



Partnership for Philanthropic Planning
2010 Leadership Assembly

Co-Creation: Best Ideas from Roundtable Discussions

Co-creation is a process that allows people to work together to solve problems and respond to challenges. At the 2010 Assembly, council leaders worked in roundtable groups to discuss their local challenges. The following ideas were among the best solutions to common problems. “Council models” are groups where these strategies are currently being used. If you’d like to make contact with people at these councils, find links to council web sites at http://www.pppnet.org/pdf/PPP_Council_Listing.pdf

Recruiting and Retaining Council Members

Invite guests to attend one meeting for free. If they join the council, reward them with play or concert tickets, museum passes, etc. (freebies provided by council members’ organizations).

Allow each council member to bring one free guest each year. Board members make follow-up calls to guests to highlight benefits of council membership.

If there are nonprofit organizations whose staff should be more involved in the council, find a way to have that organization host an event for the council.

Give senior members a job to keep them engaged—ethics committee, government relations liaison, etc. It helps if the job requires them to report to the council each month.

Use Survey Monkey (surveymonkey.com) or another surveying program to ask members what topics they’d like to learn more about.

- Start with PPP’s council survey template:
http://www.pppnet.org/council_resources/pdfs/Planned_Giving_Council_Survey_Template.pdf

Create a council group on LinkedIn—this can be used to keep track of people who have left the area or discontinued their council membership.

- Join PPP’s group on LinkedIn, as well as the groups for PPP and the National Conference on Philanthropic Planning on Facebook.

Call members BEFORE their renewal dates to encourage them to continue their council membership.

Governance

Start a buddy system to pair incoming board members with experienced board members.

- Council model: Greater Cincinnati Planned Giving Council

Add “glamour and prestige” to board service.

- Send a press release to local business journal announcing new board members. See a sample from PPP: [Press Release Sample](#)
- Send thank you notes to board members’ bosses to reinforce the value of their service.
- Be sure to formally and publicly show appreciation to board members.

Conduct in-person orientation with new board members, and provide a binder or flash drive with council bylaws and other critical documents.

- Use PPP’s Leadership Orientation Binder TOC at http://www.pppnet.org/council_resources/pdfs/Leadership_Orientation_Binder.pdf

Reach out to non-board members to get work done. Include them on committees or short-term task forces. Keep working groups small so that communication is more manageable.

Programming

Offer a comprehensive fundamentals “night school” for several months.

- Council model: Northern California Planned Giving Council <http://www.ncpgcouncil.org/ncpgc/planned-giving-basics.html>

Get council programs recognized as content for a university certificate program on fundraising, nonprofit management, etc.

Schedule a program or special event in which a prominent donor is interviewed by a community leader (e.g., university president)—both must be people that the audience really wants to hear.

In a mentoring program, the relationship should be driven by the mentee, not the mentor. The mentee should be committed to the relationship, and clear about his/her expectations. At the end of a year, mentees should become mentors to keep the program going.

Devote three meetings each year to analysis of case studies, so that members can be actively involved.

Start a council book club to enhance more traditional programming.

- Some tips for running a book club: <http://www.book-clubs-resource.com/running/> Visit PPP’s group on LinkedIn to find (and add to) a list of titles that might be appropriate for your council’s book discussion group.

Have an annual program retreat to plan programs for the coming year.

- Start by reviewing PPP’s Sample Program Calendar: http://www.pppnet.org/council_resources/pdfs/Creative_Council_Programming_Calendar.pdf
- Council model: Planned Giving Group of Indiana

Hold a “summer tour” program to give council members a behind-the-scenes look at interesting nonprofits (zoo, museums, etc.).

- Council model: Planned Giving Council of Houston <http://www.pgch.org/>

Schedule a series of programs on “related disciplines,” e.g., psychology, behavioral economics related to seniors or wealthy families.

Schedule breakfast meetings that end by 9:30 a.m., to attract more advisors.

When pricing a conference, set non-member price to encourage people to join the council, as follows: if total cost of council membership is \$75, make the non-member conference fee \$30 more than the member fee. Then, on the day of the conference, offer a “one-day sale” on council membership, so that non-members can join for \$45. In the end, the council has collected the full dues amount, but members who join at the conference feel like they’re getting a deal.

Public Relations/Raising Community Profile of Gift Planning

Print news alerts and newsletters from PPP and alert council members to news of interest to key audiences, e.g., CEOs or CFOs, advisors.

- Visit the PPP news archive: <http://www.pppnet.org/archives.html> and the legislative news archive: <http://www.pppnet.org/government/leg-updates.html>

Develop relationships with TV anchors, producers, etc., as a way to get TV personalities to emcee council events, making them more likely to get TV coverage.

Develop contacts with writers at local business journal, to establish the council as a future resource for stories on philanthropy.

To raise profile, visibility of council, conduct an awards program with three awards: donor, organization, and professional advisor.

Council models:

- Pinnacle Award (Indian River, FL)
http://www.pppnet.org/council_resources/pdfs/Indian_Rivers_Awards_Program.pdf
- Voices of Giving (Greater Cincinnati) <http://www.gcpqc.org/initiatives/vog>

Be sure that every council member is eligible to receive an award—and does.

Post members’ success stories on council web site, e.g., show how a member used something he/she learned at a council meeting to get a gift or move a relationship forward.