

2016 – 2017 Strategic Plan

PRESIDENT

Goal: AFGCC will Optimize Chapter Operations and Financial Resources

OBJECTIVE	STRATEGY	ACTION/OUTCOME
Objective 1: Engage members in the committee structure and other chapter leadership activities	Work with VP's and Committee Chairs to ensure that job descriptions and expectations are up to date	<i>First Quarter of 2016</i>
	Send email messages to all new and renewing members inviting participation.	
	Work with Membership Committee to Review AFPI Membership Marketing plan and integrate appropriate action steps into current protocols	<i>Second quarter of 2016</i>
Objective 2: Continue the process to encourage active participation of board members.	Board members complete annual self-evaluation.	<i>Annually</i>
	Hold annual board orientation (signing commitment form, expectations) for new and continuing members	<i>Annually</i>
	Develop succession plans at all levels of organization.	<i>Ongoing</i>
	Ensure every board member serves on a committee	<i>Ongoing</i>
	Encourage 100% BTC participation by board members	<i>Ongoing</i>
Objective 3: Review and monitor board policies and procedures to ensure they reflect actual practice and are used in implementing objectives	Approve new/revised policies as needed using AFPI resources and experience of other chapters	<i>Ongoing</i>
	Update Chapter 990 information	<i>First Quarter of 2016</i>
	Recruit Policy Review Chair to conduct full policy review in 2016	<i>December 2016</i>
Objective 4: Meet Accord and Ten-Star Gold and Friends of Diversity requirements annually	Create Accord and Ten Star dashboard to assist board members in determining priorities and focal points for chapter governance activities and to monitor key target dates	<i>Ongoing/Updates at all Board Meetings</i>
	Monitor achievements through monthly Vice President reports	<i>Ongoing</i>

	Update dashboard annually to reflect and changes and new dates	<i>Review each January</i>
Objective 5: Update and Monitor Strategic Plan	Review Strategic Plan at Annual Board Retreat	<i>February</i>
	Update Strategic Plan and obtain board approval	<i>Present retreat results at March 2016 Board Meeting and finalize by May 2016</i>
Objective 6: Support the AFPGC Past Presidents Advisory Group created in 2011	Invite former Immediate Past President to chair	<i>2nd Quarter of 2016</i>
	Appoint and Support Board liaison and co-chair who facilitate recruitment of the members and the organization of the meetings,	<i>By March 2016</i>
	Develop programs and or involve senior development leadership in the chapter	
	Past President's group plans in conjunction with Program committee and VP Professional development on programming 1 program annually	<i>planning in place no later than first quarter each year</i>
Objective 7: Establish relationships with other chapters and allied organizations	Work with Professional Development Committee and Communications Committee to create collaborative relationships and communication exchanges.	<i>Ongoing</i>
Objective 8: Board Development	Invite members who sit on AFPI committees to share role with current board members	
	Examine board composition and identify gaps	<i>2nd Quarter of 2016</i>
	Work with COD to insure a continual board development process to obtain high quality candidates for board membership and effective chapter leadership.	<i>By third quarter of 2016</i>

TREASURER

Goal: AFGCC will Optimize Chapter Operations and Financial Resources

OBJECTIVE	STRATEGY	ACTION/OUTCOME
Objective 1: Secure the long term financial stability of the chapter	Maintain the Finance Committee.	<i>Finance committee composed of Treasurer, president, vice president of resource development, president-elect</i>
	Refine annual budgeting process that engages VP's and Committee Chairs enhancing their by-in for achieving projected results so that budget is approved in December of the preceding year	<i>By December 2016 and 2016.</i>
	Continue to work with a VP's on a monthly basis to assure budget compliance and account for variances in the plan	<i>Ongoing</i>
	Insure that all necessary state and federal filings are submitted by the deadline dates each year.	<i>Ongoing</i>
Objective 2: Ensure transparency of financial status of chapter to all chapter members	Assist President in preparing financial information for Accord	<i>Ongoing</i>
	Communicate to the membership the chapter's financial status and decisions monthly through the website	<i>Ongoing</i>
	Review and refine financial protocols, including checking account policy, investment policy, check writing policies, check request/payment procedures	<i>Ongoing</i>
	Review procedures for record maintenance and retention	<i>By April of 2016</i>
	Insure monthly results/reports are accurately reflected in the accrual based accounting system.	<i>Monthly/Ongoing</i>

SECRETARY

Goal: Ensure Chapter files of Correspondence and Program Materials are maintained by Chapter Administrator

OBJECTIVE	STRATEGY	ACTION/OUTCOME
Objective: Document and retain records of Chapter meetings, policies and correspondence	Monitor and edit minutes for Executive Committee and Board meetings	<i>Monthly</i>
	Meet with Chapter Administrator to review chapter files	<i>Annually</i>

RESOURCE DEVELOPMENT VICE PRESIDENT AND NPD CHAIR

Overall Goal: Secure Annual and Long Term Resources to Ensure Financial Stability of the Chapter

OBJECTIVE	STRATEGY	ACTION/OUTCOME
Objective 1: Increase dollars raised and number of donors for BTC Campaign	Solicit Executive Committee and Board by 2/28/2013.	<i>Completed 4.2016</i>
	Ensure 100% participation by March Board meeting.	
	Develop strong Case for Support	<i>Completed</i>
	Develop Giving categories. Consider category for Young Professional donors	<i>May/June</i>
	Enlist members in providing testimonials (can also be used with Membership)	<i>May/June</i>
	Engage BTC Committee	<i>chairs named; beginning planning</i>
	Develop BTC Campaign Timeline for solicitation letters and personal solicitations	<i>May/June</i>
	Identify opportunity within existing events to include BTC Kick-off	<i>Ongoing</i>
	Develop comprehensive BTC communications plan (in coordination with Communications Committee).	<i>Ongoing</i>
	Screen membership list for leadership ask opportunities and plan strategic solicitations	<i>June/July</i>
	Review giving history of members to target for increased gifts; new gifts; and renewal of lapsed donors	<i>June/July</i>
	Engage Board and Committee members to personally solicit members where relationships exist. Coordinate w/Past Pres. Re: endowment campaign?	<i>Ongoing but focus on later summer</i>
	Review stewardship plan – ack. Letters, and follow-up notes re: how dollars are used	<i>Ongoing</i>
Objective 2: Increase presence, visibility and use of Jobs Board by regional non-profit organizations, thereby increasing revenue	Offer discount for multiple job listings.	<i>Completed</i>
	Identify mailing list for Northern OH nonprofits - send letter to HR offices to promote use of AFP website to post fundraising jobs.	<i>ongoing, and gathering new information aimed at new push over the summer of 2016</i>
	Identify HR professional assn – ask for ways to promote using AFP job opps.	<i>ongoing</i>

	Ask each Board member to share Job Opps information with their respective HR offices. Elicit other ideas from Board.	<i>Ongoing</i>
Objective 3: Optimize sponsorship opportunities for programs and events throughout the year.	Review/revise sponsorship opportunities and prospect list. Clear any asks with NPD Committee before proceeding.	<i>Sponsorship Committee named; identifying prospects; will begin solicitations in June/July</i>
	Coordinate w/NPD Sponsorship Committee – package solicitation to fundraising vendors?	<i>Ongoing</i>
	Develop plan to increase ad revenue for website.	<i>Ongoing</i>
Objective 4: Ensure successful implementation and revenue from National Philanthropy Day	NPD planning meetings begin in February and continue through to event in November	<i>Ongoing</i>
	Review and revise pricing structure for NPD Sponsorships and Workshops	<i>Completed; sponsorships to be part of overall - not just NPD - sponsorship effort</i>
	Enhance morning workshop program to ensure greater revenue	<i>Not holding morning workshops in 2016</i>
	Send solicitation packets out early in order to maximize follow-up to prospects	<i>solicitation packets will be part of year round effort</i>
Objective 5: Plan and execute event for Annual Meeting in December	Identify and solicit underwriting sponsorship for Annual Meeting event	<i>Ongoing, but also part of overall sponsorship effort</i>

COMMUNICATIONS VICE PRESIDENT

Goal: AFGCC will increase its presence in Northeast Ohio by communicating with targeted audiences related to the fundraising profession.

OBJECTIVE	STRATEGY	ACTION/OUTCOME
Objective 1: Internal Communications	Engage more members	<i>Reformat Flash Traffic</i> <i>Send "like" invitations to members for our Facebook page and LinkedIn Groups</i> <i>We will "like" our member organizations to encourage them to "like" us back</i>
		<i>Utilize QR Codes for all marketing pieces including NPD</i>
	Expand Social Media Usage	<i>Utilize YouTube account to create new videos/share existing quality videos that are relevant</i> <i>Better utilize LinkedIn Group by post relevant content and starting group discussions every 1-2 weeks</i> <i>Post on Facebook at least one time per week</i>
Objective 2: External Communications	Increase media exposure	<i>Develop new media relationships - print and radio and TV</i> <i>Develop Media Kit</i>
	Cross Promote with other Civic and Professional Organizations	<i>Continue to connect with YNPN, Engage Cleveland/Global Cleveland/Cleveland Leadership Center, others</i>
	Increase AFGC awareness within NEO nonprofits	<i>Target nonprofits to approach re: membership</i>
Objective 3: Government Relations	Continue work started in 2012	<i>Schedule Annual Event: Columbus, OH</i>

MEMBERSHIP VICE PRESIDENT

Goal 3: AFGCC will increase growth, retention and involvement of members.

OBJECTIVE	STRATEGY	ACTION/OUTCOME
Objective 1: Utilizing a combination of new member recruitment and increase in retention achieve a rate to have a net 5% increase in the number of members from December 2013 to December 2016.	Outreach to and recruitment of prospective members by membership category, e.g. young professionals, large organizations, small organizations, professionals, etc.	<i>Develop cadre of Membership Committee members each with specific responsibilities to reach out prospective individuals and groups in order to raise awareness of AFP and the benefits of AFP membership and to bring new members on board.</i> <i>Develop goals at the Committee level for recruitment in this year's target membership categories: Large Non-Profit Organization and Small Non-Profit Organization.</i>
		<i>Continue promoting the formation of collegiate chapters at area colleges and universities where energy champions exist to take on the project Raise awareness of all member benefits with potential members, new members and existing members</i>
	Raise awareness of all member benefits with potential members, new members and existing members	<i>Utilize Flash Traffic to make all recipients aware of member benefits. Include a membership benefit in every Flash Traffic.</i> <i>Raise awareness of the availability of scholarships for membership by promoting them widely and consistently</i>
		<i>Raise the profile of and promote the Mentoring program.</i>
	Hold three or more member networking/mixer/recruitment events with at least one targeting Young Professionals and one targeting mentors/mentees.	<i>Schedule the events so that they are geographically varied. (Feedback is that Downtown is a good location for young professional's events.)</i> <i>The benefit of membership for Young Professionals is networking. Offer ample opportunities for this.</i> <i>Recruit sponsors for member events when possible</i>

	Enhance engagement of new members	<i>Every new member will receive a letter signed by President and Vice President for Membership welcoming them and encouraging them to get involved in the chapter.</i>
		<i>Members of the Membership Committee and/or Board will make phone calls to new members to welcome them, answer questions and encourage involvement.</i>
		<i>Members of the Membership Committee and Board will contact new members and personally ask them to attend AFP events.</i>
	Outreach to renewing members	<i>Monthly calls to those whose memberships are due to renew in the next month or two months, pro-actively encouraging membership renewal. Members also receive 5 renewal notices in the mail from National AFP.</i>
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Objective 2: Increase member involvement in Chapter activities	Ensure all new and renewing members are invited to join Committees, volunteer at NPD or otherwise become involved in the affairs of the Chapter	<i>Promote opportunities for involvement via passive means such as Flash Traffic and by having Committee Chairs reach out to prospective volunteers one-to-one. Encourage Committees to look beyond Board members when staffing their committees.</i>
		<i>Ensure that each Committee Chair follows up with volunteers when they self-identify through program surveys or call the AFP office.</i>
	Engage with Collegiate Chapter	<i>Explore with Board creating Board position from the Collegiate Chapter after the chapter has been in existence for a year.</i>
		<i>Inquire how other Chapters are engaging with their Collegiate Chapters.</i>

PROFESSIONAL DEVELOPMENT VICE PRESIDENT

Goal 4: AFGCC will develop more skilled, knowledgeable and ethical fundraising professionals

OBJECTIVE	STRATEGY	ACTION/OUTCOME
Objective 1: Provide professional development that is inclusive to all professional levels, industries and organizational size	Create a balanced array of programs that appeal to young professionals, mid-level and seasoned fundraisers, as well as volunteers, board members and other nonprofit executives	<i>Confirm programs for 2016; select programs for 2017</i>
	Create programs for small, medium and large organizations	<i>Investigate more targeted programs for 2016</i>
	Use free roundtables to showcase niche programming	<i>Pilot brown bag programs for 2016</i>
	Engage senior level fundraising executives with programming and training	<i>Use Seasoned CFRE's for review course</i>
Objective 2: Work collaboratively with AFGC committees, other AFP chapters and other outside organizations	Recognize new members and those who have reached milestone anniversaries at programs to promote membership	<i>Include in announcements and/or power point pre-session</i>
	Survey membership for programming topic recommendations	<i>Ongoing as part of the post-event survey; member survey completed; repeat every 2 years</i>
	Work with NPD committees to find speakers and/or sponsors for programs, Ensure programs complement each other.	<i>Programming should complement each other; current NPD structure does not include morning programming</i>
	Work with communications to promote programs on Flash Traffic, website and social media	<i>Send preliminary program write-ups to Communications for "sizzle" and more exciting write-ups to increase attendance</i>
	Promote NPD and networking events at programs	<i>Include in handouts and announcements; prepare a calendar of programs with special dates included</i>
	Work with Diversity Committee to ensure programs are inclusive and fulfill Friends of Diversity standard	<i>Ensure that year's programs appeal to and include diverse audiences - see Objective #1</i>
Work with scholarship committee to encourage use of scholarship for programs and conferences	<i>Promote scholarships at programs and recognize recipients</i>	

	Collaborate with surrounding AFPI chapters, OANO, YNPN, The Foundation Center, BVU and others	<i>Contact potential collaborators to discuss ongoing relationships, especially where programs provide a logical connector</i>
Objective 3: Explore advanced learning opportunities/credentialing with fundraising executives in NE Ohio	Ensure all programs qualify for and are publicized as offering CFRE credits - Operational standard	<i>Provide J&M with program information in time for CFRE credits to be obtained; J&M handles tracking - Operational standard</i>
	Recognize those who have obtained their CFRE and ACFRE to elevate the importance of those credentials	<i>Include in announcements and/or power point pre-session presentations</i>
	Explore partnerships with area colleges and universities	<i>Expand partnership with IU and JCU; continue discussions with others</i>
	Offer certificate programs specific to fundraising (i.e., Fundamentals, CFRE Review Course or study group, Indiana University courses)	<i>Promote IU certificate; continue to offer IU courses (May and September) and IU CEO Course</i>
Objective 4: Promote advocacy for the profession	Continue to build library of webinars	<i>Update library annually; review and retire outdated webinars; work with Val Lay on recommended speakers</i>
	Promote ethical fundraising through programming - Operational standard	<i>Include ethics in programs throughout the year, i.e., Boot Camp, Prospect Research, etc.</i>
	Participate in Ohio Legislative Day in even years	<i>Scheduled for 2017; offer advocacy training workshop either fall 2016 or spring 2017</i>
	Work with AFPI to promote advocacy issues that impact all nonprofits	<i>Examine possible advocacy efforts: encourage members to participate through articles in Flash Traffic; investigate possibility of promoting philanthropy at RNC</i>