

**ASSOCIATION OF FUNDRAISING PROFESSIONALS GREATER CLEVELAND CHAPTER**

**STRATEGIC PLAN**

*Goal 1: AFGCC will optimize chapter operations*

*Board Assignment: President*

**PRESIDENT**

OBJECTIVES	STRATEGIES	ACTION STEPS/OUTCOMES
Objective 1: Develop review process with management company.	Review contract annually to discuss changes and additions. Hold quarterly meetings beginning January 1, 2009 to review progress.	Ongoing  Review annually
Objective 2: Create process to encourage active participation of board members.	Board members complete annual self-evaluation.  Hold annual board orientation (signing commitment form, expectations) for new members Develop plan for succession at all levels of organization.  Ensure every board member serves on a committee Ensure 100% EMC participation Establish consensus agenda and implement this at board meetings	Ongoing  Review annually  Review regularly  Ongoing Ongoing Done
Objective 3: Develop standardized policies and	Review AFP-I samples Research AFP-GC minutes (past three years) for previous policy discussions Look at the 16 items we removed from bylaws to see if they need to become procedures Draft new/edit existing policies Develop on-line document sharing system for policies, forms, procedures, operating plans, job descriptions, etc.  Approve new/revised policies	Done Done  In progress  Ongoing System established; post by June 2010  June 2010 retreat
Objective 4: Meet Accord and Ten-Star requirements annually	Review process of each – particularly Ten-Star – with board annually to determine priorities and focus points Review required and optional items annually	Ongoing  Review annually
Objective 5: Monitor Strategic Plan	Introduce process to review at each board meeting Process fully established and working well	Done Last quarter 2010
Objective 6: Build and cultivate relationships with former AFP Board members.	Communicate with Former Board on semi-regular basis via email updates specifically for former Board.  Plan annual event for former Board to maintain their ties to AFP.	

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**Goal 2: AFGCC will continue to be fiscally responsible and optimize resources for chapter benefit  
Board Assignment: Secretary/Treasurer, Vice President, Resource Development, and Chair, NPD**

**Secretary/Treasurer**

<b>OBJECTIVES</b>	<b>STRATEGIES</b>	<b>ACTION STEPS/OUTCOMES</b>
Objective 1: Secure the long term financial stability of the chapter	<p>Create the Finance Committee by December 2009.</p> <p>Explore the return on investment for the cost of membership; quantify the value by June 2010. Formalize investment policy by June 2010. Benchmark chapters ( AFP Toledo and Indianapolis) regarding their arrangements for scholarship funds ; consider donor-advised fund. explore alternative development sources by December 2010.</p>	<p>Finance committee composed of Treasurer, president, vice president of resource development, president-elect and one at-large board member (consider adding a CPA?)</p> <p>Tabled until economy turns around</p>
Objective 2: Ensure transparency of financial status of chapter to all chapter members	Communicate financial status & decisions annually through website by December 2009.	Continue to improve

**Vice President, Resource Development & Chair, NPD**

<b>OBJECTIVES</b>	<b>STRATEGIES</b>	<b>ACTION STEPS/OUTCOMES</b>
Objective 1: Secure the long term financial stability of the chapter	<p>Send NPD invitations to Youngstown, Pittsburgh, and Akron chapters</p> <p>Solicit NPD sponsorships from local and national vendors</p> <p>Seek sponsorships for individual professional development programs</p> <p>Analyze support necessary to effectively operate NPD</p>	<p>annually</p> <p>annually</p> <p>annually</p> <p>2010</p>

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**Goal 3: AFGCC will increase its presence in and benefit to Northeast Ohio by communicating with a broad representation of individuals, groups, and organizations within the fundraising profession.**

**Vice President, External Relations**

OBJECTIVES	STRATEGIES	ACTION STEPS/OUTCOMES
Objective 1: Structure	Consider changing the name of the committee and title of Vice President from External Affairs to Communications.	Tabled
Objective 2: Internal/external communications	<p>explore feasibility of replacing electronic newsletter with a 2.0 solution like a blog, Twitter feed, Facebook account, Ning group, etc.</p> <p>Maintain the current website with an emphasis on its role in e-commerce and utilities, like the member roster, links to AFP-I, and other guiding documents.</p>	<p>Make a recommendation to the board by March 31, 2010. Have a new solution in place by June 30, 2010.</p> <p>Continue to update the website regularly.</p>
Objective 3: Inclusion	<p>Apply for Friends of Diversity Chapter Designation by deadline: February 1, 2010.</p> <p>through constant reminders sent by the board-appointed inclusion point person, we will ensure that the board-adopted definition of inclusion comes to life and informs all decisions and activities regarding member recruitment and member spotlights, program presenters and content, communication activities, and recruitment for committee and board service.</p>	<p>Tabled to 2011</p> <p>Ongoing</p>
Objective 4: Outreach (With membership)	<p>launch the internship program by December 31, 2009 and monitor closely during a 12-month pilot period. Provide written evaluation by December 31, 2010.</p> <p>Re-focus and evaluate mentoring program</p>	Tabled

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**Goal 4: AFGCC will increase growth, retention and involvement of members**

**Board Assignment: Vice President, Membership**

**Vice President, Membership**

OBJECTIVES	STRATEGIES	ACTION STEPS/OUTCOMES
Objective 1: Membership growth	find out what members want through a survey and what the obstacles to membership are. recruit a larger committee recruit a Scholarship Committee co-chair Monthly calls to new and lapsing members; contact from membership chair and president to newly joined members. Keep data to track what activities are being completed (calls, etc.) and results Bring attention to new and non-members at events to encourage membership and collegiality. Offer free membership raffle drawing at membership recruitment and mixer events. more prominent promotion of membership benefits, perhaps through testimonials (live or printed) from current members. annual member appreciation and/or volunteer recognition event. work with External Relations to develop marketing plan for scholarships available to new members. respond to economy by increasing amount of each scholarship. see external relations goals for mentoring and internships create annual plan to include feedback to use goals. Develop a value statement by June 2010.	Get resources from AFP International for survey; complete by December 2009.  in progress  ongoing  ongoing  ongoing  tabled due to budget constraints  in progress
Objective 2: Identify and facilitate activities that ensure cultural and social diversity in our membership and leadership	use survey to determine whether membership is relevant to them	complete by June 2010
Objective 3: Identify and recruit future professionals in the fundraising profession	Develop AFP Collegiate Chapters at Baldwin Wallace, CWRU Collaborate with colleges and employers with education and internship opportunities (in conjunction with External Relations)	tabled; looking for new leaders  tabled; looking for new leaders

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**Goal 5: AFGCC will develop more skilled, knowledgeable and ethical fundraising professionals  
Board Assignment: Vice President, Professional Development**

**Vice President, Professional Development**

OBJECTIVES	STRATEGIES	ACTION STEPS/OUTCOMES
Objective 1: Enhance the value of education and training across the spectrum of members	<p>Ensure all programs qualify for and are publicized as offering CFRE credit – Operational Standard</p> <p>Bring attention to new and non-members at events to encourage membership and collegiality.</p> <p>Host annual ethics program</p> <p>Continue to offer Essentials of Fundraising Series each spring &amp; fall.</p> <p>Promote the educational component of CFRE, value of accreditation and benefit of attending programs that qualify for CFRE.</p> <p>Implement annual survey of membership regarding topics of interest for programming</p>	<p>ongoing</p> <p>ongoing</p> <p>ongoing ongoing; awaiting curriculum revision</p> <p>joint with membership</p>
Objective 2: Improve accessibility of program schedule in AFP-GC communications.	<p>Print fliers or bookmarks of upcoming events and distribute at Roundtables, luncheons, meetings.</p> <p>List upcoming events on website, registration promoted on website and through email blasts.</p>	<p>ongoing</p> <p>ongoing</p>
Objective 3: Promote concept of diversity throughout program schedule and speakers.	<p>Work with Diversity Committee to recruit program speakers from diverse backgrounds</p> <p>Incorporate ideas of inclusion and diversity within all programs through the year</p> <p>Plan at least one program each year with focus on inclusion and diversity as main topic</p>	<p>ongoing</p> <p>ongoing</p> <p>ongoing</p>
Objective 4: Engage senior fundraising executives with education and training	<p>Define criteria to identify target market for senior fundraisers</p> <p>Recruit senior fundraisers to teach the Essentials course.</p> <p>Plan spring and fall program marketed and targeted to senior fundraisers</p> <p>Recruit former Board member to chair committee to implement programming specific to Senior Fundraisers</p>	<p>Central Ohio (Columbus chapter): hosts “advanced professionals coffee” three times per year. For one hour prior to lunch meeting, the luncheon speaker meets privately with members who have 5+ years of experience (no additional cost, but members must reg</p> <p>ongoing</p> <p>ongoing</p> <p>ongoing</p>

Objective 5: Coordinate educational programs with regional and professional partners.	Continue annual NOPGC and North Central OH AFP programming partnership	ongoing
Objective 6: Promote CFRE accreditation through program activities.	<p>Hold annual CFRE informational session prior to or after luncheon programs</p> <p>Ensure that all programs qualify for CFRE credit through application to AFP National.</p> <p>Survey members to determine interest in CFRE review course.</p>	Baton Rouge chapter has 45 minute session prior to lunch meeting for new members and new to fundraising members to meet with 2 to 3 advanced professionals from the chapter to discuss specific topics. These are advertised in advance; example of topic—"what is CFRE and why should I care?"
Objective 7: Support participation and enhancement of NPD event and sponsors	<p>Where possible, use NPD vendors as program presenters</p> <p>Always promote NPD through announcements and fliers at programs throughout the year</p>	<p>ongoing</p> <p>ongoing</p>