



**Association of Fundraising Professionals (AFP)
ON, Canada South Chapter**

**STRATEGIC PLAN
2015-2017**

**Prepared by
Board of Directors
AFP ON, Canada South Chapter
October 8, 2015**

I. VALUES AND MISSION

Core Values

- Ethics
- Education/Professional Development
- Diversity
- Leadership

Mission

AFP, an association of professionals throughout the world, advances philanthropy by enabling people and organizations to practice ethical and effective fundraising.

The core activity through which AFP fulfills this mission include education, training, mentoring, research, credentialing and advocacy.

II. INTERNAL AND EXTERNAL ORGANIZATION ASSESSMENT

Planning team members looked inward at the chapter organization to identify its internal strengths and weaknesses, and outward to identify external opportunities and threats.

Internal Strengths Include:

- Engaged Membership
- NPD Celebration
- Strategic Plan
- Networking
- Diverse and Experience Board of Directors
- International support
- Professional Development
- Active Social Media channels
- Building Ethics and Accountability
- Mentorship Program

Internal Weaknesses include:

- Small membership
- Working Board of Directors/No paid staff member
- Community Centrique fundraising-event heavy community
- Infant stages of succession planning
- Brand Awareness
- Board Orientation specific to Canada South
- Website
- Lack of non-board members on committees
- Cover Large Region

- The large number of people who say they are “fundraisers” but have no affiliation and/or ethics

External Opportunities Include:

- Collaboration
- Increase Membership
- Diversity and Inclusion Partnerships
- Leadership
- CFRE
- Recognition of value of AFP membership with employers
- Government Relations
- Member Only Events
- Media Relations
- Networking

External Threats Include:

- Media – negative/cost per dollar
- Economy
- Membership Cost
- Smaller Membership
- Large number of charitable organizations within our community
- Media/Public perception of fundraising
- Non-fundraising professionals hired in leadership roles
- “Volunteer” fundraisers Eg) Sports Teams

Why Chapter Board Members are involved in AFP

- Education
- Credibility
- Ethics
- Advancement of Profession
- Mentoring

III. A VISION FOR THE FUTURE

Vision Statement

Fundraising is recognized as a credible and respected profession for the betterment of our communities.

IV. CRITICAL ISSUES

- Retention of Membership

- Geographic Inclusion-Chatham-Kent, London, Sarnia
- Formalizing Policies, Procedures and Budget
- Building membership
- Succession Planning

V. GOALS AND OBJECTIVES

From this work, the following goal statements were created, with measurable objectives to be accomplished within specified timeframes

GOALS

1. Strengthen and grow membership through diversity, recruitment, retention & engagement to deliver optimal value to members.
2. Provide high quality and relevant fundraising programs, education & training to increase knowledge & advance profession.
3. Increase visibility and recognition of the chapter's leadership role in promoting ethical, professional fundraising & philanthropy.
4. Effectively govern and manage the chapter with consistent best practices and standards set forth by AFP IHQ and CRA.

OBJECTIVES & ACTION STEPS

The following objectives were defined for each goal as listed below:

4 Goals:

Membership

Programming

Communications

Governance/Administration

Goal #1-

MEMBERSHIP: Strengthen and grow membership through diversity, recruitment, retention & engagement to deliver optimal value to members.

Objectives

1. Develop and implement a Membership Marketing Plan
 - a. December 31, 2016 – 50 member goal
 - b. December 31, 2017 – 60 member goal
 - c. Recruitment efforts
 - d. Retention efforts
 - e. Highlight benefits
 - f. Develop value proposition to members and supervisors
 - g. Develop welcome strategy
2. Implement and grow a mentoring program.
 - a. Determine the number of matches as a goal
3. Implement a plan that ensures diversity and inclusion is encompassed in all chapter operations.
4. Implement a plan that ensures the Youth in Philanthropy Program is facilitated on an annual basis.

Areas Identified During the Day about Membership

- 42 current members, 8 lapsed
- Prospect list – reach out
 - Do a mailing
- Youth in Philanthropy initiative
- Welcome new members
 - Share benefits
 - Possibly develop new member package
 - Buddy/mentoring program
- Retention efforts
 - Call members at expiration date
- Members bring credibility
- Recruit to new member categories
- Personal asks
 - Board strategy
- Name tags at sessions indicating membership
- Diverse communities – new demographic
- Messaging to supervisor about value
 - Letting/preparing individual to make the case
- Advocate to small nonprofits
- Member only benefit developed

- Reach out to members on a regular basis
- Web sessions for rural members
- Regional conferences
- Geographic reach
- Highlight benefits
- Communicate benefits

Mentoring

- Formalized
- Member only program
- Get young professionals involved
- Young professionals want networking

Diversity

- AFP is more accessible to diverse organizations within in our community
- Gender
- Youth
- Cultural

Youth in Philanthropy

- Grade 10 – career planning/education presentations
- Youth Co-chair committee
- Youth Networking Sessions to hear from Senior level
- Youth rate/Student rate for sessions

Goal #2-PROGRAMMING:

Provide high quality and relevant fundraising programs, education & training to increase knowledge & advance careers.

Objectives

1. Develop an annual education plan
 - a. Years in Profession
 - b. Diverse
 - c. Consistent
 - d. Multi-level
 - e. Geography
 - f. Online/webinar/innovative/accessible
 - g. Ethics
 - h. CFRE credits
 - i. Diverse speakers
2. Develop a CFRE study group
3. Promote and enhance scholarship opportunities
 - a. National
 - b. Chapter

Areas Identified During the Day about Education

- Regularly scheduled sessions
- Develop yearly plan
 - CFRE credit
 - All levels of experience
 - One per month
 - NPD
 - AGM
 - One free per year (member only)
 - Holiday party
- CFRE study group – 6 weeks
- “Nacho typical reception”
 - 50-50 contribution to a nonprofit
- Best Sessions
 - Tony Elisher
 - Tammy Zonker
 - Interactive
 - Leadership – trending
 - Roundtable discussions
- Ideas
 - Large nonprofits – bring leaders in to speak to members
 - Role of board and leadership

- AFP/CFRE information
- Media panel
- Panel of funders
- Sponsors
- Competition versus collaboration
 - Recruitment strategy
- Ethics session – gear it toward those who “think” they are a fundraiser
- Scholarships
 - Communicating
 - Budgeting
 - Application approval

Goal #3-COMMUNICATIONS: Increase visibility and recognition of the chapter's leadership role in promoting ethical, professional fundraising & philanthropy.

Objectives

1. Continue to implement and grow an annual National Philanthropy Day® event.
 - a. Explore educational component
 - b. Increase nominees through partnerships
 - c. Increase sponsorships
 - d. Implement an evaluation tool-survey
2. Implement an annual communications strategy
 - a. Develop media partners
 - b. Social media
 - c. Ethics
 - d. Recruitment
 - e. Recognition of profession and chapter
 - f. Member spotlights
3. Develop a government relations strategy
 - a. Have representation on the Canadian Government Relations Committee

Areas Identified During the Day about Communications

National Philanthropy Day®

- 200 attendees
- Luncheon
- Media – SNAP
- 7 award winners
- Need more nominees – 1st communication in May
- Collaborate with United Way, Community Foundation, WEAVA (but don't lose control of event)
- Revenue – sponsors and tickets
- Take advantage of 15th anniversary in 2016
- Consider an evaluation tool/Survey –Eg) breakfast or lunch, educational component
- Look at shortening nomination form
- Celebrate fundraising profession

Communications

- Website – Webplanet/AFP template
- Facebook, Twitter, LinkedIn
- Board strategy
- AFPCanadaSouth@gmail.com
- Stock articles about member benefits
- Put together in an annual plan
 - Media
 - Why is AFP important

- Member spotlights

Government Relations

- Invite local politicians to NPD
- Consider having representative on Canadian Government Relations Committee
- Declare NPD as official day

Goal #4-Governance/Administration:

Effectively govern and manage the chapter with consistent best practices and standards set forth by AFP IHQ and CRA.

Objectives

1. Be a Ten Star Chapter Annually
2. Ensure Annual Board Retreat
 - a. Orientation
 - b. Policies
 - c. Board manual
3. Develop Policies and Procedures
 - a. Historical documentation
 - b. Financial
4. Develop a Succession Plan
 - a. Board
 - b. Committees

Areas Identified During the Day about Governance/Administration

- Working Board-Develop Board package-Expectations agreement/Committee leadership and participation and 100% Board Participation Every Member Campaign
- Board Retreat (fun yet informative)
- Annual Budget Developed
- Board Buddy idea
- Monthly Board meetings – 2 hours
- Monthly financial report at every board meeting
- Transition planning
- Set up a Google Docs Account for future board and committees
- Develop committee structure
- Succession planning
- Policies
- Board meetings
 - Monthly Reports submitted 1 week prior to meeting
 - Board meeting triggers committee meeting
 - Agenda, Minutes, Reports submitted for Google Docs

Administration

- More committee members
- Grant to fund administration help