

**AFP, Alabama Chapter
Update to the Strategic Plan 2015
SUMMARY: STRATEGIC PLAN REPORT**

This report is an updated version of the strategic plan analysis done through the Chapter visit by Val Lay in November 2013.

The critical issues identified during the 2013 retreat were: Lack of understanding the value of AFP membership; lack of community awareness (especially by CEOs and executive directors); need for a viable financial model; recruit/engage new groups: small NPOs, faith-based NPOs, treating members as we do donors, and increasing members' involvement; time constraints/balance; competition from other professional organizations; overcoming a "dark" history; negativity; and ensuring stronger connections among committees. Continuing strong programming is also a needed element of the overall plan.

Professional development, governance/operations, membership, and external affairs were the four priority areas agreed upon by the Board for the period running through December 31, 2015.

This document includes Values, Critical Issues and Vision Statements followed by Goals and Objectives to achieve them.

Values

Board members introduced themselves and shared what they value about the chapter:

- Connections
- Networking
- Education—for new members of AFP; for the community; for best practices
- Knowledge of fundraising
- Chapter has strong "survival"—new leadership styles
- Professionalism
- Mentoring newer fundraisers
- Being in a community of fundraisers; peers share
- Valuable experience

And what they value about their leadership experience with the chapter:

- Continuing education; the leaders are "constant learners"
- Networking with board and with leaders from other chapters
- Giving back

- Supporting others; giving advice
- Importance of youth
- Importance of diversity
- Relationships/ team
- Making the chapter healthy
- Transfer of knowledge to serve on other boards
- Leadership training; AFP chapter peers willing to share
- Opportunity to learn about AFP and the chapter

Critical Issues

These critical issues are current for 2015.

- Lack of understanding the value of AFP membership
- Lack of community awareness (especially by CEOs and executive directors)
- Membership: Recruit/engage new groups: small NPOs, faith-based NPOs
- Time constraints/balance
- Competition from other professional organizations
- Continue strong programming
- Stronger connections among committees
- *Added in 2015: Messaging for Be the Cause*

Vision Statements

At the beginning of 2015, the following are vision statements identified in 2013 still needing focus. The vision statements are grouped into the priority areas AND a few additional vision statements have been added:

Professional Development

- Is the benchmark chapter for all others to emulate in developing fundraising leaders, or is engaging
 - *How to define/measure: interest, participation? Evaluations/surveys?*
- Has broad educational opportunities for all members at any stage of professional development
- *Collaborates with other groups to provide educational opportunities*
- Has easily accessible resources to help members address ethical and best practice challenges with confidence
 - *Must determine if this is a long-term goal...will require a plan*

Governance/Operations

- Has an endowed chair at a major state university
 - *Must define this chair and determine if it is a long-term goal*
- *Has a highly usable email communications system*
- *Has a board leadership "pipeline" (succession plans, co-chairs of committees)*

Membership

- 80% of all registered nonprofits have an AFP member, or recruits and includes ALL fundraisers in the community
 - *Define the "pool" from which the group is drawn*
- Has over 120 involved members or has 150 good, dedicated members
 - *Define involved, good or dedicated: regular attendance, renews membership?*
- *All members serve on committees, continue to build committees*
- *Member benefits are well defined*
- Participation in our luncheons is at 75 to 80% of members
- Has a mentorship program, or has mentoring and leadership opportunities with less experienced fundraisers, or has networking opportunities that inspire lasting friendships and mentorships
- Has an inclusive and diverse membership
- Has unity: all members feel connected to the organization and to other members, and feel appreciated

External Affairs

- Has an elevated brand awareness among youth, community and corporate community
 - *How to measure: more social media "hits"?, increased membership?*
- Provides regular content on public radio and public television (on giving)
 - *External relations makes a plan to achieve*
- Has an AFP Alabama impact statement
- Is the ultimate, go to authority on everything fundraising, or is recognized as the leading authority on professional, ethical fundraising education and practice in Central Alabama or, is seen as the organization you must be a part of if you are a serious fundraiser, or has a *high level of relevance*
 - *How to measure: requests for information? Increased sponsorships? Increased membership?*

The planning period during the Val Lay visit was designated as January 1, 2014 through December 31, 2015.

Goals and Objectives

These Objectives are relevant in 2015.

Governance/Operations (Margaret, Emily)

Goal: The AFP Alabama Chapter is effectively governed, efficiently managed, appropriately structured and soundly funded.

Objective: balance budget and pay back money market account. *In 2015, Board voted to pay some surplus funds into Money Market.*

Professional development (Margaret, Valerie, Jennifer)

The AFP Alabama Chapter provides opportunities for professional growth for all those in the fund development profession.

Objective: Ensure annual programming provides applicable information that addresses members' needs and fundraising trends.

Action Step: CFRE Study Group

Objective 3: Create an annual comprehensive calendar to enhance members' professional development, including:

Chapter meetings (6)

Webinars

Other offerings: coffee with a funder

Networking

Signature education event (1)

Membership (Lani, Margaret)

The AFP Alabama Chapter strengthens its membership by increasing diversity, recruitment, retention and engagement

Objective 1: Recruitment goals: Increase number of members to 120 from 114. (We exceeded our goal of 100 last year 2014.)

Objective 2: Increase number of small nonprofit organizations from seven to twelve. (We exceeded our goal of five last year 2014.)

Objective 3: Retention goal: Increase retention rate from 70.45% to 74%.

Action step: Member orientation

Objective 4: Engagement goal: Implement a strategy to accurately measure membership participation at monthly meetings, then increase participation by 10% by year end.

External Affairs (Megann, Margaret, Emily)

The AFP Alabama Chapter provides information on and promotion of programs, membership benefits, and educational resources through timely and articulate internal and external communications

Objective 1: improved communication with members

Actions: be engaging/appreciative of loyal members and organizations

More regular emails

Continue strong social media presence

Increase social media followers

Clean up e-newsletter list (*renewed efforts to communicate primarily through email*)

Objective 2: more community awareness/credibility of AFP

Actions: relationship with AAN, United Way, member organizations

Include maturing out professionals in advisory board

Create/invite to serve by *end of 2015*, past presidents, etc.
Measurable: increase credibility, membership, outside reputation

Objective 3: more awareness of NPD among members

Actions: BBJ continued relationship

Engage appropriate media in coverage more

Being proactive earlier in nominating process

Recommendations

It is recommended that the board add oversight for the strategic plan as a responsibility of one of its officers. (AFP assigns this to its President-Elect.)

It is recommended that the board *share the strategic plan—communicating its essence—with the chapter* in a manner that will encourage their active involvement in moving the chapter toward its vision. Regular reports or announcements (verbal, website, e-blast) to the chapter members on outcomes and successes achieved by using the strategic plan will help them feel more involved. High member involvement contributes to vibrant leadership.

Val Lay

December 18, 2013

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