

**Association NAME
STRATEGIC PLAN 2015-2016**

Goal 1: will optimize chapter operations and financial resources

PRESIDENT

OBJECTIVES	STRATEGIES	ACTION STEPS/OUTCOMES
Objective 1: Develop a plan to provide an effective way for members to engage in the committee structure and other chapter leadership activities	<p>Work with VP's and Committee Chairs to ensure that job descriptions and expectations for members of all committees are in place.</p> <p>Conduct a member engagement survey</p>	<p><i>First Quarter of 2014</i></p> <p><i>Sencond quarter of 2014</i></p>
Objective 2: Continue the process to encourage active participation of board members.	<p>Work with Communication committee to effectively market the new engagement process to the membership</p> <p>Board members complete annual self-evaluation.</p> <p>Hold annual board orientation (signing commitment form, expectations) for new and continuing members</p> <p>Develop plan for succession at all levels of organization.</p> <p>Ensure every board member serves on a committee</p> <p>Ensure 100% EMC participation</p> <p>Conduct a board assement to determine the current boards strenghts and weakness. Develop a board profile designed to address any weak areas from the board assessment</p>	<p><i>Second quarter of 2014</i></p> <p><i>Annually</i></p> <p><i>Annually</i></p> <p><i>Review regularly</i></p> <p><i>Ongoing</i></p> <p><i>Ongoing</i></p> <p><i>Work with the COD Chair and President Elect to accomplish 2nd Quarter of 2014</i></p>
Objective 3: Implement and monitor the policies and procedures approved by the Board	<p>Approve new/revised policies as needed.</p> <p>Review Insert Association-I samples and update AFGC policies to be compatible with Insert Association-I</p> <p>Complete bi annual of all polices, Recruit Policy Review Chair by Jan. 2014</p>	<p><i>Ongoing</i></p> <p><i>Ongoing</i></p> <p><i>By June 2014</i></p>
Objective 4: Meet Accord and Ten-Star Gold and Friends of Diversity requirements annually	<p>Review process of each – particularly Ten-Star Gold– with board annually to determine priorities and focus points. Involve chapter management service to monitor key target dates</p> <p>Review required and optional items annually</p>	<p><i>Ongoing/ Updates at all Board Meetings</i></p> <p><i>Review each January</i></p>
Objective 5: Update and Monitor Strategic Plan	<p>Review at each board meeting</p> <p>Review and revise at Feb. 2014 Board Retreat</p>	<p><i>Ongoing</i></p> <p><i>Present retreat results at March 2014 Board Meeting and finalize by May 2014</i></p>

**ASSOCIATION
STRATEGIC PLAN 2015-2016**

PRESIDENT (continued)

OBJECTIVES	STRATEGIES	ACTION STEPS/OUTCOMES
<p>Objective 6: Support the Insert Association Past Presidents Advisory Group created in 2011</p>	<p>Support the Insert Association PP's efforts to solicit funds for the endowment fund.</p> <p>Appoint and Support Board liaison and co-chair who facilitate recruitment of the members and the organization of the meetings,</p> <p>Develop programming for advanced professionals. Past President's group will work in conjunction with Program committee and VP Professional development on programming to plan a minimum of 1 program annually</p>	<p><i>Third Quarter of 2014</i></p> <p><i>By March 2014</i></p> <p><i>planning in place no later than first quarter each year</i></p>
<p>Objective 7: Establish relationships with other regional Insert Association Chapter and similar Fundraising Organizations</p>	<p>Work with VP Communications and Govt relations liaison to insure special program with other chapters in Ohio for govt relations day.</p>	<p><i>Summer of 2014</i></p>
<p>Objective 8: Board Development</p>	<p>Implement year round board development process to insure that there are sufficient high quality candidates to submit to the COD each year, ensuring the board and its committees have effective leaders to provide direction for the Chapter</p>	<p><i>By third quarter of 2014</i></p>

**ASSOCIATION
STRATEGIC PLAN 2015-2016**

Goal 1: Insert AssociationC will optimize chapter operations and financial resources

Secretary/Treasurer

OBJECTIVES	STRATEGIES	ACTION STEPS/OUTCOMES
Objective 1: Secure the long term financial stability of the chapter	Maintain the Finance Committee. Monitor investment policy and results from same Refine annual budgeting process that engages VP's and Committee Chairs enhancing their by-in for achieving projected results so that budget is approved in December of the preceding year	Finance committee composed of Treasurer, president, vice president of resource development, president-elect and one at-large board member (consider adding a CPA) <i>Ongoing</i> <i>By December 2013 and 2014.</i>
	Continue to work with a VP's on a monthly basis to assure budget compliance and account for variances in the plan	<i>Ongoing</i>
	Insure that all necessary state and federal filings are submitted by the deadline dates each year.	<i>Ongoing</i>
	Assist President in preparing financial information for Accord	by January 15 2014
	Objective 2: Ensure transparency of financial status of chapter to all chapter members	Communicate to the membership the chapter's financial status & decisions monthly through the website
Review and refine financial protocols, including checking account policy, investment policy, check writing policies, check request/payment procedures		Ongoing [bi-annual review by June 2014
Review procedures for record maintenance and retention		By April of 2014
Insure monthly results/reports are accurately reflected in the accrual based accounting system.		<i>Monthly/ Ongoing</i>

**ASSOCIATION
STRATEGIC PLAN 2015-2016**

Vice President, Resource Development & Chair, NPD

OVERALL GOAL: SECURE ANNUAL AND LONG TERM RESOURCES TO ENSURE FINANCIAL STABILITY OF THE CHAPTER		
OBJECTIVES	STRATEGIES	ACTION STEPS/OUTCOMES
Objective #1: Increase dollars raised and number of donors for EMC Campaign	Solicit Executive Committee and Board by 2/28/2013. Ensure 100% participation by March Board meeting.	Completed, 5/6/2013
	Develop strong Case for Support	May/June
	Develop Giving categories. Consider category for Young Professional donors	May/June
	Enlist members in providing testimonials (can also be used with Membership)	May/June
	Engage EMC Committee	Completed, 3/2013
	Develop EMC Campaign Timeline for solicitation letters and personal solicitations	Completed, 3/2013
	Identify opportunity within existing events to include EMC Kick-off	Ongoing
	Develop comprehensive EMC communications plan (in coordination with Communications Committee).	Ongoing
	Screen membership list for leadership ask opportunities and plan strategic solicitations	May/June
	Review giving history of members to target for increased gifts; new gifts; and renewal of lapsed donors	May/June
	Engage Board and Committee members to personally solicit members where relationships exist. Coordinate w/Past Pres. Re: endowment campaign?	Ongoing
	Review stewardship plan – ack. Letters, and follow-up notes re: how dollars are used	Ongoing
	Objective #2: Increase presence, visibility and use of Jobs Board by regional non-profit organizations, thereby increasing revenue	Offer discount for multiple job listings.
Identify mailing list for Northern OH nonprofits - send letter to HR offices to promote use of Insert Association website to post fundraising jobs.		Third Quarter
Identify HR professional assn – ask for ways to promote using Insert Association job opps.		Third Quarter
Ask each Board member to share Job Opps information with their respective HR offices. Elicit other ideas from Board.		Ongoing
Objective #3: Optimize sponsorship opportunities for programs and events throughout the year.	Review/revise sponsorship opportunities and prospect list. Clear any asks with NPD Committee before proceeding.	Third Quarter
	Coordinate w/NPD Sponsorship Committee – package solicitation to fundraising vendors?	Ongoing
	Develop plan to increase ad revenue for website.	Third Quarter

**ASSOCIATION
STRATEGIC PLAN 2015-2016**

Vice President, Resource Development & Chair, NPD (continued)

OVERALL GOAL: SECURE ANNUAL AND LONG TERM RESOURCES TO ENSURE FINANCIAL STABILITY OF THE CHAPTER		
OBJECTIVES	STRATEGIES	ACTION STEPS/OUTCOMES
Objective #4: Ensure successful implementation and revenue from Special Event	NPD planning meetings begin in February and continue through to event in November	Ongoing
	Review and revise pricing structure for NPD Sponsorships and Workshops	May, 2013
	Enhance morning workshop program to ensure greater revenue	May/June, 2013
	Send solicitation packets out early in order to maximize follow-up to prospects	June, 2013
Objective #5: Plan and execute event for Annual Meeting in December	Identify and solicit underwriting sponsorship for Annual Meeting event	Third Quarter

Goal 2: Insert AssociationC will increase its presence in Northeast Ohio by communicating with targeted audiences related to the fundraising profession.

Vice President, Communications

OBJECTIVES	STRATEGIES	ACTION STEPS/OUTCOMES
Objective 1: Internal Communications	Engage more members Expand Social Media Usage	<ul style="list-style-type: none"> * Reformat Flash Traffic * Send "like" invitations to members for our Facebook page and LinkedIn Groups * We will "like" our member organizations to encourage them to "like" us back * Utilize QR Codes for all marketing pieces including NPD * Utilize YouTube account to create new videos/share existing quality videos that are relevant * Better utilize LinkedIn Group by post relevant content and starting group discussions every 1-2 weeks * Post on facebook at least one time per week
Objective 2: External Communications	Increase media exposure Cross Promote with other Civic and Professional Organizations Increase Insert Association awareness within NEO	<ul style="list-style-type: none"> * Develop new media relationships - print and radio and TV * Develop Media Kit * Continue to connect with YNPN, Engage Cleveland/Global Cleveland/Cleveland Leadership Center, others * Target nonprofits to approach re: membership
Objective 3: Government Relations	Continue work started in 2012	Schedule Annual Event: Columbus, OH

Goal 3: Insert Association will increase growth, retention and involvement of members**Vice President, Membership**

OBJECTIVES	STRATEGIES	ACTION STEPS/OUTCOMES
Objective 1: Utilizing a combination of new member recruitment and increase in retention achieve a rate to have a net 5% increase in the number of members from December 2013 to December 2014.	Outreach to and recruitment of prospective members by membership category, e.g. young professionals, large organizations, small organizations, professionals, etc.	<p>A. Develop cadre of Membership Committee members each with specific responsibilities to reach out prospective individuals and groups in order to raise awareness of Insert Association and the benefits of Insert Association membership and to bring new members on board.</p> <p>B. Develop goals at the Committee level for recruitment in this year's target membership categories: Large Non-Profit Organization and Small Non-Profit Organization.</p> <p>C. Continue promoting the formation of collegiate chapters at area colleges and universities where energy champions exist to take on the project Raise awareness of all member benefits with potential members, new members and existing members</p>
	Raise awareness of all member benefits with potential members, new members and existing members	<p>A. Utilize Flash Traffic to make all recipients aware of member benefits. Include a membership benefit in every Flash Traffic.</p> <p>B. Raise awareness of the availability of scholarships for membership by promoting them widely and consistently</p> <p>C. Raise the profile of and promote the Mentoring program.</p>
	Hold three or more member networking/mixer/recruitment events with at least one targeting Young Professionals and one targeting mentors/mentees.	<p>A. Schedule the events so that they are geographically varied. (Feedback is that Downtown is a good location for young professionals events.)</p> <p>B. The benefit of membership for Young Professionals is networking. Offer ample opportunities for this.</p> <p>C. Recruit sponsors for member events when possible</p>

**ASSOCIATION OF FUNDRAISING PROFESSIONALS GREATER CLEVELAND CHAPTER
STRATEGIC PLAN 2015-2016**

Vice President, Membership (continued)

	Enhance engagement of new members	A. Every new member will receive a letter signed by President and Vice President for Membership welcoming them and encouraging them to get involved in the chapter.
		B. Members of the Membership Committee and/or Board will make phone calls to new members to welcome them, answer questions and encourage involvement.
		C. Members of the Membership Committee and Board will contact new members and personally ask them to attend Insert Association events.
	Outreach to renewing members	A. Monthly calls to those whose memberships are due to renew in the next month or two months, pro-actively encouraging membership renewal. Members also receive 5 renewal notices in the mail from National Insert Association.
	Outreach to renewing members	A. Monthly calls to those whose memberships are due to renew in the next month or two months, pro-actively encouraging membership renewal. Members also receive 5 renewal notices in the mail from National Insert Association.
Objective 2: Increase member involvement in Chapter activities	Ensure all new and renewing members are invited to join Committees, volunteer at NPD or otherwise become involved in the affairs of the Chapter	A. Promote opportunities for involvement via passive means such as Flash Traffic and by having Committee Chairs reach out to prospective volunteers one-to-one. Encourage Committees to look beyond Board members when staffing their committees. B. Ensure that each Committee Chair follows up with volunteers when they self-identify through program surveys or call the Insert Association office.
	Engage with Collegiate Chapter	A. Explore with Board creating Board position from the Collegiate Chapter after the chapter has been in existence for a year. B. Inquire how other Chapters are engaging with their Collegiate Chapters.

**ASSOCIATION
STRATEGIC PLAN 2015-2016**

Goal 4: Insert AssociationC will develop more skilled, knowledgeable and ethical fundraising professionals

Vice President, Professional Development

OBJECTIVES	STRATEGIES	ACTION STEPS/OUTCOMES
Objective 1: Provide professional development that is inclusive to all professional levels, industries and organizational size	Create a balanced array of programs that appeal to young professionals, mid-level and seasoned fundraisers, as well as volunteers, board members and other nonprofit executives	Confirm programs for 2015; select programs for 2016
	Create programs for small, medium and large organizations	Investigate more targeted programs for 2016
	Use free roundtables to showcase niche programming	March program on consulting schedules; determine topics for at least one more in 2015
	Engage senior level fundraising executives with programming and training	Group made programming recommendations for 2015; Karen Owens on panel for March program
Objective 2: Work collaboratively with Insert Association committees, other Insert Association chapters and other outside organizations	Recognize new members and those who have reached milestone anniversaries at programs to promote membership	Include in announcements and/or power point pre-session
	Survey membership for programming topic recommendations	Ongoing as part of the post-event survey; consider sending a survey through Flash Traffic to everyone on the email list
	Work with NPD committees to find speakers and/or sponsors for programs, Ensure programs complement each other.	Cy Pres program was referred by NPD committee
	Work with communications to promote programs on Flash Traffic, website and social media	Send preliminary program write-ups to Communications for "sizzle" and more exciting write-ups to increase attendance
	Promote NPD and networking events at programs	Include in handouts and announcements; prepare a calendar of programs with special dates included
	Work with Diversity Committee to ensure programs are inclusive and fulfill Friends of Diversity standard	Ensure that year's programs appeal to and include diverse audiences - see Objective #1
	Work with scholarship committee to encourage use of scholarship for programs and conferences	Facilitate a discussion with Membership to see if scholarships can be giving for monthly programs
	Collaborate with surrounding Insert Association chapters, OANO, YNPN, The Foundation Center, BVU and others	Contact potential collaborators to discuss ongoing relationships, especially where programs provide a logical connector
Objective 3: Explore advanced learning opportunities/credentialing with fundraising executives in NE Ohio	Ensure all programs qualify for and are publicized as offering CFRE credits - Operational standard	Provide J&M with program information in time for CFRE credits to be obtained; J&M handles tracking - Operational standard
	Recognize those who have obtained their CFRE and ACFRE to elevate the importance of those credentials	Include in announcements and/or power point pre-session presentations

	Explore partnerships with area colleges & universities	Expand partnership with IU and JCU; continue discussions with others
Vice President, Professional Development continued		
	STRATEGIES	ACTION STEPS/OUTCOMES
	Offer certificate programs specific to fundraising (i.e., Fundamentals, CFRE Review Course or study group, Indiana University courses)	IU Major Gifts Course offered in April 2015; rotate other special programs according to member needs
	Continue to build library of webinars	Update library annually; review and retire outdated webinars; work with Val Lay on recommended speakers
Objective 4: Promote advocacy for the profession	Promote ethical fundraising through programming - Operational standard	Include ethics in programs throughout the year, i.e., <i>Boot Camp</i> , <i>Prospect Research</i> , etc.
	Participate in Ohio Legislative Day in even years	Scheduled for 2016
	Work with Insert Association to promote advocacy issues that impact all nonprofits	Examine possible advocacy efforts like IRA Charitable Rollovers; encourage members to participate through articles in Flash Traffic