



Strategic Plan 2011-2013

AFP Fort Worth Metro Chapter

A Ten-Star Chapter Celebrating 30 Years 1980-2010

December, 2010

EXECUTIVE SUMMARY AND HISTORICAL PERSPECTIVE

Thirty years ago, a number of familiar Fort Worth fundraisers belonged to the Southwest Society of Fundraisers (SSF). **Carolyn Martchenke** CFRE and **Robert Cargill** CFRE joined forces with the late Bill McDanel, Glenn Wilkins, and others, to establish the first AFP Fort Worth Metro Chapter on June 30, 1980.

Beginning in 1960, the national organization that is our parent association was known as the National Society of Fund Raising Executives (NSFRE). In 2001, it officially became AFP and for nearly five decades, AFP has worked to advance ethical and effective fundraising and support charities that provide critical services to their communities.

During that time, philanthropy has made extraordinary contributions to the world and played a key role in improving the lives of people in every conceivable way. Globally, the first CFRE's (Certified Fund Raising Executives) were conferred in 1981, making a huge difference in how the organization was viewed by both its members and the entire philanthropic community.

Carolyn assisted with the first practice exams and then took the test without any preparation and became a CFRE in 1982. Today, professional fundraisers are listed in the Top 25 Careers according to a 2008 U.S. News and World Report.

The Fort Worth Metro Chapter is proud to build on its 30-year history and celebrates by establishing this Strategic Plan to begin the journey of the next 30 years.

The Fort Worth Metro Chapter of AFP is a mission-driven organization. Its Mission, Vision, Core Purpose, and Core Values define the organization and direct its activities. These statements inform the strategic plan and act as a touchstone for all aspects of our Chapter.

Mission:

The Mission of the Association of Fundraising Professionals, Fort Worth Metro Chapter mirrors that of our parent and international organization, the core of which is to “Advance philanthropy through education, training and advocacy.”

Vision:

To help everyone in our community realize they can become philanthropists at levels significant to them.

Core Purpose:

Our purpose is to advance philanthropy by enabling people and organizations to practice effective and ethical fundraising.

- Positions fundraising as a respected and honorable profession, and fundraisers as valued and honorable professionals.
- Provides an array of accessible and credit-approved educational opportunities that meet the need of fundraising professionals at every level of experience.
- Develops and promotes strong networking opportunities, fostering care and congeniality among our members.
- Promotes professional credentialing.

Core Values:

- **Service Responsiveness:** Understanding that our focus is on service to our members and that it is provided in a timely and thoughtful manner, open to new ideas, and striving to exceed expectations.
- **Philanthropy:** Believing 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 chapter members.
- **Excellence:** Providing our fundraising community with the highest quality of knowledge, research, advocacy, career support, news and information, strategic alliances, and related tools and insights to foster success.
- **Integrity and Credibility:** Conducting business according to the highest ethical principles and serving as trustworthy stewards of our resources.
- **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.

GOALS 2011-2013

The Fort Worth Metro Chapter of AFP has identified FIVE goals and related activities that are important for the fulfillment of its mission over the next several years. There are TWO goals that focus primarily on internal chapter operations. The other THREE goals involve both internal and external audiences. The order of their presentation does not reflect any particular priority.

GOAL I

SUPPORT OUR MEMBERS THROUGH A VARIETY OF SERVICES THAT FACILITATE THEIR OWN PROFESSIONAL DEVELOPMENT.

- Market the benefits and value of AFP membership to current and prospective members.
- Develop an education program targeted to nonprofit board members.
- Acknowledge support of organizational decision makers who encourage their employees' participation in AFP.
- Present programs that foster professional development at all career levels.
- Develop and maintain a 12-month plan of programs that addresses the needs of a diverse membership.
- Conduct annual member survey to identify beneficial programs and services.
- Assist members in accessing services provided by AFP International.
- Encourage individuals and facilitate opportunities for members to achieve CFRE and ACFRE Certification.
- Promote Fundamentals of Fundraising and CFRE Review Course opportunities to members.
- Investigate additional ways in which monthly programs can serve our mission.
- Investigate educational opportunities for senior level members.
- Promote introductory memberships in AFP.
- Promote non-AFP Fort Worth professional development opportunities.
- Provide a forum for awareness, member interaction, and mutual support among members.
- Sustain new member orientation.
- Maintain social component to all events. Plan quarterly social activities to allow members additional opportunities to network and get to know each other.
- Consider incorporating affinity groups at monthly lunches.
- Work to increase diversity among membership and board of directors.

GOAL II

STRENGTHEN AN UNDERSTANDING OF PHILANTHROPY AND ESTABLISH THE CHAPTER AS THE VOICE OF THE DEVELOPMENT PROFESSION IN OUR COMMUNITY.

- Establish a Speakers Bureau and promote its use throughout our community.
- Seek out opportunities to include AFP as a voice in the community dialogue regarding philanthropy, nonprofit organizations, and the fundraising profession.
- Build stronger relationships with strategic partners. (Partnership for Philanthropic Planning, Funding Information Center, Volunteer Center of North Texas, United Way, DOVIA, media partners, etc.)

- Survey membership to create statistical data on the impact of AFP members re: overall budget, people served, people employed and programs offered by organizations represented in our chapter.
- Develop campaign to increase awareness of the impact of philanthropy.
- Investigate ways in which to utilize the Donor Bill of Rights.
- Enhance National Philanthropy Day as the region’s premiere event celebrating philanthropic institutions, groups, and individuals and the fundraising profession.
- Consider involving past National Philanthropy Day winners in workshops and chapter activities.
- Explore inviting a national motivational speaker, perhaps in partnership with the Dallas chapter.

GOAL III

BROADEN THE AWARENESS OF THE ASSOCIATION AND OUR CHAPTER IN OUR COMMUNITY.

- Create and implement a comprehensive communication and marketing plan.
- Maintain good relationships with all media outlets.
- Ensure that all AFP events receive adequate promotion and coverage.
- Develop a media packet.
- Dedicate specific people and dollars to marketing to communicate Chapter messages.
- Develop Marketing / PR campaigns specific to each chapter event, with a designated person responsible for each.
- Increase visibility with the following groups:
 - Local Chambers of Commerce
 - Government
 - Civic Groups such as Rotary, Kiwanis and Lion’s Clubs
 - Media
 - Boards & CEO’s
 - Business & Professional Associations
 - Educational Institutions
- Develop a plan to reach a broader audience.
- Investigate ways in which to increase broader “reach” of monthly meeting announcements.
- Develop a list of fundraisers and nonprofit CEOs who are not currently members.
- Identify ways in which individual members can promote AFP.
- Utilize testimonials for promotional purposes.
- Sponsor opportunities for prospective members to attend program(s) free of charge.

GOAL IV

OPERATE AND MAINTAIN AN EFFECTIVE AND EFFICIENT CHAPTER.

- Build organizational structure to support ongoing activities.
- Serve as responsible stewards of chapter resources.
- Manage the affairs of the chapter within the confines of a balanced annual budget.

- Conduct an annual audit of the chapter's financial operations.
- Establish a plan for the investment and use of reserve funds.
- Develop and implement mentoring programs to support new members (and those who join committees and the board) to retain members and foster chapter leadership.
- Expand role of committees to involve more members and to develop future leadership.
- Retain skilled and knowledgeable chapter administrator.
- Conduct an annual appraisal of the chapter administrator.

GOAL V

PROMOTE THE IMPORTANCE OF ETHICAL PRACTICES AS PART OF THE FUNDRAISING PROFESSION

- Promote awareness of the *AFP Code of Ethics* and the *Donor Bill of Rights*.
- Provide at least one program per year on the topic of ethics.
- Promote chapter dialogue about ethical practices.
- Increase and promote access to a pathway for graduated professional development focused especially on best practices and ethical standards.

Strengths

- Committed chapter administrator
- Diverse organization
- Strong leadership
- Strong history
- Recognition of NPD event (for members and for community)
- Involvement of senior professionals
- Positive growth (membership)
- Commitment to education
- Retention of members [5-10 year level]
- Strength of the community
- Functioning committees

Weaknesses

- Geography...weak in fringe areas
- Recruiting process – mentoring & leadership development
- AFP membership restrictions – individual vs. institutional

Opportunities

- Committees as recruitment and development of leadership
- Bring a “Prospect” to lunch
- Mentoring: new members, new board members, new committee members
- Audio conferences
- Partnering with other organizations – PPP/AHP
- Attendance incentives – door prizes
- Outreach to senior members
- Speaker’s Bureau
- Fun social networking for members
- Helping hand for new members
- More complete chapter website

Challenges

- Dues structure – rising dues
- The economy
- Serving ALL members – geographic, diversity (senior/grassroots, etc.)
- Certification process
- Involving all members
- Buy-in in the community (people of wealth)
- Who is the next generation of philanthropists?

CONCLUSION

The Fort Worth Metro Chapter of the Association of Fundraising Professionals is an entirely volunteer organization, supported by one part-time chapter administrator. It has all the strengths and weaknesses that inevitably arise from such a structure.

As such, it is vitally important that the mission, vision, core purpose, and core values of the organization play a central role in short and long term planning as well as in the operation and activities of the chapter.

Passion for these central concepts among the members and leaders of the chapter will always drive the organization.