



# Strategic Plan

*AFP Greater Austin 2021-2025*

*Since 1960, the Association of Fundraising Professionals (AFP) has been the standard-bearer for professionalism in fundraising. Today, AFP serves nearly 30,000 members and the broader fundraising community in a myriad of ways, helping charities and fundraisers create even more impact around the world.*



## Vision

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



## Mission

AFP empowers individuals and organizations to practice ethical fundraising through professional education, networking, research, and advocacy. As part of the global AFP network, the AFP Greater Austin Chapter facilitates ethical and effective fundraising in Central Texas.



## Strategic Roadmap

AFP has identified strategic pathways that, on their own, contribute to delivering value to our membership. Together, these pathways form a roadmap to further differentiate, distinguish and elevate AFP – today, tomorrow and into the next decade.

### *These pathways are:*

- PROMOTE INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)
- PROVIDE RELEVANT AND HIGH-QUALITY FUNDRAISING EDUCATION
- INCREASE CAPACITY AND STRENGTHEN COMMUNITY
- CHAMPION ETHICAL FUNDRAISING PRACTICES

By promoting environments that are inclusive, diverse, and equitable, and that expand access to the world of fundraising for historically under-represented groups; by equipping our members with high-quality fundraising education; by increasing capacity and strengthening connections between chapters and members; by positioning members to be influential leaders and advocates for the causes, organizations, and communities they serve; and by upholding ethics as a core pillar of what it means to be a fundraiser...AFP members will actively advance social good and create impact that changes the world.

In partnership with AFP Global, the AFP Greater Austin Chapter developed the enclosed landmarks and milestones to guide our local journey along these strategic pathways.

# Strategic Planning Process

This strategic plan was developed at a unique time for the Association of Fundraising Professionals Greater Austin Chapter. The annual strategic planning processes began in 2020 at the end of the prior strategic plan. This plan was created, published, and adopted during a the COVID-19 pandemic, and during a time that our communities – locally and globally – were facing unprecedented challenges.

Across sectors – nonprofit, private, education, government – organizations and leaders were confronted with economic, social, political, and health challenges that had previously been unacknowledged. The AFP Greater Austin Chapter, like all others, was deeply impacted.

The organization had to navigate learning how to operationalize our work in a virtual world, how to sustain membership and build community, and how to do it all in a way that responded to the social movements that were amplified during the pandemic – specifically relating to anti-racism and equity.

In 2020, the AFP-GAC Board of Directors, Strategic Planning Committee, and the Director of Strategic Planning, embarked on a process to create a new plan to guide the organization forward. We leveraged the guidance and support of AFP Global and worked to be in alignment with the AFP Global Strategic Plan. The committee and various stakeholders met regularly to draft strategic pillars and directions, as well as associated tactical goals related to the 4 primary strategic pathways: Promote inclusion, diversity, equity, and access (IDEA); Provide relevant and high-quality fundraising education; Increase capacity and strengthen community; Champion ethical fundraising practices.

In early 2021, the draft plan was presented to the AFP-GAC Board of Directors and was approved as the strategic direction of the organization for the next 3 years. At the same time, in an effort to incorporate community feedback, AFP-GAC requested input on the strategic plan from an informal network of BIPOC (Black, Indigenous People of Color) fundraising professionals better known as Central Texas Black/African American Fundraising Professionals Network (CTXBFP).

The CTXBFP Network conducted two focus groups with BIPOC fundraisers in the Fall of 2021, and the themes and findings from those focus groups, themes of inequity in the fundraising profession, implicit bias, racism, and microaggressions, and tokenism, were shared with the AFP-GAC Board.

Through these findings, and based on the goals of the approved strategic plan, it became clear in the first year of our new strategic plan that we should prioritize the goal of engaging the support of a strategic DEI/IDEA consultant to help audit the organization and make recommendations, as well as provide trainings as was outlined in the strategic plan. In 2021, the board released a Request for Proposals to retain the consulting services for a partner agency.

AFP-GAC selected local consulting firm Full Humanity to lead us through a year-long engagement focused on conducting a Culture and Climate survey, Board IDEA Training Sessions, Equity Audit, Executive Coaching and Keynote Programming. This work was conducted in 2022.

In 2023, the AFP-GAC Board of Directors felt that we were now equipped with a wealth of tools, knowledge, and training and embarked on a process to work to integrate the 2021-2023 Strategic Plan with the recommendations and Strategic Implementation Plan that Full Humanity provided. The Board decided to extend our existing plan from a three-year plan to a five-year plan in order to be more fully able to engage with our strategic visions and tactical approaches.

The final plan reaffirms and sets forth the mission, vision, strategic directions, and goals that will guide the AFP Greater Austin Chapter for the next three to five years and beyond. The plan will be used by the Board of Directors to develop annualized operational plans that will guide short-term actions and provide a framework with which the organization's work can be measured.

Strategic Pillar	Three to Five Year Goal
<p><b>Promote Inclusion, Diversity, Equity, and Access (IDEA)</b> and establish AFP-GAC as a place where POGM (People of the Global Majority) and other marginalized communities have a sense of belonging and are valued fully for their strengths. Ensure that AFP-GAC becomes a professional destination for diverse voices by 2025.</p>	<p><b>1. Establish and implement a transparent <a href="#">IDEA action plan</a> across diverse sectors of AFIGAC;</b></p> <ul style="list-style-type: none"> <li><b>1.1.</b> Create process for tracking progress and maintaining accountability of IDEA Action Plan responsibilities to be reviewed quarterly (Dir of Strategic Planning)</li> <li><b>1.2.</b> Embed Board Member IDEA Responsibilities within job descriptions (President)</li> <li><b>1.3.</b> Establish concrete and meaningful partnerships with fundraisers of color (Dir. of Outreach)</li> <li><b>1.4.</b> Appoint IDEA Liaison and Cultural Ambassador on each committee annually (Committee Leads)</li> <li><b>1.5.</b> Factor in relevant changes/updates into both internal and external communications in order to reflect program diversity and attention to IDEA (Co-VPs of Comms)</li> </ul>
	<p><b>2. Invest resources to guide and expand AFIGAC through process and practice with a focus in equity, inclusion and belonging;</b></p> <ul style="list-style-type: none"> <li><b>2.1.</b> Increase dedicated funding in annual budget allocated to IDEA initiatives (President &amp; Treasurer)</li> <li><b>2.2.</b> Remove barriers to access to AFP membership and education programs (VP of Membership)</li> <li><b>2.3.</b> Hire a DEI consultant to work with AFIGAC to embed IDEA values into chapter culture and infrastructure (President)</li> <li><b>2.4.</b> Establish and award at least 4 chapter scholarships per year specifically for BIPOC fundraisers (Dir of Volunteer Engagement &amp; Scholarships)</li> <li><b>2.5.</b> Complete initial Community Asset Mapping (Dir. of Strategic Planning)</li> <li><b>2.6.</b> All AFP-GAC board members attend Beyond Diversity or Undoing Racism (President Elect)</li> </ul>
	<p><b>3. Create an inclusive and accessible environment for AFP members and non-members who have not historically been represented in the fundraising profession and philanthropy;</b></p> <ul style="list-style-type: none"> <li><b>3.1.</b> Use white supremacy culture learnings to evaluate current membership experience (VP Membership)</li> <li><b>3.2.</b> Increase representation of historically underrepresented groups on leadership, board, and committees to be more reflective of greater Austin community (Past President &amp; Committee Leads) <ul style="list-style-type: none"> <li><b>3.2.1.</b> # of BIPOC (track race and ethnicity), LGBTQIA+, members with disabilities on leadership/board/committees</li> </ul> </li> <li><b>3.3.</b> Establish policies and procedures to guide our chapter communications and amplify the voices of BIPOC fundraisers (VP of Communications)</li> <li><b>3.4.</b> Establish process(es) for regularly collecting and tracking demographics and satisfaction of members, program and</li> </ul>

	<p>event participants, volunteers, speakers, and vendors (VP of Membership)</p> <p><b>3.5.</b> Establish Board and committee diversity that is outwardly visible (Past President &amp; Committee on Directorship)</p> <p><b>3.6.</b> Offer low and no barrier community building and networking events (Dir. of Outreach)</p> <p><b>3.7.</b> Develop policy/practice for reporting and addressing microaggressions and publish at all AFP events (President)</p> <p><b>4. <i>Establish effective relationships with external partners who broaden our access to diverse voices and help create the change we want to see in the profession.</i></b></p> <p><b>4.1.</b> Develop process(es) to proactively and strategically engage with external partners and historically underrepresented nonprofits (VP of Partnerships/ Dir of Outreach)</p> <p><b>4.1.1.</b> # of organizations personally engaged annually / # of strategic partnerships realized annually</p> <p><b>4.1.2.</b> # of organizations led by and/or serving diverse communities engaged through annual outreach campaign</p> <p><b>4.2.</b> Launch collegiate chapter (VP of Membership)</p> <p><b>4.2.1.</b> # and demographics of collegiate members / collegiate member program participation</p> <p><b>4.3.</b> Advocate in coalition with partner organizations to help advance equity among the funding community</p>
<p><b>We envision a future where: AFP and its members understand the business and social value that IDEA brings to delivering on our impact; at its essence, the ongoing awareness of IDEA's business and social value fosters inclusive behaviors, practices, and environments that become embedded in everything the association touches.</b></p>	
<p><b>Provide Access to Relevant and High-Quality Fundraising Education</b> and centralize equity across all programs, meetings, and events</p>	<p><b>1. <i>Increase the accessibility and inclusive hospitality of professional development opportunities available to members who have limited access to quality education offerings or who lack the resources to participate in large (in-person) AFP gatherings;</i></b></p> <p><b>1.1.</b> Diversify locations of education and networking events, including locations that have cultural significance to BIPOC communities, and vary time of day and medium (virtual vs. in-person) (VP of Education)</p> <p><b>1.2.</b> Annually evaluate scholarship application and selection process and update as needed for greater equity, transparency and participation (Dir of Volunteer Engagement &amp; Scholarships)</p> <p><b>1.2.1.</b> # and demographics of applicants, # and demographics of awardees, # of organizations not previously represented in AFP membership</p> <p><b>1.3.</b> Create standardized satisfaction survey (updated annually) for dissemination to attendees of all programs (VP of Education)</p> <p><b>1.3.1.</b> Satisfaction rating (experience/hospitality, relevance, quality) by membership status and demographics</p> <p><b>1.4.</b> Develop an updated IDEA commitment statement and land acknowledgement to be shared at every event and published on materials (Dir. of Outreach)</p> <p><b>2. <i>Offer diverse programs and content to be accessible and welcoming to meet a variety learning styles and professional experience levels of members and non-members alike;</i></b></p>

	<p><b>2.1.</b> Develop a matrix for educational offerings (topics, focus area, field experience, speaker diversity, time of day, location, medium, etc.) to evaluate and maintain balance of programming for different attendees &amp; their interests. (VP of Education)</p> <p><b>2.2.</b> Launch web-based Values &amp; Skills Institute to increase offering of skills-based learning (VP of Education)</p> <p><b>2.2.1.</b> # of offerings per year; # of total offerings in content library; # of views/downloads/participants</p> <p><b>3. <i>Assess, create, and deliver content and best practices on timely issues impacting the non-profit sector.</i></b></p> <p><b>3.1.</b> Implement biennial membership survey to inform education and networking offerings (Dir of Strategic Planning)</p> <p><b>3.2.</b> Deliver at least 1 formal chapter meeting/education session and 2 round table/community culture conversations with specific focus on IDEA initiatives/practices (VP of Education / VP of Membership / Dir of Outreach)</p> <p><b>3.3.</b> Continue to lead other Texas AFP Chapters in statewide advocacy through biennial Legislative Action Day (Dir of Legislative Affairs)</p> <p><b>3.3.1.</b> # of attendees, # of external partners (other AFP chapters and organizations), # of legislator visits</p>
<p><b>We envision that all AFP members will have access to a tailored fundraising education experience that meets them where they are and, equally important, where they are going. Ultimately, we will promote the message that all fundraisers can find ways to demonstrate leadership, no matter their title or their role in their organization.</b></p>	
<p><b>Increase Capacity &amp; Strengthen Community</b></p>	<p><b>1. <i>Amplify the AFP global network of fundraisers and resources available for all members;</i></b></p> <p><b>1.1.</b> Create communication strategy to increase awareness and utilization of AFP Global resources, including a focus on transparency around membership fees (VP of Communications)</p> <p><b>1.2.</b> Host one AFP sponsored General Membership Benefits forum per year and/or recorded webinar (VP of Membership)</p> <p><b>2. <i>Create and implement a proactive welcoming and open culture for diversified AFPGAC constituencies; (i.e. members, non-members, speakers, vendors);</i></b></p> <p><b>2.1.</b> Develop welcome/onboarding series to orient new members on how they can engage (VP of Membership)</p> <p><b>2.1.1.</b> 80% of new members will be contacted by a volunteer in their first 3 months of AFP membership.</p> <p><b>2.2.</b> Develop standards of service for stewarding members, program participants, speakers, etc. (VP of Membership / VP of Education)</p> <p><b>2.3.</b> Re-establish the AFP mentorship program with a goal of having 10 connections made per year (VP of Membership / Mentorship Program Chair)</p> <p><b>3. <i>Strike organizational taskforce to build a systematic approach for mobilizing current donors and to assess a more</i></b></p>

	<p><b><i>diversified funding model and relationship management process;</i></b></p> <p><b>3.1.</b> Evolve budgeting process to consider contributed income more holistically and decrease reliance on Philanthropy Day. (Treasurer)</p> <p><b>3.1.1.</b> Grow revenue from other streams annually by 3-5%.</p> <p><b>3.2.</b> Develop relationship management process and documentation that reduces dependency on chapter administrator and creates sustainability for chapter leaders year after year. (VP of Resource Development)</p> <p><b>3.3.</b> Evaluate the relationship with AFP Funders who are not committed to IDEA (VP of Resource Development)</p> <p><b>4. <i>Harness the strength of committees and volunteer opportunities to build the capacity and leadership pipeline for members and non-members alike.</i></b></p> <p><b>4.1.</b> Develop practices and/or sub-committee leadership opportunities that promote leadership development and succession planning (Past President / Committee Leads)</p> <p><b>4.2.</b> Leverage the Power of Personal Connection to actively recruit for committee and volunteer opportunities with a requirement for each Board member inviting 3 members/non-members as personal guests to programs each year (All Board)</p> <p><b>4.3.</b> Recognize service and accomplishments of committees/subcommittees via monthly newsletter and social media feature (VP of Communications)</p> <p><b>4.4.</b> Implement a Co-Leadership plan to share the load (Past President &amp; Committee on Directorship)</p> <p><b>5. <i>Engage stakeholders and members in the strategic planning process</i></b></p> <p><b>5.1.</b> Assess the need for a 5 year strategic plan (Dir. of Strategic Planning)</p> <p><b>5.2.</b> Revise board roles/responsibilities and job descriptions from lens of BIPOC leaders (Past President &amp; Committee on Directorship)</p> <p><b>5.3.</b> Evaluate org structure and infrastructure to focus on doing a few things better instead of doing more (Pres Elect)</p>
<p><b>We envision a moment in the future when: 1) AFP meets our members where they are, with resources they need, when they need them, while generating sustainable and comprehensive sources of revenue; 2) AFP chapters and members are engaged and committed to growth and expansion of AFP; and 3) AFP chapters and members are leveraged to nurture and expand relationships that transform their organizations and the communities they serve.</b></p>	
<p><b>Champion Ethical Fundraising Practices</b></p>	<p><b>1. <i>Establish AFP as a go-to resource across the fundraising and philanthropic sector for ethical principles and practices and raise the profile of ethics during the month of October;</i></b></p> <p><b>1.1.</b> Host at least one AFP CFRE forum annually to encourage members and non-members to pursue this certification (VP of Education)</p> <p><b>1.1.1.</b> # of CFRE certification / % increase in # of new certifications achieved annually</p> <p><b>1.2.</b> Determine a baseline and minimum # of CFRE credit hour education offerings per year (VP of Education)</p>

	<p><b>1.3.</b> Increase awareness of AFP among nonprofit executive leadership by thanking EDs/CEOs for their organizations' commitment to ethical fundraising practices through investment in AFP membership(s) for staff (President Elect)</p> <p><b>1.3.1.</b> # of organization leaders reached</p> <p><b>2. <i>Proactively publish and share positive stories that demonstrate ethical behaviors across the fundraising landscape that can serve to enhance the fundraising brand;</i></b></p> <p><b>2.1.</b> Develop a practice for regularly collecting and sharing ethical stories/content that feature different perspectives (fundraiser, donor, client, etc.) and celebrate the variety of ways philanthropy can manifest among different groups and cultures (VP of Communications)</p> <p><b>2.1.1.</b> # of ethical stories published via newsletter, social media, Values Institute, etc.</p> <p><b>3. <i>Position AFPGAC as an innovative thought leader/partner and socially conscious voice for both the philanthropic community and non-profit sector.</i></b></p> <p><b>3.1.</b> Host two Community Forums annually, in partnership with other philanthropic or nonprofit organizations (e.g. CTX Education Funders, Mission Capital, etc.) to discuss critical issues in philanthropy around equity, inclusion, and diversity (VP of Education / VP of Partnerships)</p> <p><b>3.2.</b> Actively promote the work of other organizations through AFP communications channels (VP of Communications)</p> <p><b>3.3.</b> Adopt and promote new ethical standards (e.g. Donor Code of Ethics, Fundraiser Bill of Rights, etc.) created by AFP Global and participate in their development as opportunities arise (President / President-Elect)</p>
<p><b>We envision the moment when the importance of adhering to ethical fundraising practices is a notion that is embraced widely around the world; when AFP members are consistently in positions where they can effectively champion the importance of running ethical and credible organizations; where AFP is seen by non-profit organizations as the key resource for the professional development of ethical leaders in fundraising and beyond; and when AFP's Code of Ethics continues to be a key differentiator for the Association, serving to strengthen fundraising and increase public trust in charitable giving.</b></p>	





## References and Links

- IDEA Action Plan
  - Created in 2020 by AFP-GAC
  - <https://afpgac.memberclicks.net/assets/docs/AFP%20Austin%20-%20IDEA%20Action%20Plan.pdf>
- Request for Proposal: Inclusion, Diversity, Equity, and Access (IDEA) Consultant for the Association of Fundraising Professionals Greater Austin Chapter
  - Launched Sept 2021
  - <https://www.afpaustin.org/assets/AFPGAC%20IDEA%20Request%20for%20Proposals.pdf>
- Black Professional Fundraisers Focus Groups
  - Conduction in November 2021
  - In partnership with Central Texas Black/African American Fundraising Professionals Network (CTXBFP)
  - Contributing Authors of CTXBFP: Karl Nichols, Director Strategic Planning, AFP Greater Austin Chapter & Dr. Jacqueline Smith-Francis, Chair, CTXBFP
  - [https://afpgac.memberclicks.net/assets/docs/Final\\_BIPOC%20Focus%20Group%20Executive%20Summary%20to%20AFPGA%20-%20January%202022.docx.pdf](https://afpgac.memberclicks.net/assets/docs/Final_BIPOC%20Focus%20Group%20Executive%20Summary%20to%20AFPGA%20-%20January%202022.docx.pdf)
- Full Humanity Consulting Equity Audit
  - <https://afpgac.memberclicks.net/assets/docs/AFP-GAC%20Equity%20Audit.pdf>
- Full Humanity Consulting Equity Strategic Plan Implementation Tool
  - [https://afpgac.memberclicks.net/assets/docs/Equity%20Strategic%20Plan%20Implementation%20AFP-GAC\\_2023%20Final.pdf](https://afpgac.memberclicks.net/assets/docs/Equity%20Strategic%20Plan%20Implementation%20AFP-GAC_2023%20Final.pdf)

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