



Strategic Plan

Introduction

Originally created in 1988 as the National Committee on Planned Giving (NCPG), the Partnership for Philanthropic Planning (the Partnership) is a 501(c)(3) public charity whose mission is to help people and organizations create charitable giving experiences that are the most meaningful in achieving both charitable mission and the philanthropic, financial, family and personal goals of the donor.

The Partnership achieves its mission through research, education, advocacy, community dialogue and the setting of standards and best practices in philanthropic planning. The Partnership strives to engage all constituents in the charitable gift planning process: planned giving and major gifts professionals, nonprofit managers and trustees, financial and estate planners, trust managers and administrators.

The Partnership for Philanthropic Planning helps maximize the value of charitable giving for nonprofit organizations and donors by helping fundraising professionals provide the most meaningful charitable giving experience for donors; helping financial planning professionals provide their clients with excellent advice on charitable giving and estate planning; and helping nonprofit managers and trustees better accomplish the missions of their organizations through meaningful philanthropic planning.

The Partnership for Philanthropic Planning is supported by 128 local councils and over 10,000 individual and council members, as well as charities, associations and business organizations that support the mission of *charitable giving made most meaningful*.

Charitable Gift Planning Defined

Charitable gift planning is the process of cultivating, designing, facilitating, and stewarding gifts to charitable organizations.

Charitable gift planning:

- uses a variety of financial tools and techniques for giving,
- requires the assistance of one or more qualified specialists,
- utilizes tax incentives that encourage charitable giving, when appropriate, and
- covers the full spectrum of generosity by individuals and institutions and is based on powerful traditions of giving in the United States.

The techniques of charitable gift planning include both revocable and irrevocable arrangements, gifts available for use at the time they are given and gifts that may not be available until a future date, and split-interest gifts intended to balance financial, personal, and charitable objectives.

Donors should seek charitable gift planning advice from professionals with integrity, expertise, and experience in law, investments, property, tax, and charitable transfers in order to assure both the technical merits of the transfer and the philanthropic quality of the gift.

ENDS Policies

The Partnership for Philanthropic Planning has defined the following desired outcomes or "Ends Policies" as critical components of mission achievement. These Ends guide all activities of the Partnership.

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

Definition: The Partnership is recognized by charitable gift planners, financial and estate planning professionals, the media, legislators, regulators, fundraisers, nonprofit administrators, allied professional organizations, donors, and the public as the spokes-organization and standard setter for philanthropic planning .

The end is achieved when: Partnership guidelines and standards are widely used by charitable gift planners and well respected by all key constituencies. The Partnership is the first place that charitable gift planners, financial and estate planning professionals, the media, legislators, regulators, fundraisers, nonprofit administrators, allied professional organizations, donors, and the public go for information on charitable gift planning. The Partnership is always consulted when legislation or regulation affecting charitable planning is considered.

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

Definition: Charitable gift planning is recognized and respected by charitable gift planners, financial and estate planning professionals, the media, legislators, regulators, fundraisers, nonprofit administrators, allied professional organizations, donors, and the public as a professional expertise. The public recognizes the term "charitable gift planner."

The end is achieved when: Charitable gift planners and donor advisors value each other as teammates in the charitable gift planning process. Charities include and value gift planners as a part of their development teams. Membership in the Partnership is recognized as evidence of commitment to gift planning professionalism.

3. Charitable gift planning is widely practiced.

Definition: Americans at all income and asset levels engage in philanthropic planning. Every fundraiser and donor advisor has at least a basic familiarity with planned giving options and presents these options to all donors, prospects and clients.

The end is achieved when: The number of planned gift donors is equal to the number of people who support charity during their lifetime. Charitable organizations are able to measure a steady increase in the number of planned gifts committed and realized. All donor advisors ask clients about their philanthropic goals.

4. Charitable gift planners are well-trained and competent.

Definition: Fundraisers and donor advisors plan charitable gifts competently and ethically. Donors have meaningful charitable giving experiences.

The end is achieved when: There is general agreement regarding the skills, knowledge and experience required for competence in charitable gift planning. Fundraisers and donor advisors have a wide variety of options for acquiring and maintaining skills, knowledge and experience. The number of public complaints about poorly structured gift plans or incompetent/unethical gift planners steadily decreases.

5. Local planned giving councils are vibrant, healthy and well-supported by the Partnership for Philanthropic Planning.

Definition: The Partnership and its affiliated planned giving councils work together to forward the mission of the organization. Partnership councils have a reputation for organizational excellence because of their leadership infrastructure, program quality and community involvement.

The end is achieved when: Both the number of planned giving councils and the number of council members is steadily increasing, and at least 75% of members belong to both a local council and the Partnership. Councils rate the Partnership's services as essential to their leadership infrastructure, program quality and community outreach. All councils have strong participation by both nonprofit and for-profit gift planners.

Strategies

The ability of the Partnership for Philanthropic Planning to be successful in achieving its Ends and ultimately, its mission, depends upon successful accomplishment of the following key priorities:

- 1) Engaging all of the constituencies critical to the philanthropic planning process
- 2) Providing unique programs and services
- 3) Implementing successful models of collaboration and partnership
- 4) Creating brand awareness and support