



Rockford Area Chapter 2010 Goals and Objectives

Goal 1: Offer excellent fundraising and development education and training opportunities for members and prospective members

Objective 1:

Offer 8-10 educational programs for individuals at the monthly membership meetings geared to all levels of fundraising experience

Action Steps:

1. Ensure programs are 55 minutes in length to qualify for CFRE continuing education credit
2. Secure speakers to address the six fundraising content areas identified by CFRE (prospect identification, solicitation, donor relations, volunteerism, management and stewardship)
3. Submit program schedule to CFRE International and Continuing Education approval
4. Promote full-year program on Web site calendar
5. Provide program evaluations for members to complete at every monthly meeting and review them at committee meetings
6. Seek to coordinate the scheduling of prominent speakers from Madison, Milwaukee, Indiana, and Chicago

7. Promote sharing of fundraising ideas by providing a Creative Ideas table at each meeting for members to share their marketing/fundraising pieces (i.e., brochures, donor recognitions, direct mail appeals)

Objective 2:

Provide educational conference information to members with emphasis on the needs of members

Action Step:

Provide chapter members with information regarding educational programs in the Chicago, Madison, Milwaukee, and Indianapolis area

Objective 3:

Promote and recruit member(s) who qualify for the annual Chamberlain Scholarship; manage educational conference & scholarship; manage IHQ's scholarship to International Conference

Action Steps:

1. Update application form and make it available at monthly meetings and online beginning in June 2010
2. Promote scholarship availability and the upcoming AFP conference to members at monthly meetings, on Web site and in newsletter beginning in June 2010
3. Committee reviews applications and presents recommendations of winners to the AFP Board by September 30, 2010
4. Notify scholarship winners and AFP Headquarters by October 31, 2010

Objective 4:

Point members toward resources and educational materials to enrich their fund development career

Action Steps:

1. Encourage members to consult the AFP Web site for educational resources and valuable fundraising tools
2. Encourage members to share resources that can benefit other members

3. CFRE Accreditation

- a) Motivate members to actively seek CFRE Accreditation by providing support through mentoring and educational resources
- b) Survey member interest and research the availability of 2-day CFRE Educational Courses in the tri-state area
- c) Provide support and resources to those members privately seeking their CFRE Accreditation

Objective 5:

Provide mentoring opportunities for members

Action Steps:

1. Work with the Membership Committee to pilot a mentoring program
2. Develop a survey for mentor/mentee interest (include on monthly meeting evaluation form)
3. Post members and their areas of expertise on the Web site
4. Ask participating mentors and their mentees to complete evaluation forms for review by Professional Advancement Committee at year-end

Goal 2: Increase membership and/or retain existing members – Membership & Survey Committee

Objective 1:

Review Recruitment and Retention Plan that aims to maintain our net membership enrollment at a minimum of 57 as of November, 2009

Action Steps:

1. Contact non-members from email list to invite them to chapter meetings and to join AFP; follow up as appropriate and try to determine the reason for not joining AFP
2. New member information packets will be available at each meeting.

3. Call/email guests after chapter meetings to follow up on possibility of membership and to get feedback on impression of the meeting and chapter
4. Follow up with members who are up for renewal or whose membership has lapsed
5. Provide membership information at appropriate events when possible

Objective 2:

Maintain up-to-date information on all current members

Action Step:

Educate members on how to update his/her online AFP information via meeting announcements, emails and reminder cards

Objective 3:

Highlight individual members, their backgrounds, their accomplishments, educational advancements so that the other members and community will appreciate the professionalism of the Association membership

Action Steps:

1. Recognize all members who are CFRE certified—can be done at a monthly meeting or as a part of Annual Meeting & National Philanthropy Day
2. Recognize milestone membership years, 5, 10, 15, 20, etc.; perhaps with a pin provided by the local chapter—can be done at Annual meeting or as a part of National Philanthropy Day ceremonies
3. Create accomplishment form for all members to complete; make available on the Web site and at monthly meetings
4. Share complete accomplishment forms with PR committee for media recognition

Objective 4:

Manage the membership scholarship activities

Action Steps:

1. Review membership scholarship criteria and present to board
2. Present application & deadline information to membership and make available on Web site
3. Determine scholarship award recipients
4. Award membership scholarships by year end 12/31/10

Survey-Subcommittee**Objective 1:**

Survey Chapter committees to determine what information they need from the membership to better serve the members

Action Step:

Solicit from Executive Board information that they would like included in the survey; 3-5 questions that their Committees would like to know from the membership to identify future interest and goals

Objective 2:

Survey Chair will format the survey, prepare it for distribution at the April Chapter meeting, and provide survey response

Action Steps:

1. Provide a survey form for each member; place on tables at the April Chapter meeting
2. Ask Chapter President to announce survey availability and to encourage those attending to take 5-10 minutes to complete
3. Distribute the survey in email format to all members, post meeting, so input is gathered from those that were not in attendance

4. Share results with the Board members by the end of April
5. Share results with the membership at large in May

**Goal 3: Facilitate meeting attendance and notification of meetings
– Reservations Committee**

Objective 1:

Send out meeting notices; take reservations; call in reservations

Action Step:

Design meeting notice Web site template; populate for each meeting and send out; report reservation number to the restaurant

Objective 2:

Recruit members to assist in managing registration table

Action Step:

Staff and supply the registration table with required items; update and supply nametags for each meeting

Objective 3:

Locate appropriate meeting site for general membership meetings

Action Step:

Identify an accessible site; keep cost affordable; ensure appropriate size

Goal 4: Promote Philanthropy within the Rockford Area – National Philanthropy Day Committee

Objective 1:

Promote National Philanthropy Day in the community

Action Steps:

1. Host a NPD event attended by local and regional AFP members and guests
2. Conduct National Philanthropy Day event that recognizes philanthropists in the community and promotes the virtue of altruistic giving of one's time, talent, and treasure to benefit the community
3. Work with AFP Public Relations committee to develop and implement marketing plan

Objective 2:

Secure at least three nominations for "four" major awards

Action Steps:

1. Research activities of other AFP chapters that are successful at securing a plentiful amount of nominations
2. Review local nomination forms and process
3. Adjust nomination forms and process if determined changes will be helpful
4. Eliminate the "Honor Your Own" award at the NPD event but provide a volunteer appreciation event at the April meeting (see Objective 6)
5. Recruit a nomination committee outside of the NPD committee if necessary
6. Include "permission from nominee" as a part of the process
7. Add "helpful tips" to nomination form
8. Make definition of each award category clear and distinct

9. Educate members about the award categories; work with education committee
10. Actively solicit nominations for youth award categories for the “up and coming” philanthropist
11. Provide a monetary award to youth award recipient’s school or agency to further promote philanthropic efforts
12. Divide membership list among committee members and make personal phone calls to solicit nominees, if needed
13. Send Save the Date and Start Thinking of Nominees notices to chapter members early and often using email and AFP meetings
14. Invite recipients to make brief comments at the podium
15. Archive pertinent information for future committee use
16. Archive event photographs on CD

Objective 3:

Organize and execute NPD event

Action Steps:

1. Review event formats of the past (times, places)
2. Research other activities scheduled between November 9 & 20th (Veteran’s Day events are often held on second Tuesday of November)
3. Set event date and time
4. Secure location
5. Recruit event sponsors
6. Select menu – consider one main course item (with vegetarian option)
7. Set ticket price same as 2009 (\$35) if possible
8. Recruit items for “swag bags” for each recipient
9. Review options for decorations; make final selection

10. Determine room layout and process for greeting attendees
11. Explore ways to make nominees feel special at event (i.e. special seating, flowers, ribbons on nametags)
12. Recruit AFP members to help with day-of-event duties and responsibilities
13. Prepare outline script for MC to include invitation to recipients to make brief comments

Objective 4:

Attract at least 175 full paying attendees to the NPD event

Action Steps:

1. Update mailing lists – based on information available
2. Create invitation
3. Research pricing for printing
4. Select printer
5. Complete mailing of invitations
6. Secure committee member to receive and record reservations
7. Work with AFP PR committee to promote the event
8. Explore creative means of promotion among AFP and community members
9. Make personal phone calls to recruit attendees

Objective 5:

Reevaluate mailing information to reduce costs, be “green” and reach a wide audience

Action Steps for Save the Date and event invitations:

1. Constant contact
2. Media
3. Email
4. Social networks
5. AFP members
6. Past recipients and community members

Objective 6:

Coordinate a volunteer recognition event for the April 2010 Chapter meeting.

Action Steps:

1. Recruit additional committee members
2. Announce event and provide nomination forms at Jan., Feb., and March chapter meetings
3. Post nomination forms on Web site
4. Send Constant Contact notice
5. Order small token of appreciation for each volunteer
6. Provide a dessert for the April meeting (Giovanni’s has agreed)
7. Prepare a program to highlight each volunteer’s contributions

Goal 5: Promote the Rockford Area Chapter of AFP activities to members and the public – Public Relations Committee

Objective 1:

Communicate Chapter activities to the membership

Action Steps:

1. Create a Rockford chapter Facebook page for use to distribute news briefs and updates to members, recognize member and chapter accomplishments, and share articles on philanthropy
2. Maintain current information on the AFP – Rockford Web site as well as the International AFP Web site
3. Publicize the new Honor Your Own recognition opportunities

Objective 2:

Establish media contacts so that AFP is recognized as spokesperson in the community for the philanthropic agenda

Action Steps:

Identify key spokesperson contacts by field (social services, arts, hospitals, etc.) to distribute to media and to us in releases

Objective 3:

Communicate Chapter activities to the public

Action Steps:

1. Issue press releases announcing chapter achievements, public AFP events, and award winners
2. Invite media for photo opportunities to public AFP events

Objective 4:

In conjunction with the Membership Committee, highlight individual members, their backgrounds, their accomplishments, educational advancements so that the other members and community will appreciate the professionalism of the Association membership

Action Steps:

1. Use Facebook page to recognize member accomplishments
2. Assign a board member to meet with each new member to orient them to the chapter, recruit for a committee, and facilitate networking

Objective 5:

Recruit members to write articles, special editorial comments or letters to the editor relevant to philanthropic topics. In conjunction with Professional Advancement Committee, seek outlets for articles written by members

Action Steps:

Use Facebook pager, newspaper guest opinion column, letters to the editor, and Web sites. Ensure articles are topical, relate back to Rockford, are timely, etc.

Objective 6:

Maintain and update Chapter's Web site and IHQ's Web site space for Chapter news

Actions steps:

1. Collect board member updates for the Web site (i.e. philanthropy day, membership, etc.)
2. Post meetings, news, events on IHQ's Web site
3. Consider linking to member Web sites on the non-confidential page

Goal 6: Conduct a successful Every Member Campaign – EMC Committee

Objective 1:

Conduct Every Member Campaign (IHQ) beginning in March, 2010 to achieve 100% participation by April 30, 2010

Action Steps:

1. Submit grant proposal for EMC Chapter Partnership grant by April 15th, for use of funds earned from previous year if chapter qualifies for 25% refund based on reaching goal
2. Solicit Board Members via email by end of March 2010
3. Have Board President send follow up solicitation in order to announce 100% Board participation at April member meeting
4. Send email solicitation to general membership through Constant Contact early April
5. Make follow up calls to general membership for completion of campaign by May 31st
6. Provide campaign updates to Board and general membership
7. Check IHQ status reports on line and send thank you letters for members who have contributed

Objective 2:

Determine if there will be chapter campaign

Action Step:

Discuss at committee level, make recommendation to the Board by March, 2010

Goal 7: Achieve excellence in the governance of the Rockford Area Chapter – Governance Committee

Objective 1:

Oversee, review regularly, and edit the 2010 Goals and Objectives

Action Steps:

1. Ensure committees set action plans
2. Monitor implementation of action plans
3. Conduct a semi-annual review of all goals, objectives and action plans

Objective 2:

Maintain administrative responsibility and fiscal accountability

Action Steps:

1. Maintain a balanced budget
2. Adhere to generally accepted accounting principles and follow AFP Accord, regulations, and reporting schedules
3. Comply with governmental laws and regulations for not-for-profit organizations

Objective 3:

Achieve the International AFP Chapter 10 Star Award for 2010

Action Steps:

1. Determine in 2010 what will qualify and apply for Award
2. Work with specific committees to ensure qualifying criteria are accomplished

Objective 4:

Recruit all members to become active in a specific committee

Action Steps:

Strategize at Board and Executive Committee meetings about members not involved and determine appropriate cultivation activities

Objective 5:

Review the role of Chapter Administrator and Web Master, and explore efficiencies

Action Steps:

1. Contract with a part-time person to perform the duties of Web management and Internet communication
2. Assign bookkeeping and membership record keeping
3. Review on annual basis all mailing lists to assure accuracy and usefulness

Objective 6:

Convene membership on an as needed basis to develop a response to an immediate extra-ordinary community/national/international need

Action Step:

Convene members in an extra-ordinary session to develop a plan and public statement whenever a situation occurs that calls for a mobilization of an extra-ordinary charitable response

Objective 7:

Develop a Nominating Committee consisting of at least three members, including the Immediate Past President (who will serve as the Chair), which will present a slate of officers and director nominees to serve in the coming year to the entire chapter membership at least thirty days prior to the Annual Meeting

Objective 8:

Develop the beginning of a Policies & Procedures Manual, which will include but not be limited to written policies in the four suggested by AFP International:

- Budget
- Money on Reserve
- Financial Review and Audit
- Check Writing

Plus:

- Membership Management