



**ASSOCIATION OF  
FUNDRAISING  
PROFESSIONALS  
BLUEGRASS CHAPTER  
LEXINGTON KENTUCKY**

*2016-2017 Strategic Plan*

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**ASSOCIATION OF FUNDRAISING PROFESSIONALS  
BLUEGRASS CHAPTER  
LEXINGTON, KENTUCKY**

*Background*

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The Association of Fundraising Professionals (AFP) represents nearly 30,000 members in 242 chapters in the United States, Canada, Mexico, and China and works to advance philanthropy through advocacy, research, education, and certification programs. Originally named the National Society of Fundraising Professionals (NSFR), the association officially changed its name in 2001 as did the chapter to better reflect the region in which it serves: the Kentucky Bluegrass.

The Bluegrass Chapter of AFP was established in early 1985 by a small group of fundraising professionals in Central Kentucky. By the end of that first year, ten members had enrolled, and in April of 1986 enrollment jumped to 20 professionals, representing nonprofits from Louisville to Northern Kentucky. Several years later, due to strong interest expressed from Louisville area professionals, the Bluegrass Chapter encouraged and supported the creation of the Greater Louisville Chapter. Then the Greater Cincinnati Chapter expanded and incorporated additional northern Kentucky nonprofit organizations to further encompass and serve the state's many fundraising professionals. Over the next 18 years, the Bluegrass Chapter continued to increase its own membership and define its boundaries.

Today, roughly 100 members represent a wide variety of nonprofit organizations and fundraising expertise throughout Central and Eastern Kentucky. The Bluegrass Chapter has enjoyed great success in its first stages of growth, but it is now deemed the appropriate time to grow again by further striving for excellence in the services and professional development opportunities provided by the Chapter. There are many fundraising professionals in our community who are not yet members of our association and many more opportunities to collaborate with the other AFP chapters in the Commonwealth to maximize resources and to promote the profession statewide.

Through education, training, and advocacy, AFP will continue to advance philanthropy to support the many important needs of the community. The 2016-2017 Strategic Plan provides an important roadmap that will serve as a guide for this organization through the next exciting years. This Strategic Plan will help the chapter's leadership stay the course and achieve the important goals that were identified with valuable input from the entire membership.

## Mission Statement

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

## Vision Statement

Our chapter's vision is to work with our members to advance the profession of fundraising as a credible and respected profession both locally and globally.

## Quality Statement

The Bluegrass Chapter is committed to excellence in providing the highest quality services and benefits for our members and other constituents. We work to be responsive to their needs and strive to exceed expectations for our key customer groups:

- Fundraising Professionals: AFP Members and Potential Members
- Members' Employers
- Donors
- Nonprofit Organizations

## Inclusion & Diversity Statement

The AFP Bluegrass Chapter will provide a welcoming, culturally and professionally diverse environment for fundraising professionals in Central and Eastern Kentucky while fostering meaningful interaction and deeper understanding of the various beliefs, ethnicity, skills, perceptions, and backgrounds within our community.

## Bluegrass Chapter Priorities

During the span of this plan, the Chapter will focus on these priorities:

- The Chapter will strive to *strengthen the profession* by serving as a resource to the Central Kentucky philanthropic community through education, information, and advocacy while promoting and supporting the fundraising profession.
- The Chapter will promote and expand the *knowledge* base of its members through educational and networking opportunities.
- The Chapter will constantly seek to improve its *organizational effectiveness* through enhanced administrative functioning, communication, and leadership.
- The Chapter will focus on increasing membership.

## Bluegrass Chapter Priorities & Goals

### Strengthening the Profession

GOAL I: Educate the philanthropic community as to the role of the fundraising profession and the importance of professional development.

GOAL II: Become the recognized source for philanthropic information, advocacy, ethical standards, and the development of the fundraising profession.

GOAL III: Grow our membership by implementing a Chapter Recruitment and Retention Plan.

GOAL IV: Promote the fundraising profession to youth and nurture future philanthropic leaders.

### Knowledge

GOAL I: Provide relevant and comprehensive educational opportunities to members.

GOAL II: Encourage and support members to become Certified Fundraising Executives (CFRE).

GOAL III: Promote wide participation in the chapter's Mentoring Program.

**Organizational Effectiveness**

GOAL I: Effectively communicate with our members and promote benefits of membership on an ongoing basis.

GOAL II: Strive to be a model chapter of excellence and continuous improvement.

GOAL III: Provide leadership development opportunities for our board members, officers, and members.

Goal IV: Develop effective strategies for identifying, recruiting, and training prospective members, chapter leaders, and board members.

<h2 style="margin: 0;">Goals and Objectives</h2>	<p><b>STRENGTHENING THE PROFESSION</b></p> <ul style="list-style-type: none"> <li>Educate the philanthropic community</li> <li>Become the recognized source for philanthropic information</li> <li>Continue to grow our membership</li> <li>Promote the fundraising profession to youth</li> </ul>
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**STRENGTHENING THE PROFESSION**

The primary focus of the Bluegrass Chapter of AFP mission is strengthening the profession. During 2016-2017, the Bluegrass Chapter of AFP will:

**GOAL I: Educate the philanthropic community as to the role of the fundraising profession and the importance of professional development.**

Objectives	Activity	Officer /Staff Assignment	Timeline
Establish, maintain, and increase connections with related community organizations	1) Identify constituent priorities for each year 2) Determine ideal strategies for each constituent; i.e. conferences, reception, program speakers, or panels	Primary: VP Community Relations Secondary: VP Membership	2016 - 2017

**GOAL II: Be a primary source for philanthropic information, advocacy, ethical standards, and professional growth for fundraisers in the Bluegrass Region.**

Objectives	Activity	Officer /Staff Assignment	Timeline
Capitalize on the visibility and audience afforded by NPD	1) Identify constituents 2) Develop new promotion strategies	Primary: VP Community Relations Secondary: NPD Co-Chair	2016 - 2017
Increase visibility of AFP resources, i.e. programs and webinars	1) Assess webinar interest for next year 2) Allocate funding for mix of live and purchased webinars, available on chapter website 3) Promote webinars 4) Host lunch that addresses AFP resources	Primary: VP Education Secondary: Program Committee, Webinar Chair and Administrator VP Education/ Program Committee	1) Before Jan. of upcoming year 2016 and 2017 2) by Jan. 2016 and 2017 3) ongoing 4) schedule once
Review and upgrade library resources	1) Identify appropriate materials to include in the library collection 2) Purchase materials 3) Announce new book purchases on website	Primary: VP Education Secondary: Library/ Historian Chair	2016 - 2017
Showcase member accomplishments and awards as a means to promote larger association	1) Highlight professional accomplishments of members through media outlets, i.e. Facebook, LinkedIn, website, newspapers, and other publications	Primary: VP Community Relations Secondary: Newsletter Chair	2016 - 2017
Gain visibility with members of related organizations	Meet with leadership of other nonprofit groups, promoting membership and inclusion ( <i>see Inclusion Committee Plan</i> )	Primary: VP Membership Secondary: Inclusion Committee	2016 - 2017
Gain visibility with media outlets	Meet with leadership of central Kentucky media outlets and explain AFP role	Primary: VP Community Relations	2016 - 2017

**GOAL III: Grow our membership by implementing a Chapter Recruitment and Retention Plan.**

Objectives	Activity	Officer /Staff Assignment	Timeline
The chapter will, at a minimum, equal the international AFP membership renewal average	1) Initiate 1:1 contact with members during the month before their renewal date, encouraging them to renew and discovering barriers 2) Contact members personally whose memberships have lapsed to encourage renewal	Primary: VP Membership Secondary: Membership and Inclusion Committee	2016 - 2017
Increase new member enrollment and engagement	1) Set a target number of scholarships and publicize scholarship opportunities 2) Provide scholarships to support attendance at various AFP Programs and Conferences 3) Develop a New Member Assimilation Plan (Set % goal for engagement beyond monthly luncheon)	Primary: VP Membership with Membership and Inclusion Committee  Scholarship Chair  VP Membership with Membership and Inclusion Committee	2016 - 2017
Continue to grow membership through outreach and follow-up	1) Contact Nonprofit EDs/CEOs to discuss benefits of membership 2) Continue to follow up with visitors after events or programs 3) Contact members who have not attended event in three months 4) Host <b>two</b> membership social/reception events 5) Send applications to non-members after event	Primary: VP Membership       Secondary: Membership and Inclusion Committee	2016 - 2017       2016 - 2017
Ensure that inclusion and diversity are incorporated into all aspects of chapter Recruitment and Retention Plan	1) Perform annual assessment report on chapter diversity efforts: a) Chapter’s demographic composition b) Involvement of under-represented populations	Primary: VP Membership, with Membership and Inclusion Chair	2016 - 2017

**GOAL IV: Promote the fundraising profession to youth and nurture future philanthropic leaders.**

Objectives	Activity	Officer /Staff Assignment	Timeline
Promote and strengthen the Thoroughbred Collegiate Chapter	1) Continue the working relationship with the Chapter and its sponsor(s)	Primary: Education Chair Secondary: Youth and NPD Chair	2016 - 2017

**KNOWLEDGE**

A second focus of the Bluegrass Chapter’s mission is knowledge. During 2016-2017, the Bluegrass Chapter of AFP will increase the knowledge base through education.

**KNOWLEDGE**

- Provide relevant and comprehensive educational opportunities to members
- Encourage and support members to earn CFRE

**GOAL I: Provide relevant and comprehensive educational opportunities to members.**

Objectives	Activity	Officer /Staff Assignment	Timeline
Develop and implement a segmented programming calendar for whole year	1) Perform a member survey to identify program interests and available speakers	Primary: VP Education Secondary: Program Committee	Before Jan. 2016, and each year thereafter
	2) Schedule and publish program calendar		By Jan. 2016
	3) Design an individual program assessment tool and implement		By Jan. 2016
Involve senior level development professionals from Bluegrass community	1) Identify pool 2) Involve in 1:1 mentoring 3) Involve in monthly program, periodic professional	Primary: VP Education Secondary: Program Chair	2016 - 2017

	roundtable/conferences		
Develop partnerships with other chapters to enhance quality of programming and networking opportunities	1) Maintain current and seek new partnerships in KY and beyond	Primary: VP Education Secondary: Conference Chair	2016 - 2017

**GOAL II: Encourage and support members to become Certified Fundraising Executives (CFRE).**

Objectives	Activity	Officer/Staff Assignment	Timeline
Enhance community knowledge and recognition of the significance of becoming CFRE	1) Host a Recognition ceremony to celebrate major leadership contributions 2) Design promotion strategy to encourage CFRE certification	Primary: VP Education and VP Community Relations	Nov 2015 and 2017  2016
Support members in seeking certification by making information, training, and testing available	1) Survey membership interest in CFRE 2) Provide list of area CFRE review opportunities 3) Provide a scholarship for a current member to enroll in the CFRE Review Course 4) Assign an existing CFRE to any member desiring new certification 5) Register luncheons as CFRE accredited program hours	Primary: VP Education  Secondary: Program Chair	2016 - 2017

**GOAL III: Promote chapter-wide Mentoring participation**

Objectives	Activity	Officer/Staff Assignment	Timeline
Design a sustainable mentoring program that utilizes senior professionals and attracts junior fundraisers	Commission a Mentor Leadership Team with oversight (recruitment, training, pairing, assessment, and award ceremony)	Primary: VP Education and Mentor Chair	2016 - 2017
Continue AFP organizational	Engage other AFP chapters to develop	President and Board	2016

mentorship program	and maintain best practices		
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## ORGANIZATIONAL EFFECTIVENESS

The final area of focus for the Bluegrass Chapter of AFP mission involves continuing to strengthen the foundation of the association through effective communication, outstanding achievement and leadership development.

## ORGANIZATIONAL EFFECTIVENESS

- Effectively communicate with our members
- Strive to be a model chapter of excellence
- Provide leadership development opportunities

### GOAL I: Effectively communicate with our members and promote benefits of membership on an on-going basis.

Objectives	Activity	Officer /Staff Assignment	Timeline
Solicit membership feedback	1) Solicit feedback through annual membership survey 2) Collect feedback at conclusion of each event	Primary: VP Membership Secondary: Programs and Administrator	2016 - 2017
Create and implement strategies to serve the needs of constituents in Eastern Kentucky	1) Explore opportunities to support Eastern KY nonprofits and development staff 2) Recruit member with regional connection to assume leadership	Primary: VP Education Secondary: Education Committee or Regional Outreach Team	2016

### GOAL II: Strive to be a model chapter of excellence and continuous improvement.

Objectives	Activity	Officer /Staff Assignment	Timeline
Complete the Ten Star Award requirements each year	1) Submit Chapter Leadership Form 2) Host an organized event focused on	Primary: President, Chapter Administrator	2016 - 2017

	ethical fundraising 3) Identify and complete 7 of the 12 remaining options		
Encourage members to invest in the national organization each year	1) Strive to equal or exceed AFP Internal member giving average to “Be the Cause” campaign 2) Strive for representation on AFP national committee or as national officer	Primary: President  Foundation Development Chair	2016 - 2017
Meet the mandates of the parent organization to ensure compliance as a chapter each year	1) Meet Chapter Accord requirements and submission to meet AFP deadline 2) File the IRS 990 form	Primary: President, Chapter Administrator Treasurer	2016 - 2017

**GOAL III: Provide leadership development opportunities for our board members, officers and members.**

Objectives	Activity	Officer /Staff Assignment	Timeline
Provide leadership development opportunities for current board members	1) Offer orientation for new board members, including new member packet 2) Host bi-annual Board Retreat to focus on board training and development 3) Update job descriptions for board/committee chairs 4) Identify and recruit diverse board members	Primary: President Secondary: Nominations Chair	2016  2017
Identify and nurture future leadership to ensure the success and continuity of the Chapter	1) Implement succession plan 2) Identify, recruit, and orient prospective chapter leaders 3) Utilize the nominating committee to identify leaders	Primary: President, Past President, President-Elect	2016 - 2017