



Strategic Action Plan | 2026-2029

Association of Fundraising Professionals, South Sound Chapter

September 15, 2025



Facilitated by:



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LETTER FROM THE BOARD CHAIR



Dear AFP South Sound,

I am thrilled to share our three-year strategic plan, a comprehensive guide to steering our association through the challenges and opportunities of the current moment. This plan represents the culmination of extensive collaboration and input from our community—including AFP South Sound members, non-members, the AFP IDEA cohort, and our board leaders. We are deeply grateful for the perspectives and feedback that shaped its development.

In 2026, we will celebrate the 20th anniversary of our association.

Over these two decades, AFP South Sound has become known for professional development, peer networking, and premier philanthropy and fundraising convenings in the South Sound. What may be less visible, but equally important, is our strong governance model: fiscally responsible and grounded in shared purpose and understanding. By building on what we currently offer and envisioning what more we can provide, we have affirmed a new vision statement:

“An inclusive and thriving community of fundraisers inspiring transformational philanthropy.”

Alongside this, we have updated our mission:

“Advance community-driven philanthropy through connection, professional development, collaboration, and innovation.”

I am deeply grateful to our dedicated and patient board of directors, whose leadership was instrumental in shaping this plan. Over the next three years, we will embrace new technology, expand and strengthen professional programming, and pursue strategic partnerships that increase value for our members and future members.

To guide our work, we have identified three key focus areas:

1. Increase our Capacity for Growth and Change
2. Maximize our Value and Relevance
3. Strengthen the AFP South Sound Brand

I look forward to working with our members and partners to accelerate the success of South Sound fundraisers. The moment calls for nothing less.

With Gratitude,

Lee Warnecke

AFP South Sound President, 2025

INTRODUCTION

The Strategic Planning Process

This strategic plan was developed by the AFPSS Board of Directors and Leadership Team over an 8-month period using an evidence-based method of strategic planning called Technology of Participation. ToP methods were developed by The Institute of Cultural Affairs (ICA), a leader over the past five decades in promoting lasting positive change in organizations and communities around the world. ToP Strategic Planning presents a structured planning process that incorporates the workshop method for building consensus, the focused conversation method for effective group communication and an implementation planning process for turning ideas into productive action and concrete accomplishments.

The strategic planning process was facilitated by Robin Callahan, AFPSS Board Member and President of The Callahan Collaborative, a nonprofit consulting firm committed to helping nonprofits and their leaders to thrive.

PARTICIPANTS: Laura Badeaux, Chris Baiocchi, Jesse Bohlin, Mary Brickle, Emily Mendez-Bryant, Rufina Caluya, Kato Lujan Camacho, Jennifer Li Dotson, Michael Goodell, Jennie Griek, Victor Martin, Shannon Michlitsch, Laura Rose, Ruth Tollefson, Steve Saalfeld, and Lee Warnecke



ORGANIZATIONAL OVERVIEW

Vision & Mission

VISION

An inclusive and thriving community of fundraisers inspiring transformational philanthropy

MISSION

To advance community-driven philanthropy through connection, professional development, collaboration, and innovation

Summary of Constituents Survey Feedback

As we look to the future and envision the potential growth and impact of AFPSS, we believe that the insights and perspectives of our key constituents are invaluable. The AFP South Sound Constituents Survey (August 2025) engaged 16 respondents, including current and past members, board/committee volunteers, IDEA Cohorts, sponsors, partners, local nonprofit staff, and administrative support. While the sample size was modest, the feedback still provides valuable insights into the chapter's perceived strengths, challenges, and opportunities.

Networking emerged as the most consistently valued aspect of AFP South Sound, with members highlighting the importance of connections to colleagues, professional development, and visible community presence. Respondents also emphasized barriers related to cost, accessibility, and geographic reach, underscoring the need to expand programming and membership representation beyond Tacoma.

The report also surfaces concerns about inclusivity and affordability— important considerations for future strategic planning. Members recognize AFP South Sound as a respected and reliable organization but see opportunities to strengthen its role in convening diverse professionals, expanding education access, and addressing governance and affordability challenges.



EMERGING THEMES

1. Networking and Relationship-Building as Core Value

- Networking with professional colleagues consistently ranked as AFP South Sound's most important role.
- Respondents expressed appreciation for opportunities like the South Sound Philanthropy Summit, affinity groups, and educational events that bring colleagues together.

2. Accessibility, Geographic Reach, and Program Delivery

- Members outside Tacoma noted difficulty attending events; they encouraged programming across the broader South Sound and more hybrid/virtual options.
- Expanding event locations and offering flexible participation models would strengthen inclusion and reach.

3. Diversity, Equity, and Representation

- Respondents stressed the importance of recruiting a more diverse membership and leadership body.
- Calls were made for affinity groups and a board that better reflects the region's demographics and communities beyond Pierce County.

4. Affordability and Membership Barriers

- Cost of membership and lack of employer support were identified as barriers to participation.
- Suggestions included lowering membership fees, offering scholarships, and providing more career-level-specific programs.

5. Professional Development and Fundraising Challenges

- Members requested continued professional development opportunities, including CFRE preparation and education tailored to local philanthropic contexts.
- Respondents also flagged unmet needs such as burnout, governance clarity between board and staff, and adapting to political and economic shifts affecting fundraising.

OBJECTIVES & KEY STRATEGIES

Objective 1 – Increase our Capacity for Growth and Change

- 1a. Improve Internal Systems and Processes
- 1b. Improve Data-driven Decision Making
- 1c. Good Governance and Leadership Sustainability
- 1d. Increase Revenue
- 1e. Explore Our Future

3-Year Success Indicators

- 1a. A CRM that tracks members, sponsors, and company engagement
- 1b. We make critical decisions related to governance, finance, and programming using data and a decision-making framework
 - 1c1. Succession plans exist for the board, key volunteers, and staff leadership
 - 1c2. An IDEA committee led IDEA plan, adopted by the Board
- 1d. Increase annual revenue by at least 20 % (\$21,000+ in FY25, \$25,000 in FY28)
- 1e. Decision from the Board and membership regarding our future association with AFP Global

First-year Smart Goals

- 1a. Convene the task force, select CRM
- 1b. Create an evaluation plan for monthly programs, Summit & National Philanthropy Day
 - 1c1. A fully functioning Governance Committee with an annual work plan
 - 1c2. IDEA Committee reviews and updates IDEA statement, board re-adopts
- 1d1. 100% of the Board giving a personally significant gift to AFP
 - \$1,500 goal to AFP Global
 - \$3,000 to the AFPSS Chapter
- 1d2. Develop a coordinated revenue strategy and increase annual revenue by 5%
- 1e. Establish a “Futurist” Task Force

Objective 2 – Maximize Our Value and Relevance

- 2a. Engage Members
- 2b. Increase Program Impact
- 2c. Build Strategic Partnerships

3-Year Success Indicators

- 2a1. 3% increase in member retention and 5% growth in new members
- 2a2. Achieve baseline for member engagement (average of participation in 3 events or programs/year)
- 2b1. IDEA Cohort completes sixth year
- 2b2. 9 programs per year for members and non-members
- 2c. Two solid collaborative partnerships codified through a partnership agreement

First-year Smart Goals

- 2a1. 33% of the 3-year goal (TBD) towards member retention and growth in new members
- 2a2. Develop a member orientation
- 2b1. Identify Opportunities to build on IDEA cohort successes (i.e., additional cohorts or affinity groups)
- 2b2. Develop a program plan
- 2b3. Review and update the benefits and deliverables of the IDEA cohort
- 2c1. Establish a partnership agreement with SSPGC



Objective 3 – Strengthen Our Brand

3a. Strengthen the Brand

First-year Smart Goals

3a1. One-third of the way to the 3-year goal of website visits, newsletter open rates and click-through rates

3a2. Website Updates

- Outreach and communication plan/calendar aligned with our program/plan calendar
- Calendar on the website home page with programs and events listed
- Updated photos, bios, spell check, and grammar review

3a3. Modernized media strategy

3a4. Table at NAWA, South Sound Philanthropy Summit

3a5. Board and committee accessible photo library on Google Drive

3-Year Success Indicators

3a1. 50 % increase in website traffic, 65% open rate on newsletter and 20% click-through rates

3a2. An updated website that we are proud of

3a3. An increase in the number of community members who engage with us

