



**ASSOCIATION OF  
FUNDRAISING  
PROFESSIONALS  
BLUEGRASS CHAPTER  
LEXINGTON KENTUCKY**

*Advancing Philanthropy in Kentucky  
2008-2010 Strategic Plan*

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## *Background*

The Association of Fundraising Professionals (AFP) represents 28,000 members in 188 chapters in the United States, Canada, Mexico, and China and works to advance philanthropy through advocacy, research, education, and certification programs. Originally named the National Society of Fund-Raising Professionals (NSFRE) the association officially changed its name in 2001 as did the chapter to better reflect the region in which it serves: the Bluegrass Chapter.

The Bluegrass Chapter of AFP was established in early 1985 by a small group of fundraising professionals in Central Kentucky. By the end of that first year, ten members had enrolled, and in April of 1986 enrollment jumped to 20 professionals, representing non-profits from Louisville to Northern Kentucky. Several years later, due to strong interest expressed from Louisville area professionals, the Bluegrass Chapter encouraged and supported the creation of the Greater Louisville Chapter. Then the Greater Cincinnati Chapter expanded and incorporated additional northern non-profit organizations to further encompass and serve the state's many fundraising professionals. Over the next 18 years, the Bluegrass Chapter continued to increase its own membership and define its boundaries.

Today, the current 120 plus members represent a wide variety of non-profit organizations and fundraising expertise throughout Central and Eastern Kentucky. The Bluegrass Chapter has enjoyed great success in its first stages of growth, but it is now deemed the appropriate time to grow again by further striving for excellence in the services and professional development opportunities provided by the Chapter. There are many more fundraising professionals in our community who are not yet members of our association and many more opportunities to collaborate with the other AFP chapters in the Commonwealth to maximize resources and to promote the profession statewide.

Through education, training and advocacy AFP will continue to advance philanthropy to support the many important needs of the community. The 2008-2010 Strategic Plan provides an important roadmap that will serve as a guide for this organization through the next exciting 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.

## Mission Statement

AFP, an association of professionals throughout the world, advances philanthropy by enabling people and organizations to practice effective and ethical fundraising. The core activities through which AFP fulfills this mission include education, training, mentoring, research, credentialing, and advocacy.

## Vision Statement

Our chapter's vision is to work with our members to advance the profession of fundraising as a credible and respected profession both locally and globally.

## Quality Statement

The Bluegrass Chapter is committed to excellence in providing the highest quality services and benefits for our members and other constituents. We work to be responsive to their needs and strive to exceed expectations for our key customer groups:

- Fundraising Professionals: AFP Members and Potential Members
- Members' Employers
- Donors
- Nonprofit Organizations

## Bluegrass Chapter Priorities

During the span of this plan, the Chapter will focus on these priorities as we strive to *advance philanthropy in Central Kentucky*:

- The Chapter will strive to *strengthen the profession* by serving as a resource to the Central Kentucky philanthropic community through education, information, and advocacy while promoting and supporting the fundraising profession.
- The Chapter will promote and expand the *knowledge* base of its members through educational and networking opportunities
- The Chapter will constantly seek to improve its *organizational effectiveness* through enhanced administrative functioning, communication and leadership.

## Bluegrass Chapter Priorities & Goals

### **Strengthen the Profession**

GOAL I: Educate the philanthropic community as to the role of the fundraising profession and the importance of professional development

GOAL II: Become the recognized source for philanthropic information, advocacy, ethical standards, and the development of the fundraising profession

GOAL III: Continue to grow our membership by continuing to implement the Chapter Recruitment and Retention Plan

GOAL IV: Promote the fundraising profession to youth and nurture future philanthropic leaders

### **Knowledge**

GOAL I: Provide relevant and comprehensive educational opportunities to members

GOAL II: Encourage and support members to become Certified Fundraising Executives (CFRE)

### **Organizational Effectiveness**

GOAL I: Effectively communicate with our members and promote benefits of membership on an on-going basis

GOAL II: Strive to be a model chapter of excellence and continuous improvement

GOAL III: Provide leadership development opportunities for our board members, officers and membership

## Goals and Objectives

### STRENGTHEN THE PROFESSION

The primary focus of the Bluegrass Chapter of AFP mission is strengthening the profession. During 2008-2010, the Bluegrass Chapter of AFP will:

### STRENGTHEN THE PROFESSION

- Educate philanthropic community
- Become the recognized source for philanthropic information
- Continue to grow our membership
- Promote fundraising profession to youth

- Educate the philanthropic community as to the role of the fundraising profession and the importance of professional development and certification
- Become the recognized source for philanthropic information, advocacy, ethical standards, and the development of the fundraising profession
- Continue to grow our chapter membership by further implementing the Chapter Recruitment & Retention Plan
- Promote the fundraising profession to youth and nurture future philanthropic leaders

### GOAL I: Educate the philanthropic community as to the role of the fundraising profession and the importance of professional development

Objectives	Activity	Officer/Staff Assignment	Timeline
Identify constituents that comprise the philanthropic community and develop strategies to increase their awareness of our organization	1) Identify constituents 2) Determine strategies for each constituent 3) Develop timeline to implement strategies and assign to existing or <i>ad hoc</i> committees	Primary: VP Community Relations Secondary: VP Membership	

**GOAL II: Become the recognized source for philanthropic information, advocacy, ethical standards, professional development for fundraisers**

Objectives	Activity	Officer /Staff Assignment	Timeline
Capitalize on the visibility and audience afforded by NPD	1) Identify constituents 2) Develop new promotion strategies	Primary: NPD Chair Secondary: VP Community Relations	
Increase the visibility of AFP resources including the AFP library	1) Host educational session(s) at Library 2) Host lunch that addresses AFP resources	Primary: VP Community Relations Secondary: Programs Chair Library Chair	
Showcase member accomplishments and awards as a means to promote larger association	1) Highlight professional accomplishments of members through media outlets 2) Use "Association of Fundraising Professionals" rather than acronym to improve name recognition	Primary: VP Community Relations Secondary: Newsletter	
Encourage participation in local advocacy when appropriate to reinforce the national AFP	1) Report from Political Action Committee at member meetings 2) Annual program about AFP role in political action 3) Host Annual Legislative Day with other KY chapters	Primary: President Secondary:	

**GOAL III: Continue to grow our membership by further implementing the Chapter Recruitment and Retention Plan**

Objectives	Activity	Officer /Staff Assignment	Timeline
<p>Have 70% of our members renew their chapter membership each year.</p>	<ol style="list-style-type: none"> <li>1) Develop and publicize scholarship opportunities</li> <li>2) Provide scholarships to support attendance at various AFP Programs &amp; Conferences</li> <li>3) Initiate 1:1 contact with members the month before their renewal date, encourage them to renew and discover barriers</li> <li>4) Contact members whose membership has lapsed to encourage renewal</li> </ol>	<p>Primary: VP Membership</p> <p>Secondary: Membership Committee</p>	
<p>Continue to grow the membership through outreach and follow-up</p>	<ol style="list-style-type: none"> <li>1) Contact Non-Profit ED/CEO to discuss benefits of membership</li> <li>2) Continue to follow-up with visitors after events/program</li> <li>3) Contact members who have not attended event in three months</li> <li>4) Host membership social/networking event</li> <li>5) Send applications to non-members after attend event</li> </ol>	<p>Primary: VP Membership</p> <p>Secondary: Membership Committee</p>	

**GOAL III: Continue to grow our membership by further implementing the Chapter Recruitment and Retention Plan (Cont.)**

Objectives	Activity	Officer /Staff Assignment	Timeline
Ensure that diversity is incorporated into all aspects of chapter Recruitment and Retention Plan	1) Define what diversity means to chapter 2) Pass resolution that defines chapter's commitment to diversity 3) Diversity Committee to perform self-assessment to assess current status of diversity efforts including a) assessment of chapter's demographic composition and b) to ensure that chapter is being inclusive of underrepresented populations	Primary: Diversity Chair Secondary: VP Membership	

**GOAL IV: Promote the fundraising profession to youth and nurture future philanthropic leaders**

Objectives	Activity	Officer /Staff Assignment	Timeline
Promote and strengthen the Thoroughbred Collegiate Chapter	1) Take one student to AFP conference each year and have them share experience with entire chapter 3) Encourage student to write article about their experience for newsletter/web 4) Involve collegiate chapter members in Bluegrass chapter committees and board 5) Help them develop their own website or page 6) Help prepare them for job interviews 7) Share materials with students prior to graduation about the advantages of membership as a new professional	Primary: Youth & Philanthropy Chair Secondary: VP Membership	
Work with K-12 to establish youth in philanthropy initiatives	1) Meet with Superintendent to brainstorm options 2) Convene focus group with K-12 groups that do fundraising	Primary: Youth & Philanthropy Chair	

## KNOWLEDGE

A second focus of the Bluegrass Chapter of AFP mission is knowledge. During 2008-2010, the Bluegrass Chapter of AFP will be increasing the knowledge base through education.

## KNOWLEDGE

- Provide relevant and comprehensive educational opportunities
- Encourage and support members to earn CFRE

### GOAL I: Provide relevant and comprehensive educational opportunities to members

Objectives	Activity	Officer/Staff Assignment	Timeline
Develop and implement segmented programming calendar	1)Development 101 series for new professionals 2)CFRE prep course for mid-level professionals 3)Audio-conference 4) Lunch programs 5) Annual Conference	Primary: VP Education Secondary: Ed Committee	
Provide ways to involve senior level development professionals within the Bluegrass community	1) Target as program presenters 2) Involve in 1:1 program 3) Advocacy 4) Host periodic "senior professional roundtable"	Primary: VP Education Secondary: Ed Committee	
Continue to develop partnerships with other chapters to enhance quality of programming and networking opportunities	1) Clarify partnership with Cincinnati Chapter for Drive In Conference	Primary: VP Education Secondary: Ed Committee	

**GOAL II: Encourage and support members to become Certified Fundraising Executives (CFRE)**

Objectives	Activity	Officer/Staff Assignment	Timeline
Enhance community knowledge and recognition of the significance of becoming CFRE	1) Host a breakfast with a panel of current development professionals who hold the CFRE credentials 2) Host a ceremony to celebrate those who hold/receive the CRFE credentials at a general meeting or New Member Social	Primary: VP Education Secondary: Certificate Chair	
Support members in seeking the certification by making information, training and testing available	1) Host CRFE Review Course 2) Provide a scholarship for a current member to enroll in the CFRE Review Course 3) Award membership scholarship to someone who has recently achieved their CFRE 4) Add CFRE Review Materials to the local Resource Library 5) Register luncheons as CFRE accredited program hours	Primary: Certificate Chair Secondary: Program Chair	

## ORGANIZATIONAL EFFECTIVENESS

The final area of focus for the Bluegrass Chapter of AFP mission involves continuing to strengthen the foundation of the association through effective communication, outstanding achievement and leadership development.

## ORGANIZATIONAL EFFECTIVENESS

- Effectively communicate with our members
- Strive to be a model chapter of excellence
- Provide leadership development opportunities

### GOAL I: Effectively communicate with our members and promote benefits of membership on an on-going basis

Objectives	Activity	Officer /Staff Assignment	Timeline
Develop a strategic communication plan	1) Identify audiences 2) Improve existing and identify new methods of communicating	Primary: VP Community Relations Secondary: VP Membership	
Solicit membership feedback	1) Solicit feedback through biennial membership survey ; 2) Collect feedback at conclusion of each event	Primary: VP Membership Secondary: Programs	
Create and implement strategies to serve the needs of constituents in Eastern Kentucky	1) Host meeting for AFP members from Appalachia counties 2) Design programs that address needs of fundraisers working in Appalachian 3) Explore feasibility of hosting chapter activities east of I-75 on a regular basis	Primary: VP Education Secondary: Ed Committee	

**GOAL II: Strive to be a model chapter of excellence and continuous improvement**

Objectives	Activity	Officer /Staff Assignment	Timeline
Complete the Ten Star Award Requirements each year	1) Submit Chapter Leadership Form 2) Host an organized event focused on ethical fundraising 3) Submit at least one nomination for the 2007 AFP national awards 4) Identify and complete 7 of the 12 remaining options	Primary: President Secondary: Secretary	
Encourage members to invest in the national organization each year	1) Strive for 100% of board and 25% of chapter members contributing to the "Every Member" campaign 2) Strive to have 5 members on national committees or national officers	Primary: President Secondary: Foundation Development Chair	
Meet the mandates of the parent organization to ensure compliance as a chapter each year	1) Meet Chapter Accord Requirements 2) Complete the Chapter Accord and submit accordingly to meet the deadline (Jan 15) 3) File the IRS forms	Primary: President Secondary: Secretary, Treasurer	
Maintain strong chapter administration	1) Keep master calendar to ensure all deadlines are met 2) Work closely with Treasurer to insure the financial stability of the organization	Primary: President Secondary: Secretary, Treasurer	

**GOAL III: Provide leadership development opportunities for our board members, officers and membership**

Objectives	Activity	Officer /Staff Assignment	Timeline
Provide leadership development opportunities for current board members	1) Offer orientation for new board members, including new member packet 2) Host annual Board Retreat to focus on board training and development 3) Provide job descriptions and board expectation agreement 4) Identify and recruit diverse board members	Primary: President Secondary: Nominating Committee, Diversity Chair	
Identify and nurture future leadership to ensure the success and continuity of the Chapter	1) Develop a succession plan 2) Host workshop for members interested in serving on board 3) Utilize the nominating committee to identify future leaders	Primary: President Secondary: Nominating Committee, President-Elect	
Create leadership development opportunities for our membership	1) Send 1-2 members to attend AFP leadership workshop each year 2) 1) Increase # of members serving on committee or one-time initiative	Primary: President Secondary: Scholarship	