



## 2021-2023 STRATEGIC PLAN

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### *Chapter Information*

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The Association of Fundraising Professionals Greater Tri-State Chapter is currently comprised of 48 members representing a wide variety of non-profit organizations and fundraising expertise throughout the Tri-States area of Iowa, Wisconsin, and Illinois. The AFP Greater Tri-State Chapter is a Ten Star Gold Chapter (2021) and strives to bring value to our members. There are many more fundraising professionals in our community who are not yet members of our association and many more opportunities to collaborate with the other AFP chapter in the tri-States to maximize resources and to promote the profession statewide.

Through education, training, and advocacy AFP will continue to advance philanthropy to support the many important needs of the community. The 2020-2023 Strategic Plan provides an important roadmap that will serve as a guide for this organization through the next exciting years. This Strategic Plan will help the chapter's leadership plan for and achieve important goals identified with valuable input from the Board and committee members.

Once complete this will be shared on the AFP Greater Tri-State Chapter website with a link in the newsletters.

*What do we want to be known for?*

AFP Greater Tri-State Chapter seeks to be known by the community as the experts on fundraising and philanthropy and help elevate the success of fundraising in the tri-state community and within member non-profits.

## Mission Statement

The Greater Tri-State Chapter of AFP supports and serves fundraising professionals for ethical and effective fundraising, advocacy, and inclusion and encourages philanthropy in northeast Iowa, southwest Wisconsin and northwest Illinois

## Vision Statement/Core Values

The vision of the Greater Tri-State Chapter of AFP is to work with members to advance the profession of fundraising as a credible and respected profession both locally and globally.

### **Core Values**

Ethical Behavior/Adhere to the AFP Code of Ethics

Integrity

Education/Teaching/Engagement

## Quality Statement

The Chapter is committed to excellence in providing the highest quality services and benefits to members and other constituents. We work to be responsive to their needs and strive to exceed expectations for key customer groups:

- Fundraising Professionals: AFP Members and Potential Members
- Members' Employers

- Donors
- Nonprofit Organizations

#### Core Activities

- Ethical and Effective Fundraising
- Advocacy
- Inclusion
- Networking
- Recognition/awareness of AFP
- Education/Training
- Promoting Credentialing

## Chapter Priorities

Throughout the 2021-2023 strategic plan the Chapter will focus on these priorities:

- The Chapter will ***strengthen capacity and connectivity*** by focusing on member engagement, retention, and communication, while acting as a resource on professional and ethical fundraising.
- The Chapter will promote and expand the ***knowledge*** base of members through educational and networking opportunities
- The Chapter will constantly seek to improve its ***organizational effectiveness*** through enhanced leadership, and administrative function and communication.

## Chapter Goals

### Membership

Goal 1: The Greater Tri-State Chapter will add value to members and prospective members by enhancing their involvement in the chapter and its activities.

### **Education**

Goal 2: The Greater Tri-State Chapter will provide high-quality, creative programs, and activities that are of value to members and the community.

### **Communication**

Goal 3: The communications committee will oversee the communication needs of AFP Greater Tri-State Chapter to strengthen capacity and connectivity, while communicating policies, events, educational and membership opportunities to members and prospective members.

### **Governance/Leadership**

Goal 4: The Greater Tri-State Chapter will increase leadership skills, optimize systems for chapter operations and governance while also furthering our commitment to Inclusion, Diversity, Equity, and Access (IDEA).

### **National Philanthropy Day**

Goal 5: The National Philanthropy Day committee will host an annual event which celebrates philanthropy and philanthropists in the tri-state community and recognizes the impact fundraising has on the needs of the community.

## Goals and Objectives

### **STRENGTHENING THE PROFESSION**

Within each goal the individual committees determined measurable objectives and then strategies and tactics to achieve the goals and objectives.

**GOAL I: The Greater Tri-State Chapter will add value to its members and prospective members by enhancing their involvement in the chapter and its activities.**

*The Membership Committee is integrating the IDEA pathways in these ways:*

**PROMOTE INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)**

- Promoting inclusive communications to the Tri-State area in support of our local AFP – Greater Tri-State Chapter
- Encourage members to regularly update demographic information with AFP Global

**PROVIDE RELEVANT AND HIGH-QUALITY FUNDRAISING EDUCATION**

- Providing opportunities for professional networking among members and non-members.

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- Work with the communication committee to procure a list of non-profits that serve underrepresented populations and/or employ a diverse workforce.
- Educating prospective members on the available membership AFP Global levels, chapter-level programs, and committee opportunities.

### INCREASE CAPACITY AND STRENGTHEN COMMUNITY

- Sponsor an annual membership scholarship for professional member who represents constituents of diverse backgrounds.
- Sponsor an annual membership scholarship for a young professional.
- Promote opportunities for mentoring relationships on a local level or through AFP Global.

### CHAMPION ETHICAL FUNDRAISING PRACTICES

- Following the AFP Code of Ethics.
- Upholding our own ethical behavior and actions as professional fundraisers and as a communications committee.

Objectives	Activity/Tactics	Officer /Staff Assignment	Timeline
1. Maintain a retention rate of 75% of members over a one year period.	<p>a. Membership Committee, in partnership with Education Committee will complete a survey of AFP Greater Tri-State Chapter members once per year assessing the value of their membership and what topics they would like to see for future trainings.</p> <p>b. Membership Committee and Board members contact members to gauge satisfaction with AFP. <i>Ex. What prompted them to become a member and what keeps them renewing their membership?</i></p> <p>c. Recognize new and renewing members in the Chapter newsletter.</p>	Membership Committee	<p>Annually review in January and July</p> <p>The Membership Chair will measure retention through the membership roster, available on <a href="http://www.afpnet.org">www.afpnet.org</a></p>

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<p>2. Grow chapter membership by engaging new or lapsed non-profits</p>	<p>a. Membership committee to reach out to new and renewing members within one month of the membership notice to welcome them to the chapter and inform of upcoming events and other ways to be involved.</p> <p>b. Contact a list of 15-20 nonprofits who are not involved to provide awareness, benefits of membership and invite to join.</p> <p>c. Partner with the Communication Committee to implement a membership drive that recruits new non-profits and fundraisers.</p> <p>d. Include on Summer Social invite that AFP members are encouraged to bring one prospective new member to this event.</p> <p>e. Communicate membership discounts to non-profits outside of Dubuque when AFP International runs \$50 off specials in June/July and November.</p>	<p>Membership Committee and Communication Committee</p>	
<p>3. Recruit non-profits in and outside of Dubuque, and work to better understand what opportunities exist outside of Dubuque.</p>	<p>a. Send invitations to the summer social to at least 5 non-profits outside of Dubuque.</p> <p>b. Promote the Fund Raising School, National Philanthropy Day, CFRE sessions, and other regional conferences to prospective members and organizations outside of Dubuque.</p>	<p>Membership Committee</p>	<p>Annually</p>

**GOAL II: The Greater Tri-State Chapter Education Committee will provide high-quality, relevant professional development programs and activities for chapter members and the broader non-profit community.**

***The Education Committee is integrating the I.D.E.A. pathways in these ways:***

**PROMOTE INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)**

- Seeking speakers from diverse backgrounds for programming activities and rotating program locations and formats that are ADA accessible for participants.
- Host an education program focused on diversity, equity, and inclusion each year.

**PROVIDE RELEVANT AND HIGH-QUALITY FUNDRAISING EDUCATION**

- Planning a comprehensive education calendar each year.
- Host an education program focused on the Certified Fundraising Executive credential each year.

**INCREASE CAPACITY AND STRENGTHEN COMMUNITY**

- Offering programs at minimal costs and exploring scholarship opportunities for the Fund Raising School.
- Explore programming partnership opportunities with other chapters and regional non-profit organizations.

**CHAMPION ETHICAL FUNDRAISING PRACTICES**

- Following the AFP Code of Ethics
- Upholding our own ethical behavior and actions as professional fundraisers and as a communications committee.
- Host an education program centered on ethical fundraising each year.

Objectives	Activity	Officer /Staff Assignment	Timeline
1. Provide an annual schedule with monthly education program at rotating locations throughout the Tri-State region.	a. Monthly Education Program Schedule (see attachment) <ul style="list-style-type: none"> <li>i. In most cases, attendance at monthly programs is complimentary for members and \$10 for non-members.</li> <li>ii. The monthly schedule will be planned in 3-6 month increments. A standing meeting time for programs unless otherwise noted will be followed in 2022.</li> </ul>	Education Committee	Monthly

	<ul style="list-style-type: none"> <li>iii. The chapter will plan specific programming related to Fundraising Ethics, CFRE, and diversity, equity, and inclusion each year.</li> <li>iv. Administer an annual membership survey at the December annual meeting to gauge interest in potential education topics.</li> </ul> <p>b. Establish a conference planning committee and nominate a chair from the Education Committee to lead these planning efforts.</p> <ul style="list-style-type: none"> <li>i. Collaborate with the Community partners to include the Foundation of Greater Dubuque to co-sponsor, plan, and implement a half day seminar with well-known fundraising experts.</li> <li>ii. The Fund Raising School will be offered as the fall conference in 2022.</li> </ul>		
2. Collaborate with the Communication Committee to promote education opportunities.	a. Members of the Education Committee will submit information regarding upcoming chapter education programs and regional/	Education Committee with Communication Committee	Monthly



	<p>national learning opportunities for the monthly e-newsletter.</p> <p>b. Prior to each monthly education program, the Communication Committee will send a dedicated email communications promoting the program to members and non-members.</p> <p>iii. Event information will be published on the Chapter webpage and Facebook page.</p> <p>iv. Mailed invitations for select programs will also be implemented.</p> <p>c. In partnership with the Communication and Conference Committees, the fall conference will be promoted to other regional chapters and past conference attendees via print and electronic communications.</p>		
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**GOAL III: The communications committee will oversee the communication needs of AFP Greater Tri-State Chapter to strengthen capacity and connectivity, while communicating policies, events, educational and membership opportunities to members and prospective members.**

*The Communications Committee is integrating the IDEA pathways in these ways:*

PROMOTE INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)

- Create inclusive communications to the Tri-State area in support of our local AFP – Greater Tri-State Chapter

PROVIDE RELEVANT AND HIGH-QUALITY FUNDRAISING EDUCATION

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- Communicating with our fellow members, prospective members and the local communities we serve what educational opportunities are available locally and how they can become involved.

### INCREASE CAPACITY AND STRENGTHEN COMMUNITY

- Developing a communication and marketing campaign that will encourage joining our local chapter and what we have to offer.
- In collaboration with local entities, creating a list of all nonprofits in the area and working with membership to contact these entities.
- Communicating to the community who we are and what we do to improve capacity.
- Creating stronger partnerships with our members, prospective members and supporters.

### CHAMPION ETHICAL FUNDRAISING PRACTICES

- Following the AFP Code of Ethics
- Upholding our own ethical behavior and actions as professional fundraisers and as a communications committee.

Objectives	Activity	Officer /Staff Assignment	Timeline
1. Grow committee by 1-2 members.	a. Personally invite members to serve on the committee.	Communications Committee	Annually
2. Promote (in collaboration with other committees) programs, events and the chapter as a whole.	a. Create a chapter monthly e-newsletter and maintain the chapter website. b. Communicate policies of the AFP Board and post on the website. c. Institute an AFP membership campaign using outside assistance for design. d. Promote chapter achievements through press releases to local media.	Communication Committee	Weekly/ Monthly 2021-2023
3. Build social media presence and evaluate	a. Optimize AFP's Facebook presence by empowering Board members to engage their	Communication Committee	2021-2023

additional social media channels	Facebook networks. In 2022, grow Facebook followers from 125 to 300. b. Create paid advertising posts for key programs and events.		
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**GOAL IV: The Greater Tri-State Chapter will increase leadership skills, optimize systems for chapter operations and governance while also furthering our commitment to Inclusion, Diversity, Equity, and Access (IDEA).**

*The Executive Board is integrating the IDEA pathways in these ways:*

PROMOTE INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)

- Adopting the AFP IDEA definitions, statement of principles, and resolution as an AFP Board of Directors and publishing this information on the chapter website.
- Reviewing and reaffirming Board policies each year and publishing this information on the chapter website.
- Establishing an IDEA Taskforce which promotes IDEA pathways on each committee and monitor activities to ensure objectives are being met.

PROVIDE RELEVANT AND HIGH-QUALITY FUNDRAISING EDUCATION

- Allocate budget resources that supports comprehensive and values-based education and engagement opportunities for members and non-members.

INCREASE CAPACITY AND STRENGTHEN COMMUNITY

- Develop partnerships with professionals and organizations that are new to AFP.
- Welcome new members to Committees each year and create pathways for Board involvement and leadership.

CHAMPION ETHICAL FUNDRAISING PRACTICES

- Following the AFP Code of Ethics
- Upholding our own ethical behavior and actions as professional fundraisers and as an Executive Board.

Objectives	Activity	Officer /Staff Assignment	Timeline
1. Evaluate policies on an annual basis and make recommendations	a. Existing policies will be presented to and voted upon by the full Board as part of the consent agenda. The	President, Secretary, and Full Board	Annually (March)

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for changes or review to the full Board.	<ul style="list-style-type: none"> <li>secretary will capture any requested updates.</li> <li>b. New policies will be presented as new business to the full Board for discussion and vote as needed.</li> <li>c. Once approved, all policies are saved in Dropbox by the Secretary and submitted to the Communication committee to have saved on the Chapter website and linked in the chapter e-newsletter.</li> </ul>		
2. Maintain chapter designation as an IDEA Champion	<ul style="list-style-type: none"> <li>a. Adopting the AFP IDEA definitions, statement of principles, and resolution as an AFP Board of Directors and publishing this information on the chapter website.</li> <li>b. Once approved, the Secretary will save the approved version to the Dropbox.</li> <li>c. Establish an IDEA Taskforce which promotes IDEA pathways on each committee and monitor activities to ensure objectives are being met in the IDEA Champion plan.</li> <li>d. IDEA pathways will be integrated into the strategic plan for committee implementation and specific tactics will be included in the annual IDEA plan.</li> </ul>	President-Elect, IDEA Taskforce, Committees	Reviewed annually; updated as needed every three years (2022, 2025, 2028)
3. President, President-Elect or their designee, annually reviews the strategic plan with Committee chairs and Chapter leaders.	<ul style="list-style-type: none"> <li>d. Strategic plan is reviewed with each committee chair in January. Once updated, it is presented to the Executive Board in February and full Board in March for a vote.</li> </ul>	President, President Elect, or their designee	Annually (Jan-March)

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	<ul style="list-style-type: none"> <li>e. IDEA pathways will be integrated into the strategic plan for committee implementation.</li> <li>f. Once approved, the Secretary will add the updated plan to Dropbox.</li> <li>g. Communications Committee will link the strategic plan to the e-newsletter and website.</li> </ul>		
4. Submit chapter governance documents and award nominations.	<ul style="list-style-type: none"> <li>a. President to submit Chapter governance documents, award nominations, etc. in accordance with the deadlines set forth by AFP Global.</li> <li>b. Ensure Secretary of State information is current with the State of Iowa (every year for officer names; every 3 years for renewal 2021; 2024, 2027).</li> </ul>	President	December/January
5. Meet Be The Cause Campaign chapter goals.	<ul style="list-style-type: none"> <li>a. In partnership with the Membership Committee secure 100% Board participation in giving to the Be the Cause Campaign.</li> <li>b. Invite Board members to become part of AFP giving societies.</li> <li>c. In partnership with the Membership Committee, invite the broader AFP community to give back and reach Chapter goals.</li> </ul>	Board of Directors/ Membership Committee	Annually

**GOAL V. The National Philanthropy Day committee will host an annual event which celebrates philanthropy and philanthropists in the tri-state community and recognizes the impact fundraising has on the needs of the community.**

*The NPD Committee is integrating the IDEA pathways in these ways:*

PROMOTE INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)

- Diversity on the review committee and within the award recipient applications.

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- Inviting panel speakers from diverse backgrounds and organizations to participate in the NPD supplemental activities.

### PROVIDE RELEVANT AND HIGH-QUALITY FUNDRAISING EDUCATION

- Utilizing National Philanthropy Day as an opportunity to celebrate philanthropy in our region while also providing professional development programming that is beneficial for fundraisers, donor, and volunteers.

### INCREASE CAPACITY AND STRENGTHEN COMMUNITY

- Developing a communication and marketing campaign that will encourage award nominees, NPD registrations, and sponsorships.
- Celebrating National Philanthropy Day by recognizing award recipients and AFP member organizations.

### CHAMPION ETHICAL FUNDRAISING PRACTICES

- Following the AFP Code of Ethics
- Upholding our own ethical behavior and actions as professional fundraisers and as an NPD committee.

Objectives	Activity	Officer /Staff Assignment	Timeline
1. Recognize a minimum of four awardees at the National Philanthropy Day luncheon each year	Working with the membership committee and NPD committee, invitations will be sent to community leaders and AFP membership to garner nominations for each of the recognition categories.  Increase diversity among the award selection panel and procure at least 3 nominations from diverse candidates.	NPD Committee	Annually at November event
2. Maintain a minimum of 175 attendees each year at the National Philanthropy Day luncheon	Work with all chapter committees to increase the mailing list for the luncheon. Add the invitation to our website and other social media opportunities.	NPD Committee  And Communication	Annually at November event

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3. Review best practices of like-sized AFP chapters regarding National Philanthropy Day events	<p>The NPD chair and committee members will contact like-sized chapters and review AFP best practices in general to be aware of any new ideas that have been adopted, with respect to NPD events.</p> <p>Continue to offer supplemental programming and panel discussions as part of the NPD celebration. Inviting diverse panel participants will be a priority each year.</p>	NPD Committee	Annually
<p>4. Receive/solicit a minimum of 3 nominations in each award category.</p> <p><i>Individual Philanthropist, Philanthropic Organization, Volunteer Fundraiser, Professional Fundraiser, Youth in Philanthropy</i></p>	<p>Expand mailing list, increase size of nomination postcards, lengthen nomination time period, increase marketing/messaging soliciting nominations, personal outreach to previous awardees, etc.</p> <p>Procure at least 3 nominations from diverse candidates.</p>	NPD Committee	Annually