

**ASSOCIATION OF FUNDRAISING PROFESSIONALS GREATER CLEVELAND CHAPTER  
STRATEGIC PLAN 2011-2012**

***Goal 1: AFPGCC will optimize chapter operations and financial resources***

**PRESIDENT**

| OBJECTIVES   | STRATEGIES  | ACTION STEPS/OUTCOMES   |
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| Objective 1: Develop a new agreement with the management company that bills a flat monthly rate vs. a per hour basis | <p>Develop a contract and then review it annually after the first year discuss changes and additions.</p> <p>Hold quarterly meetings beginning March, 2011to review progress.</p>   | <p>Contract finalized and signed January, 2011</p> <p>Quarterly for 2011 and then determine frequency for 2012 and beyond</p>             |
| Objective 2: Continue the process to encourage active participation of board members.                                | <p>Board members complete annual self-evaluation.</p> <p>Hold annual board orientation (signing commitment form, expectations) for new and continuing members</p> <p>Develop plan for succession at all levels of organization.</p> <p>Ensure every board member serves on a committee</p> <p>Ensure 100% EMC participation</p> <p>Continue to use the consensus agenda at board meetings</p> | <p>Annually</p> <p>Annually</p> <p>Review regularly</p> <p>Ongoing</p> <p>Ongoing</p>   |
| Objective 3: Implement and monitor the policies and procedures approved by the board                                 | <p>Approve new/revised policies as needed.</p> <p>Review AFP-I samples and update AFGC policies to be compatible with AFP-I</p> <p>Develop on-line document sharing system for policies, forms, procedures, operating plans, job descriptions, etc.</p>   | <p>Ongoing</p> <p>Ongoing</p> <p>System established for the Program Committee, expand to all Board and Chapter functions by June 2012</p> |
| Objective 4: Meet Accord and Ten-Star requirements annually  | <p>Review process of each – particularly Ten-Star – with board annually to determine priorities and focus points</p> <p>Review required and optional items annually</p>   | <p>Ongoing</p> <p>Review annually</p>   |
| Objective 5: Update and Monitor Strategic Plan   | <p>Review at each board meeting</p> <p>Review and revise at Feb. 2011 Board Retreat</p>   | <p>Ongoing</p> <p>Present retreat results at March 2011 Board Meeting and finalize by May 2011</p>  |

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| Objective 6: Establish a AFPGC Past Presidents Advisory Group   | <p>Create an endowment fund for scholarships and bring recommendation to AFPGC board for approval of fund creation.</p> <p>Develop programming for advanced professionals</p> <p>Continue to select the Fundraising Executive of the year</p> | <p>Appointed Board liaison to facilitate recruitment of the members and organize the initial meetings, January 2011</p> <p>Ongoing</p> |
| Objective 7 Establish relationships with other regional AFP Chapter and similar Fundraising Organizations | Work with VP of Professional Development and committee to explore the option of joint programs  | Follow up with the Columbus Chapter about hosting a State wide Public Policy day at the Capitol.                                       |

**Secretary/Treasurer**

| OBJECTIVES   | STRATEGIES   | ACTION STEPS/OUTCOMES  |
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| Objective 1: Secure the long term financial stability of the chapter                   | <p>Maintain the Finance Committee.</p> <p>Monitor investment policy and results from same</p> <p>Create a new financial report format that creates clearer explanation of results for monthly and year to date</p> <p>Develop an annual budgeting process that engages VP's and Committee Chairs enhancing their by-in for achieving projected results</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>Ongoing</p> <p>By June of 2011</p> <p>By March of 2011</p> |
| Objective 2: Ensure transparency of financial status of chapter to all chapter members | Communicate financial status & decisions annually through website by December 2011.  | Continue to improve  |

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

| OBJECTIVES   | STRATEGIES  | ACTION STEPS/OUTCOMES   |
|--|---|---|
| Objective 1: Secure the long term financial stability of the chapter | <p>Seek sponsorships for individual professional development programs</p> <p>Solicit NPD sponsorships from local and national vendors</p> <p>Explore alternative, and more cost effective locations for hosting the NPD event</p> <p>Implement a Local component for the EMC effort</p> <p>Research special/social event for members that generates funds to support chapter scholarships</p> | <p>Package has been approved. Secure sponsorships by June 2011</p> <p>annually</p> <p>Fall 2011</p> <p>Recruit Chair by March 2011</p> <p>Summer 2011</p> |

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2011 -2102 STRATEGIC PLAN**

**Goal 2: AFGCC will increase its presence in Northeast Ohio by communicating with targeted audiences related to the fundraising profession.**

**Vice President, Communications**

| OBJECTIVES                           | STRATEGIES   | ACTION STEPS/OUTCOMES   |
|--------------------------------------|--|---|
| Objective 1: Structure               | Changed the name of committee and Vice President to Communications   | Present for Board approval of name change at March 2011 Board meeting   |
| Objective 2: Internal Communications | Apply Google analytics to our website and e-newsletters; Incorporate Google words so that fundraising leads inquiries to AFGCC site<br><br>Create an editorial calendar for relevant events/topics<br>Create a professional LinkedIn page for AFGCC<br>Spotlight on new members or member organization in e-communications<br>Maintain the current website with an emphasis on its role in e-commerce and utilities, linking to AFP-I's LinkedIn and Facebook pages. | In Progress<br><br>New<br><br>Ongoing   |
| Objective 3: External Communications | Increase media exposure<br><br>Increase AFGCC awareness by educating and engaging Northeast Ohio non-profits   | Further develop relationship with Plain Dealer reporter Margaret Bernstein<br>Compelling cause - 1x/yr find a need that was addressed by a local hero<br>Develop 1-2 new media relationships<br>Create partner program with medical/higher ed/arts organizations<br>Create an AFP fact sheet<br>Conduct joint training for CEOs with BVU/Foundation Center; identify target groups and shared programming opportunities |
| Objective 4: Inclusion               | Apply for Friends of Diversity Chapter Designation by deadline: January 31, 2012.<br>Create a Diversity Plan and update all communications with inclusive language<br><br>Host a Diversity/Inclusive event in 2011<br>Ensure that inclusion comes to life in member recruitment, member spotlights, program presenters and content, communications activities, and recruitment for committee and board service.  | In Progress<br><br>In Progress<br><br>Scheduled for October 5, 2011<br>Ongoing  |
| Objective 5: Youth In Philanthropy   | Explore current resources:   | 1. Find out more from AFP-I<br>2. Look into program at the Case's Mandel Center<br><br>3. Investigate the Mott Fund from the United Way   |

**ASSOCIATION OF FUNDRAISING PROFESSIONALS GREATER CLEVELAND CHAPTER  
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**Goal 3: AFPGCC will increase growth, retention and involvement of members**

**Board Assignment: Vice President, Membership**

**Vice President, Membership**

| <b>OBJECTIVES</b>  | <b>STRATEGIES</b>   | <b>ACTION STEPS/OUTCOMES</b>   |
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| Objective 1: Increase new members by 10% over previous year. | Outreach to prospective members.  | <p>A. Email or follow-up phone call with invitation to join AFP to all non-members attending any AFP event.</p> <p>B. Ask each Board member to submit two names of potential members, prepare membership packet and bring to an AFP event.</p> <p>C. Identify Top 10 prospect list of professionals who should join AFP and develop strategic plan for each prospect's membership ask.</p> <p>D. Identify Career Services staff person at Masters in Nonprofit programs at area Universities – ask to present to classes and have membership materials promoted to students</p> <p>E. Utilize member mailing program from the National Office for local membership recruitment.</p> <p>F. Distribute membership materials at all AFP functions/events.</p> |
|  | Scholarship program for prospective members   | <p>A. Increase awareness of scholarships among members and non-members through e-alert, announcements at monthly events</p> <p>B. Email blast sent to membership six weeks before deadline for scholarship applications are due.</p> <p>C. Encourage Board members to reach out to new/younger staff members at their organizations to consider joining AFP.</p> <p>D. Work with Communications Committee to help develop marketing plan for promoting scholarships &amp; membership</p>   |
|  | New member mixer/Membership recruitment event. Determine focus – can this also be used as a member & volunteer recognition event? | <p>A. Utilize offer from Katherine Miracle to help host a new member/member recruitment event</p> <p>B. Invite three new members to join committee to help plan event</p> <p>C. Make calls to luncheon guests, new members, and prospective member pool to personally invite them</p> <p>D. Develop incentive for encouraging attendance</p>   |

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| Objective 2: Increase membership retention rate from 72% to 75% | Outreach to new and renewing members                               | <p>A. Monthly calls to new and renewing members from Membership Committee and Board.</p> <p>B. Send hand-written welcome notes to new members.</p> <p>C. Introduce new and renewing members at AFP monthly events</p> <p>D. In advance of monthly luncheons, review attendance list and invite new members to serve as New Member Table Host.</p> <p>E. Call or email new members on a monthly basis to invite them to sit with a membership committee member or board member at the next AFP event</p> |
|   | Outreach to lapsing members  | <p>A. Monthly calls to those whose memberships will lapse in the next month, pro-actively encouraging membership renewal. Members will receive renewal notice information in the mail from National AFP.</p> <p>B. National AFP calling center will contact lapsed members in weeks following membership lapse.</p>   |
| Objective 3: Increase member involvement in Chapter activities  | Ensure all new and renewing members are invited to join Committees | <p>A. Invite all new and renewing members to serve on a committee or volunteer in other ways, such as serving as Greeters at events/luncheons.</p> <p>B. Ensure that each Committee Chair follows up with volunteers when they self-identify through program surveys or call the AFP office.</p>  |
|   | Explore development of Collegiate Chapter                          | <p>A. Confirm with Bob Cahen progress with Collegiate Chapter at Lakeland Community College.</p> <p>B. When Chapter has been created, explore with Board creating ad hoc position for a Board position from Collegiate Chapter</p> <p>C. Inquire how other Chapters are engaging with their Collegiate Chapters</p>   |
|   | Develop Mentoring Program for new professionals                    | <p>A. Confirm with Debbie Miller the implementation plans for a mentoring program.</p> <p>B. Develop strategic plan to recruit active mentors and mentees</p> <p>C. Develop expectations for success for Mentoring program</p>  |

**ASSOCIATION OF FUNDRAISING PROFESSIONALS GREATER CLEVELAND CHAPTER  
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**Goal 4: AFPGCC will develop more skilled, knowledgeable and ethical fundraising professionals  
Board Assignment: Vice President, Professional Development**

**Vice President, Professional Development**

| OBJECTIVES  | STRATEGIES  | ACTION STEPS/OUTCOMES  |
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| <p>Objective 1: Enhance the value of education and training across the spectrum of members and promote the CFRE</p> | <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.<br/>Host annual Ethics program<br/>Offer Fundamentals of Fundraising Series at least once per year.</p> <p>Promote the educational component of CFRE, value of accreditation and benefit of attending programs that qualify for CFRE in annual programming calendar<br/>Implement survey of membership regarding topics of interest for programming</p> <p>Hold a CFRE Cocktail hour to meet with prospective Fund Raisers who are considering it.<br/>Survey members to determine interest in CFRE review course.</p> | <p>handled by J &amp; M</p> <p>ongoing</p> <p>ongoing<br/>identifying chair for this and will offer in Fall 2011</p> <p>will offer in Fall 2011</p> <p>joint with membership</p> <p>to be planned</p> <p>Spring 2011</p> |
| <p>Sub Objective 1 A: Support participation and enhancement of NPD event and sponsors</p>                           | <p>Where possible, use NPD vendors as program presenters</p> <p>Always promote NPD through announcements and fliers at programs throughout the year<br/>Work with Inclusion Committee to recruit program speakers from diverse backgrounds; especially faith based organizations, African-American, Hispanic, and Asian organizations, geographical inclusion (regional programming), and small vs. large organizations.</p>  | <p>ongoing</p> <p>ongoing</p> <p>ongoing</p>   |

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| Objective 2: Promote concept of inclusion throughout program schedule and speakers.   | <p>Incorporate ideas of inclusion within all programs through the year</p> <p>Plan at least one program each year with focus on inclusion as main topic</p>   | <p>ongoing</p> <p>ongoing</p>   |
| Objective 3: 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 Fundamentals course</p> <p>Plan 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>ongoing</p> <p>ongoing</p> <p>to be planned by past President's group</p> <p>completed</p> |
| Objective 4: Coordinate educational programs with regional and professional partners. | <p>Continue annual NOPGC and North Central OH AFP programming partnership and also reach out to AFP Mahoning-Shenango and the Cuyahoga County Library System</p>  | <p>ongoing</p>  |