



**2017 – 2019 Strategic Plan
Created by the AFP-HR
Board of Directors
February 2017**

AFP Vision

**Stimulate the world of generosity and positive social change
through fundraising best practice.**

AFP-HR Vision Statement

**To be recognized as the premier fundraising resource for
professionals to learn, collaborate and grow together for a
vibrant Hampton Roads community.**

Association of Fundraising Professionals – Hampton Roads Chapter

P.O. Box 2338, Norfolk, VA 23501 - www.afp-hr.org

Association of Fundraising Professionals – Hampton Roads Chapter

2017-2019 Strategic Plan

Goals

Governance

Develop an effectively governed, efficiently managed, appropriately structured and soundly funded organization

National Philanthropy Day

Continue to enhance the NPD experience ensuring our chapter is the recognized authority on philanthropy

Education

Provide a variety of professional education activities, enhancing knowledge to meet the needs of diverse experience levels

Membership

Strengthens membership through diversity recruitment, retention and engagement

Marketing/PR

Raise awareness of AFP and its resources to internal and external audiences

Ethics

Provide education to chapter members, board members, and the public on the fundamental principles and ethics of the fundraising profession

Mentoring

Provide one-on-one assistance to enhance knowledge and skills of development professionals

Diversity and Inclusion

Ensure that a broad diversity of backgrounds and perspectives is recognized and made an integral part of the AFP Hampton Roads Chapter. This includes member recruitment, as well as leadership development, including the board of directors and chapter committees.

Government Relations

Create a toolkit to help Hampton Roads AFP members better understand how each individual can become more involved for the good of charitable giving while also providing more frequent updates at monthly chapter gatherings.

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Governance Goal:

Develop an effectively governed, efficiently managed, appropriately structured and soundly funded organization

Objectives:

1. Develop strategic 3-year financial plan and budget to include reserves

- Review budget and analysis with finance committee (2017, finance comm.)
- Develop 3-year financial plan(2017)
- Invest reserves(2017-2018)
- Review budget and financial policies monthly (on-going, President, President – Elect, Treasurer)
- Review revenue and expenses monthly (on-going, BOD)

2. Increase revenue to expand programming and opportunities for membership

- Grow sponsorship committee (annually, Chair of Sponsorship)
- Explore additional revenue generating ideas (annually, BOD)
- Encourage Board and membership involvement in fundraising (on-going, President, President-Elect, Sponsorship chair)

3. Ensure efficient chapter management

- Hold monthly chapter, board, and executive committee meetings
- Provide board orientation for all members(annually, President, President-Elect)
- Review Strategic Plan(annually, BOD)
- Develop a diverse organization and board
- Monitor committee chairs and committees for productivity (on-going, President, President-Elect)
- Manage chapter administrator (on-going, President)
- Create a welcoming environment for diverse fundraising professionals (on-going, President, President –Elect, BOD)

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- Champion education, training and information resources for fundraising professionals to succeed in all stages of their careers (on-going, President, President-Elect, BOD)
- Communicate with AFP International and provide resources to board and members (on-going, President, President-Elect)

4. Develop leadership opportunities for all members

- Promote engagement opportunities to members
- Work with committee chairs to identify committee positions
- Committee chairs identify potential board members

5. Operate a high-performing chapter within AFP International

- Complete application and obtain Ten Star Gold Award
- 100% Board participation in Be the Cause Campaign
- File Chapter Accord in a timely and efficient manner
- Complete application and obtain Friends of Diversity designation
- Be an active participant of VFRI
- Participate in AFP International committee opportunities

National Philanthropy Day Goal:

Continue to enhance the NPD experience ensuring our chapter is the recognized authority on philanthropy.

Objectives:

1. Grow revenue through retention of prior sponsors and through recruiting new sponsors to fill each sponsor level

- Assign previous sponsors to committee and board members for follow-up
- After honorees are confirmed, determine potential sponsors and assign to committee & board members
- Sponsorship chair to provide deadlines for regular updates and create monthly dashboard
- Secure two year commitments

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- 2. Grow pool of nominations to ensure at least 3 nominations in each category.**
 - Utilize past honorees for nomination recommendations
 - Challenge committee chairs and board members to submit a nomination
 - Review application and try to streamline process
 - Brainstorm potential pool of nominations with board and/or committee and assign individuals to submit nominations
 - Review award categories and criteria
 - Engage Board & Past Presidents in a February nomination session
- 3. Secure speaker for evening program and NPD luncheon 6 months out to ensure appropriate publicity.**
 - Narrow speaker choice to 3 by first committee meeting – ensure they have date available and will work with budget (~~FLS chair~~)
 - Consider local community philanthropist
- 4. Evaluate program through SWOT analysis following event to determine tweaks and necessary additions to improve program**
 - Committee to meet within week after event to SWOT (NPD CHAIR)
 - Present SWOT to board (NPD chair)
 - Work with successor to ensure smooth transition of NPD
 - Secure the following year's date when planning current year

Education Goal:

Provide a variety of professional education activities, enhancing knowledge to meet the needs of diverse experience levels.

Objectives:

- 1. Provide at least 3 educational programs annually for each of the 3 different levels(emerging, advancing and leading) (2018)**

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- Keep RFP for presenters online all year and push publicly in late summer/early fall. Ask that presenters identify skill level for presentation
 - Increase educational pop-up opportunities and publicize online and on FaceBook
 - Assess schedule in late fall for year out to identify what's missing to meet 3 programs for 3 different level goal
 - Identify target program audience and promote in monthly meeting announcements
 - Work with FLS Chair to plan a national speaker program that aligns with monthly programming needs
- 2. Explore programming opportunities on the Peninsula**
- Give it a try in 2017 and see how it goes, try breakfast
 - See if any committee members are willing to take ownership
 - Strengthen & support Steering Committee and schedule four annual events
- 3. Include at least 1 interactive/innovative educational activity each year, rotating locations each year (2018)**
- Have committee member find an opportunity and schedule
- 4. Double the total of educational program offerings by 2020 through pop-ups**
- Promote pop-ups online and across membership so it isn't on committee
 - Promote pop-ups to CFRE's and other organizations
 - Explore how to best utilize pop-ups for our community

Membership Goal:

Strengthen membership through diversity recruitment, retention and engagement

Objectives:

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1. Retention: Increase retention 5% over last year's average retention rate within a 12 - month period. Consider revising to 2%

- Have a designated committee member call members 30 days prior to their expiration date and encourage them to renew.
- Have committee member present at monthly meeting check in for every luncheon, taking note and making a personal connection with non-member guests, following up each with phone call or offer for personal meeting. Call within 3-4 days of luncheon.
- Hold a new member orientation breakfast annually and explain in detail the value of membership and reinforce it and encourage them to reach out to other prospective members.

2. Increasing new members: Increase members to over 200 by the end of 12-month period

- Identify unrepresented prospects and non-profit organizations in Chamber of Commerce directory and Volunteer HR directory and any other effective directory source.
- Committee chair to assign 2 members at each meeting to identify 4 non-profits who currently do not have any member in AFP-HR.
- Distribute the list of companies to committee members and have them invite prospective new members to upcoming events and luncheons.

3. Maximizing member engagement: Increase participation in chapter luncheons and special events by 25%

- Use roster list to call all registered members two weeks prior to registration deadline and ask for verbal commitment for luncheon attendance.
- Assign committee members and board to reach out to those who attend luncheons regularly but do not appear to engage in committee or other activities and ask them to engage in a temporary capacity for social event or to personally commit to inviting a guest for the next luncheon (board member, CEO, etc.)

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- Increase number of members attending NPD year over year

Marketing/PR Goal:

Raise awareness of AFP and its resources to internal and external audiences.

Objectives:

- 1. Update website utilizing the new AFP template by spring 2018 to assure AFP and general public can access resulting in increased meeting attendance by 50%, scholarship applications and advocacy outreach**
 - Work with AFP International to get new information and formatting
 - Sit on webex to learn of the changes
 - Create process for updating different sections of website to keep items relevant
- 2. Increase print and social media. Utilizing a weekly schedule to touch on all program areas to include member highlights, success among members, education sessions offered, professional tips and tricks**
 - Work with the committee to assign tasks for the following items:
 - FaceBook/Instagram/etc.
 - Local magazines/newspaper stories of giving and philanthropy in our community
- 3. To create a general marketing piece (video and other) for AFP-HR to highlight the Be the Cause Campaign**
 - Press release about “kudos” of our members, CFRE, promotions, personal highlights. (emails, updated story online/FB)
 - Work with ironclad to create video/marketing plan for entire year to highlight AF-HR Instead utilized Ironclad for NPD video

Other Actions:

- Monthly calls about upcoming story opportunities/potential outreach
- Review budget and post action plan to continue, change and grow

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- Coordinate with Education committee to administer an annual survey to membership

Ethics Goal:

Provide education to chapter members, board members, and the public on the fundamental principles and ethics of the fundraising profession

Objectives:

- 1. Review AFP Code of Ethics at AFP-HR monthly meeting**
 - Provide an ethics question for round table discussion at each membership meeting
- 2. Keep our professions ethical standards in the forefront of our membership**
 - Have a link to AFP Code of Ethical Standards and A Donor Bill of Rights in each newsletter and on our website

Mentoring Goal:

Provide one-on-one assistance to enhance knowledge and skills of development professionals

Objectives:

- 1. AFP Hampton Roads Mentor Partnership Program will support and nurture fundraising professionals in the Hampton Roads area by pairing advanced development professionals with those members who are new to the field of fundraising, contemplating a career change, or seeking expert guidance.**
 - Develop a six month mentorship program
 - Advertise the mentorship program at membership meetings, in the newsletter and on the website
 - Call for applications of interested mentors
 - Identify mentors – pair with mentees

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2. Provide mentorship resources for all members

- Set up a mentorship “hotline” (email)

Diversity and Inclusion Goal:

Ensure that a broad diversity of backgrounds and perspectives is recognized and made an integral part of the AFP Hampton Roads Chapter. This includes member recruitment, as well as leadership development, including the board of directors and chapter committees.

Objectives:

1. Provide scholarship opportunities to increase diversity and inclusion within chapter membership and at national conferences.

- Work with Scholarship Committee to ensure that a diversity of chapter members apply and are considered for scholarship for AFP membership and to attend AFP conferences.
- Provide at least two complimentary quarterly luncheon passes to underrepresented individuals.

2. Guarantee chapter communications material, including Facebook and website information use inclusive language that will reflect AFP’s diversity and inclusion.

- Include a diversity tidbit or article in the chapter’s electronic communications. Minimum of 2x/year.
- Highlight diversity and inclusion through stories and postings of members and groups.

3. Promote diversity and inclusion at National Philanthropy Day activities to include awardees.

- Submit nominations of candidates within the community who represent diversity.

4. Recruit speakers or facilitators each year with expertise in the area of diversity and fundraising to speak to the general membership of the chapter at either a monthly luncheon, National Philanthropy Day or other activities.

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- Annual Diversity Workshop/Luncheon – Devote at least one monthly meeting and/or educational session to the topic of diversity in philanthropy and nonprofit management.
- Bring educational value to members when examining how philanthropy functions in diverse groups, by having at least one program (speaker, roundtable/panel) annually with a focus on inclusion.
- Work with Chapter Program Committee to choose speaker(s), plan logistics, advertise, etc.

5. Include diversity and inclusion in the structure of the chapter's Strategic Plan.

- Each year apply for Friends of Diversity Chapter Certification. (Due February 2nd.)
- Work with the Membership Committee to recruit new AFP members that expand the diversity and inclusivity of the AFP-HR chapter.

Government Relations Committee Goal

Create a toolkit to help Hampton Roads AFP members better understand how each individual can become more involved for the good of charitable giving while also providing more frequent updates at monthly chapter gatherings.

Objectives:

1. Gather research to establish knowledge regarding tax reformation:

- Obtain knowledge regarding recent tax reform changes.
- Monitor AFP IHQ emails/alerts, legislative issues and distribute info to members.
- Include update in monthly e-newsletter and provide reference material.
- Provide a 5 minute update/education tip at each monthly luncheon program.
- Recruit committee members.
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2. Develop plan of action for year 1 (2018):

- Obtain listing of current local, state and federal legislators.
- Assign responsibilities for committee members.

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- Query members or member organizations to learn who has contacts with local, state or federal officials.
- Learn more about our legislators – to include philanthropic interests.
- Outline content for a member toolkit.
- Help members better understand legislative process.
- Evaluate interest in determining if there should be a greater presence and/or involvement of elected officials with chapter.
- Determine how/when we could visit elected officials.
- Seek lobbying day opportunities for committee/board attendance and to learn about how best to do so.