



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

2011-2013 Strategic Plan

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

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 100 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 2011-2013 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:

- 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

Strengthening 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 members

Goals and Objectives

STRENGTHENING THE PROFESSION

The primary focus of the Bluegrass Chapter of AFP mission is strengthening the profession. During 2011-2013, the Bluegrass Chapter of AFP will:

STRENGTHENING 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
- 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: NPD Co-Chair	
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: Library Chair Secondary: Programs 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	
Gain visibility with members of other related organizations	Meet with leadership of these groups and present to membership as possible (such as Non-Profit Leadership Initiative and United Way)	Primary: VP Comm Relations	
Gain visibility from media outlets	Meet with leadership of central Kentucky media outlets and explain AFP role	Primary: VP Comm Relations	
Gain visibility with local leadership groups	Present to membership of groups like Rotary	Primary: VP Comm Relations	

GOAL III: Grow our membership by implementing a Chapter Recruitment and Retention Plan

Objectives	Activity	Officer /Staff Assignment	Timeline
<p>Have 78% of our members renew their chapter membership each year.</p>	<ol style="list-style-type: none"> 1) Develop and publicize scholarship opportunities 2) Provide scholarships to support attendance at various AFP Programs & Conferences 3) Initiate 1:1 contact with members during the month before their renewal date, encouraging them to renew and discovering barriers 4) Contact members whose membership has lapsed to encourage renewal 	<p>Primary: VP Membership Secondary: Membership Committee</p>	
<p>Continue to grow the membership through outreach and follow-up</p>	<ol style="list-style-type: none"> 1) Contact Non-Profit ED/CEO to discuss benefits of membership 2) Continue to follow-up with visitors after events/program 3) Contact members who have not attended event in three months 4) Host membership social/networking event 5) Send applications to non-members after attend event 	<p>Primary: VP Membership Secondary: Membership Committee</p>	

GOAL III: Grow our membership by implementing a 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) 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) Develop a working relationship with the Chapter and its sponsor(s)	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 2011-2013, 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) Monthly lunch programs: survey members regularly to gauge how we're meeting needs 2) Audio-conference: select a diverse annual program 3) Promote an Annual Conference; develop mini-conferences in odd years	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	
Develop partnerships with other chapters to enhance quality of programming and networking opportunities	1) Seek partnerships (AFP affiliate clubs, PGCBG) in coordinating bi-annual, region-wide 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 ceremony to celebrate those who hold/receive the CRFE credentials 2) Regularly promote the certification at other events	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) Assign an existing CFRE to any member desiring new certification 4) 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, including Facebook and other social networks 3) Develop specific plan for updating online sites	Primary: VP Community Relations Secondary: VP Membership	
Solicit membership feedback	1) Solicit feedback through semiannual membership survey; 2) Collect feedback at conclusion of each event	Primary: VP Membership Secondary: Programs & Administrator	
Create and implement strategies to serve the needs of constituents in Eastern Kentucky	1) Host meeting for AFP members from Appalachian counties 2) Design programs that address needs of fundraisers working in Appalachia 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 annual AFP national awards 4) Identify and complete 7 of the 12 remaining options	Primary: President, Administrator Secondary: Secretary	
Encourage members to invest in the national organization each year	1) Strive for 100% of board and 37% 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 and submit accordingly to meet the deadline 3) File the IRS forms	Primary: President, Administrator 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: Administrator, President Secondary: Secretary, Treasurer	

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

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, Past 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) Increase # of members serving on committees or one-time initiatives	Primary: President Secondary: Scholarship	

Ideas generated that will help to implement strategic goals:

Strengthening the Profession / Community Relations

Develop committee to implement these activities.

1. Letter from president
2. Phone bank

Meeting with leadership of these groups, and present to their membership as applicable

- Kentucky non-profit network
- United Way of the Bluegrass
- Herald-Leader
- Insight Cable
- Central Kentucky Broadcasters
- Lexington Forum
- Lexington Rotary and other civic groups
- Leadership Lexington
- TOPS
- Commerce Lex
- Junior Achievement

Strengthening the Profession / Membership

- Expand membership committee and consider new member mentors to show new members the full benefits of membership.....do not make this part of strategic plan unless we have large group discussion and agree that mentors are the way to proceed as this may have been tried in the past.
- Track member attendance on a spreadsheet to identify any lapse in attendance (i.e 3 months) where f/u contact could help retain membership
- Evaluate cost-effectiveness of hosting membership social/networking event.....this has not been successful in recruiting new members, perhaps \$\$ spent better elsewhere
- Consider limited luncheon scholarships for non-members. (Join AFP and receive next luncheon free)
- Explore opportunity to take a web conference to distant areas and promote membership
- Look at all area non-profits and target new members.