

STRATEGIC PLAN FOR THE
ASSOCIATION OF FUNDRAISING PROFESSIONALS –
GREATER HOUSTON CHAPTER

APRIL 2008



Introduction and Background

In October 2007, Dini Partners was retained as pro-bono counsel to facilitate a strategic planning process for the Greater Houston Chapter of the Association of Fundraising Professionals (AFP-GHC). Encouraged by the strategic planning of the International Association of Fundraising Professionals (IAFP) which was concluded in 2007, the Board of the AFP-GHC decided to embark on a strategic planning process which would elevate the chapter from the status of a leader to that of a clear front-runner among AFP chapters. The goal of this process was not change for change's sake, but was to reflect on how the AFP-GHC could have an impact on philanthropy and the support of fundraising professionals in the geographic area served by this chapter.

Representing the fundraising profession in the fourth largest city in the United States, the AFP-GHC Board decided to “look beyond the horizon” to the year 2015 – seven years in the future. The express goal of this process was to engage the membership and others in the professional fundraising community in helping to shape a vision and direction that would establish the agenda for the AFP-GHC Board for future years.

The strategic planning model utilized by Dini Partners and the chapter leadership is based upon an understanding that organizational wisdom is shared and spread across a wide spectrum of members instead of being lodged in a narrow group of leaders. Throughout this process, more than 85 AFP-GHC members and other professionals played an active role or contributed in some way to this process.

The first step in this process was the identification, recruitment, and orientation of a 16-member Strategic Planning Oversight Committee (SPOC) who would shepherd this process from the initial data gathering to the development and refinement of the final goals. The SPOC was chaired by AFP-GHC Board member Greg Robertson.

The second step of the planning process was to gather data through focus groups and interviews to help identify the central issues, concerns, and opportunities to be addressed during the SPOC meetings. During this phase, the Dini Partners gathered initial insights through a series of six focus groups representing:

- Advanced professionals (10 or more years in the profession)
- Mid-range professionals (four to nine years in the profession)
- New professionals (three or fewer years in the profession)
- Executive directors and CEOs
- Lapsed members
- Geographically distant members

Through this process, the Dini Partners was able to articulate a starting point of the process in the lived experience of the membership.

Through this planning process, the primary objectives were to articulate a vision, goals, and action steps that would enhance the AFP-GHC's capacity to serve its membership and the greater community of eleemosynary institutions. During the SPOC meetings, Dini Partners led those on the committee, comprised of board members and current, past, and future presidents, through a visioning process that established the focus for future decision-making. The leadership articulated the chapter core values and core purpose, and then formulated a "big, hairy, audacious goal" (BHAG) or vision statement for the next seven years. Finally, the SPOC determined the top 10 strategic issues to be addressed by Task Teams. The Task Teams met on three occasions to set SMART (Specific, Measurable, Achievable, Relevant to the institutional BHAG, and Time-bound) goals and developed action plans intended to guide the AFP-GHC in the fulfillment of this strategic plan.

With the input of more than 85 AFP-GHC chapter members and others who served on one of the nine Task Teams, opportunities to continually improve and address the 10 key strategic issues were explored, ending with the formulation of draft goals and action step recommendations.

The following strategic plan, developed by the SPOC for the AFP-GHC, outlines the preliminary steps necessary to move the chapter toward its vision – *By 2015, the AFP – Greater Houston Chapter will drive philanthropy for our community.*

It has been the Dini Partners' pleasure to be of service to the Association of Fundraising Professionals – Greater Houston Chapter and to be of service to our shared profession and the noble work of fundraising and philanthropy.

IAFP Mission and Vision Statements

The mission statement for the International Association of Fundraising Professionals was not revised or altered in the course of the strategic planning process; it was considered the starting point for the process.

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.

Core Values and Core Purpose

The Strategic Planning Oversight Committee developed a vision based on a two-step process of articulating the core purpose (*enduring singular purpose of the AFP-GHC that will stand the test of time*) and core values (*essential beliefs*) of AFP-GHC.

It should be noted that the core values are merely summary statements that touch upon the essential or guiding principles of the AFP-GHC, but do not reflect the total reality of the

organization and its complex membership. There are many more values that could be attributed to the organization beyond the core values articulated below.

Professionalism – *The role of fundraising professionals is an essential, noble pursuit and advances the greater Houston nonprofit community.*

Learning / education – *The assurance of relevant and high quality educational opportunities for fundraising professionals at all career points and in all staff roles.*

Ethical fundraising – *Universal adherence to the AFP Code of Ethical Principles and Standards, and assuring that fundraising professionals are informed of ethical fundraising practices and the tenets of the Donor Bill of Rights.*

Integrity – *Transparency in the management of chapter finances and governance.*

Fun – *An environment of camaraderie and building bonds between fellow fundraising professionals.*

Inclusiveness – *Welcoming all fundraising professionals, regardless of employment status, organizational size, or professional position, and encouraging all to become active participants in the chapter.*

After articulating the core values, the Strategic Planning Oversight Committee turned its attention to the core purpose which is the enduring reason for the existence of AFP-GHC. Here the SPOC was challenged to reach beyond the mission to articulate why AFP-GHC exists. The challenge was to answer the question, “Why will it be important for AFP-GHC to exist 100 years from now, even if market conditions suggest that it should not exist?”

The core purpose of the AFP-GHC is to foster a vibrant community by promoting philanthropy and supporting fundraising professionals.

Vision: The BHAG

Flowing from this two-step process of articulating the core purpose and core values, the Strategic Planning Oversight Committee developed a transformational goal to be realized over the next seven years – by 2015. Characterized as a BHAG (Big, Hairy, Audacious Goal), this statement is intended to elevate expectations, planning, and performance throughout the organization. A successful BHAG will challenge an organization and serve as a catalyst for planning and action. It is intended to be transformational while remaining true to the core mission and identity of the AFP-GHC.

By 2015, the AFP – Greater Houston Chapter will drive philanthropy for our community.

In its shortest form – as a form of tagline for the strategic plan, this BHAG was summarized as follows:

AFP – Greater Houston Chapter: We drive philanthropy!

Throughout the strategic planning process, after this BHAG was developed, the short-hand version was used as a question to challenge the quality of planning. Often the question would be asked as follows, “Does this help us to drive philanthropy?”

Strategic Areas

The Strategic Planning Oversight Committee determined that there are 10 strategic issues that should be addressed as the chapter works to realize the BHAG of driving philanthropy in our community. These strategic issues represent both obstacles and opportunities that should be overcome or seized in the implementation of the strategic plan:

Engaging Advanced Professionals – Keeping our most senior members active and involved in leading our profession.

Supporting Entering Professionals – Serving those who are new to the profession, including young professionals and those who have made a career change.

Affinity and Collaborative Relationships – Strengthening professionals through affinity and collaborative relationships.

Community Resourcing (Resources) – Becoming the “go to” source for fundraising thought and professional leadership.

Advancing Membership – Increasing and retaining memberships.

Hospitality – Welcoming and engaging members and visitors.

Programs – Strengthening programs.

Enhancing Professional Skills – Equipping fundraising professionals with state of the art knowledge and skills.

Marketing/Communication/Branding – Increasing the chapter profile and recognition.

Staffing the Plan – Exploring the volunteer and professional resources needed to achieve the BHAG.

Strategic Goals

The Strategic Planning Oversight Committee appointed Task Teams comprised of AFP-GHC members and other professionals in the field to address each strategic issue by formulating strategic goals. Each strategic goal was measured against the criteria of being SMART (Specific, Measurable, Achievable, Relevant to the institutional BHAG, and Time-bound). Additionally, each goal was evaluated against the questions: Is this goal bold? Is this goal transformational for the AFP-GHC in the light of the BHAG developed in this planning process?

Advanced Professionals:

Strategic Goal 1: *By 2015, 50% of advanced professional members will participate in at least one educational and one social event or program per year other than National Philanthropy Day (NPD).*

Supporting Entering Professionals:

Strategic Goal 2: *By 2015, 90% of chapter members who are entering professionals will participate in at least five educational, social, mentoring, affinity programs, or committees/activities of the chapter per year.*

Working through Affinity and Collaborative Relationships:

Strategic Goal 3: *By 2013, establish 10 viable smaller affinity groups of AFP-GHC members based upon some common dimension such as the focus, location, or budget of their respective organizations.*

Strategic Goal 4: *By 2015, annually involve professional associations as collaborators in five strategic initiatives to advance community philanthropy.*

Community Resourcing (Resources):

Strategic Goal 5: *By 2015, the AFP-GHC will become the local resource for information concerning best practices, public policy, and questions relative to philanthropy for civic, business, media, government, thought-leaders, and local philanthropists.*

Advancing Membership:

Strategic Goal 6: *By 2015, increase membership to 1,000 and attain a retention rate of 80% for all renewing members.*

Hospitality:

Strategic Goal 7: *By 2013, at every AFP-GHC event or program, every member and guest will always feel welcomed.*

Programs:

Strategic Goal 8: *By 2015, enhance the appeal, type, and content of AFP-GHC programs and events such that the percentage of participation by members and non-members increases by 5% per year.*

Enhancing Professional Skills:

Strategic Goal 9: *By the end of 2015, increase the total number of CFREs in the greater Houston area by 75%.*

Strategic Goal 10: *By the end of 2013, establish a degree-granting Center for Philanthropy in Houston with a local higher education institution.*

Marketing/Communication/Branding:

Strategic Goal 11: *By 2015, increase the recognition of the AFP-GHC brand and the respect of the fundraising profession as measured by the number of media mentions.*

Strategic Goal 12: *By 2015, increase community awareness and presence by building relationships with local and national media publications, developing strategic story ideas that highlight the AFP-GHC, and which are also of interest to select target markets/demographics within greater Houston.*

Staffing the Plan:

NOTE: Addressing this strategic issue was deferred until the implementation of the plan during which time the staffing resource demands will become clearer.

Strategic Planning Oversight Committee

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Michelle Buchanan, CFRE
Emelda Douglas
Jennifer Evans
Kevin Foyle, CFRE
George Grainger
Chris Kasavich
Amelia Kleiman

Anne Murphy, CFRE
Greg Robertson (*Chair*)
Diana Morales Taylor
Linda Toyota
Sukey Voskamp, CFRE
Barbara Walker, CFRE
Iska Wire
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Dini Partners

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Dawn Blitz, Consultant
Holly Williams, Consultant
Stacey Cooper, Project Manager

Focus Group Participants

Mid-range Professionals

Sarah Boyd
Marilyn Green
Cathy Henderson
Nina Wilson Jones
Catherine Merriman
Doyin Oguntona

Lapsed Members

Erin Keating
Carol Ostlind
Susan Truax

New Professionals

Nelson Bowman
Katherine Cabaniss
Dawn Lorenz
Reema Tandan
Loria Wilson
Amber Winsor

Non-Houston Members

Joan Cain
Tom Ferguson
Maureen Fitzgerald
Patricia Green
Monica O'Neal

Executive Level Professionals

Anne Budill
Marc Mattsson
Elise Passy
Nancy Tucker
Anthony Love

Advanced Professionals

Jenny Dudley
Mark Dulworth
Winiford (“Win”) Dunn
David Dwyer
Laura Easton
Angela Hodson
Marcia Hovious
Deborah Lackey
Sam Lasseter
Marianita Paddock
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Task Team Participants

Advanced Professionals

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Affinity Groups/Collaborators

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Linda Toyota

Community Resourcing (Resources)

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Muffin Clark

Entering Professionals

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Dawn Lorenz
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Nan Duhon
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Marketing/Communications

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Amber Winsor
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Membership

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Programs

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Professional Skills

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