

**Association of
Fundraising Professionals
SC Piedmont Chapter
2014-2016 STRATEGIC PLAN**



**AFP Piedmont Chapter
2014 – 2016 Strategic Plan**

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BACKGROUND

This plan documents the strategic planning, critical organizational issues, goals and objectives developed by the AFP Piedmont Chapter board of directors for the period January 1, 2014 through December 31, 2016. The board met for a three-hour planning session on June 19 and a three-hour planning session on June 20, 2013 to conduct the planning process. A follow-up session was held on September 25, 2013.

The board identified the outcomes they hoped would result from the strategic planning process. They are listed alphabetically:

- Be the best chapter we can be while keeping our day job priorities
- Collaboration enhanced
- Develop a consensus on the mission and vision for the chapter
- Diversity redefined to reflect profession in the upstate
- Engage senior/experienced members and recruit non-members
- Enhanced CFRE
- Geographic area better reached/covered and marketed to
- Greater visibility and vitality for National Philanthropy Day
- Less turnover in the field
- Maintain the 10 Star and Diversity designations
- Keep members and community abreast of current nonprofit related regulation changes

During the planning process, the group discussed its values and the mission of the Piedmont Chapter, discussed how to record the chapter's history, identified the chapter's constituents, developed a vision for the future, analyzed the internal and external environment and identified the critical issues the board must address over the next 3 years. The process resulted in the creation of mission and values statements, and development of the critical goals and objectives that will be the focus of the Piedmont Chapter's work. By identifying a vision for the future and creating the steps needed to get there, the strategic plan maximizes the ability of the chapter to create its future and meet its mission through 2016.

The following individuals participated in the strategic planning process:

Board of Directors/Planning Group

Cynthia Beacham Bob Saacke
 Joy Blue Jocelyn Slaughter
 Judy Bynum Susan Spires
 Catriona Carlisle Paige Stephenson
 Scott Dishman
 Cayce French
 Coby Hennecey
 Jamie Inman
 Barbara Martin
 Jayne McQueen

Facilitator

Larry Hostetler
 AFP Staff

CHAPTER HISTORY

SC PIEDMONT CHAPTER AFP HISTORICAL FRAGMENTS

The current SC Piedmont Chapter of AFP began as the National Society of Fundraising Executives (NSFRE) in 1987. It was the direct result of the efforts of R. Wayne King, who moved to the Upstate from Oklahoma and was extremely surprised to learn that there was no professional chapter nearby that he could join.

Wayne, who is now the President & CEO of the West Virginia University Foundation, recalls that he obtained a list of independent NSFRE members from the national office. He started with these people as the foundation of a mailing list and added names and addresses of people in the business. He recalls that they picked a date, found a speaker and sent out a letter inviting people to come. Jayne McQueen, one of the Chapter's founding members, recalls that the gathering was held in a hotel meeting room that was conveniently located. After the first few meetings, officers were elected and Wayne became the first president. He subsequently helped start Columbia and the Charleston chapters. The Upstate chapter was officially chartered in 1987 or 1988; unfortunately, AFP does not have any records from the early years.

Because of this gap, information is primarily anecdotal and based on the recollections of past presidents and others who were involved then. Among the early presidents were Dean Anderson of Anderson College and Kathy Brown (now Kathy Brown Mignerey) from the SC School of the Deaf and the Blind.

A partial listing of presidents includes:

1996 – Judy Burke Bynum	2006 – Les Gardner
1998 – Marty Richards	2007 – Les Gardner
1999 – Mary Treadway	2008 – Jamie Inman
2000 – Mary Harris Edwards	2009 – Jamie Inman
2001 – Todd Stephens	2010 – Crissy Maynard
2002 – Stephen Taylor	2011 – Barbara Martin
2003 – Susan Dunlap	2012 – Susan Spires
2004 – Susan Spitzer	2013 – Jocelyn Slaughter
2005 – Barry Nickelsburg	

Some of their reflections follow:

Marty Richards recalls: *I was a member of the SC Piedmont Chapter from 1994 to 2006 and served on the board two full terms, I think that a term was three years and it seems to me I then became President in my second term... Our meetings rotated between Greenville and Spartanburg and Philanthropy Day was at the Piedmont Club for several consecutive years. At some point, I think around 2004, there was a very significant change in the format of Philanthropy Day. I know I was already off the board when that happened.*

We had some really good conferences too. I remember a good one at Furman University and the one we did with the Foundation Center at Spartanburg County Library.

Past President Todd Stephens reflects: *I started with NSFRE/AFP Piedmont in 1997, and acquired my CFRE in 2003. During my time we tried a mailed out newsletter (it was short lived, because of cost). Philanthropy Day was at the Piedmont Club for those two years as well. We had an annual conference that we had here at the Headquarters Library and it was anchored by Alexander Haas and Martin.*

Steve Taylor recalls that he was Chapter President when we had National Philanthropy Day at the "new" Spartanburg Public Library: *Barbara Talisman came down from Chicago (and we had met several times in Chicago before she moved to Washington, DC) as the program facilitator for the day.*

Fred Payne remembers: *We had a variety of events, including an AFP training workshop/CFRE Prep in Spartanburg at the Library... It must have helped because I passed the exam. I remember many National Philanthropy Day programs. It was a great way for us to recognize our donors and to allow them to see exemplary donors to other institutions.*

I believe AFP training and support was a special factor in Greenville Tech Foundation being awarded the CASE Circle of Excellence award -twice- as the top foundation among 2-year public college foundations. I remember traveling to San Francisco in 2001 to receive our first Circle of Excellence award and our Board Chair, Doug Kondra, met us there and we enjoyed the special events together.

Judy Bynum remembers that National Philanthropy Day began in the late 80s or early 90s: *Each organization was allowed to honor an individual or an organization and the event drew large crowds. The Chapter also sponsored an annual professional development conference for many years and the location varied between Spartanburg and Greenville. We did not always meet monthly.*

Historical details including a list of National Philanthropy Day winners can be found in the chapter's Dropbox.

CONSTITUENTS

PROCESS

In a two-step process, participants identified the Piedmont Chapter's constituents; those individuals, groups and organizations which influence or are influenced by the chapter. These were then ranked according to their degree of importance to the health and success of the chapter. The group then reviewed the mandates related to constituents. Mandates are defined as the expectations held by each constituent. Mandates may be formal (such as laws, by-laws, contracts, policies, etc.) or informal, based on experience, discussion, interaction and perceptions of constituents.

The group identified 11 entities, groups or types of organizations as constituents of the chapter. The constituents are listed alphabetically by priority.

CONSTITUENTS

Primary Constituents

Members
Members' Organizations
Non-member fundraisers
Organizations' volunteers and Boards

Secondary Constituents

AFP International
Organizations' Donors
Speakers/Teachers
Community needs/Organizations' Clients
The Non-profit sector

Tertiary Constituents

Upstate Economy
The Community

CORE VALUES

The members of the strategic planning group identified the reasons they joined AFP and why they continue to be involved.

Reasons for joining and being involved

The planning group listed the reasons for joining and being involved with AFP:

- AFP's energizing effect
- Career advancement
- Ethical and effective philanthropy with professionals and the community
- Excellence in education
- Giving back
- Networking
- New ideas
- Shaping resources
- The place to be in the profession
- Validation that I'm not alone

The group then reviewed the Association's core values:

- Philanthropy
- Inclusiveness
- Excellence
- Integrity and Credibility
- Collaboration
- Service responsiveness

After discussion, the following values were selected and values statements were developed:

AFP PIEDMONT CORE VALUES

- **Integrity and Credibility:** Conducting business according to the highest ethical principles and serving as trustworthy stewards of our resources.
- **Excellence in Knowledge:** Providing the fundraising community with the highest quality of knowledge, research, advocacy, career support, news and information, strategic alliances, and related tools and insights to ensure a successful future.
- **Philanthropy:** The belief that ethical and effective fundraising are the cornerstones of philanthropy and that philanthropy changes the world.
- **Inclusiveness:** Embracing diversity in the fundraising community, with a commitment to understanding and addressing the shared and unique needs of all members of that community.
- **Collaboration:** Recognizing that we can accomplish our purpose only with the strong support and partnership of other individuals, AFP chapters and other groups who share our vision.
- **Service Responsiveness:** Understanding that our focus is on service to our members, our chapters, stakeholders and customers and that it is provided in a timely and thoughtful manner, open to new ideas, and exceeding expectations.

MISSION

PROCESS

The AFP Piedmont Chapter had adopted the AFP International Mission Statement as part of the previous strategic plan:

“AFP, an association of professionals throughout the world, advances philanthropy by enabling people and organizations to practice effective and ethical fundraising.”

After discussion, and a review of several chapters’ mission statements, the group determined that the following mission should be adopted for this plan:

The AFP Piedmont Chapter promotes philanthropy and supports the practice of ethical and effective fundraising.

The Mission Statement was adopted by the Board of Directors on October 17, 2013.

A VISION FOR THE FUTURE

PROCESS

The AFP Piedmont Chapter of the future

As a visioning exercise, the planning group was challenged to create statements that would document the accomplishments of the “perfect” AFP Piedmont Chapter in 2020. From these statements, the board was divided into groups and asked to write stories that describe what it was like to attend a meeting of the chapter as a member transferring in from another chapter. The stories were shared and from those the key characteristics of the vision were developed.

SUMMARY OF CHARACTERISTICS

According to the board members' vision, the primary characteristics (listed in alphabetical order) that will identify the AFP Piedmont Chapter in 2020 are:

- All levels of experience represented
- Amazing
- Board members and business community attending
- Career-beneficial
- Drives philanthropy
- Enlightening programming with takeaways
- Fabulous
- Greeted by past presidents
- Honor to be involved
- Incredible technology
- Lot of younger fundraisers
- Meeting quarterly as an entire chapter
- Simulcast in various locals
- Started on time
- Welcomed and paired with member
- Well-organized

After discussion that included phrases such as “drives philanthropy” and “highest integrity”, and recognition that the vision of the chapter is that it will be a resource to a diverse group in the upstate area, including not only members and attendees but in many ways including geographic diversity, the following Vision Statement was developed:

VISION STATEMENT

The vision of the AFP Piedmont Chapter is that it will be viewed as the leading resource for philanthropy in the Upstate.

The Vision Statement was adopted by the Board of Directors on October 17, 2013.

ORGANIZATIONAL ASSESSMENT

PROCESS

The board undertook a mini-TWOS analysis by identifying the external threats from the community and internal weaknesses of the chapter that it must be aware of in order to be proactive and then examining the external opportunities from the community and internal strengths the chapter can use to its advantage. Every member of the group had input into each area, and together the group developed a fairly detailed picture of the environment in which the Piedmont Chapter operates.

RESULTS

Threats

- Large geographic area
 - Travel times
 - Different personalities to counties
- To NPD, competition from other awards programs and other organizations
- Non-profit organization training offered by private companies and from other organizations
- Other professional associations for fundraisers (CASE, AHP) and industry groups like SCANPO
- Budget cuts that cut out funding for AFP membership and lunches
- Membership organizations seeing a decline as a new generation comes into the profession
- Lack of understanding of Development by Executive Directors and Boards
- Staff turnover in profession
- Legislative changes including elimination or reduction of charitable tax deduction

Weaknesses

- No Staff
- Limited time
- Difficult to find willing leadership
- Resource development
- Membership recruitment – moving people from attending to belonging
- Networking/relationship building with peers
- Diversity in finances – a large percentage of budget comes from too few sources
- Communication/being open to new ideas
- Lack of diversity geographically, in organizational size, and in age/experience
- Marketing of our members as trainers
- Awareness of AFP
- NPD, in its finances, awareness of the event, and value

Opportunities

- Expand membership
 - Other counties
 - Younger and Collegiate
 - Senior leaders of organizations
 - Board members of Non-profits (if not membership, at least attending)
 - Executive Directors
 - Smaller non-profits
- Build awareness of AFP
 - Marketing to bring awareness
 - Inviting leaders of the community to attend meetings
 - Promote members as trainers
- Utilize the connections our members have to bring in more organizations
- Increase the number of members holding CFRE credential
- Communicate the power of philanthropy in the region
- Offer advanced training tracks for a fee and bring in good trainers
- Different networking ideas – like topical roundtables

Strengths

- Programming
- Networking
- Variety of organizations
- Core group of committed members and board
- Willing to share expertise and mentor
- Variety of connections to recruit speakers and members
- Being able to attain and maintain 10-Star and Diversity designations
- Level of board engagement and their individual strengths
- Good financial support for the organization from board member companies
- Financially strong/good stewards
- Acceptable membership base
- Commitment to ethical fundraising

CRITICAL ISSUES

PROCESS

Based on the mission and values of the chapter, the identified constituent mandates, the SWOT analysis, and the group's vision for 2020, the board identified the following critical issues that need to be addressed by the board during the period January 1, 2014 and December 31, 2016 in order to achieve the vision. The critical issues are listed in alphabetical order with no priority implied.

CRITICAL ISSUES

The Piedmont Chapter lacks in the following areas:

Membership

A plan to engage members and non-members from various counties of the upstate

A strategy to move visitors into committed members and future leaders of the chapter

Education

Relevancy for various levels of fundraising professionals

PR/Communications

A prestigious National Philanthropy Day event recognizing member non-profit organizational philanthropists with a coveted award

Reputation and respect outside the fundraising profession

Resource Development

Funding to support strategic initiatives

2014-2016 AFP SC Piedmont Chapter Goals

Goal 1 – Strengthen membership through diversity, recruitment, engagement, and retention.

Person Responsible: VP of Membership

Goal 2 – Provide quality relevant education to all experience levels of fundraisers throughout upstate South Carolina

Person Responsible: VP of Education

Goal 3 – Increase the visibility and recognition of the chapter as a respected leader in ethical professional fundraising, philanthropy, and advocacy.

Person(s) Responsible: VP of Communications and designated Chairs

Goal 4 – Maintain funding sufficient to support operations and strategic initiatives.

Person Responsible: Treasurer

2014-2016 AFP SC Piedmont Chapter Objectives

Goal 1 – Strengthen membership through diversity, recruitment, engagement, and retention.

Person Responsible: VP of Membership

Objective 1.1 – Each One Reach One Membership Recruitment Initiative

Person Responsible: Board

Done by: Ongoing

Objective 1.2 – Develop prospect list of new members

Person Responsible: VP of Membership

Done by: 6/30 each year

Objective 1.3 – Establish greeters for each meeting

Person Responsible: VP of Membership to delegate

Done by: List developed semi-annually

Objective 1.4 – Contact lapsed members within 30-60 days

Person Responsible: VP of Membership

Done by: monthly, reviewed quarterly

Objective 1.5 – Achieve annual retention rate greater than or equal to 80%

Person Responsible: VP of Membership

Done by: Reviewed annually

Objective 1.6 – Implement and engage collegiate chapter

Person Responsible: Youth in Philanthropy Chair

Done by: Fall 2013, Ongoing

2014-2016 AFP SC Piedmont Chapter Objectives

Goal 2 – Provide quality relevant education to all experience levels of fundraisers throughout Upstate South Carolina

Person Responsible: VP of Education

Objective 2.1 – Elevate monthly programming to include advanced topics.

Person Responsible: VP of Education

Done by: Ongoing

Objective 2.2 – Measure satisfaction with monthly programs through member and guest evaluations.

Person Responsible: VP of Education to delegate

Done by: Monthly

Objective 2.3 – Budget permitting, provide four scholarship categories for training annually including Leadership Academy, Chamberlain Scholarship, CFRE, and diversity meeting stipends.

Person Responsible: Scholarship Chair, Board

Done by: Ongoing

2014-2016 AFP SC Piedmont Chapter Objectives

Goal 3 – Increase the visibility and recognition of the chapter as a respected leader in ethical professional fundraising and philanthropy.

Person Responsible: VP of Communications and designated Chairs

Objective 3.1 – Execute public relations plan to provide awareness to the community regarding value of chapter and its members including the goals and mission of the organization.

Person Responsible: VP of Communications

Done by: Ongoing

Objective 3.2 – Develop a prestigious National Philanthropy Day (NPD) event recognizing philanthropists with a coveted award.

Person Responsible: NPD Chair

Done by: November of each year

Objective 3.3 – Promote awareness and encourage advocacy of governmental regulatory changes that impact the nonprofit sector.

Person Responsible: Government Relations Chair

Done by: Ongoing

2014-2016 AFP SC Piedmont Chapter Objectives

**Goal 4 – Maintain funding sufficient to support operations and strategic initiatives.
Person Responsible: Treasurer**

Objective 4.1 – Create chapter budget.

Person Responsible: Treasurer

Done by: 12/15 of each year

Objective 4.2 – Increase sponsorship of NPD by 10% each year.

Person Responsible: NPD Chair

Done by: November of each year

Objective 4.3 – Seek underwriters for a minimum of three chapter meetings annually.

Person Responsible: Chapter member

Done by: Ongoing

ACTION STEPS & TIMELINE

Annually 2014 - 2016

1.1.1	Invite guest to a meeting	Ongoing	Board	2.3.1	Complete Chamberlain Scholarship marketing and scholar selection	October 1	Scholarship Chair
2.1.1	Feature dynamic speakers at monthly events	Ongoing	VP of Education	2.3.2	Promote CFRE scholarship opportunity and CFRE attainment to membership	Ongoing	CFRE Chair and VP of Communications
2.2.1	Create attendee satisfaction survey(s)	January	VP of Membership	3.1.1	Complete chapter PR	Ongoing	VP of Communications
1.4.1	Pull list of lapsed members and contact them	Monthly	VP of Membership	3.2.1	Develop prestigious NPD event	November	NPD Chair / Co-Chairs
2.2.2	Ask for evaluation / input after meetings	Monthly	Membership committee designee	3.3.1	Share governmental regulatory updates with Board and Chapter	Ongoing	Government Relations Chair
1.2.1	Develop new member prospect list	June 30	VP of Membership	4.2.1	Increase NPD sponsorships by 10% annually	November	NPD Chair / Co-Chairs
1.3.1	Develop greeter schedule	Semi-annual	Membership committee designee	4.3.1	Secure chapter meeting underwriters	Ongoing	Treasurer or Board designee
1.2.2	Make contact with new member prospects	Ongoing	VP of Membership	4.1.1	Complete chapter budget and get Board approval	December 15	Treasurer
1.6.1	Engage collegiate chapter	Fall, Ongoing	YIP Chair	1.5.1	Attain membership retention rate of 80%+	December 31	VP of Membership

RECOMMENDATIONS FOR FUTURE ACTION

The AFP Piedmont Chapter board of directors will review and refine the objectives to make sure that they are complete, and have a measurable component. It is recommended that the objectives be looked at in their totality to determine if the timelines set are reasonable, given that all board members are volunteers, and there are few if any committees in place. The board will then assign the responsibility for each objective to the appropriate individual or committee and charge that person/group with creating the Action Steps needed in order to accomplish the objective.

It is recommended that one individual on the board, most usually the president-elect, be charged with the responsibility for overseeing and monitoring the work of the strategic plan. Further, it is recommended that 15 minutes of every board meeting is set aside to review one objective and its strategies, in order to get the best thinking of the full board and make changes as appropriate.

It is also recommended that once the Action Steps have been developed, as well as the responsibility assigned and timeline determined, these can be submitted to the facilitator for inclusion in the plan. They will be put into both an Action Step timeline and a Summary Strategic Plan format for use by the board.

The Strategic Plan document should be available and/or distributed to the membership.

The Piedmont Chapter's Strategic Plan should be considered a living, changing document, and should be adjusted regularly as circumstances and needs require.

It is further recommended that the board plan a follow-up meeting for December 2013 or January 2014, and annually thereafter, for the specific purpose of reviewing the strategic plan in its entirety, evaluating progress on the objectives and making adjustments as needed. In this way, the objectives and strategies will guide the board as it works to accomplish organization's goals and move toward its vision.

By identifying the steps needed to get there, this strategic plan maximizes the ability of the AFP Piedmont Chapter to proactively create its future and meet its mission through the year 2016.