# **Association of Fundraising Professionals - Golden Gate Chapter**

A diversity of voices, A welcoming community

# Strategic Plan 2021-2024

## **Introduction:**

The AFP Golden Gate Chapter (AFP-GG) has been serving non-profit development professionals in the San Francisco Bay Area for 50 years. With a diverse constituency of more than 350 members, the chapter is one of the largest in the United States. In recent years it has consistently achieved the Ten Star Gold Award and the IDEA Champion designations from the global AFP organization.

The mission of AFP Golden Gate is to promote philanthropy and support the effective and ethical work of the diverse community of Bay Area fundraising professionals.

Our 30-member voluntary board of directors is highly engaged in all facets of the chapter and works with an administrative team to deliver a wide range of professional development and educational opportunities to its members. The chapter is best known in the Bay Area philanthropic community for hosting an annual National Philanthropy Day program where leaders in the non-profit community are honored for their impact.

As a chapter of the Association of Fundraising Professionals International (AFPI), AFP-GG aligns with the vision, mission and guiding principles of APFI:

### **AFPI Vision:**

To stimulate a world of generosity and positive social good through fundraising best practice.

### **AFPI Mission:**

The Association of Fundraising Professionals empowers individuals and organizations to practice ethical fundraising through professional education, networking, research and advocacy.

### **AFPI Guiding Principles:**

*Ethics and Trust.* As champions of ethical fundraising, fundraising professionals work to increase public trust in charitable giving. We are accountable to donors and their organizations to perform to the highest standards. We practice courage and integrity in the stewardship of private and public resources.

*Professional Preparation*. Fundraising professionals are prepared to serve as leaders and mentors within and on behalf of our organizations. We embrace continuing education and credentialing as pathways to advance in all stages of our professional careers. We use knowledge and skills to strengthen our organizations and communities. We understand, promote and share best practices to use and grow the fundraising body of knowledge.

Advancing Philanthropy. Fundraising professionals are leaders in developing a culture of philanthropy within our organizations and communities. We train staff, boards and volunteers in

ethical and effective fundraising practices. We work across organizations and nations to advance positive social good.

*Inclusivity.* Fundraising professionals reflect the diversity of the communities we serve. We work to address the needs of a diverse society. We welcome and support a diversity of individuals and offer pathways for them to succeed.

Partnership and Collaboration. Fundraising professionals are trusted partners with donors in achieving social good. We collaborate locally and globally with other organizations around shared priorities. We work effectively with decision makers in government and business to achieve shared objectives through philanthropy.

*Creativity and Innovation*. Fundraising professionals stimulate giving through innovative practices and solutions. We imagine and research new ways to connect with donors and achieve results. We share effective ideas and techniques to promote success across the philanthropic sector.

## **Strategic Planning Process**

The chapter's strategic planning process began in January 2021 to define a four-year vision for serving its members and the fundraising profession and advancing the philanthropic sector.

The strategic plan was provisionally approved by the board in May 2021, with updates made in November 2021 to reflect feedback from a survey and two focus groups conducted in August and October respectively. Goals and strategies reflect prioritization based on survey and focus group discussions.

### **Strategic Planning Committee:**

Janet Harris, Chair. Principal, Palisade Consultants

Liz Warner, President. Managing Director & Chief Development Officer, Ploughshares Fund Victoria Silverman, Past President. Managing Founder, Cook Silverman Search

Esther Landau, President Elect. Senior Director of Advancement, The Arc San Francisco

Anjali Billa, Associate Vice President of Advancement, San Francisco State University

Mark Hernandez, Director of Philanthropy, Success Centers

Jennifer Hull, Chapter Manager, AFP Golden Gate Chapter

### **External Interviews:**

Charlie Casey, President, Pacific Foundation Services

Manju Ramachandran, AFP-Silicon Valley, Co-Founder IDEA Fellowship;

Development Director, All Stars Helping Kids

Melissa Perez, Board Member, Development Executives Roundtable;

Senior Consultant, Glavin, Jacobson

May Leong, Director Donor Services, East Bay Community Foundation

Linda Wood, Senior Director, Haas, Jr. Fund

Alexandra Derby Salkin, Vice President for Philanthropic Partnerships,

Marin Community Foundation

Kelley Coe, AFP-GG Member, Co-Chair IDEA

## **GOALS**

# Membership & Inclusion, Diversity, Equity, Access

AFP-GG will build and support a growing, diverse membership of emerging and professional fundraisers and nonprofit leaders in the Bay Area.

## **Programs & Education**

AFP-GG will serve the nonprofit community by empowering and educating professional fundraisers at all stages of their careers and it will promote the work and impact of Bay Area philanthropists.

## **Brand & Visibility**

AFP-GG will showcase its role in the philanthropic community and the service its members provide to improve quality of life for all residents of the Bay Area.

# **Fiscal Health**

AFP-GG will invest in its mission while operating in a financially healthy and sustainable manner and diversifying our revenue sources.

# Goal: Membership & Inclusion, Diversity, Equity, Access

AFP-GG will build and support a growing, diverse membership of fundraisers and nonprofit leaders in the Bay Area.

# **Strategies:**

- Provide high-quality programs where emerging fundraisers can learn, seasoned fundraisers can mentor, and all can find a supportive community;
- Ensure that programs and events allow members of all communities to feel they belong and are valued;
- Ensure the values of inclusion, diversity, equity, and access (IDEA) are centered and visible in the Chapter's leadership, programs, marketing, and committee membership;
- Highlight the benefits of AFP-GG and AFP Global membership (e.g. professional development, people-centered, social and job networking);
- Expand AFP-GG's reach to include executive directors and other non-profit leaders

## **Objectives:**

# **Diversity**

- Ensure diverse representation on board and in committees;
- A minimum of 1-3 IDEA fellows move into board or committee pipeline each year;

### Growth

- Grow membership to 400 by December 2024 (from baseline 332, Jan. 2021);
- Attract two new Institutional Memberships year over year (baseline 12, Jan. 2021);
- Establish sustainable plan to support and grow IDEA Fellowships, 15-20 fellows per year;
- IDEA Fellows renew as paid member following fellowship year at rate of 50-75%;
- Grow Mentorship Program to 25 pairings per year (baseline of 17 in 2021);
- Increase interest in two new Mentor tracks (experienced executives and consulting);

### **Finance**

- By 2023, Membership dues will comprise a minimum of 13% of annual budget;
- By 2023, Mentor program revenue will combine with Program revenue to total a minimum of 12% of annual budget.

## Feedback from Survey & Focus Groups:

- Hold quarterly welcome meetings for new members (virtual and/or in person)
- Establish cohort/affinity groups by county, experience level, nonprofit industry type, BIPOC, etc. to help make the large membership feel more accessible and connected
- Conduct anti-racism work for the board and staff

- Conduct a demographic survey of the board to better understand the baseline measure for increased diversity
- Maintain accessibility of programming by keeping virtual options available
- Create a process for following up with non-members who attend events

# Tactics (to be updated and prioritized yearly):

### Membership & MarComms:

- Promote to potential members in Sacramento, Livermore, etc. (cost to belong to a second chapter is only \$30);
- Promote members, feature their stories to highlight chapter's value and promote benefits of membership;
- Enable and encourage Board members to promote chapter membership, especially within underrepresented constituencies;
- Promote various membership levels (especially large and small organizational memberships), explore payment installment plans and specific benefits.
- Use all channels (handwritten notes, calls, emails, welcome meetings, volunteer assignments) to engage and steward new, renewing, and lapsed members;
- Investigate why members are not renewing through conversation and past call sheets;
- Develop a clear plan to reach out and engage new, renewed, lapsed members.
- Add LYBUNT/SYBUNT style outreach to lapsed members;
- Offer/promote discounts for Institutional Memberships;
- Promote Institutional Memberships to non-profit organizations as well as like-minded organizations (e.g. Kapor Center);
- Cross-promote AFP with other professional organizations (e.g. DER, CASE, CalNonprofits, etc).
- Expand networking opportunities around NPD, exclusive to AFP members, and for the broader community;
- Consider logistics of a joint membership or a "community" membership for affordability;

#### IDEA

- Conduct a survey among members so they can self-identify personal traits (e.g. BIPOC, LGBTQ+) as well as career experience, and professional interests;
- Prioritize IDEA Fellows for election to open board positions. Publicize benefits of membership, both AFP Global and Chapter; Engage one or more corporate or foundation funders to underwrite IDEA Fellowship program annually;
- Solidify a succession plan for IDEA Fellowship Program leadership;
- Select one person from each committee to also serve on IDEA committee;
- Make virtual programming accessible financially, socially, physically;

### Finance

• Reflect full need for IDEA, Mentor, Program areas in chapter fundraising goals;

## [INTERNAL ONLY] Timetable:

### 2021:

- Celebrate what we have accomplished during pandemic year;
- Stem the tide of attrition retain current members and renew X% of lapsed members;
- Grow membership by 10%, including institutional membership (add 2);
- Launch IDEA Fellowship, enlist 8 members;
- Recruit 1-3 IDEA Fellows into board and committee pipeline;
- Reach 20 Mentor pairs;
- Conduct Strategic Plan review against goals in July.

#### 2022:

- Grow membership by 10%, including institutional membership (add 2);
- Grow IDEA Fellowship, enlist 12 Fellows;
- Conduct member survey to self-identify personal traits, thereby creating data on the diversity of AFP-GG membership;
- Build stronger community as measured by increased attendance at programs and networking events, and annual member survey results;
- Recruit 1-3 IDEA Fellows into board and committee pipeline;
- Reach 22 Mentor pairs;
- Conduct Strategic Plan review against goals in July.

#### 2023:

- Grow membership by 10%, including institutional membership (add 2);
- Grow IDEA Fellowship, enlist 15-20 Fellows;
- Conduct member survey to self-identify personal traits, thereby creating data on the diversity of AFP-GG membership;
- AFP-GG IDEA Fellowship program makes presentation at ICON;
- Recruit 1-3 IDEA Fellows into board and committee pipeline;
- Reach 25 Mentor pairs;
- Conduct Strategic Plan review against goals in July.

## [INTERNAL] Accountable Parties:

- Membership Committee
- IDEA Committee
- Mentor Committee
- MarComms Committee
- Program Committee
- AFP GG leadership

# Goal: Programs & Education

AFP-GG will serve the nonprofit community by empowering and educating professional fundraisers at all stages of their careers and it will promote the work and impact of Bay Area philanthropists.

# **Strategies:**

- Create a robust schedule of programs that appeals to every member of the chapter and motivates them to attend sessions frequently;
- Offer programs and resources that meet fundraisers' needs to develop essential skills and knowledge throughout their career (from beginner to CFRE professional to senior nonprofit leader);
- Engage historically excluded groups in developing program content, selecting presenters, and in outreach efforts;
- Provide professional education that is responsive to national and global events and trends, and that addressees philanthropy's role in a changing world;

# **Objectives:**

# **Attendance and Promotion**

- Increase overall attendance at educational programs by 10%;
- Promote programming far in advance and through different pathways.
- Attract participation at our networking, mentoring, and in-person gatherings

### Content

- Feature 40% of program content and speakers from the BIPOC, LGBTQIA+, disabled, and other historically excluded communities but *not* to simply to speak about diversity, equity and inclusion;
- Increase number of sessions focused on industry trends;
- Increase programming for advanced career professionals and those seeking their CFRE;
- Consider more collaborations (CVNL, DER) to meet needs of various career levels
- Create a forum for nonprofits and philanthropists to discuss issues and address the challenges we face.

#### Revenue

• Generate earned revenue of minimum 12% of chapter budget (program fees and mentor program fees combined);

# Feedback from Survey & Focus Groups

- Offer more in person events outside of SF
- Give marketing a long runway by planning the program year at least 6 months out;
- Consider offering a sliding scale for chapter led programs; keep virtual option for affordability
- Consider establishing a special time of year when anyone can attend programs for member rates, give people a taste of what we offer
- More offerings on: grant writing; Asian programming; for advanced career professionals; tech platforms and CRMs;
- More career fundraiser led sessions, fewer consultant led

# Tactics to be updated and prioritized yearly:

- Schedule an annual programming retreat each spring for the following July June;
- Begin each programming year with a budget in hand;
- Set metrics for program content, e.g. senior-level, small-shop, international, etc.
- Publish annual schedule each June for upcoming year;
- Meet with Finance Committee twice yearly and regularly review budget actuals;
- Work closely with MarComm/ACG to ensure timely, broad promotion of all programs;
- Survey membership regularly for feedback on relevance of educational programs;
- Reduce emphasis on Major Gifts. Add more programs for small-shop and grassroots organizations;
- Aim to hit # CFRE members in chapter;
- Consider cohesive program themes, single threads, and/or topical series;
- Produce programs in a variety of formats in-person, online, hybrid;
- Explore different business models/fee structures to reach attendance and financial goals;
- Create an engagement calendar for every Board member. For Example, require attendance at 3-5 programs/year and regularly promote on social media;
- Add 2 board members and 2 additional AFP members to Programs Committee;
- Launch and maintain a CFRE study group;
- Explore partnerships with groups (e.g. YNPA, DER, Latino Giving Circle, LCF) for targeted outreach;
- Monitor speakers at other conferences who are people listening to?

### Timetable:

### 2021:

- Rethink program delivery model
- Create a sustainable fee structure (using revenue expectations)
- Plan programs for 12 months out; promote on website/social media (MarComm)
- Add 2 AFP members to Programs Committee prior to planning retreat

### 2022:

- Add 2 board members to Programs Committee
- Explore and build partnerships with groups like YNPA, DER, Latino Giving Circle, etc.
- 25% + of programming featuring BIPOC+ communities and content
- X% increase in program attendance (25 or 30% of goal)
- X% increase in program revenue (25 or 30% of goal)
- Create educational opportunity framework for all program planning and promotion
- Increase overall attendance over previous year; increase attendance by targeted populations

### 2023:

- Program offerings create chapter leadership pipeline for attendees, increase engagement overall
- Program offerings are significant source of revenue in budget
- Programs consistently excel at serving early, mid, and late career professionals
- Programs remain relevant to BIPOC+ communities
- Programs are consistently well attended and feedback is positive

## **Accountable Parties:**

- Programs Committee
- Full Board
- MarComms Committee
- ACG
- IDEA Committee
- Finance Committee
- Membership Committee

# Goal: Brand Identity & Visibility

AFP-GG will showcase its importance in the philanthropic community and the service its members and local philanthropists provide to improve quality of life for residents of the Bay Area.

## **Strategies:**

- Ensure a strong connection with our values and brand across all programs and communications;
- Increase AFP-GG's reach into underrepresented communities; welcome and engage diverse constituencies;
- Use the optimum, best-in-class communication channels and cadence to reach target audiences.
- Feature timely, cutting-edge topics at NPD and the NPD Forum that are relevant to nonprofits, fundraisers, and philanthropists;
- Integrate NPD honorees and philanthropists into programs and chapter events throughout the year;

# **Objectives:**

## **Brand and Messaging**

- Clearly define the AFP-GG brand, including a simple statement regarding the values of our chapter and membership
- Ensure all board members and committee members are trained on the brand statement, keep it top of mind and strive to implement this brand;
- Ensure all messaging uses inclusive images and language;
- Promote chapter values more prominently

### Measuring Engagement

- Consider how we will define and measure increased engagement of historically excluded groups, and how will we market that audience specifically
- Create and monitor key performance benchmarks including email, social media, and other engagement platforms);
- Support and monitor key indicators of chapter success as they relate to our strategic goals:
  - Increase communications engagement and reach by 10% (baseline metrics = 1950)
  - Increase job posting sales and participation in Consultant Directory such that they comprise a minimum of 20% annual revenue;
  - Increase NPD attendance by 10% (baseline 2021 = 300?)

- Increase attendance at other programs by 10% (baseline 2021 = ?)
- Increase communications to underrepresented constituencies by X%
- Increase memberships to 400

## **NPD**

- NPD: In addition to those who give, showcase those on the ground doing the work and those who are impacted.
- Better connect and integrate IDEA and NPD, especially value of inclusion
- Explore who and what "our story" is is it fundraisers, frontline fundraisers, philanthropists or impact?

# Feedback from Survey & Focus Groups

- Make scholarship process more visible on website and promote on social media
- Spotlight partnerships between fundraisers and philanthropists throughout the year.
- Consider monthly email message from the President
- Make board & staff more visible and accessible on site
- Keep virtual (free) option for NPD to promote better inclusion.
- Keep the Forum/educational component of NPD

### **Tactics:**

- Recruit and maintain a strong, diverse MarComm Committee;
- Re-structure MarComm Committee into two functions: strategy and implementation;
- Recommend modification of management team (ACG) contract to include additional communication tasks (e.g. handling all social media, etc.);
- Consult and partner with all committees and ACG management team to guide and support programs and projects that are true to the brand;
- MarComm Committee serves as the "guardians of the brand" in relation to all images and language, consistently align with IDEA; and assure that the brand represents all communities;
- Refine communications approaches based on performance analytics;

## **Timetable:**

### 2021:

- Discuss MarComm Committee role and capacity to provide strategic messaging guidance and develop content for promoting AFP-GG. This may include discussion of modifying ACG contract with Executive Committee;
- Recruit and maintain a diverse committee membership.

### 2022:

- MarComm meets regularly with all standing committees;
- Job posting sales increased by X%;

- Increase focus on underrepresented constituencies;
- Regularly hit benchmarks with social media engagement.

## 2023:

- Chapter membership increase by X%, with X% increase from underrepresented constituencies;
- Program attendance increase by X%, with X% increase from underrepresented constituencies;
- Job posting sales increase by X%.

# **Accountable Parties**

- MarComm Committee
- Programs Committee
- NPD Committee
- IDEA Committee
- Membership

### Goal: Fiscal Health

AFP-GG will invest in its mission while operating in a financially healthy and sustainable manner and diversifying our revenue sources.

## **Strategies:**

- Maintain balanced budgets and achieve annual goals for reserves
- Set and achieve targets for diversifying revenues
- Build a Finance Committee to provide clear board oversight of the organization's finances
- Create a Development Committee to strengthen and diversify contributed income
- Create an annual written financial plan with the engagement of all committees and present to the board annually along with the operating budget
- Increase transparency of finances to members
- Secure annual sponsorships for scholarships and general program support, not just NPD

# **Objectives:**

- Total Budget Objectives
  - o Earned revenue will reach 45% of annual budget, NPD will reach 50% of annual budget, and contributed income will reach 5%;
  - o Reserves will maintain at a minimum of 9 months operating support;
- Earned Revenue Objectives (45%):
  - o Membership dues comprise a minimum of 13% of annual budget;
  - o Program fees (including Mentor program) will comprise a minimum 12% of annual budget;
  - o Job postings and consultancy directory will comprise a minimum of 20% of annual budget;
- NPD contributed income will comprise no more than 50% of annual budget (with a goal of 30% net profit each year);
- Additional contributed income will include (5%):
  - o General chapter contributions and grants;
  - o 100% Board participation in annual campaign, over and above membership dues.

### Feedback from Survey & Focus Groups

- Seek cost savings where possible to keep programs and membership affordable
- Invest in a CRM to help track donations and sponsorships to the chapter
- Add option to make a contribution on the membership form or in the thank you letter
- Consider corporate sponsorships to "purchase" certain number of scholarships/memberships

#### **Tactics:**

- Form Finance and draft its charter, including maintenance of good record keeping;
- Form Development Committees and draft its charter, including managing an annual fundraising campaign;
- Orient Board to annual budget at January retreat meeting;
- Involve Board in generating earned and contributed revenue, beyond Board giving;
- Increase cash on hand to X% of annual budget and set cash reserve at Y (operating expenses for Z months);
- All Board members work to grow chapter membership;
- Evaluate AFP-GG financial strategies in relation to peer chapters;
- Assure funding for IDEA fellowships and other scholarships;
- Assess progress to goals of Strategic Plan in July, and adjust as necessary.

### Timetable:

### 2021:

- Finance Committee formed; charter drafted;
- Board meetings will devote significant focus to budget/financial health, including the nature of annual cash flow cycle and cash reserve, at least once per year;
- Fund 8 IDEA Fellowships for current year;
- Assess progress to goals in July (?);
- End budget year in the black (currently in the red);
- 2022 budget developed collaboratively with all program areas tasked with revenue goals; approve at January 2022 meeting;

### 2022:

- Membership increased by 10% over prior year;
- Cash on hand is \_\_\_% of annual budget
- Cash reserve of \_\_ months
- Fund 12 IDEA Fellowships
- Assess progress to goals in July (?);
- End budget year in the black;
- 2023 budget developed collaboratively with all program areas tasked with revenue goals; approve at November 2022 meeting.

#### 2023:

- Membership increased by 10% over prior year;
- Cash on hand is \_\_% of annual budget
- Cash reserve of \_\_ months
- Fund 15 IDEA Fellowships
- Assess progress to goals in July (?);
- End budget year in the black;
- 2024 budget developed collaboratively with all program areas tasked with revenue goals; approve at November 2023 meeting.

### **Accountable Parties:**

Treasurer and Finance Committee

- ACG Staff
- Development Committee
- Membership Committee
- Mar/Comm Committee
- President and full Board

# Internal Addendums

- Survey Tool
- Survey Results (Powerpoint)
- Focus Group notes