



Aloha Chapter

2020-2022 Strategic Plan

(updated 02/16/2021)

Background

The Association of Fundraising Professionals (AFP) represents over 30,000 individual and organizational members in 240 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 (3) 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 identified with valuable input from the entire membership.

Mission Statement

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.

Vision Statement

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

Chapter Goals

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 by further enhancing 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 through identification 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.

Chapter Goals & Objectives Overview

GOAL I: DEVELOP SKILLED PROFESSIONALS

OBJECTIVES:

1. Develop a 15-month professional advancement calendar with a minimum of eight (8) events per year (including the NPD Conference as one) either in-person and/or virtual formats.
2. Identify five (5) new CFRE candidates per year to obtain five (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 one (1) new member per year for two (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 annual “Be The Cause” campaign as agreed upon by the AFP Foundation and Aloha Chapter Board.

Objectives and Tactics

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

Objectives	Tactics	Committee/Staff Assignment	Timeline	Evaluation
Develop a 15-month professional advancement calendar with a minimum of eight (8) events per year (including the NPD Conference as one) either in-person and/or virtual formats.	<ol style="list-style-type: none"> 1) Draft topics for sessions & recruit speakers. 2) With approval from the Board, schedule seminars. 3) Finalize venue, format, and marketing. 4) Develop Communications Strategy. 5) Draft messaging with the Communications Vendor to disseminate information. 	Professional Advancement Committee Marketing Committee	Ongoing	Annual
Identify five (5) new CFRE candidates per year to obtain five (5) new CFREs by December 31, 2021.	<ol style="list-style-type: none"> 1) Survey membership for recruits who meet the minimum experience level. 2) Provide network of support from current CFREs. 	Executive Committee	Ongoing	Annual
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 & 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. 	National Philanthropy Day Conference Committee & Professional Advancement Committee National Philanthropy Day Committee & Finance Committee National Philanthropy Day Committee & Executive Committee	Ongoing	Annual
Support the Chapter’s Membership goals by providing value added opportunities for AFP-Aloha Members.	<ol style="list-style-type: none"> 1) Coordinate with the membership committee to devise appropriate pricing to incentivize membership. 	Professional Advancement Committee & Membership Committee	Ongoing	Annual
Support the Chapter’s Diversity goals by providing collaborative opportunities	<ol style="list-style-type: none"> 1) Coordinate with the Diversity Committee to include at least one “Diversity”-focused Professional Advancement or Networking offering. 	Professional Advancement Committee & Diversity Committee	Ongoing	Annual
Maintain a scholarship program to serve underrepresented organizations, populations, and members, including but not	<ol style="list-style-type: none"> 1) Develop Scholarship requirements and applications. 2) Identify deadlines. 	Scholarship Committee	Ongoing	Annual

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limited to neighbor islands and organizations with less than \$1 million operating budgets. Award at least 10 unduplicated scholarships per year.	<ol style="list-style-type: none"> 3) Work with the Marketing Committee to create and post announcement(s). 4) Receive applications and review. 5) Make recommendations to Board for approval. 6) Communicate awards to winners. 			
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Goal II Membership: The Aloha Chapter will *grow and engage its members* by further enhancing chapter value.

Objectives	Tactics	Committee/Staff Assignment	Timeline	Evaluation
Provide engagement opportunities for current, new, and prospective members.	<ol style="list-style-type: none"> 1) Develop and execute one (1) to two (2) member-networking events annually. 2) Host Annual Meeting & Holiday Luncheon. 	Membership Committee	Ongoing December	Annual
Net at least one (1) new member per year for two (2) years	<ol style="list-style-type: none"> 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	2Xs per year Ongoing	Annual
Meet or exceed retention rate of 77% each year with 175 or more members by December 31, 2021	<ol style="list-style-type: none"> 1) Develop and execute end of year membership survey to understand what is important to members. 2) Send personalized letters to each member for renewing or joining. 3) Make personal contact with new members (phone call or email) to welcome and thank them for joining. 4) Make follow up calls to lapsed members. 	Membership Committee	Ongoing	Annual

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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	Ongoing	Annual
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	Ongoing	Annual
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, Hawaii Gift Planning Council, Attorney General's Office, as well as other partners that meet AFP diversity guidelines. 	Government Relations Committee	Ongoing	Annual

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 & year-end board satisfaction survey. 	Directorship Committee	January January June & December	Annual
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 (1) 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 	Entire Board Diversity Committee with Executive Committee Executive Committee	Ongoing December	Annual

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Ensure that the representation of the Board of Directors accurately reflect the diversity of membership and nonprofit industry.	1) Assess composition of membership based on agreed upon characteristics and develop a matrix for board composition.	Directorship Committee with Diversity Chair	January to March	Bi-Annual
	2) Evaluate success of completing matrix		November	Annual
Ensure the most effective structure for contracted staff.	1) Conduct annual review of vendor contracts.	Directorship Committee	November	Annual
	2) Conduct regular meetings with vendors to evaluate performance.		Quarterly	
	3) Convene committee to conduct annual assessment of vendors and chapter needs.		November	Annual

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
Create a sustainable fundraising plan to diversify the chapter’s revenue stream.	<ol style="list-style-type: none"> 1) Refresh Case for Support. 2) Create Sponsorship Benefits Menu. 3) Review historical donors and honorees and stratify prospects for target asks 4) Identify specific Aloha Chapter projects that align with local grant opportunities and submit applications. 5) Identify and partner with community organization like HCF, AUW, HANO and HPGC to increase AFP membership benefits value. 	Resource Development Committee, Professional Advancement Committee, & Marketing Committee	Ongoing	Annual
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.	<ol style="list-style-type: none"> 1) Publicize opportunity to the AFP Membership. 2) All eligible activities should have scholarship opportunity narrative highlighted. 3) Consider scholarship for membership organizations/individual members ONLY. 	Resource Development Committee	Ongoing	Annual

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<p>Manage the annual “Be the Cause” Campaign goals set for the Aloha Chapter agreed upon by the AFP Foundation and Aloha Chapter Board, with two (2) to three (3) new or lapsed donors each year.</p>	1) Maintain 100% board giving to achieve Gold Star goal.	BTC Campaign Chair	April 30	Annual
	2) Draft and disseminate general appeal to board members.	Board President	March	
	3) Pull reports of the “Be The Cause” campaign donors from the last five (5) years; Prioritize top donors.	BTC Campaign Chair & Chapter Administrator	January/February	
	4) Follow up with direct calls to chapter members as identified by the Board	BTC Campaign Chair	July	
	5) BTC Campaign Promotion / Donor Acknowledgement Listing - eNews	Entire Board	Aug/September	
	6) Mahalo and Impact Message – Annual Meeting & eNews	BTC Campaign Chair	Monthly	
		BTC Campaign Chair	December	