership role that IPA could play in facilitating connection and collaboration at a regional, statewide, and national level.

Vision: IPA members actively collaborate with each other and with others in their communities to address issues of importance. IPA member organizations rely on each other for information about promising practices and engaging regularly in public-private or other types of partnerships at the local level.

In five years, success might look like:

- More public-private partnerships are taking place.
- Statistics about health and wellbeing in Indiana communities improve (community rankings).
- Members self-report that they are collaborating or participating in partnerships more often.
- Anecdotes arise that show that members are collaborating with their communities/others.
- Members are satisfied with IPA connecting them to others.
- Members are engaged in IPA-convened collaborative opportunities.

4.

AMPLIFY THE VOICE OF INDIANA'S PHILANTHROPIC SECTOR

Amplify the **voice of Indiana's philanthropic sector** by promoting the impact of philanthropy, as well as advocating for and engaging members in public policy issues of importance to the sector and the communities it serves.

Background: Individuals working in the field of philanthropy feel that the general public, and often even community decision makers, do not fully understand the role and impact of philanthropy in their communities. Stakeholders believe that IPA can help bolster the field by increasing public awareness of philanthropy's role in the community. Additionally, stakeholders discussed the value of IPA as an entity that can amplify the voice of the philanthropic sector in the state to advocate for public policy issues that affect member organizations, grantees, and communities. Stakeholders saw IPA's role in advocacy as educating members about policy issues of interest, supporting member advocacy efforts, and interacting with policy-makers on behalf of the sector.

Vision: IPA is the "go-to" resource for legislators, the media, and other public figures to call when they want to be connected to philanthropic organizations in Indiana. IPA also is called upon when community leaders want to better understand how the philanthropic sector is affected by their work, or to engage the philanthropic sector in their initiatives or ideas.

In five years, success might look like:

- Legislators and others see IPA as the "go-to" for connections to the philanthropic sector in Indiana.
- Requests are received from legislators, government officials, or the media asking IPA for comments or opinions.
- Members are satisfied with IPA's advocacy work.
- Members self-report an increased ability to connect with public policy issues of interest to them.
- Anecdotes arise about IPA impacting public policy issues that are part of its agenda.
- IPA is featured in earned media placements.

5.

ENHANCE IPA'S CAPACITY AND EFFECTIVENESS

Enhance IPA's capacity and effectiveness to achieve its mission.

Background: To inspire innovation, empower members through education, engage members and communities, and amplify the voice of the sector, IPA will need to invest in its own sustainability, capacity, and impact. Stakeholders mentioned the following pieces of IPA infrastructure that may benefit from intentional focus on sustainability: seeking new funding streams, diversifying membership, and intentionally upskilling staff on trending issues/topics. Additionally, to understand the impact that IPA is having on its members and on the field, success targets and metrics must be established around action items that address the organization's strategic goals.

Vision: IPA is a thriving organization with a sustainable funding model, staff with knowledge about the foremost trends in the field, and members from a variety of different types of philanthropic organizations. IPA can clearly articulate its impact on members and on Indiana communities.

In five years, success might look like:

- Board report that the organization is financially stable.
- Staff report that they know about and understand the newest trends in the field
- Staff and board report office space that is optimized for productivity, teamwork and member experience.
- The size and diversity of paid membership increases.
- There is an increase in engagement with IPA amongst a variety types of philanthropic organizations
- Members report that IPA had a positive impact on them and/or their organization.

IPA's Five Strategic Goals 2020 – 2024

Inspire

forward thinking **innovation and action** by curating, modeling, and sharing effective practices.

Empower

members to engage in effective philanthropy by providing comprehensive **high-quality education and training** that meets their needs.

Engage

members & communities through **collaboration and convening to address key, common, and regional issues** that affect their work.

Amplify

the **voice of Indiana's philanthropic sector** by promoting the impact of philanthropy, as well as advocating for and engaging members in public policy issues of importance to the sector and the communities it serves.

Enhance

IPA's capacity and effectiveness to achieve its mission.