



# **2018-2020 Strategic Plan**

Version Date 1/18/2018



# AFP Central Ohio Chapter Mission, Vision and Values

*(As a part of the 2018-2020 Strategic Planning process, the Board of Directors adopted new Mission, Vision and Values statements in 2017)*

## Vision of Central Ohio AFP

*(the long-term outcome, change we hope to impact/have in the future)*

**A thriving network of professionals who strengthen our nonprofit community by advancing donor-centered philanthropy.**

## Mission of Central Ohio AFP

*(why we do what we do)*

**To empower, support, and engage individuals and organizations who fundraise in our community.**

## Value Proposition

*(the direct output of business strategy, our brand promise)*

**AFP Central Ohio promises to create and support a confident community of**

- **professionals who have the knowledge they need,**
- **nonprofits who have the talent they need, and**
- **donors who have the impact they intend.**

## Values Statements

*(what we believe, the truths we hold most dear)*

**At AFP Central Ohio, we value:**

- **Missions** – our commitment to the causes we serve are deep and the inspiration for our work.
- **Central Ohio** – our practice is informed by AFP International yet our focus is our smart and open region.
- **Ethics and Trust** – we endorse the Donor Bill of Rights and the Code of Ethics, and encourage practices that promote relationship building over transactions.
- **Teaching and Learning** – our dynamic programs feature
  - **the field** (local and national speakers, coursework, credentials, conferences),
  - **each other** (fellowships, mentoring, networking), and
  - **philanthropists and funders** (community connections, recognition).
- **Diversity and Inclusion** – we welcome all, promote scholarships to reduce barriers, offer affinity groups to increase accessibility, and are intentional with our planning.

## Tag Line – What is AFP Central Ohio?

**It's personal. It's professional. It's smart.**



# 2018-2020 Strategic Plan

## Four Pillars/Index

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# Professional Development

(At all stages)

**Goals:**

1. Provide access to varied professional development opportunities that reflect the needs of our membership.

**Strategic Objectives:**

1. Differentiate programming to engage members at all levels (rethink “monthly lunches” formula)
2. Offer pathways for learning and growth.

**Captain:** VP of Education

Tactics				
Tactic	Timeline	Desired Outcome	Assigned To (lead)	Budget
<i>What we'll do.</i>	<i>Year - Quarter</i>	<i>Result or Metric.</i>	<i>Committee(s) and/or Individuals (Lead person &amp;</i>	<i>No impact or New</i>
<p><b>Monthly Topics with Branching Programs:</b>            Determine system to create a comprehensive annual professional development calendar including monthly educational topic/themes, covering both fundraising and professional skills development topics, expansion into relatable programming for chapter’s additional learning pathways including new programming (book clubs, early/late day by tracks, etc), linkage to affinity groups, chapter structure/projects, and adding projects by groups and project leaders</p>	<p>2018: launch branch programs, appoint project leads as necessary, evaluate &amp; adjust, plan for 2019;             2019: launch 2019 plan, etc.</p>	<p>Use theme months to test, have themes in place             Create new Education Chair Elect to go with Education Chair             Create new Project Leaders</p>	<p>Education Committee Chair</p>	<p>Potential costs/need for additional programming to need staff support</p>
<p><b>Track Programs:</b>            Examine professional skills needed for a pipeline of advancing fundraising professional positions, relate back to Tracks            Develop professional development opportunity tracks            1) Career years of experience and            2) Position and Project responsibility</p>	<p>2018: Develop program tracks for years of experience, appoint leads for tracks, ready 2019 plan and prepare for cost impacts;             2019: launch 2019 plan, develop program tracks for areas of responsibility, appoint leads for tracks, ready 2020 plan and prepare for cost impacts;             2020: launch 2020 plan</p>	<p>Two matrix formats will be completed to coordinate needs and track opportunities by level             Create new Project Leaders for each Task Matrix</p>	<p>Education VP</p>	<p>None, based in other efforts</p>

<p><b>National/Regional Speakers:</b> Explore opportunities, cost factors, collaborations and sponsorships to bring in national/regional expertise speakers - including for tracks and augmented trainings such as a series for senior professionals on leadership/career development topics.</p>	<p>2019: develop plan and prepare for cost impacts in 2020; 2020: launch 2020 plan, develop 2021 plan and prepare for cost impacts; 2021: launch 2021 plan</p>	<p>Develop projected costs and/or sponsorship opportunities. Draft track augmented aspects and test</p>	<p>Education Committee</p>	<p>New \$ for additional speakers - sponsorships and/or budget to cover augmented learning opportunities</p>
<p><b>Mentoring Enhancements:</b> Examine and modify Mentorship programming and expectations to meet membership needs at all levels, including aspects of career coaching and changing/sudden crisis mentoring needs</p>	<p>2018: develop and ready 2019 plan and prepare for cost impacts; 2019: launch 2019 plan, etc.</p>	<p>Draft of mentorship programming, revision, expand mentorship opportunities for all tracks</p>	<p>Mentorship Chair</p>	<p>New \$ for additional mentorship programming, events (example 2 annual Kick-off breakfasts)</p>
<p><b>Technology Integration:</b> Utilize current and new technology to enhance and expand educational programming in new ways</p>	<p>2020: explore possibilities within scope of 2021 budget, prepare for cost impacts; 2021: launch</p>	<p>Technology enhances educational opportunities</p>	<p>Technology Chair</p>	<p>Potential increase in AV costs for events</p>
<p><b>CFRE Review - Chapter Owned &amp; Operated Course:</b> Determine if chapter should offer own or a state CFRE Review and/or cover the educational topics and knowledge base associated with the CFRE (former 9 Review modules) to prepare for CFRE Refresher Course and CFRE exam</p>	<p>2019: assess chapter-developed course options, ROI, ready plan for 2020 2020: plan offering</p>	<p>Members will be able to get knowledge on all 9 module topics within two years</p>	<p>IHQ Courses Chair</p>	<p>New \$ investment in own CFRE review. New \$ additional speakers and materials</p>

# Value & Impact

(Identify our differentiating value & communicate it)

**Goal:** AFP demonstrates its differentiating value to members, nonprofits, donors and community stakeholders.

**Strategic Objectives:**

1. Internal: Clarify and communicate value proposition for member recruitment, engagement and retention.
2. External: Build meaningful relationships with nonprofits, stakeholders, media, etc. that increase AFP's impact in central Ohio.
3. Consider AFP's impact on: a) retention in profession and b) turnover within organizations.

**Captain:** VP of Marketing

Tactics				
Tactic	Timeline	Desired Outcome	Assigned To (lead)	Budget
<i>What we'll do.</i>	<i>Year - Quarter</i>	<i>Result or Metric.</i>	<i>Committee(s) and/or Individuals (Lead person &amp; support team.)</i>	<i>No impact or New</i>
<b>Member Testimonials:</b> Personal membership testimonials	2018: In person sharing at events  2019: develop Video testimonials and launch in multiple channels	Show value and impact that AFP has on individual members and share that with event attendees and then the greater community with video. Encourage joining and staying in AFP at all levels of your career. Be inclusive, showing all types of members.	Marketing Chair	\$\$\$
<b>Brand Standards &amp; Refreshed Website:</b> Consistent, concise and industry leading branding standards	2018: develop Templates and brand guidelines toolkit, launch  2019: develop new website  2020: launch new website	Create branding guidelines and templates for the entire chapter to utilize to create better brand recognition, raise the professionalism of the organization and be a leader among professional associations.	Communications VP	\$\$\$

<p><b>Education Handouts:</b> Branded education handouts</p>	<p>2018: develop template for branded education handouts. Launch at core group of events (well-attended, notable speakers).</p> <p>2019, 2020: Expand to all education events</p>	<p>Have branded education materials for members/guests to take home from a session to share with additional audiences (external, supervisors, boards, potential new members).</p>	<p>Communications VP/Education Committee Chair</p>	<p>\$\$\$</p>
<p><b>New Member Materials &amp; Concierge:</b> Concierge and new member materials for new members</p>	<p>2019: develop materials.</p> <p>2020: launch. Begin with printed welcome materials outlining benefits, move to personal concierge assigned to a new member for a period of time.</p>	<p>Create personal relationships with new members to walk them through the AFP experience showing them first-hand the value AFP has to members.</p>	<p>Membership VP/Marketing Chair</p>	<p>\$\$\$</p>
<p><b>Member Statistics/Impact:</b> Determine and collect relevant statistics on members</p>	<p>2018: Determine statistics that would be helpful for all audiences and determine collection method. Once complete, surveys can be sent to collect data, conduct survey, analyze results</p> <p>2019: Create media and outreach plan once data is collected</p> <p>2020: Share info</p>	<p>Collect statistics on members that can shed a positive light on being an AFP member.</p>	<p>Marketing VP</p>	<p>\$\$\$</p>

# Diversity and Inclusion

(Permeates everything we do)

**Goal:** The chapter is living out its D&I promise.

**Strategic Objectives:**

- 1. Identify who is missing.
- 2. Outreach: Attract a diverse membership.
- 3. Inclusion: Create a feeling of belonging.

**Captain:** VP of Membership

<i>What we'll do.</i>	<i>Year - Quarter</i>	<i>Result or Metric.</i>	<i>Committee(s) and/or Individuals (Lead person &amp; support team.)</i>	<i>No impact or New</i>
<b>Central Ohio Nonprofit Demographics:</b> Partner with The Columbus Foundation and United Way to research, survey and analyze the demographics of the Central Ohio Nonprofit Community.	2018: - Q1: Develop partnership with Columbus Foundation and United Way - Q2: Identify organizations to survey and develop survey - Q3: Administer survey - Q4: Analyze survey results	Identify how the Central Ohio AFP Membership reflects the greater Central Ohio nonprofit community. Identify the gaps in our membership to build a recruitment strategy.	Membership VP	Potential cost for survey analysis if unable to incorporate into volunteer hours or with partner organizations.
<b>Personal Invitations to Programs:</b> Individual outreach and invitations to educational programming by the Board of Directors to targeted professionals based upon identified gaps in membership.	2019 and 2020	Following the identification of our membership gaps, utilize personal relationships to encourage AFP membership and attendance at educational programs.	Membership Chair	Potential cost for luncheon scholarships for targeted guests.



<p><b>New Faces of Fundraising:</b> Develop and Implement a New Faces of Fundraising Pilot Program. (Sub-Tactic: Assess opportunities for sponsorship of pilot program.)</p>	<p>2018: Research/development/Sponsorship 2019: First Cohort, if applicable 2020: Evaluation</p>	<p>Establish an annual cohort program to encourage a more diverse membership, increase awareness of AFP, and create new sponsorship opportunities in the chapter.</p>	<p>D&amp;I Chair/Sponsorship</p>	<p>Cohort scholarships to cover membership, potential luncheon fees, events, etc. Research will need to be completed in 2018 to determine full scope of budget needs.</p>
<p><b>D&amp;I Liaisons to Committees:</b> Diversity and Inclusion Committee restructured as liaisons to all Board Committees to ensure all chapter operations are infused with diversity and inclusion efforts.</p>	<p>2018: - Q1: Restructure - Evaluate to determine if new structure works or needs adjusting for 2019</p>	<p>Integrate D&amp;I efforts into all aspects of chapter operations rather than silo the committee's work.</p>	<p>D&amp;I Chair/Sponsorship</p>	<p>N/A</p>
<p><b>Board D&amp;I Training</b> Diversity and Inclusion training for Board of Directors</p>	<p>All</p>	<p>In addition to D&amp;I liaisons, all Board members are trained to integrate D&amp;I practices in chapter work.</p>	<p>Immediate Past President</p>	<p>Complete in tandem with a chapter educational or D&amp;I event to utilize D&amp;I speaker budget.</p>
<p><b>Accommodate all Members and Guests:</b> Develop programming budget to include accommodations for all members and guests. (e.g., interpreter services)</p>	<p>2018: Budget inclusion</p>	<p>Ensure that all members and guests are welcome, comfortable and able to participate in all chapter events regardless of their abilities.</p>	<p>Treasurer</p>	<p>Approximate cost of \$250/4 hour event already in 2018 budget.</p>
<p><b>Retain Friends of Diversity Recognition</b></p>	<p>All</p>	<p>Continue our Friends of Diversity Status</p>	<p>Membership VP</p>	<p>N/A</p>

# Governance & Sustainability

(Alignment of human and financial resources.)

**Goals:**

1. The organization has the necessary funds to meet the operating obligations of the organization. (Treasurer)
2. Determine the best chapter staffing model. (President-Elect)
3. Determine the best board governance structure to fulfill mission and goals. (Past President)

**Strategic Objectives:**

1. Address spending policy and address revenue generation opportunities.
2. Examine chapter staffing model and succession plan.
3. Examine board size and chapter leadership.

**Captain:** President

Tactics				
Tactic	Timeline	Desired Outcome	Assigned To (lead)	Budget
<i>What we'll do.</i>	<i>Year - Quarter</i>	<i>Result or Metric.</i>	<i>Committee(s) and/or Individuals (Lead person &amp; support team.)</i>	<i>No impact or New</i>
<b>IHQ Relationship/Benefits:</b> Review what the chapter is receiving from IHQ	2018	knowledge if better use of these resources is possible	Immediate Past President	N/A
<b>Local Fee Structure:</b> Assess fees/costs to members at the local level (i.e., education programs, local membership fee, bundled options)	2019: evaluate and determine next steps  2020: launch potential new fee structure	more fair and equitable fee structure(s) for members and chapter	Treasurer	N/A

<p><b>ROI of Key Programs/Activities:</b> Evaluate ROI of expense items and income streams, i.e., Job Bank, NPD</p>	<p>2018 (with the exception of additional staff expense)</p>	<p>better committee awareness of intrinsic value of expense items and how to pay for them, more right-sized committee budgets. Better knowledge and understanding of importance of income streams and how to maximize them.</p>	<p>Treasurer</p>	<p>potential for future impact</p>
<p><b>Sponsorship &amp; Partnership Opps:</b> Consider sponsorships and/or partnerships within the community at micro- and macro-level, expand connections and programs with other partnering organizations, local programming (example Seeds for Growth) and learning accreditations to offer additional educational opportunities and professional certifications</p>	<p>2018: Identify sponsor/partner opportunities  2020: launch opportunities</p>	<p>income potential of meaningful outside sources is explored; stronger influence, engagement and connection to other ed opportunities</p>	<p>Sponsorship Chair and Education Chair Elect</p>	<p>New \$ to invest in partnerships and possible sponsorships for member participation, potential for future additional income</p>
<p><b>Internal and External Assessment: Staffing and Board Structure:</b> Benchmark with like-sized chapters on their chapter staffing model and board structure</p>	<p>2018</p>	<p>Idea-gathering and assessment of chapter's board makeup. Better understanding of expectations, hours, and compensation of the chapter administrator.</p>	<p>President Elect</p>	<p>N/A</p>
<p><b>Internal Assessment: Committee and Additional Staffing Needs:</b> Conduct an internal assessment of staff support and board structure (interviews, focus groups, surveys with committee members/chairs)</p>	<p>2019</p>	<p>Chapter moves toward most effective structural makeup of board and committees for efficient programs, services, and use of volunteer time. Board and committees are right-sized, engaged, and more members are involved and participating</p>	<p>President Elect</p>	<p>N/A</p>
<p><b>ROI of Additional Staffing Costs and Models:</b> Gauge cost vs. ROI of adding staff</p>	<p>2020</p>	<p>thoughtful use of resources for adding additional staff</p>	<p>President Elect</p>	<p>potential future impact on expenses</p>

2018-2020 AFP Central Ohio Strategic Plan Timeline

PILLAR	Tactic	Lead	Budget Impact 2018 Revenues / (Expenses)	Budget Impact 2019 Revenues / (Expenses)	Budget Impact 2020 Revenues / (Expenses)	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Jan-19	Feb-19	Mar-19	Apr-19	May-19	Jun-19	Jul-19	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20
						Professional Development	Monthly Topics with Branching Programs	Education Committee Chair		Add: additional staff support?		LAUNCH: monthly topics/branch programs APPOINT: Project leads as needed			EVALUATE & ADJUST: monthly topics/branch programs model as needed			PLAN READY: for 2019 monthly topics/branch programs			LAUNCH: 2019 monthly topics/branch programs			EVALUATE & ADJUST: monthly topics/branch programs model			PLAN READY: for 2020 monthly topics/branch programs			LAUNCH: 2020 monthly topics/branch programs			EVALUATE & ADJUST: monthly topics/branch programs model			PLAN READY: for 2021 monthly topics/branch programs					
Track Programs	Education VP		Add: track program costs?		DEVELOP: track programs for yrs of experience APPOINT: project lead for track			PLAN READY: for 2019 yrs of of experience track programs and cost impacts			LAUNCH: 2019 track program from yrs of experience DEVELOP: track programs for areas of responsibility APPOINT: project lead for track			EVAL & ADJUST: yrs of experience track program PLAN READY: for 2020 yrs areas of responsibility track programs and cost impacts			LAUNCH: 2020 track program from areas of responsibility DEVELOP: track programs for areas of responsibility APPOINT: project lead for track			EVAL & ADJUST: areas of responsibility track program																					
National/Regional Speakers	Education Committee		Add: speaker costs?		DEVELOP: explore outside speaker opportunities within scope of 2019 budget and plan for 2020						PLAN READY: for 2020 outside speakers and cost impacts			DEVELOP: plan for outside speakers for 2021			PLAN READY: for 2021 outside speakers and cost impacts																								
Mentoring Enhancements	Mentoring Chair		Add: mentoring enhancement costs?		DEVELOP: explore mentoring enhancements			PLAN READY: for 2019 mentoring enhancements and cost impacts			LAUNCH: mentoring enhancements			EVALUATE & ADJUST: mentoring enhancements			PLAN READY: for 2020 mentoring program																								
Technology Integration	Technology Chair		Add: tech app costs?		DEVELOP: explore possibilities within scope of 2019 budget and plan for 2020						PLAN READY: for 2020 tech apps and cost impacts																														
CFRE Review - Chapter Owned & Operated Course	IHQ/Education Course Chair			CFRE Decision TBD	ASSESS: chapter-developed CFRE options, ROI			PLAN READY: for 2019 summer CFRE offering			LAUNCH: CFRE offering 2019			DECIDE: next steps for CFRE programming and budget impacts																											
Value & Impact	Member Testimonials	Marketing Chair		Add: Video development costs?		LAUNCH: sharing testimonials in person at events.						DEVELOP: video testimonials for sharing			LAUNCH: video testimonials integrated in multiple channels																										
	Brand Standards & Refreshed Website	Communications VP		Add: Website development costs?	Add: Website development costs?	DEVELOP: new templates and brand guidelines toolkit.			LAUNCH: new templates and brand toolkit.			DEVELOP: New Website			LAUNCH: New website																										
	Education Handouts	Communications VP/Education Committee Chair	Add: Design/print costs?			DEVELOP: template for branded education handouts at programs.			LAUNCH: branded education handouts at select programs.			EXPAND: branded education handouts to be available for all education programs.																													
	New Member Materials & Concierge	Membership VP/Marketing Chair		Add: Design/print costs?		DEVELOP: new member welcome/benefits materials consistent with new brand guidelines and highlighting results of member benefits/impact survey.						LAUNCH: new member materials and concierge assignments to new members.																													
	Member Statistics/Impact	Marketing VP	In-house or outsource?			DEVELOP: member survey goals (positive benefits/impact of AFP membership) and questions			SURVEY: member benefits/impact survey			ANALYZE: member survey results			LAUNCH: communicate survey findings that demonstrate positive benefits/impact of AFP membership; weave into multiple channels																										

2018-2020 AFP Central Ohio Strategic Plan Timeline

PILLAR	Tactic	Lead	Budget Impact 2018 Revenues / (Expenses)	Budget Impact 2019 Revenues / (Expenses)	Budget Impact 2020 Revenues / (Expenses)	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Jan-19	Feb-19	Mar-19	Apr-19	May-19	Jun-19	Jul-19	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20												
Diversity & Inclusion	Central Ohio Nonprofit Demographics	Membership VP	In-house or outsource?			PARTNER: Columbus Foundation & United Way				IDENTIFY: survey group & questions				SURVEY: nonprofit professionals survey to identify gaps in membership				ANALYZE: nonprofit survey results and next steps																																			
	Personal Invitations to Programs	Membership Chair		Add: Cost of comp programs for invited guests (for strategic guest requests)		LAUNCH: personal invitations to nonprofits/professionals to close the nonprofit demographic gap uncovered by survey																																															
	New Faces of Fundraising	Diversity & Inclusion Chair/Sponsorship		Program Funding to Offset Expenses		DEVELOP: research, develop program model, identify funding prospects												LAUNCH: New Faces, pilot year (if applicable based on research and sponsorship opportunities)						EVALUATE and ADJUST: New Faces model as appropriate																													
	D&I Liaisons to Committees	Diversity & Inclusion Chair				RESTRUCTURE: assign D&I liaisons to various committees				EVALUATE and ADJUST: D&I liaison model as needed																																											
	Board D&I Training	Immediate Past President	Leverage existing D&I budget			PLAN and LAUNCH: Board D&I training												PLAN and LAUNCH: Board D&I training refresher						PLAN and LAUNCH: Board D&I training refresher																													
	Accommodate all Members and Guests	Treasurer		\$240/4-hour event in D&I budget		LAUNCH: accommodations to increase accessibility (e.g. interpreter services), when possible																																															
	Friends of Diversity Designation	Membership VP				MAINTAIN: Friends of Diversity designation																																															
Governance & Sustainability	IHQ Relationship/Benefits	Immediate Past President				EVALUATE: IHQ relationship and available IHQ resources and best utilization for chapter																																															
	Local Fee Structures	Treasurer																ASSESS: local fee structure and consider equitable pricing models for chapter and members;						DECIDE: next steps and budget impacts as needed						LAUNCH: New fee structure based on determination																							
	ROI of Key Programs/Activities	Treasurer		ROI Decisions TBD	ROI Decisions TBD	ASSESS: ROI of key programs and activities and budget model						DECIDE: program/activity budgets as appropriate																																									
	Sponsorship & Partnership Opps	Sponsorship Chair & Education Chair Elect		New Sponsorship Revenue TBD	New Sponsorship Revenue TBD	EVALUATE: sponsorship and partnership opportunities that increase revenue or reduce costs												LAUNCH: identify and approach prospective funders or partners																																			
	Internal and External Assessment: Staffing and Board Structure	Pres-Elect				BENCHMARK: gather ideas of successful board and staffing models among like-sized chapters				ASSESS: Internal constituents				RECOMMEND: 2019 Board Structure to Exec Committee/Board				ANALYZE: Staff Benchmarks				RECOMMEND: Staff Model Analysis																															
	Internal Assessment - Committee and Additional Staffing Needs	Pres-Elect				EVALUATE: SWOT analysis and skill set required of current committee structure, size and staffing support												RECOMMEND: 2020 additional staffing				ANALYZE: Cmte Structures				RECOMMEND: 2020 Cmte Structure to Exec Committee/Board																											
	ROI of Additional Staffing Costs and Models	Pres-Elect			New Expenses TBD													EVAL: Staffing and structures ROI of any changes made																																			
<b>Timeline Color Coding:</b>																																																					
Yellow = internal work; research and development			Green = external activity; milestone decisions						Gray = no activity planned						Red Font = Behind schedule/Needs attention																																						