

**2017-2019  
STRATEGIC  
PLAN**



*Champion. Support. Connect.*

**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.

**MISSION**

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

**VALUES**

Knowledgeable, Ethical,  
Responsive, Collaborative,  
Transparent

**GOALS**

1. Champion philanthropy in Indiana by increasing the awareness and understanding of the value of philanthropy and promoting philanthropy's role in Indiana.
2. Increase philanthropic impact in Indiana by supporting and connecting IPA members to one another and to resources that will enhance their work.
3. Demonstrate organizational excellence and sustainability.

# GOAL 1

Champion philanthropy in Indiana by increasing the awareness and understanding of the value of philanthropy and promoting philanthropy's role in Indiana.

2017-2019  
STRATEGIC  
PLAN

## STRATEGIES

1

Educate/Assist Indiana's state and federal elected officials to support an environment that allows philanthropy to flourish.

2

Communicate to key external stakeholders about value/role of philanthropy in Indiana.

3

Enhance communication with membership about the role they play in communicating philanthropy's impact.

4

Increase the awareness and understanding of the value of youth philanthropy.

## OUTCOMES

More elected officials and policymakers have connected with IPA staff and members.

IPA takes public positions on issues that affect the scope and role of philanthropy in Indiana, including those that could affect the overall quality of life for people in Indiana if deemed appropriate by IPA Board.

IPA promotes the activities of its members.

Reach a broader audience, outside of philanthropy.

More non-member corporations & faith-based organizations are exposed to the value of organized philanthropy & the role IPA plays.

IPA promotes the activities of its members and encourages member outreach to external stakeholders about their organization's impact.

YPII will shape and contribute to the field of youth philanthropy.

There is an increase in foundations and youth-serving organizations that have incorporated concepts of youth philanthropy into their programming.

## METRICS

Annual minimum one in-person touch w/ IN Congressional delegation and at least 50 state legislators.

Annual IPA legislative agenda developed and approved by the IPA Board.

At least 33% newsletter open rate by external stakeholders.

At least 50 additional social media followers annually.

At least two monthly IPA generated communications about the role and value of philanthropy.

At least 50% of representatives from non-member corporations report improved understanding of philanthropy.

10+ outreach efforts to non-member corporations & faith-based organizations annually.

At least 30% of members responding to annual survey report outreach to external stakeholders.

25% of IPA organizational members are mentioned in media on annual basis.

At least 40% of Indiana community foundations have incorporated youth philanthropy concepts into their programming by the end of 2019.

10+ youth philanthropy outreach efforts to Indiana youth-serving organizations annually.

# GOAL 2

Increase philanthropic impact in Indiana by supporting and connecting IPA members to one another and to resources that will enhance their work.

## STRATEGIES

**1** Provide professional development, grantmaker education, and networking opportunities for members through GIFT, YPII, and general IPA programming.

**2** Serve as resource for timely and relevant information and best practices in philanthropy that is Indiana specific or impact the work of members.

**3** Seek out special initiatives and collaborations that enhance, inform and/or support the interests of Indiana's philanthropic sector.

## OUTCOMES

Foundations and other grantmakers/ philanthropic advisors across the state have opportunities to connect.

IPA activities stimulate discussion, learning, and potential for shared action.

Members engage with IPA in multiple ways.

IPA members report that IPA has been beneficial to their organization's efforts.

IPA members rate IPA resources as helpful.

IPA members report special initiatives have been valuable to their work.

Members are supported by affinity groups that address their professional needs and interest areas.

## METRICS

Annual cumulative program registration of at least 1,500 participants.

85% of members record at least one active engagement with IPA on an annual basis (e.g. program participation, volunteer service, leadership circle).

50% of members actively engage in 3 or more IPA activities on annual basis.

Annual member survey ratings of at least 4.0 on 5-point scale.

25% of survey respondents report participation in collaborations that encourage philanthropic engagement (IPA led and/or community based).

75% of members who participated in special initiative activities (defined annually) rate the knowledge gained as valuable to their work.

75% of Members involved in an IPA supported affinity group rate their participation as valuable to their work.

# GOAL 3

Demonstrate organizational excellence and sustainability.

2017-2019  
STRATEGIC  
PLAN

## STRATEGIES

1

Model best practices in sound budget, reserve & investment policies & procedures.

2

Model best practices related to Board leadership and governance.

3

Invest in enhanced technology, personnel and programs.

4

Focus on efforts to retain current members and increase membership from categories prioritized by Board.

5

Research and implement new income streams.

## OUTCOMES

IPA has achieved sufficient financial sustainability to weather unexpected loss of significant annual income.

Money used from reserves is replenished.

Effective Board governance and Board member engagement.

Highly qualified staff is recruited and retained.

Technology supports achieving IPA goals.

Internal policies & procedures are in place to ensure successful succession planning for key staff positions.

IPA membership represents significant portion of endowed assets and grantmaking by foundations in Indiana.

Increased participation by faith-based philanthropic organizations & non-member corporations in IPA activities.

Sufficient income from multiple revenue streams to support positive annual budget and long term financial sustainability.

Income from new products or activities is realized.

Feasibility of an endowment campaign is explored.

## METRICS

Reserve equivalent to one year operating budget (~\$1,000,000).

Reserve funds invested in programs, personnel and technology are replenished within three years of investment.

Avg rating of 2.5 out of 3 on Board self-assessment ratings in all categories.

100% Board participation in annual self-assessment.

95% of annual member survey respondents report accessing IPA website or other online resources.

By the end of 2017, appropriate policies and procedures are in place related to key staff succession planning.

95% annual member retention by year-end.

Annual new member financial targets achieved.

80% of Indiana's "Top 25" foundations (annual grantmaking) are members.

90% of Indiana's "Top 25" foundations (by asset size) are IPA members.

1% of total program participants are affiliated with faith-based org. or non-member corporate entities on annual basis.

95% of budgeted revenue from new income streams is realized.

Decision about an endowment campaign is made by the IPA Board by the end of 2017.