



Planning for the Future: Strategies for Chapter Development

Liza Turcotte, MPA
Vice President for Strategic Planning

Kevin Krizan
Chapter Member

Cindy Roe Ware
Chapter Member

Elisa Mundis Strickler
Chapter Member

TABLE OF CONTENTS

Executive summary.....	3
Inside the Lowcountry chapter.....	4
Mission	
Vision points and core values	
Chapter strengths	
2012 work plan for strategic planning.....	5
The strategic plan.....	7
What's next for strategic planning?.....	9
Addendum.....	10
Acknowledgements.....	12

EXECUTIVE SUMMARY

The Strategic Planning Committee, with the support of the Board of Directors, embarked on a significant overhaul of the chapter's strategic plan in 2011. The committee aimed to write a plan that would provide a core set of forward-thinking goals to support purposeful and calculated growth for three to five years in the following areas:

- Commitment to excellent educational offerings to chapter members and professional fundraisers in the Lowcountry region of South Carolina
- Empowerment of chapter members and the creation of a dynamic environment in which each member can actively participate
- Dedication to chapter business operations in an effort to position the chapter for growth

Guided by AFP International's strategic plan and the mission of the Lowcountry Chapter, the Strategic Planning Committee developed the following document between February 2011 and November 2011. The committee wrote a draft of the strategic plan and worked individually with board members to achieve the final version, including four goals:

- Goal 1: Advance the educational platform for the chapter
- Goal 2: Advance infrastructure and resources for chapter growth
- Goal 3: Advance the chapter's effort to achieve and attend to diversity
- Goal 4: Advance the membership experience of chapter members

The final product is the result of a Strategic Planning Committee that enjoyed strong chapter leadership, enthusiasm for the plan from the Board of Directors, and a collaborative approach to building the final document.

In 2012, the committee worked with an updated strategic plan and provided project-based support and ongoing evaluation for the goals outlined in the new document. To accomplish this, the committee worked more tactically than strategically. At the end of the year, the chapter emerged with some of the important tools required by the strategic plan and allowed the board time to work within and evaluate the effectiveness of the plan.

INSIDE THE LOWCOUNTRY CHAPTER

Mission

AFP International

AFP, an association of professionals throughout the world, advances philanthropy by enabling people and organizations to practice ethical and effective fundraising. The core activities through which AFP fulfills this mission include education, training, mentoring, research, credentialing and advocacy.

AFP South Carolina Lowcountry Chapter

The Association of Fundraising Professionals exists to foster the development and growth of fundraising professionals and the profession, to preserve and enhance philanthropy and volunteerism, and to promote high ethical standards in the fundraising profession.

Vision Points and Core Values

- The chapter will, in every activity, seek to build awareness in the community of the importance of philanthropy so that executive directors and boards embrace and become advocates for the “joy of giving”.
- In all the AFP South Carolina Lowcountry Chapter does, it will pursue diversity as a core value. Diversity is the seeking and achieving of a broad representation of experiences, perspectives, opinions, and cultures.

Chapter Strengths

The South Carolina Lowcountry Chapter concluded 2012 well-positioned for continued growth. The following represent some recent successes and points of pride:

- The chapter concluded 2012 with roughly 130 members.
- Educational offerings for members, notably low cost and free offerings, continue to experience growth.
- The chapter’s financial position is solid and stable, despite an unfavorable economic climate.
- Communication among chapter members and with the local community continues to mature.
- AFP International has awarded the chapter Ten Star status for three consecutive years, recognition reserved for high performing chapters. The chapter has also received the Friends of Diversity designation every year AFP International has awarded it.
- With the addition of new community awards, the chapter increased the number of opportunities to recognize philanthropic excellence in the Charleston area.

THE STRATEGIC PLAN

Goal 1: Advance the educational platform for the chapter

Advance the chapter's educational platform and standards through cohesive educational opportunities for all career levels.

Strategies

- Enhance the chapter's strong commitment to interesting, timely, and diverse programming to members at all career levels.
- Enhance the chapter's strong commitment to mentoring opportunities, to include meaningful interaction among new fundraising professionals, experienced fundraising professionals, and those in the chapter who have earned the distinction of Certified Fundraising Executive (CFRE).
- Utilize the multiple scholarship opportunities offered by the chapter—including scholarships for AFP membership, Summer Institute, and the Chamberlain Scholarship—to showcase the educational opportunities offered by the Lowcountry Chapter.

Goal 2: Advance infrastructure and resources for chapter growth

Prepare the South Carolina Lowcountry Chapter for continued growth through the evaluation of and best use of current resources, opportunities, and potential areas of need.

Strategies

- Evaluate the chapter's current governance, infrastructure, and financial position. Determine areas for improvement and develop a plan of action to ensure the chapter's resources are adequate for future years.
- Ensure board members are well-prepared and well-trained for their leadership role and governance of the chapter.
- Conduct annual strategic planning sessions.
- Investigate the chapter's interest and ability to grow into an organization that encompasses meaningful assistance and resources for member organizations to build more effective boards.
- Recognize and reward the value of strategic partnerships with sponsors and potential donors.
- Consider the implementation of an annual appeal to support the chapter directly.

Goal 3: Advance the chapter's effort to achieve and attend to diversity

Build and maintain an effective program to enhance chapter diversity in all aspects.

Strategies

- Use the Diversity Chair position to create a strong, diverse committee to build an action plan and develop a membership reflective of the area by June 2013.
- Develop strategy to support the chapter's increasing breadth and depth of professional experiences, perspectives, opinions, and cultures.

Goal 4: Advance the membership experience of chapter members

Create a dynamic environment in which chapter members are actively engaged at all levels of career experience.

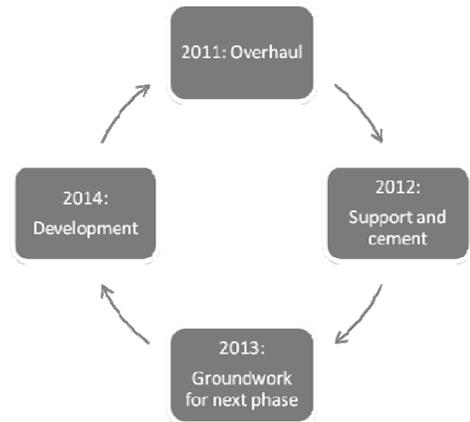
Strategies

- Chapter leadership will formalize and adhere to a plan to welcome new members, help them become involved in the work of the chapter, and evaluate their level of satisfaction with their membership.
- Chapter leadership will develop a strategy to recruit and retain members with a high-level of professional experience.
- Members of the board will utilize a committee structure for their areas of responsibility to create meaningful opportunities for chapter members to participate in the work of the chapter.

WHAT'S NEXT FOR STRATEGIC PLANNING?

The 2012 Strategic Planning Committee worked with a four year cycle in mind, depicted at right. Depending on priorities for 2013, the 2013 Committee may choose to lay the groundwork for a revised strategic plan or alter the planning cycle.

During 2011 and 2012, a common thread in conversations, both at the board level and within the Strategic Planning Committee, was the need to “raise the profile” of the Lowcountry Chapter inside our service area. A deliberate, thorough, and purposeful look at the way in which those outside the Lowcountry Chapter perceive and relate to the organization is an essential step in this process. Chapter leadership in 2013 may choose to commit to a new goal of *Advancing the chapter's position in the community*, which would include a project we called the *Chapter Positioning and Perception Audit*. The broadest details of this goal and its accompanying strategies are included below for consideration.



Possible strategic planning cycle for the Lowcountry chapter, 2011-2014.

Advance the chapter's position in the community

Position the South Carolina Lowcountry Chapter as a nonprofit industry leader specializing in fundraising, development, and philanthropy to the fundraising profession and community at-large in the greater Charleston area and Lowcountry region of South Carolina.

Strategies

- Conduct a thorough Chapter Positioning and Perception Audit to determine the most effective ways to engage the fundraising community. The Audit should encompass a wide variety of professional expertise and work in tandem with the chapter's efforts to increase membership, attend to diversity and provide excellent educational offerings.
- In response to the Chapter Positioning and Perception Audit results, the Communications Committee should develop a plan to increase visibility of the chapter.
 - Work in tandem with other applicable committees to identify and implement strategies to increase visibility and develop the perception of the chapter, such as increased memberships, educational programming, and media exposure.
 - Implement subcommittees, or recruit additional members of the Communications Committee, to actively work with area media and enhance visibility of the chapter through additional media outlets.

ADDENDUM

The following are tactics associated with each of the four primary goals addressed in the strategic plan. The committee developed the list throughout the year, and it is included here as a reference point.

Goal 1: Advance the educational platform for the chapter

Tactics

- Board members with responsibility for programming will meet at the direction of the chapter President to plan educational programming for the coming year. The partnership should be proactive, collaborative, and serve as a means to provide breadth and depth in educational events. Programs, Professional Development, Summer Institute, Mentoring, and Ethics chairs should participate in the planning process.
- Evaluate on an ongoing basis educational programming and gauge members' preferences for future offerings through the use of regular surveys of event attendees and general membership. Programs, Professional Development, Summer Institute, and Ethics chairs should share information at least quarterly.

Goal 2: Advance infrastructure and resources for chapter growth

Tactics

- The President, President Elect, Immediate Past President, Sponsorship Chair, and Treasurer should analyze the current financial position of the chapter and, taking into account infrastructure needs, work to ensure the chapter has necessary resources and governance to ensure stability during growth.
- Conduct an audit of position descriptions to ensure each is an accurate, comprehensive, and useful document. Update each as necessary to ensure tasks are assigned and align with the chapter's strategic plan.
- Consider an orientation for new board members.
- Consider the implementation of standardized year-end reporting by board members to build chapter access to historical information and aid in the transition of positions between board members.
- The President Elect should create an ad hoc committee of board members to investigate the chapter's interest and ability in including board training for area nonprofits as a core programming offering of the chapter. The committee should prepare a recommendation for the Board of Directors after conducting an inventory and search of available board development materials, required additional resources, and sustainability of the potential effort.
- Expand and improve relationships with sponsors by developing a plan for regular and meaningful opportunities for stewardship and engagement. For example, sponsors should be included as appropriate in chapter events, the

chapter should seek their feedback about their experience as a sponsor, and chapter members should maintain contact with sponsors during the year.

- Board members identify and cultivate new chapter members and sponsors.

Goal 3: Advance the chapter's effort to achieve and attend to diversity

Tactics

- Build on the “Friends of Diversity” icon on our web site and post the chapter diversity statement with this icon.
- Appoint an ad hoc committee to develop a comprehensive diversity plan. The committee should include the Diversity Chair, Immediate Past President and President Elect.
- Vice President of Programs and the Vice President of Professional Development should capture high-level fundraising professionals with tailored programs.
- Encourage members unable to attend chapter events to send someone else at the member price to help gain awareness of our work.
- Develop targeted e-mailings to segments of the chapter's membership to encourage wider membership and participation.

Goal 4: Advance the membership experience of chapter members

Tactics

- Under the leadership of the Vice President of Membership, a Member Stewardship Committee will help welcome, educate, engage, and re-recruit chapter members.
- Board members will recruit chapter members to committees.

ACKNOWLEDGEMENTS

This 2012 strategic planning document would not have been possible without the leadership of key volunteers who dedicate themselves to the advancement of the South Carolina Lowcountry Chapter.

2012 South Carolina Lowcountry Chapter Board of Directors

Stacy Oldfield, President

Tom Walker, President Elect

Courtenay Fain, Vice President of Professional Development

Lili Gresham Hiser, Vice President of Programs

Liza Turcotte, Vice President of Strategic Planning

Megan Draper, CFRE, Membership

Jennifer Richard, Ethics

Matt Dwyer, Every Member Campaign

Steffanie Godsill Dohn, Diversity

Kathryn Sherrod, Communications

Lauren Dickerson, National Philanthropy Day

Kathleen Forbes, Summer Institute

Lindsay Ball, Treasurer

Amanda Weingarten, Secretary

Toni Jernigan, Mentoring

Danya Jordan, Sponsorship

Lisa Cottingham, Scholarship

Sally Ehrenfriend, Governance

Leigh Handal, Awards

Kenton Barham, Past President

Peggy Hotchkiss Cieslikowski, Member at Large

2012 Strategic Planning Committee

Liza Turcotte, Vice President of Strategic Planning

Kevin Krizan, chapter member

Elisa Mundis Strickler, chapter member

Cindy Roe Ware, chapter member