



Strategic Plan

2011 - 2013

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I. Introduction

Now in its 25th year of service, AFP West Michigan is a strong and well-known organization among nonprofit professionals throughout the region. Consistent membership, stable budgeting, a committed board and a thriving nonprofit community all contribute to that reputation. What makes AFP West Michigan even stronger is the willingness of organization leaders to evaluate the chapter's strengths and set a new strategic direction for the future.

The Association of Fundraising Professionals – West Michigan is a member of the Association of Fundraising Professionals (AFP), which consists of chapters in the United States, Canada, Mexico and Hong Kong. AFP has more than 30,000 fundraising professional members throughout its 213 chapters. AFP fulfills its mission internationally, nationally and on a local level through education, training, mentoring, research, credentialing and advocacy.

The AFP West Michigan chapter is comprised of the entire western half of the state of Michigan. This large geographic region is home to a significant number of nonprofit professional fundraisers representing education, health care, health and human service, arts and faith-based organizations.

This strategic planning process was started in June, 2010. The AFP West Michigan Board of Directors set the course with the planning team, consisting of board members Brett Holleman, Sara DeMann and Anna Goddard. Philanthropia Partners was contracted to guide the planning process, led by Deb Minton, former AFP West Michigan president and board member. The planning group set the focus on four important aspects of AFP West Michigan's continued success: Membership, Education, Revenue and Volunteer Development.

This plan includes new mission and vision statements, newly-established core values, and supporting data from the planning process that included an online survey. Strategic goals were defined with a general timeline and action plan. The plan was officially adopted by the AFP West Michigan Board of Directors on December 10, 2010 with implementation to begin in 2011.

II. Mission/Vision/Core Values

Mission

The Association of Fundraising Professionals – West Michigan Chapter positively impacts our philanthropic community by connecting and educating fundraising professionals and those seeking fundraising expertise.

Vision

West Michigan has a vibrant, effective and connected fundraising community that inspires transformational giving.

Core Values

The Association of Fundraising Professionals – West Michigan Chapter believes in...

1. Responsiveness - Focusing on high quality service that is provided in a timely and thoughtful manner, open to new ideas and exceeding the expectations of our members, stakeholders and communities.
2. Inclusiveness - Embracing diversity in the fundraising community with a commitment to understanding and addressing the unique needs of all its members and ensuring the benefits we provide are accessible and affordable.
3. Collaboration - Recognizing that we can accomplish our purpose only with the strong support and partnership of other individuals and groups who share our vision.
4. Integrity - Conducting business according to the highest ethical principles and serving as trustworthy stewards of our resources.
5. Celebration - Openly and joyfully celebrating philanthropic actions, individuals and organizations that positively transform our communities.

III. The Planning Process

The AFP West Michigan Board of Directors embarked on this strategic planning process in June of 2010. The chapter had experienced consistent membership numbers, a relatively strong financial history and steady attendance at chapter events.

West Michigan is home to a vibrant nonprofit community and there are several organizations that serve nonprofit professionals locally. The AFP West Michigan Board recognizes the need for a strategic plan to serve as a guide so the chapter can remain not only relevant with fundraising professionals, but also the local leader for nonprofit networking and educational opportunities.

This strategic planning process took a close examination of AFP West Michigan in four key areas: Membership, Education, Revenue and Volunteer (Board) Development. To effectively plan for the future in these core areas, the planning group took the following course of action:

1. Current Chapter Data

The planning committee took a close look at membership, attendance, education content, National Philanthropy Day participation, financial performance and board involvement. This information helped the group benchmark progress to date as well as identify areas for growth.

2. Online Survey

The committee developed, delivered and evaluated a detailed survey to glean specific data and opinions from current members. The committee reviewed other AFP chapter surveys, including Louisiana (Greater New Orleans Chapter), Missouri (Ozarks Region Chapter), Pennsylvania (Allegheny Mountains Chapter) and Maryland (AFP Chapter). The AFP West Michigan survey was customized for this region and specific chapter issues. The survey was e-mailed to the current roster of 200 members.

The survey was a success. In total, 62 people responded for a solid return rate of 31%. This strong response allowed the planning committee to move forward, setting goals in direct response to feedback. The online survey format allowed members to complete the survey in less than 15 minutes and provide both multiple choice answers as well as “fill in the blank” feedback. The survey is attached as Appendix 1.

The Planning Process, cont.

3. Thought-Leader Interviews

As AFP West Michigan has a strong presence in the region, the planning committee sought the opinion and advice of local nonprofit thought leaders throughout West Michigan. Philanthropia Partners interviewed a small group of seasoned professionals to gain perspective. This group was asked, on an individual basis, about their perception of AFP West Michigan as well as advice for the chapter's growth and future planning. The following people generously donated their time and insight to this planning process:

- Kathy Agard, Ed.D., Executive Director, Johnson Center for Philanthropy
- Leann Arkema, President/CEO, Gilda's Club Grand Rapids
- Juan Olivarez, Ph.D., President/CEO, Kalamazoo Community Foundation
- Sally VanderPloeg, Director of Planned & Major gifts, Calvin College and President, Western Michigan Planned Giving Group
- Vicki Weaver, President, Spectrum Health Foundation
- Marilyn Zack, Vice President of Development, Grand Rapids Community Foundation

4. Goal Setting through the year 2013

The board met and analyzed all information on October 29, 2010. During this meeting, concrete goals were defined for each focus area, as well as a timeline for achieving those goals. The PowerPoint slides presented during this meeting are attached as Appendix 2.

IV. Chapter Goal Setting

I. MEMBERSHIP

Goal: Increase AFP membership to 250 members with an 80% annual retention rate

Action Steps for 2011

- Enhance/expand membership committee to reflect the geographic and demographic population served
- Organize member welcome process including formal orientation packet for members new to AFP and the chapter
- Create “lapsing” member follow up program

Action Steps for 2012

- Conduct annual AFP member satisfaction survey to assess membership benefits, program effectiveness and interest in volunteering
- Identify and develop new member feeder systems including young professionals groups, affinity groups and fundraising academia
- Develop and implement a member mentorship program including personal board member engagement

Action Steps for 2013

- Conduct annual AFP member satisfaction survey to assess membership benefits, program effectiveness and interest in volunteering

Responsibility: Membership co-chairs and committee

Chapter Goal Setting

II. EDUCATION

Goal: Host six education sessions annually with a 75% satisfaction rate from attendees

Action Steps for 2011

- Hire John Greenhoe to facilitate education sessions

Action Steps (all to be conducted each year - 2011, 2012 and 2013)

- Establish active committee of at least three members with at least one member from the board
- Initiate meetings with three organizations annually (i.e. Johnson Center, OnePLACE, West Michigan Planned Giving Group, West Michigan Public Relations Society of America) to coordinate educational programming
- Create a comprehensive education plan for each calendar year prior to its beginning. Plan will include member and community interests and align with CFRE credentialing. Program evaluation will be reassessed and updated as necessary
- Create incentives to encourage member participation in educational programming, striving for 80% of the members to attend one program annually
- Recruit and engage local fundraising professionals in the facilitation of educational programs

Responsibility: Education Chair and committee

Chapter Goal Setting

III. REVENUE

Goal: Achieve an operating margin of 20% annually

Action Steps for 2011

- Establish finance committee; determine purpose, function and individual roles of committee members
- Determine purpose and use of Venture Fund; explore need for growing a dedicated, interest-bearing fund

Action Step for 2012

- Identify and develop two (2) new revenue streams by 2013 (i.e. signature sponsorships)

Responsibility: Treasurer and finance committee

Chapter Goal Setting

IV. VOLUNTEER (BOARD) DEVELOPMENT

Goal: Develop an 18-member board of directors, representative of all the various chapter activities and constituencies, characterized by individual involvement and a commitment to active participation in AFP-WM service.

Action Steps for 2011

- Transition Nominations Committee to Board Development Committee
- Develop thorough job descriptions for each committee including member expectations and committee responsibilities
- Assist the respective chairs to recruit full Education, Finance and Membership committees
- Collaboratively promote non-board volunteer opportunities amongst the chapter membership

Action Steps for 2012

- Formalize new board member orientation process
- Review and revise board committee structure
- Establish committee member training program and leadership succession plan
- Collaboratively promote non-board volunteer opportunities amongst the chapter membership

Action Steps for 2013

- Convene 2014-2016 Strategic Planning Team
- Collaboratively promote non-board volunteer opportunities amongst the chapter membership

Responsibility: Nominations Chair and committee

V. Developing the Operational Plan; Critical Issues and Strategies

The 2011-2013 AFP West Michigan strategic plan is realistic and achievable. The key to its success will be significant commitment throughout 2011 to shore up the volunteer committees and Board of Directors. New leadership will need to be drawn from the chapter membership at large, and committee assignments and workloads will need to be dispersed more evenly for greatest success.

The Board should also review the budget to determine if additional resources are needed or should be redirected to support the plan.

The Board of Directors is called to review the plan quarterly in March, June, September and December, and the Board will review and/or revise the plan in January.

A new strategic planning process should commence in June of 2013.

VI. Acknowledgements

This collaboration would not have been possible without the time commitment, vision and dedication of the AFP West Michigan Board of Directors and members who participated in this strategic planning process. The planning team, consisting of board members Brett Holloman, Sara DeMann and Anna Goddard worked together with Philanthropia Partners, local thought-leaders and present AFP West Michigan members. Thank you to the entire board of directors, including:

Matt Bates, Education Chair

Rebecca Boase, Director

Sara DeMann, Ethics Chair

Janice Fonger, Director

Kathy Gallagher, Secretary & Membership Co-Chair

Anna Goddard, President-Elect, Communications Chair & NPD Chair

Deb Hekman, Membership Co-Chair

Brett Holleman, CFRE, President

Keith Hopkins, CFRE, EMC Chair, Certification Chair & Past President

Keith Meyering, CFRE, Immediate Past President & Nominations Chair

Deb O'Donnell, Chapter Administrator

Mark Petz, Director

Johngerlyn "Jonse" Young, Diversity Chair

Heather Zeoli, Treasurer