

# MPGC 2015-2017 Strategic Plan Summary

## **Goal 1: Engage Allied Professionals**

Strategy 1: Partner with professional associations, e.g. FPA, MN Society of CPAs

- A: Identify allied professionals to partner with
- B: provide MPGC training at other institutional educational settings

Strategy 2: Develop marketing to communicate with these groups

- A: Create a business case for incorporating planned giving into your practice
- B: Reconsider membership due structure for this audience - should there be an institutional fee rather than individual fee
- C: Improve language to be inviting to each type of professional advisor, e.g. financial planner, attorney, CPA
- D: Prioritize focus on financial advisors

Strategy 3: Provided MPGC/LAL branded education to allied professionals

- A: Incorporate allied professional content into programs
- B: Create incentives for bringing allied professionals to sessions

## **Goal 2: Outreach to Greater MN**

Strategy 1: Have education that reaches Greater MN

- A: Host three in-person Brisk Walk seminars in Greater MN by due date
- B: Make breakfast programs accessible to Greater MN
- C: Review whether a brownbag program should be hosted in conjunction with United Way
- D: Host LAL Regional Group exchange session(s) at the conference

Strategy 2: Listen to the Greater MN community

- A: Define and communicate value to Greater MN
- B: Identify 5 MPGC members in Greater MN to lead conversations about needs
- C: Identify diverse population centers

Strategy 3: Build external partnerships

- A: MCN
- B: United Way

Strategy 4: Grow Membership

- A: Grow overall membership by X% each year. Baseline set as of Y date
- B: Create strategy to reach out to diverse allied professionals and recruit to the board/committees

## **Goal 3: Strengthen the financial security of MPGC**

Strategy 1: Review potential for fundraising

Strategy 2: Review membership fees structure

Strategy 2: Review sponsorship opportunities

- A: Consider annual sponsorship

Strategy 2: Review expenses