

**Association of Fundraising Professionals  
Western Massachusetts Chapter**

**STRATEGIC PLAN  
2014-2016**

**DRAFT**

**Prepared by  
Board of Directors  
AFP MA, Western Chapter**

# TABLE OF CONTENTS

I. CORE VALUES.....	3
II. CRITICAL ISSUES.....	3
III. GOALS AND OBJECTIVES, 2014-2016.....	3
IV. OBJECTIVES AND ACTION STEPS.....	4

## **I. VALUES AND MISSION**

### **Core Values**

- Ethics
- Leadership
- Integrity
- Honesty
- Inclusiveness
- Collaboration

## **II. CRITICAL ISSUES**

The Chapter lacks...

- Succession planning for both the board and committees
- Communications both internal and external
- Collaboration among the Board
- Revenue Streams
- Defining a process for SMART goals
- More strategic marketing and communications

## **III. GOALS AND OBJECTIVES**

From this work, the following goal statements were created, with measurable objectives to be accomplished within specified timeframes

### **GOALS**

1. Strengthen membership through diversity and inclusion, recruitment, retention & engagement.
2. Provide high quality, relevant education to increase knowledge and advance careers for fundraising professionals.
3. Increase the visibility and recognition of the chapter as a leader in ethical, professional fundraising education and philanthropy.
4. Be effectively governed, efficiently managed, appropriately structured and soundly financed.

#### **IV. OBJECTIVES & ACTION STEPS**

The following objectives were defined for each goal as listed below:

##### **Goal #1: Strengthen membership through diversity and inclusion, recruitment, retention & engagement.**

##### **Objectives**

1. Increase our efforts to recruit new members.
  - a. Coordinate an acquisition mailing with the International Headquarters
  - b. Identify a list of prospects by looking at the new membership categories, types of organizations in the chapter area, non-member attendees to educational programs, community foundation list, Universities with nonprofit management programs, etc.
  - c. Make outreach calls to non-member attendees at the educational programs
2. Retain current members.
  - a. Make personal outreach phone calls to new members and lapsed members.
3. Increase our efforts to engage more members.
  - a. Communicate the educational programs available.
  - b. Encourage members to join a committee or volunteer for the chapter.
  - c. Communicate the benefits of membership.

##### **Areas Identified During the Day about Membership**

- Currently 78 members, 36% growth, 78% retention
- Need to build the membership committee to at least four members
- Develop a stronger relationship with Bay Path College, Human Service Forum of Western Mass, and Young Professionals Society
- Connect with executive directors
- Tap into other markets: CT, Berkshires, VT, Central MA, Churches
- Need a better response to our evaluations that are sent out after the educational sessions.
- Build upon the momentum from our networking events.
- Recognize new members at the monthly meetings

##### **Goal #2: Provide high quality, relevant education to increase knowledge and advance careers for fundraising professionals.**

##### **Objectives**

1. Develop an annual educational plan, which addresses
  - a. Experience levels
  - b. Topics
  - c. Geographic options
  - d. Membership benefits
  - e. Niche markets
  - f. National Philanthropy Day®
2. Develop a plan to receive better responses to educational evaluations

- a. Explore the idea of offering a benefit if someone completed the evaluation

#### Areas Identified During the Day about Education

- Need at least four members on the Education Committee; one idea is to involve consultants who have many connections at the nonprofits in the community.
- Topics needed include: Planned Giving, Diversity related – take the topic and weave diversity around it. Churches are another untapped market, but it would be important that the session be at night or a Saturday morning for this session.
- Need to develop a comprehensive marketing strategy about the educational programs. Currently announcements are sent to approximately 800 emails and 30 people attend. Ideas that surfaced included a video from the speaker that can be sent out in advance, ask the speaker to promote the session via social media their contacts and listing all the upcoming sessions for the year, in the email targeting the current program. Board members should promote each session and plan to attend themselves. The educational programs also need to be highlighted on the chapter website.
- Explore collaboration with other organizations, specifically Bay Path College.
- Top topics for the chapter include: Planned Giving, Meet the Funders, NPD, Social Media/Millennial, and Annual Giving.
- Have to put a marketing spin on the Ethics session that the chapter offers annually to fulfill the Ten Star Award requirement.
- Tie sponsorships into the educational programs, allowing the sponsor to introduce the speaker and receive recognition on the email communication that goes out to 800 people.
- Need to determine the financial policy for speakers and determine the appropriate budget.

#### **Goal #3: Increase the visibility and recognition of the chapter as a leader in ethical, professional fundraising education and philanthropy.**

#### Objectives

1. Develop a Communications Plan for Marketing Support which includes:
  - a. Educational Programs
  - b. NPD
  - c. Sponsorship
  - d. Job opportunities
  - e. Membership
  - f. Social Media
  - g. Website
  - h. Explore the possibility of a newsletter
2. Identify and pursue opportunities to collaborate with outside organizations.
  - a. WGGB & other media
  - b. Bay Path
  - c. Human Service Forum
  - d. Community Foundation
3. Implement a successful National Philanthropy Day® event which provides awareness of the chapter and the fundraising profession to the community.

#### Areas Identified During the Day about Public Relations/Communications

- Need a better focus on the role of this goal.
- Need better communications around NPD
- Need better communications around the educational programs
- Need a committee with at least four members that includes people with marketing backgrounds.
- Need to develop a better social media strategy
- Need to look at the chapter website and placement of materials on it.
- Revisit the idea of a chapter newsletter
- The goals of this committee need to be connected to the other areas of operation for the chapter.

**Goal #4: Be effectively governed, efficiently managed, appropriately structured and soundly financed.**

**Objectives**

1. Develop a governance and succession plan for the chapter focusing on both the Board and Committees.
  - a. Determine the appropriate Board size (12-15 was suggested)
  - b. Review/create the job descriptions for the various committee roles within the chapter including number of members and time commitment
  - c. Insure the goals of the Diversity & Inclusion Committee are incorporated into the governance of the chapter.
  - d. Develop a Board assessment tool.
  - e. Conduct an annual Board Orientation
  - f. Explore collaboration opportunities between committees in order to break down silos.
  - g. Create a Board matrix identifying current skill sets and determine what is needed from year to year.
  - h. Determine quantifiable metrics for the Board and committees
2. Review/adopt financial policies for the chapter.
  - a. Reserve policy
  - b. Investment policy
3. Maximize the revenue streams for the chapter
  - a. Sponsorship
  - b. Job postings
  - c. Educational events and the Education pricing policy
  - d. NPD
  - e. Membership
  - f. Be The Cause
4. Receive the Ten Star Award annually
5. Communicate the Chapter's Commitment to Diversity and Inclusion
  - a. Receive the Friends of Diversity Designation annually
  - b. Communicate that this is a strong component of the chapter
  - c. Committee reports directly to the chapter president
  - d. Insure education committee conducts at least one session around diversity and inclusion annually.

Areas Identified During the Day about Chapter Effectiveness

- Develop and revise committee job descriptions by the August 2014 Board meeting
- Review the roles and responsibilities of the chapter administrator as a Board
- Ask members if they want to join a Committee.
  - At educational programs
  - Through member communications
  - Social media
  - Range of opportunities
  - Look at member list for personal asks to get involved
  - Put this item on the Board agenda every month so it is continuously addressed
  - Volunteer lead will distribute interest to the appropriate chair - Beverly and Judy offered to take the lead on this program
  - Implement by August 20<sup>th</sup> at the upcoming networking event
- Recruit a president-elect for the chapter
- Create sustainable budgets
- Examine revenue structure
  - Educational program fees