

# STRATEGIC PLAN

2018-2020



# Introduction

The AFP Golden Gate Chapter has been serving development professionals of the five-county San Francisco Bay Area for forty-six years. With more than 500 members, the Chapter is one of the largest AFP Chapters in the United States, and in recent years has consistently achieved the 2016 AFP Ten Star Gold Award. The 23-member board of directors is highly engaged in all facets of the chapter, and works with an Executive Director and an Administrative Director to deliver a range of professional development and education opportunities to its members. The Chapter is best known in the Bay Area Philanthropic Community for hosting an annual National Philanthropy Day Luncheon in San Francisco where leaders in our philanthropic community are honored for their contributions. Chapter finances are stable with a cash reserve, and the programs are known for their excellence and strong attendance.

The Chapter began the current strategic planning process in July 2016 in order to define its vision for serving its more than 500 members and the fundraising profession, as well as advancing the philanthropic sector. The goal of this process was to develop a three-year strategic plan to guide the Golden Gate Chapter during calendar years 2018, 2019 and 2020 with specific goals to strengthen the organization, and increase its impact on the San Francisco Bay Area.

The Strategic Planning Committee was convened to implement this process with the leadership team of Tim Whalen and Katherine Bella. Initial planning occurred in July 2017, with AFP-GGC Committee Chairs providing historical information and review of the retreat plan. A strategic planning retreat was held on September 14, 2017 to provide input, perspective, review of challenges, and strategic opportunities and directions. The Strategic Plan was also reviewed by AFP-GGC Committee Chairs and informs this document.

## Strategic Planning Committee

Tim M. Whalen–Co-chair  
Chief Development Officer  
Save the Redwoods League  
Member, President Elect,  
AFP-GGC Board

Susan Corlett  
Director of Development  
Center for Environmental Health  
Member, President, AFP-GGC Board

Laura Jason, CFRE  
Principal  
Laura Jason Consulting  
Member, AFP-GGC Board

Eileen Murphy  
Executive Director  
University Development at UCSF  
Member, AFP-GGC Board

Katherine M. Bella, CFRE–Co-chair  
Associate Managing Director  
Brakeley Briscoe, Inc.  
Member, AFP-GGC Board

Brittany Janis, CFRE  
Major Gifts Officer  
Environmental Defense Fund  
Member, Immediate Past President,  
AFP-GGC Board

Elizabeth Seja Min  
Executive Director, AFP-GGC

Joseph Roybal  
Senior Grants Assistant  
The San Francisco Foundation  
Member, AFP-GGC Board

# Strategic Priorities

2018-2020



## GOVERNANCE

**Achieve greater diversity on the Chapter Board** by identifying and recruiting new Directors who are diverse in geography, gender, ethnicity, and sexual orientation, and who are working in a range of geographies, sectors, organization sizes (budgetary), and career stages.

**Revise Board Committee structure and succession planning** by updating committee charters and specifically address:

- Formalizing the co-chair model for committees and the process for populating committees
- Introducing a Development Committee or a Vice President for Development
- Creating a Mentorship Committee or a Vice President for Mentorship and bringing the program more formally into the Chapter
- Integrating National Philanthropy Day more directly into the board by having Directors chair the sub-committees of NPD (Sponsorship, Nominating, Awards, and Tributes).

**Increase Board giving** in each of the next three years to achieve 100% participation in both the Chapter and Be the Cause campaigns.



## MEMBERSHIP

**Expand the breadth of our membership** by serving fundraising professionals at all experience levels and stages of their careers.

**Create and implement a promotions plan to market the full range of AFP membership categories** including Organizational memberships for both large budget size organizations, as well as those under \$1 million and young professional memberships.

**Create and implement a member acquisition plan** to recover lapsed members and secure new members from those who attend chapter programs and events.

**Create and implement a member stewardship plan** that addresses how new and renewing members are thanked and welcomed (back) to the Chapter, including the roles of staff and Directors in this process.

**Develop and implement a new vision for the Chamberlain Scholars Program** that results in a larger more competitive candidate pool.



## **INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)**

**Partner and collaborate with the local organizations and the Mentorship Committee** to increase our chapter's diversity and support the next generation of AFP leaders who are committed to inclusion, diversity, equity, and access at AFP Golden Gate and in the Bay Area.

**Embed diversity and inclusion throughout the Chapter Board and Membership Structure** by:

- Assigning a member of each Board Committee to serve on the IDEA Committee
- Providing for IDEA program expenses in the organization's operating budget, which will be managed by the chair with support from committee members
- Holding an annual Board Training on IDEA, and on anti-oppression,
- Supporting close working relationships between IDEA Committee and all other committees in order to create a more inclusive, equitable, and accessible AFP Golden Gate membership experience.



## **PROGRAMS**

**Strive to create and publish an annual program** calendar (January–June, September–December) by the start of each calendar year.

**Develop a framework for programs that reflects a culture of philanthropy** and addresses the needs of development professionals at all stages of their careers, as well as those who work with development professionals in fundraising.

**Bring the Mentor Program closer** to the Board by having a Director serve as the leader and liaison to those leaders in the program who are not Directors.



## MARKETING & COMMUNICATIONS

**Conduct a re-branding initiative** that will involve redesigning our communication channels and brand elements, including the website, to align with the new brand:

- Identify a low-cost third party expert to facilitate the work
- Ensure key deliverables: style guide; key messages; website design
- Plan for related expenses in annual operating budget

**Explore moving to a new website platform** that is mobile responsive and plan and execute a move to the new platform if appropriate.



## NATIONAL PHILANTHROPY DAY

**Fully integrate National Philanthropy Day into the work of the Board** by ensuring both event co-chairs are Directors and that the “senior” co-chair of each NPD sub-committee (Sponsorship, Nominating, Awards, and Tributes) is a Director. Make participation in the event as a ticket or table purchaser an expectation of service on the Board.



## FINANCE

**Create and adopt a board policy for our cash reserve.**

**Identify and engage a low cost or pro-bono CPA to conduct a financial assessment of our finance and accounting policies and procedures.** Adopt new best practices as recommended by the assessment.

# AFP-International

## Vision

To stimulate a world of generosity and positive social good through fundraising best practice.

## Mission

The Association of Fundraising Professionals empowers individuals and organizations to practice ethical fundraising through professional education, networking, research and advocacy.

# AFP-Golden Gate Chapter

## Mission

AFP Golden Gate promotes philanthropy and supports the effective and ethical work of the diverse community of Bay Area fundraising professionals.

