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STRATEGIC PLAN

Strategic Context

"Do the best you can until you know better. Then when you know better, do better."

-Maya Angelou

The five-year strategic plan is based, in significant part, on a comprehensive membership survey completed in October 2020 (Appendix A: Strategic Rationale) and related assumptions. The Committee also recommends adjustments to the mission, vision and values to better align with the aspirations of the Giving Institute and Giving USA Foundation.

Mission, Vision, and Values

Mission (revised)

To actively champion thought leadership that empowers generosity

Vision (revised)

To develop extraordinary leaders dedicated to stimulating and amplifying generosity

Values Statement (new)

The Giving Institute is committed to:

- **Community** – bringing people together to create greater influence, more opportunities, deeper knowledge, and lasting impact
- **Excellence** – holding ourselves and the community of generosity to the highest standards and ethical practices
- **Diversity & Inclusion** – fostering a diverse, equitable, inclusionary, and generous community



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Goal #1: Sector Leadership and Brand Positioning

The Giving Institute will increasingly be recognized as a key association of for-profit providers who serve the nonprofit sector by equipping fundraising professionals and by convening those who are committed to elevating generosity.

Success indicators include:

- Growing engagement in Giving USA, Special Reports and other thought leadership products as quantified through a 10% growth in year-over-year sales revenue
- Third party citations of Giving USA data grow 10% year-over-year
- A 15% year-over-year growth in web traffic and social engagement of individuals interrogating the data available from Giving USA and The Giving Institute

Goal #2: Membership growth and retention: Enrich member value, experience, and engagement

The Giving Institute will grow to 70 members representing diverse perspectives over the next three years with an industry-exceeding retention rate of at least 90% in order to generate the resources for change. The Institute will create educational programs that cover industry trends as well as topics identified as being most valued to building individual member organization strength.

Success indicators include:

Membership measures:

- Annual retention rate year at least 90%
- Net growth of 3 firms per year:
 - At least one firm is not a traditional full service/campaign firm
 - At least two meet the definition of certified minority-owned and/or led
 - Extend invitations to events and/or membership to at least 10 certified minority-owned and/or led_firms
 - Add DEI measures to the membership application

Membership participation/engagement measures:

- Educational sessions score an average of at least 4 out of 5 by attendees
- Member firms can point to tangible value as a result of membership
- At least 90% of firms attending annually in programming
- At least 40% of member firms leading/presenting educational sessions
- Establish and implement a defined onboarding process for new member firms



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Goal #3: Strengthen capacity of member firms to be successful. Provide professional development and leadership opportunities to foster growth in individual participants.

Success indicators include:

- Ensure that every Mentor Series program-features a leadership development track or component
- Offer an annual program opportunity on succession planning
- Ensure that every program includes DEI content appropriate for the session
- At least 75% of members participate in committees
- At least 33% of member firms actively participate in leadership by leading a committee/task force/serve on executive committee
- During the life of the plan, conduct annual member satisfaction surveys, specifically around topics related to firm management and leadership development, each of which earn scores of at least 4 out of 5



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Appendix A

Strategic Rationale

The last strategic planning process was conducted on the heels of a significant economic recession.

Now the world is in the midst of wrestling with a global pandemic with the short and long-term impacts not fully known. In a moment of elevated cries for racial justice and healing and unprecedented political divisions, the work of The Giving Institute (Institute) and Giving USA Foundation (Foundation) have never been more important. The motto to “create shared intelligence for the greater good”, has served the Institute well, but the moment has arrived to proactively do more under the mission.

The word “philanthropy”, revered for generations, and handsomely promoted through our work for decades, is now being supplanted by a move to proliferate the more inclusive notion of generosity.

This strategic plan is designed to begin to answer the call - to be an even more dynamic catalyst for change.

The recently completed, comprehensive Membership Survey, conducted by Great Lakes Marketing Research, delivered in October 2020, has provided a treasure trove of insights to inform the strategic plan. Among them:

- 85% of members align with the mission, vision, and direction of the Giving Institute.
- Member firms are hungry to learn more about ways in which to grow their success with DEIA programs with almost 75% expressing strong interest.
- Many members want the Institute, significantly through the work of the Foundation, to continue to serve as the trusted source for education about philanthropy.
- Almost 75% report a desire for more information about ways in which to better run their firms.
- Two-thirds of members express satisfaction with membership and perceive that the value of it exceeds the cost.



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- 61% believe it is important to grow the number of member organizations. While current members are interested in ensuring that the Institute “undergird the value and prestige of membership.”

The value of convening in person has been corroborated, but the appetite for offerings related to information sharing, knowledge dissemination, thought leadership, and the work of Giving USA ranked higher than networking.

At the same time, virtual learning platforms rank well below in person formats creating a degree of complexity and challenge for both the Institute and the Foundation moving forward.

The Institute's membership is changing and evolving. The needs of counsel firms versus those of technology and other allied service providers are disparate.

This plan seeks to propose and implement strategies and tactics to promote a diverse and inclusive culture within both the Institute and among allied professionals in the field.

Although, the results of the Membership Survey were affirming, in many ways, the Strategic Planning Committee reflected thoughtfully about the mission, vision, and values of the Institute. This plan includes a recommendation to adopt new positioning statements to better reflect the direction of the organization.

Through the Foundation, the work of the Generosity Commission, and other programs and projects, the plan, fully implemented, will greatly enhance the value of membership. Through the action that Foundation research projects portend, the Institute's contributions to the philanthropic sector will be visibly recognized. Our voice will be amplified.