



# **Strategic Plan**

## **2016-2018**

*Adopted December 8, 2015*



## **AFP International**

The Association of Fundraising Professionals (AFP) represents nearly 30,000 members in 231 chapters throughout the world, working to advance philanthropy through education, training, mentoring, research, credentialing, and advocacy. The association fosters the development and growth of fundraising professionals and promotes high ethical standards in the fundraising profession.

The **AFP Southwest Florida Chapter** follows the mission and vision of AFP International as described below. As such, AFP International's mission, Vision and Values, as well as its 2016-2018 Strategic Plan, provide reference points for this plan.

## **AFP Southwest Florida Chapter**

AFP Southwest Florida Chapter is honored by AFP International as a "Ten Star Chapter," recognizing that the organization "has accomplished many of the key objectives outlined in the Strategic Plan. The awards encourage chapters to perform specific activities designed to increase professionalism within fundraising and public awareness of philanthropy." Our chapter has a stable and healthy membership of 162 with a retention rate of approximately 85% in 2015. The Chapter is led a Board of 20 volunteers (as of January 2016).

### **Mission**

AFP, an association of professionals throughout the world, advances philanthropy by enabling people and organizations to practice ethical and effective fundraising. The core activities through which AFP fulfills this mission include education, training, mentoring, research, credentialing and advocacy.

### **Vision**

Fundraising is viewed as a credible and respected profession for civic betterment throughout the world.

### **Core Values**

**Philanthropy:** The belief that ethical and effective fundraising are the cornerstones of philanthropy and that philanthropy changes the world.

**Inclusiveness:** Embracing diversity in the fundraising community, with a commitment to understanding and addressing the shared and unique needs of all members of that community.

**Excellence:** Providing the fundraising community with the highest quality of knowledge, research, advocacy, career support, news and information, strategic alliances, and related tools and insights to ensure a successful future.

**Integrity and Credibility:** Conducting business according to the highest ethical principles and serving as trustworthy stewards of our resources.

**Collaboration:** Recognizing that we can accomplish our purpose only with the strong support and partnership of other individuals, AFP chapters and other groups who share our vision.



The AFP Southwest Florida Chapter Board of Directors prioritized goals for this plan to determine where resources and attention should be focused.

### **Primary Goals for AFP Southwest FL Chapter**

- 1. Enhance the member experience**  
Through the execution of its strategic plan, AFP SWFL will deliver optimal value to its members.
- 2. Develop superlative practitioners**  
Through its programs, networks and resources, AFP SWFL will develop skilled, knowledgeable and ethical professionals.
- 3. Strengthen the profession/educate external audiences**  
Through its programs and business outreach efforts, AFP SWFL will advance effective, ethical and accountable fundraising standards and programs as essential to philanthropy.
- 4. Prepare for the future through succession**  
AFP SWFL continually enhances the professional development of fundraising professionals and advances fundraising as a career.

### **Secondary Goals for AFP Southwest FL Chapter**

- 5. AFP will aggressively promote and defend public policy that encourages philanthropy, supporting principles important to AFP and the fundraising profession.**
- 6. The Southwest Florida Chapter supports a community of inclusion, and will seek, embrace and engage diverse individuals, groups and organizations with a broad representation of experiences, perspectives, thoughts and cultures within the fundraising profession.**
- 7. We will provide strong leadership in promoting and supporting the fundraising community worldwide.**

The Strategic Planning Committee was asked to update the 2012-2015 Strategic Plan and provide recommendations for monitoring progress toward goals in the 2016-2018 plan. To insure the plan is a working document that is vibrant for three years, Chapter committees helped the Strategic Planning Committee establish appropriate metrics for monitoring progress.



### ***Executive Committee***

The Executive Committee will have responsibility for oversight of the strategic plan and monitoring progress toward the stated goals. Quarterly reports will be given to the Board on the performance dashboard. The Executive Committee may assign a Task Force to facilitate the creation of future strategic plans.

- To fully support the work of the standing committees in their execution of the Chapter's strategic priorities, the Executive Committee will convene a task force to establish Chapter Policies and Procedures by June 30, 2016 that provide the basic tools essential to succession of leadership in concert with the Chapter Bylaws. They may include:
  - Nominating process for Board members, Standing Committee Chairs and members
  - Identification of Standing Committees and their charge (purpose and primary goals)
  - Clarification of existing protocols/procedures (such as access to membership database, membership communications, website, etc.)
  - Leadership development opportunities for current Board members through means such as orientation, an annual Board Retreat, job description
  - Creation of a succession plan including cultivation strategies for potential new Board members
  - An annual workshop in June/July each year for members interested in Board service
  - Leadership development opportunities for our membership
- The Strategic Plan will be reviewed at an Annual Board meeting and updated if appropriate. Committees and their plans will be assessed annually by the Board so they remain aligned with the Strategic Plan.
- Committee Chairs will report annually on Strategic Plan implementation.
- The Strategic Plan will be posted on the Chapter's website so it is accessible to all members.

### ***Communications***

Internal and external communications will be coordinated to increase visibility, enhance the member experience and help improve the Chapter's effectiveness.

- An annual Communications Plan will be created by April 1 to ensure that visibility of AFP SWFL will be prevalent and consistent in traditional and social media to help position it as one of the most valuable association memberships for nonprofit leaders.
- The Committee will work with the Chapter Administrator to provide timely and relevant information about Chapter business in monthly meeting notices.



### ***Ethics***

Ethics training and resources will be accessible to all Chapter members to strengthen the profession and philanthropy in our area.

- All programs will include an ethics component and a minimum of one program focusing on ethics will be held each year.
- The Donor Bill of Rights will be highlighted regularly through programs and/or Chapter communications.
- Ethics Committee members will help connect Chapter members with AFP resources about ethics and inform members how to explore ethical issues.
- The Committee will track the number of inquiries it receives on a quarterly basis.

### ***Membership***

The Membership Committee will lead recruitment of new members and promote the benefits of AFP membership to enhance the overall member experience and diversity within the Chapter.

- A member retention rate of 80% or higher should be maintained.
- Grow membership by a minimum of 5% annually.
- Create a Member Stewardship Program during 2016.
- Hold regular New Member Orientation sessions.

### ***Program***

The Chapter will demonstrably strengthen the fundraising profession by providing programs above and beyond the monthly sessions.

- Annual program offerings will include making available the online video/audio conferences, hosting an annual Fundraisers' Forum, and offering an annual CFRE course.
- Satisfaction surveys will be conducted annually to evaluate effectiveness of the mentoring program.
- Satisfaction surveys will be given after each monthly program.

### ***Scholarship***

Scholarships will be awarded to help recruit new members, provide professional development for Chapter members and encourage pursuit of the CFRE credential.

- Create an updated written policy for scholarships to be approved by the Board of Directors in 2016. This will include, but not be limited to: determining if scholarships are only awarded for financial need; which membership categories qualify for scholarship support; if we should offer lunch scholarships for new or unemployed members.
- Create a scholarship category to benefit current members who wish to become CFRE certified. At a minimum: determine rules and regulations for this scholarship in 2016; award two CFRE-related scholarships in 2017 and 4 in 2018.
- Use scholarship to support membership growth. At a minimum: begin tracking how many membership scholarships are awarded to new members (vs. renewals) in 2016; double that number by the end of 2018.