

Co-creation in Practice

Instructions:

Participants engage in facilitated brainstorming to develop strategies that meet these ends in their communities.

Assign a facilitator whose job is to help the group use their collective wisdom and experience to co-create solutions to help achieve the desired outcomes for your council.

Each topic starts with a corresponding PPP Ends Policy. The Ends Policy is then framed as a Council Challenge. The group should start by reviewing the challenge and the desired outcomes. Are there other outcomes that the group wishes to add? Ones that should be deleted?

Then, the group brainstorms and shares ideas and possible solutions and strategies for reaching the outcomes. Summarize and capture the good ideas on a flip chart.

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ENDS POLICY 1

The Partnership for Philanthropic Planning is the voice of charitable gift and estate planning.

Council Challenge: Establishing our council as the Voice for charitable gift and estate planning in our community.

Outcomes Desired

- Related organizations are aware of our council's existence and program opportunities.
- Related organizations partner with us to serve our mutual constituencies.
- Local media value our council as a resource on philanthropic planning and charitable tax strategy.
- Our council is active on state government issues in support of philanthropic planning.
- Our council responds to national government issues "calls to action" by PPP

Co-created Solutions:

AFP
Community Foundations
Women in Development
Estate Planning Councils
Soropotist
CFO/Senior Mgt
United way
Council on Aging
SFP
NAIC-local chapters
CPA's
FPA
Trust Officers

Media-Radio-TV-Print

(Do they know who we are? Do they see us as a resource? Positioning/awareness

Twitter-YouTube-Facebook-Linked-In

Local Bar Associations-make presentation on philanthropic Planning

Financial Planning Assoc's

Acknowledge reality: motivation of many advisors is to make money

Education/training vs. membership-both will lead to philanthropy

Two Way Interaction-

Invite speakers from other groups to speak to councils

Co-marketing of programs-e.g. economic forecast program

Don't feel too boxed in as to program topics

Attract new members

Non-profit resources list and/or program for local advisors

Partner with local community foundations – CF's are great sponsors

Related organizations eager to partner with councils on planned giving education

AFP partnership-helps with planned giving education/expertise

Stabilizes council

Create culture

Establish planning council

Council co-sponsors have a presence at gift planning programs presented by others

Facilitate access to PPP

Promote resources

Educate councils

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ENDS POLICY 2

Charitable gift planning is widely recognized as bringing value to charitable organizations and financial and estate planning practices.

Council Challenge: Our council is recognized as bringing value to charitable organizations and financial and estate planning practices in our community.

Outcomes Desired

- Council programs provide value to charitable planners at all levels of expertise.
- Council programs provide value to financial advisors.
- Council programs are accessible and welcoming to all.
- Council programming opportunities are widely communicated and publicized.

Co-created Solutions:

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ENDS POLICY 3

Charitable gift planning is widely practiced.

Council Challenge: Increasing the quantity of gift planning that happens in our community.

Outcomes Desired

- Our council reaches out to, and provides programming for, nonprofits with no/little gift planning knowledge.
- Our council reaches out to, and provides programming for, planned gifts officers, major gift officers, and directors of development.
- Our council reaches out to, and provides programming for, financial advisors.
- Our council promotes charitable planning to nonprofit managers and trustees.
- Our council promotes charitable planning to the public.

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ENDS POLICY 4

Charitable gift planners are well-trained and competent.

Council Challenge: Establishing our council as the primary source of gift planning education and training in our community.

Outcomes Desired

- Our council offers a wide range of education formats and opportunities.
- Our council offers a wide range of education topics.
- Related organizations are eager to partner with our council on gift planning education.
- Our council co-sponsors or has a presence at gift planning programs presented by others.
- Our council facilitates access to PPP national resources

Co-created Solutions:

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ENDS POLICY 5

Local planned giving councils are vibrant, healthy and well-supported by PPP.

Council Challenge: Creating a council administration structure that fully supports the achievement of our goals.

Outcomes Desired

- Our council cultivates and trains good volunteer leadership.
- Our council has a board and committee/task force structure that fully supports our activities.
- Our council is financially stable.
- Our council makes excellent use of paid administrative staff.
- Our council communicates fully with PPP and makes uses of the resources available to us.

Co-created Solutions: