

**ASSOCIATION OF FUNDRAISING PROFESSIONALS
SOUTH CAROLINA, PIEDMONT CHAPTER
2018-2020 STRATEGIC PLAN**



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Introduction

This plan documents the strategic planning, critical organizational issues, goals and objectives developed by the AFP SC, Piedmont Chapter Board of Directors for the period of January 1, 2018 through December 31, 2020. The board met for a four-hour planning session on December 12, 2017 led by former AFP International Board Chair, Pat Feeley, CFRE. A follow up session was held on February 16, 2018 to finalize the document.

The Board reviewed AFP International's 2017-2019 Strategic Plan, and under Pat's recommendation, agreed to build the Piedmont Chapter's Strategic Plan around the same strategic goals. These strategic goals are:

1. Promote Inclusion and Expand Influence
2. Lead Ethics, Policy, and Advocacy
3. Provide Relevant and Quality Education
4. Strengthen Capacity and Connectivity

The AFP SC, Piedmont Chapter Board of Directors agreed not to include AFP International's fifth goal *Advance Social Good* because accomplishing the other four goals leads to *advancing social good*. The board went through a series of exercises deconstructing the strategic goals and making them chapter specific for the Piedmont Chapter.

Overall, the AFP SC, Piedmont Chapter aims to be a strong, fiscally responsible chapter that shares the goals of AFP International to provide value to our members and better serve the community.

AFP SC, Piedmont Chapter Guiding Principles

The AFP SC, Piedmont Chapter has elected to adopt the guiding principles of AFP International. Those Guiding Principles are:

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.

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.

Vision and Mission

The AFP SC, Piedmont Chapter adopted the mission of AFP International and localized their vision statement to be more chapter specific.

Vision

The AFP SC, Piedmont Chapter will be the leading resource for philanthropy in the Upstate, stimulating a community of generosity and positive social good through fundraising best practices.

Mission

The AFP SC, Piedmont Chapter empowers individuals and organizations to practice ethical fundraising through professional education, networking, research and advocacy.

Strategic Planning Framework Discussion

Pages 4-8 include a list of notes that were compiled during the framework discussion at the planning retreat. The AFP International Strategic Goals were reviewed, deconstructed, and discussed as they relate specifically to the AFP SC, Piedmont Chapter. The following questions were asked for each:

- Why is this goal a priority?
- What can we start/innovate?
- What can we stop/abandon?
- What can we do more of or do differently?
- What can we do less of or do differently?

Strategic Goal 1

Promote Inclusion and Expand Influence

Why is this goal a priority:

- Able to better serve our constituents
- Inclusion leads to membership growth
- Can only grow if you expand influence
- If not a priority, will become stale
- Retention
- Reflects community
- Chapter sustainability

What can we start or innovate:

- Host more events outside of monthly luncheons
- Reach out to organizations that serve diverse populations
- Reach out to smaller organizations
- More marketing; use NPD to promote chapter
- Address career stages
- Implement a mentor program
- Intentional outreach to media (NPD Award)
- Diversity committee
- Seek out leadership diversity

What can we stop or abandon:

What can we do more of or do differently:

- Board needs to be intentional with meeting members and guests at luncheons
- More Marketing
- Sponsor members at small orgs
- Create networking opportunities – doesn't have to be face to face
- More board participation in "each one, bring one"
- Improve diversity scholarship system
- More help for Diversity Chair
- Share "how-to's" and promote
- Make sure it is genuine for individuals and not totally goal driven

What can we do less of or do differently:

Strategic Goal 2

Lead Ethics, Policy, and Advocacy

Why is this goal a priority:

- Ethics forms the basis of our organization
- Fundraising world is changing quickly, anything can happen at any time, need to be informed because donors look to fundraisers as liaisons
- Money is personal
- Important to build trust as fundraising representing nonprofit organizations

What can we start or innovate:

- Share AFP International News
- Collaborate with Together SC
- Review/Discuss relevant case studies
- Create toolbox
- Expand education on ethics throughout (go beyond just AFP members)
- Assuming people know ethics
- Mediocrity

What can we stop or abandon:

What can we do more of or do differently:

- Look at gray areas of ethics and take a deeper dive
- Informal opportunities for discussion
- More state level
- Risk Management Plan for our Chapter

What can we do less of or do differently:

- Don't just do things to check off a box

Strategic Goal 3

Provide Relevant, Quality Education

Why is this goal a priority:

- Integral to maintaining membership and advancing careers

What can we start or innovate:

- Offer to all career stages

What can we stop or abandon:

What can we do more of or do differently:

- Continue choosing relevant topics and speakers
- Variety of topics
- Bring in more national speakers, do a workshop, increase the price, and use the opportunity to greatest advantage
- Round tables
- Engage seasoned pros
- Segment more
- Seminars
- Scholarships

What can we do less of or do differently:

- Review webinars before presenting to entire chapter
- Program on local AFP vs National AFP
- December program provides opportunity to do something different

Strategic Goal 4

Strengthen Capacity and Connectivity

Why is this goal a priority:

- Operate as a dynamic and principled organization
- Being accountable and transparent
- Adds value to our members
- Important to be good stewards of resources

What can we start or innovate:

- Add budget info on our website to be transparent
- Call for board nominations
- Information of Finance and Investment task force started
- More PR
- Comprehensive look at programs
- Evaluate time/location of monthly meetings

What can we stop or abandon:

What can we do more of or do differently:

- Look at more opportunities to earn revenue from luncheons with sponsorships
- Use NPD as a revenue generator
- Finance Committee
- More networking

What can we do less of or do differently:

GOALS AND OBJECTIVES

Promote Inclusion and Expand Influence

The AFP SC, Piedmont Chapter reflects a diverse and inclusive community, evolving and enhancing our community influence and mission impact.

AFP SC, Piedmont Chapter will:

1. Create a mentorship program that connects fundraising professionals at all stages of their careers.
2. Be intentional with listening to the needs of diverse groups and offering more support for the IDEA Chair (Inclusion, Diversity, Equity, and Access Chair) to achieve this goal.
3. Foster a welcoming environment for diverse fundraising professionals.
4. Broaden our AFP chapter's role as an influencer, building on our skills, expertise, and the strength and impact of our chapters, members, volunteers, and strategic partners.

AFP chapter leadership responsible for leading strategy around these objectives:

- IDEA Chair
- VP Membership
- Youth-in-Philanthropy Chair
- CFRE Chair

Tactics

1. Create a business card mentorship/networking program to inspire connections among AFP members and board members
2. Create a mentorship program that connects fundraising professionals at all stages of their careers
 - a. Identify a Mentoring Program Chair to work with Youth-in-Philanthropy co-chairs, IDEA Chair, and VP of Membership to execute outline for program that was created summer 2018.
3. Utilize a written diversity plan to increase participation of diverse individuals, groups or organizations.
 - a. In 2018, the newly formed IDEA Committee has added capacity and will ensure the plan is updated regularly to reflect the needs of the chapter and the local community.
4. Implement monthly "Diversity Moments" to broaden chapter knowledge and foster a welcoming environment.
 - a. The IDEA Committee is utilizing surveys in order to listen to the needs of the chapter and community.
5. Host events to foster community between members hoping to obtain their CFRE credentials.

Tactics continued...

6. The Youth in Philanthropy Co-Chairs positions will be re-named Mentorship Co-Chairs to focus on mentoring initiatives.
7. The IDEA Committee is planning an event which connects our chapter with strategic partners and broadens our chapter's role as an influencer in the Upstate.
8. Be more intentional at working with Greenville Partnership for Philanthropy (GPP), Spartanburg Joint Funders, Together SC, local colleges and universities, and local community foundations.

Lead Ethics, Policy, and Advocacy

The AFP SC, Piedmont Chapter inspires members and the public to engage in philanthropy-friendly public policy and ethical fundraising.

AFP SC, Piedmont Chapter will:

1. Use a variety of platforms to create and provide access to existing and emerging best practices and resources regarding ethical fundraising
2. Increase public policy and ethics actions at the local level

AFP chapter leadership responsible for leading strategy around these objectives:

- Government Relations Chair
- President
- VP Education – Program Development

Tactics

1. Provide at least one education session relating to ethics in fundraising
2. Utilize chapter Facebook page to provide access to ethical fundraising resources

Provide Relevant Quality Education

The AFP SC, Piedmont Chapter champions education, training, and information resources for fundraising professionals to succeed in all stages of their careers.

AFP SC, Piedmont Chapter will:

1. Reflect our audience and their needs, expanding effective educational and training opportunities through monthly luncheons, programs, and events.
2. Invest in leadership and professional development through scholarship opportunities in alignment with recommendations from the Finance and Investment Committee.

AFP chapter leadership responsible for leading strategy around these objectives:

- VP Education – Program Development
- President
- Treasurer
- Scholarship Chair
- IDEA Chair

Tactics

1. Provide surveys to our membership asking for topic ideas so that we are aware of their needs
2. Provide surveys to our membership so that we are aware of the quality of programming we are offering monthly
3. Secure references for each presenter to ensure that the program provided is relevant and useful
4. Ask each presenter to provide tangible takeaways at every presentation
5. Invest, annually, in bringing in a national speaker and pay if necessary
6. Use an Education Committee of diverse members to broaden scope and ideas of education offerings (committee to meet prior to the beginning of each year)
7. Explore the AFP Diverse Communities Scholarship for opportunities for chapter membership to stay engaged with AFP professional development

Strengthen Capacity and Connectivity

The AFP SC, Piedmont Chapter is a dynamic and principled organization, striving to deliver top-notch services, and investing in revenue generation for long-term financial sustainability and capacity building opportunities.

AFP SC, Piedmont Chapter will:

1. Continue to be a transparent and accountable organization/chapter.
2. Prioritize revenue generation. Increase philanthropic support and monetize programs to strengthen mission service delivery.

AFP chapter leadership responsible for leading strategy around these objectives:

- President
- President-Elect
- Finance and Investment Committee
- National Philanthropy Day® Chair
- VP Membership
- VP Publications – Communications – Chapter Support

Tactics

1. Develop opportunities to inform general membership of internal chapter operations including but not limited to reports at luncheon meetings, information in email newsletters, and/or chapter wide mailings
2. Continue to engage Finance and Investment Committee and NPD Chair to work together and keep revenue generation a priority
3. VP of Membership to lead efforts in growing and sustaining membership

Recommendations for Future Action

This plan was created with input from the 2018 AFP SC, Piedmont Chapter Board of Directors under the guidance of former AFP International President, Pat Feeley, CFRE.

It is designed to provide overall goals and themes that will guide the chapter and its leadership in annual and long-term planning.

It is recommended that this plan is reviewed quarterly by the board and updates and changes are made accordingly.