

**Association of Fundraising Professionals (AFP)
San Diego Chapter**

Strategic Plan

2016 – 2019

Strategic Planning Process

Jeanne E. Schmelzer, CFRE, conducted a SWOT analysis as part of a facilitated strategic planning session on September 11, 2015 at a half-day board meeting. Following are the identified strengths, weaknesses, opportunities and threats.

Strengths

- ▶ Strong membership numbers
- ▶ Financial reserves
- ▶ Educational opportunities
- ▶ The Board
- ▶ Name recognition
- ▶ CFRE members
- ▶ Outstanding presenters

Weaknesses

- ▶ Volunteer burnout
- ▶ Consistent program quality
- ▶ Luncheon attendance
- ▶ Barriers for young professionals
- ▶ Communication

Opportunities

- ▶ Flexibility of luncheon locations and programs
- ▶ Collaborate with other organizations/AFP International
- ▶ Measure and communicate our outcomes
- ▶ Member orientation

Threats

- ▶ National Philanthropy Day
- ▶ Member involvement
- ▶ Yearly replacement of Board positions
- ▶ North County Philanthropy Council
- ▶ Not seen as nonprofit organization resource/experts

The following values, mission and vision were subsequently adopted:

AFP Values

- ▶ Philanthropy

- ▶ Professionalism
- ▶ Integrity
- ▶ Ethics
- ▶ Service
- ▶ Education/Mentoring
- ▶ Inclusion

AFP San Diego Chapter Mission (updated 9/17/15 based on input from the board)

- ▶ AFP, an association of professionals throughout the world, advances philanthropy by empowering people and organizations to practice effective and ethical fundraising on behalf of the community.

AFP San Diego Chapter Vision

- ▶ Members are empowered to provide ethical and effective fundraising and leadership services to support the philanthropic needs of their community.

The Board determined the following strategic priorities based on input from the SWOT, Identifying the critical issues facing the chapter now and into the future:

Strategic Priorities

- ▶ Leadership Development
- ▶ Financial Stability
- ▶ **Community Relations: Communications with members and leaders in the philanthropic community**

The Board established goals in each priority and identified objectives and assignments with a timeline for completion. The following goals were voted on and approved by the Board:

Leadership Development

Goal #1

Develop a three-year succession plan

Objectives

1. Orientation booklet and meeting
2. Build strong communities - expectation
3. Identify prospective Board of Directors (BOD) members for three years on a dynamic document

Goal #2

Retain Board members

Objectives

1. Clarify BOD Job descriptions
2. Recognize and acknowledge Board members
3. Clarify chapter administrator role and duties

Financial Stability for the Chapter

Goal #1

Develop a sustainable financial model for National Philanthropy Day

Objectives

1. Create task force
2. Develop recommendations to BOD

Goal #2

1. Provide excellent educational programs to members to retain current members and increase attendance

Objectives:

1. Brainstorm a variety of new locations, times, formats, price points for educational programs
2. Invest in quality speakers

Goal #3

Build operational efficiencies through investment in technology infrastructure

Objectives:

1. Research databases and provide recommendations for investment to BOD
2. Streamline electronic communications including but not limited to: Cvent, authorize.net, AFP website

Community Relations

Goal #1

To develop a comprehensive internal communications strategy for members and an external communications strategy for the public to establish who we are, what we do, and the unique value of AFPCASD

Objectives

- 1. Internal:** Clarify and communicate chapter goals to members
- 2. External:** Communicate the value and impact that our chapter has on the community and how the chapter strengthens the profession in the region

Tactics

- Identify willing committee members across membership including:
 - Young professionals
 - Seasoned chapter members
- Create calendar of internal and external communications strategy
- Identify how we will communicate (eg: newsletter, website, email, social media) and assign committee members to “own” each area

A power point presentation on the strategic plan with assignments and timelines to be completed, was presented to the BOD on September 17, 2015 at the regular monthly Board meeting. The Board agreed to review the strategic priorities at the January 2016 meeting and provide an update on the progress of the assignments made.

*Submitted by Jeanne E. Schmelzer, CFRE
Board member at large for Strategic Planning
Revised 12/17/15*