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# **The IIMC Foundation Strategic Plan 2021**

*Wayne Hussey Consulting, Inc.  
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## **BACKGROUND**

On November 17, 2019, members of the Board of Directors of the IIMC Foundation gathered to participate in a rapid yet practical strategic planning process as designed and facilitated by Wayne Hussey Consulting Inc. The participants of the planning session confirmed their Mission Statement, updated the Vision Statement, and identified a preliminary list of Key Strategic Thrusts. This content is included below.

### ***MISSION – WHO WE ARE TODAY***

**The IIMC Foundation is a diverse team of volunteers of who are passionately committed to raising endowed dollars whose earnings help IIMC pursue its educational objectives**

### ***VISION – OUR DESIRED FUTURE***

**The IIMC Foundation will increase its fund to \$2.8 million by the end of 2020 by adding new fundraising programs and expanding current programs**

## **KEY STRATEGIC PRIORITIES**

- **MARKETING**
  - Rebrand and market society levels
  - Support special events committee with retail program
  - Work with Finance Committee to investigate ways to support giving, e.g., text, Venmo, and Zelle
  - Launch campaign “20 for 2020” with Regional contest targeting first time givers
  - Jim Tinnin scholarship promotion - List winners in programs and e-briefings; work with Development Committee to obtain photos and releases to run before keynote at conference and scroll on website; and add to Region newsletters

- **REVENUE GROWTH**

- At preconference meeting have all willing Board Members identify twelve donor prospects they will approach prior to December 2020 - these need not be conference-based contacts
- Integrate the new giving levels in our solicitation kit
- Investigate deployment of a university mail call center to test applicability and return on investment of an IIMC Foundation mail call program; and subject to Board review in May, modify the 2020 budget to incorporate this investment
- Pending the outcome of the mail call investigation, develop a Legacy Giving specific program
- Create a task force for the Legacy Giving Program and present comprehensive plan at May meeting
- Promote monthly giving as part of society level programs
- In coordination with Special Events Committee, investigate use of the IIMC conference app for text giving and create an event to motivate donors targeting Opening Ceremonies at conference and include those not in attendance
- Coordinate monthly eBlast publication and develop schedule

- **SPECIAL EVENTS**

- Use leis to market Hawaii raffle at the conference; use volunteers from Development Committee to assist with sales table; and investigate purchasing tickets through app or phones
- Sell Mardi Gras beads for \$1 each for heads/tails coin flip at conference event
- Approach another vendor for a second trip or large ticket item for a drawing
- Raffle four St. Louis baseball tickets at conference, \$100 per chance, selling only 100 chances for event on same evening as Region dinners

- **DEVELOPMENT/EVOLVING INTO THE FUTURE**

- To more effectively market IIMC Foundation to a more diverse and inclusive cohort
- Recruit diverse Committee members and IIMC Foundation Board Members

- Begin work at the local and state levels
- Development communication methodology
- Better promote the online auction and recruit volunteers
- Create an awareness and understanding of the mission of the IIMC Foundation
- Assist the IIMC Foundation in their many fundraising activities both at the annual conference and throughout the year
- Serve as a conduit between the Foundation and the membership in the Regions
- Assist in disseminating information from the Foundation to the membership in Regions so that all are aware of the many activities and benefits of the Foundation
- Build a strong support system for all Foundation activities
- Develop future Foundation Board Members
- Investigate having panel or discussion with younger clerks regarding their concerns, view of the profession, what is driving them to give or not to give so we can better target that group
- Develop succession plan for Board of Directors including diversity