



Aloha Chapter 2020-2022 Strategic Plan

Background

The Association of Fundraising Professionals (AFP) represents over 30,000 individual and organizational members in 230 chapters throughout the world, and works to advance philanthropy through advocacy, research, education, and certification programs.

Established in 1983, the Association of Fundraising Professionals, Aloha Chapter's members represent a wide variety of non-profit organizations and fundraising expertise throughout the state of Hawai'i. The Aloha Chapter has enjoyed great success and has overcome a number of challenges over the last three decades of service to Hawai'i's fundraising professionals. In 2020 AFP-Aloha Chapter will continue to strive for excellence, ensuring the services and professional development opportunities provided by the Chapter meet the highest standards and are provide 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 maximize resources and to promote the profession statewide.

Through education, training, and advocacy, AFP will continue to advance philanthropy to support the needs of the community, raise the level of fundraising, and promote the understanding and practice of ethical fundraising across the state. The current Strategic Plan provides an important roadmap that will serve as a guide for this organization through the next two years. This Strategic Plan will help the chapter's leadership stay the course and achieve the important goals that were identified with valuable input from the entire membership.

The Association of Fundraising Professionals (AFP) Aloha Chapter advances philanthropy throughout Hawai'i by actively promoting the practice of ethical and effective fundraising. We are committed to education, networking, advocacy, and mentoring in the field of fundraising for the benefit of all, with the spirit of aloha.

Charitable organizations have the philanthropic resources necessary to fulfill their missions for a better Hawai'i.

During the span of this plan, the Aloha Chapter will focus on these priority goals:

- I: The Aloha Chapter will *develop* skilled, knowledgeable and ethical professionals.
- II: The Aloha Chapter will *grow and engage* its members to further enhance chapter value.
- III: The Aloha Chapter will provide *public policy and ethics action* on the local and state level.
- IV: The Aloha Chapter will leave the chapter management in *better organizational and leadership condition* than when we joined.
- V: The Aloha Chapter will remain fiscally sound, finishing the year with a balanced budget by identifying and pursuing *diverse revenue* streams, to strengthen the organization's ability remain stable and educate the current and future non-profit leaders of Hawai'i.

Goal I: Develop Skilled Professionals

OBJECTIVES:

1. Develop a 12-month professional advancement calendar with a minimum of 6 O'ahu events per year (including the NPD Conference as 1) and 2 neighbor island events (that can be shared in the form of a webinar).
2. Identify 5 new CFRE candidates per year to obtain 5 new CFREs by December 31, 2021.
3. Host an annual National Philanthropy Day (NPD) Conference offering the highest quality professional advancement and networking opportunities available to nonprofit professionals in the state; provides opportunity and incentive to grow our membership; and recognizes and promotes philanthropy across the state.
4. Support the Chapter's Membership goals by providing value added opportunities for AFP-Aloha Members.
5. Support the Chapter's Diversity goals by providing collaborative opportunities.
6. Maintain a scholarship program to serve underrepresented organizations, populations, and members, including but not limited to neighbor islands and organizations with less than \$1 million operating budgets. Award at least 10 unduplicated scholarships per year.

Goal II: Grow and Engage Members

OBJECTIVES:

1. Provide engagement opportunities for current, new, and prospective members.
2. Net at least 1 new member per year for 2 years.
3. Meet or exceed retention rate of 77% each year with 175 or more members by December 31, 2021.

Goal III: Public Policy & Ethics Action

OBJECTIVES:

1. Increase public policy and ethics action on the local and state level.
2. Position AFP Aloha Chapter as an expert resource on nonprofit and fundraising legislative issues.
3. Seek and identify opportunities and partners to elevate the AFP Aloha Chapter within the legislative community.

Goal IV: Leadership & Organization Condition

OBJECTIVES:

1. Ensure all board members understand their role and the board's role within the organization.
2. Each Board Member is responsible for actively cultivating prospective board members and committee members to ensure leadership pipeline. Each Committee Chair, with the help of the Board's Executive team, will recruit at least one non-board committee member per year.
3. Support the Chapter's Diversity goals by ensuring the board's representation accurately reflects the diversity of membership and nonprofit community.

Goal V: Fiscal Responsibility

OBJECTIVES:

1. The Aloha Chapter's Executive Board Members will draft and present a fiscally sound, balanced budget to the Board of Directors for approval.
2. Create a fundraising plan with set giving levels and benefits with an identified prospect pool.
3. Manage and grow the "Be The Cause" campaign- Campaign Goal of \$5,625 and a 6% goal increase per year thereafter.



Goal I - Professional Development: The Aloha Chapter will *develop skilled, knowledgeable and ethical professionals.*

Objectives	Tactics	Committee/Staff Assignment	Timeline	Evaluation
Develop a 12-month professional advancement calendar with a minimum of 6 O'ahu events per year (including the NPD Conference as 1) and 2 neighbor island events (that can be shared in the form of a webinar).	1) Draft topics for sessions & recruit speakers	Professional Development Committee	September 2019 thru June 2021	2019:
	2) With approval from the Board, schedule seminars			
	3) Finalize venue, location, and marketing			
	4) Develop Communications Strategy	PR/Marketing Committee	January 2020	
	5) Draft messaging with work with the Communications Vendor to disseminate information through various channels		Ongoing	
Identify 5 new CFRE candidates per year to obtain 5 new CFREs by December 31, 2021.	1) Survey membership for recruits who meet the minimum experience level	Executive Committee	January 2020 thru August 2021	2019:
	2) Invite to attend CFRE training course			

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	3) Provide network of support from current CFREs			
Host an annual National Philanthropy Day (NPD) Conference offering the highest quality professional advancement and networking opportunities available to nonprofit professionals in the state; provides opportunity and incentive to grow our membership; and recognizes and promotes philanthropy across the state.	<ol style="list-style-type: none"> 1) Coordinate with the Professional Development Chair to develop a program that will provide unique, interesting and compelling advancement opportunities 2) Develop a cost structure that both accomplishes the Chapter’s budgetary goals and provides incentive for members to participate and nonmembers to join 3) Request nominations from the nonprofit community to identify deserving individuals and organizations for recognition 	<p>National Philanthropy Day Conference Committee and Professional Development Committee</p> <p>National Philanthropy Day Committee, Treasurer, and Revenue Development Committee</p> <p>National Philanthropy Day Committee and Executive Committee</p>	January 2020 thru October 2021	2019:
Support the Chapter’s Membership goals by providing value added opportunities for AFP-Aloha Members.	1) Coordinate with the membership committee to devise appropriate pricing to incentivize membership.	Professional Development Committee and Membership Committee		2019:

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<p>Support the Chapter’s Diversity goals by providing collaborative opportunities</p>	<ol style="list-style-type: none"> 1) Coordinate with the Diversity Committee to include at least one “Diversity”-focused Professional Advancement or Networking offering. 	<p>Professional Development Committee and Diversity Committee</p>	<p>Ongoing</p>	<p>2019:</p>
<p>Maintain a scholarship program to serve underrepresented organizations, populations, and members, including but not limited to neighbor islands and organizations with less than \$1 million operating budgets. Award at least 10 unduplicated scholarships per year.</p>	<ol style="list-style-type: none"> 1) Develop Scholarship requirements and applications. 2) Identify deadlines 3) Work with the PR/Marketing Committee to include announcement through various channels 4) Receive applications and review 5) Make recommendations to Board for approval 6) Communicate awards to winners 	<p>Scholarship Committee</p>	<p>Ongoing</p>	<p>2019:</p>

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Goal II Membership: The Aloha Chapter will *grow and engage its members* to further enhance chapter value.

Objectives	Tactics	Committee/Staff Assignment	Timeline	Evaluation
Provide engagement opportunities for current, new, and prospective members.	1) Develop and execute 1 to 2 member-networking events during the year 2) Host Annual Meeting & Holiday Luncheon	Membership Committee	August/September and October December	2019: Completed
Net at least one new member per year for two years	1) Incentivize members to bring a non-member guest to networking events. 2) Send membership invitation letters to non-members attending AFP education events.	Membership Committee	2x per year Ongoing	2019:
Meet or exceed retention rate of 77% each year with 175 or more members by December 31, 2021	1) Develop and execute end of year membership survey to understand what is important to members. 2) Send personalized letters to each member for	Membership Committee	January/February Ongoing	2019:

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	<p>renewing or joining.</p> <p>3) Make personal contact with new members (phone call or email) to welcome and thank them for joining.</p> <p>4) Make follow up calls to lapsed members.</p>			
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Goal III - Government Relations: The Aloha Chapter will *provide public policy and ethics action on the local and state level.*

Objectives	Tactics	Officer /Staff Assignment	Timeline	Evaluation
Increase public policy and ethics action on the local and state level	<ol style="list-style-type: none"> 1) Identify and analyze local and state legislative issues 2) Monitor ongoing pieces of legislation 3) Communicate the recommended position of AFP on legislative issues 	Government Relations Committee		2019:
Position AFP Aloha Chapter as an expert resource on nonprofit and fundraising legislative issues	<ol style="list-style-type: none"> 1) Represent and advocate for the nonprofit and fundraising professional community on legislative issues 2) Submit testimony on identified legislative issues of interest to the nonprofit and fundraising communities 	Government Relations Committee		2019:
Seek and identify opportunities and partners to elevate the AFP Aloha Chapter within the legislative community	<ol style="list-style-type: none"> 1) Create and maintain an ongoing dialog with our nonprofits and other stakeholders, including HANO, Gift Planning Council, Attorney General’s Office, as well as other partners that meet our diversity guidelines 	Government Relations Committee		2019:

Goal IV - Directorship: The AFP Aloha Chapter will leave the chapter management in *better organizational and leadership condition* than when we joined.

Objectives	Tactics	Officer /Staff Assignment	Timeline	Evaluation
Ensure all board members understand their role and the board's role within the organization	<ol style="list-style-type: none"> 1) Conduct board orientation/retreat 2) Establish orientation, training, evaluation, and calendar 3) Review and edit existing materials 4) Conduct mid-year board satisfaction survey 5) Conduct a retreat with new board each year 	Directorship Committee		2019:
Actively cultivate prospective board members to ensure leadership pipeline. Each Committee Chair, with the help of the Board's Executive team, will recruit at least one non-board committee member per year.	<ol style="list-style-type: none"> 1) Recruit at least one potential board members to each committee 2) Develop and maintain Board matrix to identify board needs for upcoming year 3) Solicit committee chairs for best candidates to fill needs 	<p>Entire Board</p> <p>Diversity Committee with Executive Committee Executive Committee</p>		2019:

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<p>Ensure that the representation of the Board of Directors accurately reflect the diversity of membership and nonprofit industry</p>	<ol style="list-style-type: none"> 1) Include Diversity Chair on Committee on Directorship Assess composition of membership based on agreed upon characteristics and develop a matrix for board composition 2) Annually evaluate success of completing matrix 	<p>Directorship Committee</p>		<p>2019:</p>
<p>Ensure the most effective structure for contracted staff</p>	<ol style="list-style-type: none"> 1) Conduct annual review of vendor contracts 2) Conduct regular meetings with vendors to evaluate performance 3) Convene committee to conduct annual assessment of vendors and chapter needs 	<p>Directorship Committee</p>		<p>2019:</p>

Goal IV Resource Development: The Aloha Chapter will *diversify and increase the revenue stream* to increase the organization’s ability to educate the current and future non-profit leaders of Hawai’i.

Objectives	Tactics	Officer /Staff Assignment	Timeline	Evaluation
<p>Create a strategic, scalable and sustainable plan to diversify the revenue stream</p>	<p>1) Develop fee for service program speakers bureau - Board Discussion</p> <p>Identify board topic/subject specialties; identify membership topic/subject specialties</p> <p>Create a menu of relevant topics with price points (a minimum of 8 topics)</p> <p>Market to non-profits for board development/independent schools/ advancement workshops/etc.</p> <p>2) Identify grant opportunities and obtain at least one meaningful grant per year.</p> <p>Identify local foundations that are an appropriate fit for AFP</p> <p>Create a grants due calendar</p>	<p>Resource Development Committee</p>		<p>2019:</p>

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	<p>write/submit a minimum of 3 grants per year</p> <p>3) Partner with HCF/United Way/HANO/etc to increase AFP membership benefits</p> <p>Enhance offerings to their org membership/partners/participating groups</p> <p>Identify internal AFP resources (see speakers bureau menu) that can be offered through annual AFP corp membership/sponsorships</p> <p>Possible annual board development workshop offered as a benefit to corp AFP members/sponsors</p>			
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<p>Create a fundraising plan with set giving levels and benefits with an identified prospect pool</p>	<ol style="list-style-type: none"> 1) Review historical donors and honorees and stratify prospects into target ask levels 2) Create executive summary outlining giving levels, specific benefits and impact 3) Identify community partners 4) Partner with stewardship committee 	<p>Resource Development Committee</p>		<p>TBD by achievement of objectives in three years</p>
<p>Create a scholarship program to serve underrepresented organizations, populations, and members, including but not limited to neighbor islands and organizations with less than \$1 million operating budgets</p>	<ol style="list-style-type: none"> 5) Submit Be The Cause grant (September)-Campaign Chair 6) Publicize opportunity to the AFP Membership 7) All eligible activities should have scholarship opportunity narrative highlighted. (On-going)-Chapter Admin 8) Consider scholarship for membership organizations/individual members ONLY- (August/September)-Board Discussion 	<p>Resource Development Committee</p>	<p>September 2019 Ongoing</p>	<p>2019:</p>

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<p>Manage and grow the “Be The Cause” campaign- Campaign Goal of \$5,000 and a 6% goal increase per year thereafter.</p>	<ol style="list-style-type: none"> 1) Maintain 100% board giving to achieve Gold Star goal 2) Draft and disseminate general appeal to board members-(May) Board President 3) Follow up with direct calls (if necessary: July/ August) 4) Pull reports of the “Be The Cause” campaign donors from the last 5 years (July)-Campaign Chair/Chapter Admin 5) Retain current 2019 donors-specialized electronic messaging 6) regarding impact of the 2018 campaign- (September) 7) Solicitation-(October) 8) Follow Up Phone Calls (prioritize top donors) 9) Re engage past donors- specialized electronic messaging 10) Mahalo and impact message 11) Follow up phone calls top 10% of donors from the last 5 years 12) Be The Cause celebration 13) Electronic messaging announcing success 14) Integrate special Mahalo in board pau hana or the like. 	<p>Resource Development Committee</p> <p>Entire Board</p>	<p>Ongoing</p> <p>July thru August</p>	<p>2019:</p>
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