



**OTTAWA CHAPTER
3-YEAR STRATEGIC OPERATING PLAN
January 2011 – December 2013
(Approved November 2010)**

TABLE OF CONTENTS

| | |
|--|-----------|
| INTRODUCTION | 1 |
| EXECUTIVE SUMMARY | 3 |
| MISSION, VALUES AND VISION | 6 |
| GOALS AND OBJECTIVES | 7 |
| <i>Theme #1: Membership Services</i> | <i>7</i> |
| <i>Theme #2: Infrastructure and Operations</i> | <i>9</i> |
| <i>Theme #3: Communications</i> | <i>11</i> |
| IMPLEMENTATION AND EVALUATION | 13 |
| FUTURE SUCCESS FACTORS | 14 |

APPENDICES:

| | |
|-------------|--|
| Appendix A: | 2008 Membership Survey Highlights |
| Appendix B: | AFP Ottawa Chapter, Current Situation from November 2009 Chapter Meeting |
| Appendix C: | SWOT Analysis |
| Appendix D: | Communications Stakeholder Messaging Suggestions |
| Appendix E: | Strategic Plan Implementation Timeline |

INTRODUCTION

By setting out ambitious goals, a strategic plan is intended to challenge the Board, staff and volunteers of the AFP Ottawa Chapter to strive for excellence and the highest levels of achievement in their efforts to fulfill the AFP vision. The priority initiatives set out in this plan provide a roadmap for the AFP Ottawa Chapter and are intended to act as a guide for the development of ongoing annual planning.

PROCESS

A Strategic Planning Task Force participated in several planning sessions between April and October 2010 with a mandate to prepare a strategic operational plan for the AFP Ottawa Chapter. The task force included AFP Ottawa Chapter Board members Leah Eustace, CFRE, Mark Trask, Ellen Ewert, CFRE, Pam Miles and Jose van Herpt, CFRE, and AFP member Jacqueline Belsito.

The planning process included an environmental analysis, a membership survey and consultation with key stakeholder groups. Based on this feedback and analysis, the task force determined an appropriate framework for the Strategic Operating Plan that would allow the most important Chapter issues to be addressed with a longer term view.

Both the membership survey conducted in 2008 and the SWOT (strengths, weaknesses, opportunities and threats) analysis conducted at a November 2009 AFP meeting provided helpful key directions that have been incorporated in the plan.

GENERAL FINDINGS

Membership Survey Highlights

The 2008 membership survey indicated over 92% of our membership was either “satisfied” or “very satisfied”, with the majority feeling that they do use the various resources offered as part of their membership.

The “most important” professional concerns for the respondents were: ethics of professional fundraisers; availability of fundraising/non-profit academic education opportunities in Ottawa; and expectations for good management of a shoestring budget.

Most respondents joined or remain members of AFP Ottawa due to opportunities for professional development and training, networking and because it adds to their professional credibility. In addition, the following demographic information is noteworthy:

- Almost 10% of respondents cited French as their first language
- 35% are certified (CFRE or ACFRE), with 13% either preparing for or considering certification
- Over 50% have been in the fundraising profession for more than a decade, with 30% for 5 – 10 years and 17% less than 5 years.

SWOT Analysis Highlights

The Ottawa Chapter's internal strengths are in its steady membership growth, especially from 2003 - 2008, financial stability, regular educational sessions and continued growth in our two signature events – Fundraising Day and the Philanthropy Awards. Weaknesses are in the areas of volunteer engagement on committees, board turnover and involvement, and lack of sufficient written policies, processes, written objectives and analysis.

Looking externally, the Task Force identified several areas of opportunity including growth in the membership base, more collaboration with similar organizations, reaching out to the senior fundraising professionals and offering the *AFP Fundamentals of Fundraising Course*. Possible threats included competitor organizations, legislative changes that impact charities negatively and an economy in recession.

Building the Plan

The Planning Team considered both the survey results and the SWOT analysis, along with the AFP Mission, Values and Vision, and identified many objectives for the Ottawa Chapter to address in the next few years. These objectives fall under the following three main themes and goals:

- *Membership Services* – Goal: To deliver core services and programs that resonate with and meet the needs of our membership.
- *Infrastructure and Operations* – Goal: To strengthen the Chapter's effectiveness.
- *Communications* – Goal: To effectively involve, engage and inform key stakeholder groups about the value of philanthropy and the role of the Chapter.

EXECUTIVE SUMMARY

Early in 2010, the AFP Ottawa Chapter Board of Directors endorsed a strategic planning exercise to provide direction, clarity, and focus for the Chapter's next three years. Although the Chapter had conducted a strategic planning exercise in the past, this team thought it would be beneficial to develop a strategic operating plan that was visionary and had identifiable actions to align with the spirit of moving the AFP Ottawa Chapter forward.

The following **Vision Statement** was recommended and adopted by the Chapter Board:

The AFP Ottawa Chapter is the professional association to advance, network and feel a sense of community in the fundraising profession.

The “go to” place for fundraising.

The Strategic Planning Task Force next engaged in an exercise to determine the **Chapter's Core Values** – the guiding principles and most essential beliefs of the Chapter. Six values, which are shared with AFP International, were adopted:

- **Philanthropy:** The belief that ethical and effective fundraising are the cornerstones of philanthropy and that philanthropy changes the world.
- **Inclusiveness:** Embracing diversity in the fundraising community, with a commitment to understanding and addressing the shared and unique needs of all members of that community.
- **Excellence:** Providing the fundraising community with the highest quality of knowledge, research, advocacy, career support, news and information, strategic alliances, and related tools and insights to ensure a successful future.
- **Integrity and Credibility:** Conducting business according to the highest ethical principles and serving as trustworthy stewards of our resources.
- **Collaboration:** Recognizing that we can accomplish our purpose only with the strong support and partnership of other individuals, AFP chapters and other groups who share our vision.
- **Service Responsiveness:** Understanding that our focus is on service to our members, our chapters, stakeholders and customers and that it is provided in a timely and thoughtful manner, open to new ideas, and exceeding expectations.

After the Core Values were named, the Task Force determined the **Core Purpose** which is the most fundamental reason for AFP Ottawa Chapter's existence. It states what will be important 100 years from now and won't shift with market conditions.

The group felt AFP International's Mission was right for the Ottawa Chapter:

To advance ethical and effective fundraising

The core activities through which AFP fulfills this mission include education, training, mentoring, research, credentialing and advocacy.

When investigating the potential of the Chapter, the Task Force considered membership, infrastructure and communications as the three pillars upon which the Chapter rests. At the same time, diversity and ethics are the threads that run throughout all its members' work.

At its final meeting, the Strategic Planning Task Force reviewed, revised, and endorsed the three over-arching goals:

- *Membership Services* – Goal: To deliver core services and programs that resonate with and meet the needs of our membership.
- *Infrastructure and Operations* – Goal: To strengthen the Chapter's effectiveness.
- *Communications* – Goal: To effectively involve, engage and inform key stakeholder groups about the value of philanthropy and the role of the Chapter.

Within the Strategic Plan, each of these goals is matched with a very specific set of objectives: ones that are both achievable and measurable.

The AFP Ottawa Chapter's objectives focus on capturing the intellectual property that currently exists and harnessing it for future leadership. The Board will review and refine best practices: from succession planning, to infrastructure to member and volunteer engagement.

At the same time, it will focus on encouraging the spirit of philanthropy, both inside and outside the profession. There's a huge opportunity to engage the community, build dynamic partnerships and get rid of the silos that are so prevalent in both the profession and within the Chapter.

At the end of the day, the AFP Ottawa Chapter will take a proactive rather than reactive approach to its Chapter operations, membership, fundraising and philanthropy. By doing so, it will lead by example for the whole industry. This is not a minor change: it means a culture shift starting with the Board of Directors.

OVERVIEW OF KEY RECOMMENDATIONS:

1. Leverage the experience and success of both the AFP Ottawa Chapter as an entity and that of the membership to develop a strategic operational plan that is designed to capture this intellectual property in a written and professional manner.

2. Focus on increasing the membership experience through mentorship, education, accreditation and networking. Each of these members' service offerings would benefit tremendously from analysis and research in order to determine how AFP Ottawa can continue to strengthen its member relationships.
3. After thoughtful analysis is complete, develop an overall membership plan to help support the Chapter's focus on the membership experience.
4. Recruit a Communications Chair on the board who would spearhead the development of an over-arching communications plan. This plan would include a communications audit, the identification of key messages that would resonate with all stakeholder groups, as well as customized ones, a tool kit to support the implementation of the plan, as well as metrics to monitor success over the three year period.
5. Review of processes and policies are required to support the AFP Ottawa Chapter's effectiveness. Not all policies and procedures need to be redesigned, but potentially *refined*. Objectives for governance, succession planning, nominating, committee engagement, financial reporting, revenue generation, human resources and organizational structure have been identified to provide some guidance to the individual portfolio leaders who will be responsible for reviewing their procedures and presenting recommendations.
6. Use metrics within both the overall and portfolio plans to help communicate and determine the progress toward achieving each goal. This includes the introduction of an annual presentation of portfolio plans to the Board of Directors.

The reality is that a strategic plan is only as good as its execution. In order for it to be effective and impactful, it will need to provide guidance to board meetings, committee work, volunteers and agendas. It will require the commitment of all members to make it work, to provide input and to make adjustments along the way.

To help build the membership base and revenue, the team recommends that the AFP Ottawa Chapter focus on writing formal work plans for each Portfolio Leader. This would include annual presentations of these plans to the board as well as an end of the year report on accomplishments and lessons learned.

The Strategic Plan is meant to challenge each member to strive for excellence and the highest levels of achievement in our efforts to fulfill the AFP vision.

MISSION, VALUES AND VISION

MISSION

To Advance Ethical and Effective Fundraising

AFP Ottawa maintains the same mission and core values of AFP International. The core activities through which AFP fulfills this mission include education, training, mentoring, research, credentialing and advocacy.

CORE VALUES

Philanthropy: The belief that ethical and effective fundraising are the cornerstones of philanthropy and that philanthropy changes the world.

Inclusiveness: Embracing diversity in the fundraising community, with a commitment to understanding and addressing the shared and unique needs of all members of that community.

Excellence: Providing the fundraising community with the highest quality of knowledge, research, advocacy, career support, news and information, strategic alliances, and related tools and insights to ensure a successful future.

Integrity and Credibility: Conducting business according to the highest ethical principles and serving as trustworthy stewards of our resources.

Collaboration: Recognizing that we can accomplish our purpose only with the strong support and partnership of other individuals, AFP chapters and other groups who share our vision.

Service Responsiveness: Understanding that our focus is on service to our members, stakeholders and customers and that it is provided in a timely and thoughtful manner, open to new ideas, and exceeding expectations.

VISION, AFP OTTAWA CHAPTER

The AFP Ottawa Chapter is the professional association to advance, network and feel a sense of community in the fundraising profession.

The “go to” place for fundraising.

GOALS AND OBJECTIVES

Theme #1: Membership Services

GOAL: TO DELIVER CORE SERVICES AND PROGRAMS THAT WILL RESONATE WITH AND MEET THE NEEDS OF OUR MEMBERSHIP

The professionalism of all membership services and the relevance of these services to AFP Ottawa Chapter members are paramount. These will ensure membership retention and assist with membership recruitment. Membership Services include a wide array of offerings including mentorship, education, accreditation, networking, government relations and general membership services. Educational offerings and networking have been identified as most important to the AFP Ottawa Chapter membership and, therefore, warrant particular focus.

All of the membership and educational service offerings would benefit tremendously from research and critical analysis in order to determine the most appropriate strategic directions. Some examples of potential critical analysis areas include: analysis of attendance at educational events; membership geographic representation; language preferences; number of years and experience in the fundraising profession within our membership; and member versus non-member pricing strategies. Once the appropriate analysis has been completed, the various portfolio chairs will be in a better position to develop operational work plans in their respective areas of responsibility.

These operational work plans will be the foundation documents in the development of an overall membership plan. The Task Force recommends that the Membership Chair and the Education Chair work collaboratively to design the approach and outline of this plan. The goal of this plan is to have an integrated view of all membership services; a plan that focuses on answering and delivering on the question, “What services will we offer to members so that they have the best AFP experience possible?”

To support the individual portfolios, the Task Force identified the following objectives for each area.

Educational Objectives

To continue to improve and ensure that the Ottawa Chapter is offering the educational products that resonate with the membership, prospective membership and its stakeholders in general. Led by Education Chair. The following objectives have been identified:

- 1.1 Analyze on a regular basis the AFP Ottawa Chapter's educational offerings including attendance statistics, surveys of members, prospective members and sponsors. Research and analysis will lead to a three-year educational plan. To be completed by September 2011.
- 1.2 Research and identify appropriate membership and non-membership participation goals for all educational offerings to ensure the benefit to a significant quantity of members. Determine if other offerings would generate improved participation. Part of research activity above.
- 1.3 Research other possible educational offerings that could complement the existing educational portfolio, including the *AFP Fundamentals of Fundraising Course*. Part of the research activity above.
- 1.4 Align all Fundraising Day educational content with overall education objective. Completion date by September 2011.

Accreditation Objectives

- 1.5 Develop an operational work plan to maintain and establish ways in which interested members can either obtain their CFRE or ACFRE designation or recertify for their CFRE. The plan should include specific tactics that will also encourage members seeking accreditation and, at the same time, celebrate those who have achieved it. Plan to be presented by September 2011. Led by Advancement Chair.

Networking Objectives

- 1.6 With an aim to providing improved networking opportunities to our membership on a more planned and strategic basis, review the existing opportunities, determine if additional opportunities are possible and present an operational work plan with concrete suggestions and timetable by September 2011. Led by Education Chair.

Mentorship Objectives

- 1.7 Continue to build upon the existing program at a steady rate with an aim to ensuring that the existing partnerships are effective and that appropriate resource materials and follow up infrastructure are in place. To that end, develop an operational work plan that will address, with measurable objectives, a steady planned growth of the mentorship program. Plan to be presented by September 2011. Led by Mentorship Chair.

Government Relations Objectives

- 1.8 Play an active role in AFP-Canadian Government Relations discussions, actively work to identify opportunities to support or enhance Canadian and International Headquarters Government Relations efforts in the National Capital Region and provide timely and relevant Government Relations information to the membership. Develop an operational

work plan to achieve these objectives and present by September 2011. Led by Government Relations Chair.

General Membership Services Objectives

- 1.9 AFP Ottawa Chapter members deserve top notch service such as: timely, focused and accurate communications; accurate, timely and well stewarded membership renewals, acquisitions and termination follow-up; a website that serves as an effective resource; and a point of contact through the Chapter Administrator. Develop an operational work plan that outlines all the various general member services, determine minimum standards and the processes required to carry these out. To be presented by September 2011. Led by Membership Chair.

Theme #2: Infrastructure and Operations

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|--|
| <p>GOAL: STRENGTHEN THE CHAPTER'S EFFECTIVENESS</p> |
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In order to serve its various stakeholder groups it is imperative that the AFP Ottawa Chapter strive for the highest standards of professionalism and stakeholder-focused service possible.

The objectives listed below will allow the Chapter to achieve its goal and will serve as a high-level roadmap for the Board, its various committees and staff. The Task Force discussed various categories such as governance, succession planning, nominating, committee engagement, financial reporting, revenue generation, human resources and organizational structure, all in order to develop the following objectives.

Governance Objectives

- 2.1 Undertake a review of the Chapter's recently adopted by-laws with an aim to develop comprehensive accompanying policies where required. To be completed by April 2011. Led by Secretary of Chapter.
- 2.2 Develop a Chapter "Operational Resource Manual" that will serve as an orientation and resource tool for Board and committee members and for Chapter staff. This would include a series of agreed upon good governance practice standards for the Board and its committees. Complete by April 2011. Led by President Elect.

Succession Objectives

- 2.3 Foster improved succession planning, committee involvement and the nomination process by establishing a series of initiatives and targets including, but not limited to, ideas such as: targeting all CFRE members for involvement in AFP in order to maintain their certification

or asking all bursary recipients to join a committee (an annual social, past president’s club, etc.). Approve initiatives by April 2011. Led by Nominating Chair.

Financial Objectives

- 2.4 Review existing financial reporting, procedures and planning and make recommendations for improvement. To include revised forms based on findings and a standard reporting tool for each portfolio manager. The Treasurer should consider establishing a Task Force of industry leaders as content experts. Recommendations to be completed by May 2011. Led by Treasurer.

Human and Organizational Objectives

- 2.5 Benchmark against 2 – 3 similar AFP Chapters in terms of organizational structure including board, committee and staff roles to ensure sufficient resources and organizational structure to support future membership and activity goals. Complete review by January 2011. Led by President and President-Elect.
- 2.6 Understand what the criteria are to qualify for AFP Friends of Diversity¹ designation and map out a plan to achieve this goal. Definition to be approved by January 2011. Led by President.

Revenue Generation Objectives

- 2.7 Membership - Increase the membership base to 250 by December 2013 representing a 20% increase as of July 2010 (likely to be achieved through a combination of improvements in acquisitions and retention). Benchmark against 2-3 similar chapters to test and validate this objective and, at the same time, to determine new initiatives for increasing the overall membership. Membership Chair to develop the work plan to achieve these goals by June 2011.
- 2.8 Every Member Campaign (EMC) - Maintain 100% Board participation and develop tactics to increase general membership participation and reach overall AFP Foundation for Philanthropy objective, in order to qualify for partial reimbursement to Chapter which is then used to fund member bursaries. Plan to be completed by June 2011. Led by EMC Chair.
- 2.9 Philanthropy Awards – Continue to develop this signature event with an aim to increase gross revenues (based on 2010 financials) by 3% in 2011, 5% in 2012 and 7% in 2013. Chair of Philanthropy Awards to develop individual work plan and collaborate with Chair of Fundraising Day to ensure effective leveraging strategies are being considered. Plan to achieve these objectives to be presented by February 2011.

¹ The AFP Friends of Diversity designation recognizes those chapters who have accomplished many of the key objectives outlined in the advancing diversity strategic goal. This designation encourages chapters to perform specific activities designed to increase diversity within fundraising and public awareness of the importance of philanthropy in all cultures.

- 2.10 Fundraising Day - Continue to develop this signature fundraising and educational AFP Ottawa Chapter event, with an aim to increase gross revenues (based on 2010 financials) by 3% in 2012, 5% in 2013 and 7% in 2014. Chair of Fundraising Day to develop individual work plan and collaborate with Chair of Philanthropy Awards to ensure effective leveraging strategies are being considered. Plan to achieve these objectives to be presented by June 2011.
- 2.11 Other revenue sources (such as job postings, sponsorship, other, etc.) – Explore other possible revenue generation opportunities for the Chapter through research and discussions with other AFP Chapters. Findings to be presented by June 2012. Led by President and President-Elect.
- 2.12 Develop a comprehensive sponsorship strategy that provides integrated AFP Ottawa Chapter partnership opportunities. Continue increasing the level of sophistication and professional experience with our supporters, beginning with a review of existing sponsorship levels and benefits and consultations with existing sponsors to determine level of satisfaction and to obtain suggestions. Plan to be developed by June 2012. A Lead manager for this project needs to be identified.

Theme #3: Communications

**GOAL: TO EFFECTIVELY INVOLVE, ENGAGE AND INFORM KEY
STAKEHOLDER GROUPS ABOUT THE VALUE OF PHILANTHROPY AND
THE ROLE OF THE CHAPTER**

The overall communications goal is to generate positive interest for the following: the profession of fundraising; the AFP Ottawa Chapter as the “go to” place for professionals; and the importance of philanthropy in general.

We recognize that different stakeholder groups will require customized messaging, however, there are several key over-arching messages that are common for all stakeholders. They are:

- The AFP Ottawa Chapter plays a key role as the professional fundraising association in Ottawa and the surrounding area
- The profession of fundraising is an honourable and valuable career choice.
- Philanthropy is a vital philosophy and crucial to the betterment of our society

Separate communication strategies will need to be developed for each stakeholder group and a roadmap for implementation will be tailored to the opportunities and resources available. The stakeholder groups include:

- Membership
- Prospective members

- Lapsed members
- Other not-for-profit organizations and associations
- Philanthropists
- Other AFP bodies
- Allied Professionals
- Youth
- Groups identified as “Diversity” target markets
- Media
- Government

During the strategic planning process the Task Force identified several key communication messages. They have been included in the Appendix D to assist the communications task force.

Communication Objectives:

3.1 Establish a communications task force to develop an over-arching communications plan to be presented to the Board by September 2011. The recruitment of a Communications Lead to be done by Nominating Committee for January 2011. The plan should include, but not be limited to:

- A communications audit
- Development of key messages for all stakeholder groups and related activities to share the message
- A “tool kit” to assist with the implementation of the plan
- An outreach strategy to like-minded organizations to build relationships and form beneficial partnerships
- Clear and identifiable metrics

IMPLEMENTATION AND EVALUATION

For a strategic planning process to be successful, it is crucial that mechanisms be put in place for implementing the identified strategies and objectives and evaluating the AFP Ottawa Chapter's progress toward its strategic objectives. This section recommends an approach to implementation and evaluation for the AFP Ottawa Chapter.

The initiatives for each objective will be prioritized according to the order in which they are to be completed.

When the operating plan is adjusted each year, this initial prioritization of objectives and initiatives should be examined. The appropriate actions for that year should be incorporated into its annual plan.

To assist with ensuring implementation of objectives and tactics, the Board should assign responsibilities for key tasks, whether to a staff member, Board member, or a Board committee or task force, as part of the Strategic Operating Plan. Those with assignments should have clear accountability for reporting back on their progress.

Status reports for each strategic initiative should be provided twice yearly to the Board. This ensures that they remain 'front and centre' with the Board. The status reports should focus on the progress of specific strategies and initiatives, as well as any challenges encountered.

The Task Force recommends a formal review of the Strategic Operational Plan each year by the Board of Directors. The President of the Chapter will assign a Steering Committee to review the plan, assess what progress has been made toward achieving the strategic objectives and identify whether any changes in the AFP Ottawa Chapter strategy are required. This review should include a brief examination of the external environment to determine whether significant changes have occurred that may necessitate the revision of specific strategies.

Communicating the results of the strategic planning process to key stakeholders is an important step in completing the process. This step ensures that key stakeholders are aware of the exciting plans that have been developed and can also be a successful way to re-engage certain stakeholder groups.

FUTURE SUCCESS FACTORS

In order to ensure that the AFP Ottawa Chapter strategic plan is a “living” document and not one that collects dust on a shelf, it will be important for the Board of Directors to identify one or two key individuals that will assist in bringing focus and rigour to the timely implementation and monitoring of the action steps identified in the plan. The Board has determined that a new Board Member-at-Large position be created to help facilitate the implementation of this plan. This person will work closely with the Chapter President to monitor timelines and milestones throughout the process.

It will also be important for every member of the Board to endorse the plan and help in its implementation success. It should be viewed as an opportunity for the various portfolio chairs within the Board structure to think about the future of the AFP Ottawa Chapter and how their portfolio can be improved and serve our stakeholders better.

Once the strategic plan has been endorsed by the Board and sufficient consultation has taken place then the Board should also take this opportunity to look at its current structure, both from a volunteer and staff perspective, to ensure that the resources required to carry out the desired future outcomes are available and will serve the needs of the chapter moving forward.

The Board should formally review the strategic plan two times during the year to ensure that the desired progress is being achieved. This will allow for any delay or resource issues to be addressed in a timely fashion.

AFP Ottawa – 2008 Membership Survey Highlights

- The survey was distributed to members only, in both official languages, on February 7, 2008.
- Reminder email blasts were sent to members, on average, every two weeks.
- The survey closed on 1:00 AM on March 17, 2008
- 61 members responded (29%), with the number of respondents per question varying from 53 to 61.
- 60 members responded to the English version of the survey and 1 to the French version.
- 92.6% are “satisfied” (75.9%) or “very satisfied” (16.7%) with AFP Ottawa.
- The majority is aware of and uses at least 2/3 of AFP Ottawa resources. The exceptions are mentoring, CFRE Study Groups and volunteer opportunities, of which the majority are aware of but don’t use.
- 23% were “not aware of but might use” volunteer opportunities.
- 90.2% cite English as their first language.
- 9.8% cite French as their first language.
- 49.2% are at ease with French content at educational sessions and in the newsletter, whether or not they understand French.
- 41% are not comfortable with French content at educational sessions and in the newsletter
- Francophone respondents are evenly split between those who would (3) or would not (3) increase their participation with AFP if there were more resources and content in French.
- The most important professional concerns for respondents are: Ethics of professional fundraisers, Availability of fundraising/non-profit academic education opportunities in Ottawa, and Expectations for good management on a shoestring budget with 75.4%, 70.5% and 68.9% respectively rating them as “most important” or “very important.”
- The least important professional concerns for respondents are: Growth in the number of charities, Competition between charities, and Attractiveness of the profession as a career option, with 18%, 16.4% and 14.8% respectively rating these as “least important” or “not very important.”
- Most respondents joined or remain members of AFP Ottawa due to opportunities for professional development and training, networking opportunities and because it adds to their professional credibility, with 78.4%, 68.9% and 66.1% respectively rating these as “most important” or “very important.”
- The least likely draws for joining or remaining a member are Reduced rate for CFRE application, Advocacy/lobbying and Access to AFP International resources (e.g. Resource Centre, Advancing Philanthropy, etc), with 41.7%, 39.7% and 21.4% respectively rating these as “least important” or “not very important.”
- 35% are certified (CFRE or ACFRE)
- 21.6% are not certified and do not plan to become so.
- 8.4% are currently preparing for their CFRE
- 5 respondents show interest in pursuing ACFRE.
- More than half (52.8%) of respondents have been in the fundraising profession for more than a decade.
- 30.2% have been in the profession for 5 to 10 years
- 17% have been in the profession for less than 5 years.
- Respondents were fairly evenly split between lengths of time as an AFP member: 45.4% 5 years or less and 50.8% more than 5 years. The balance weren’t sure.
- 75.8% of respondents rate their employer as “very supportive” (53.4%) or “supportive” (22.4%) – financially and by time allowances – of their participation with AFP. 24.2% have some challenges, with their employer being “somewhat supportive” (19%) or “not very supportive” (5.2%).
- 98.3% or respondents will definitely (65%) or probably (33.3%) remain a member of AFP Ottawa.

AFP, Ottawa Chapter Current Situation

November 2009 Chapter Meeting with Mark Climie-Elliott

Governance

- Average Board performance
- Recent push for succession planning
- Financially sound chapter (over \$40,000 in reserves since 2007)
- No strategic plan in place
- A 10 star chapter since 2004

Membership

- Steady growth in membership since 2003 (from 163 to 210)
- May see leveling off of membership for 2009 year
- 66% retention rate of members (international rate is 72%)
- Membership survey completed in 2008 (separate document)

Education/Accreditation

- Standard educational offerings for members
- Steady attendance of 30 – 35 members at regular breakfast educational sessions (higher attendance when sessions held jointly with CAGP)
- 8 breakfast educational sessions held each year over last two years
- Ethics course offered annually to members
- CFRE Study Buddies offered
- Audio and Web conference sessions offered to members but not well attended

Communication

- Regular newsletter provided to members since last 2 years
- Minimal French content offered in newsletter and Fundraising Day

EMC

- 100% Board participation in 2009
- Achieved our financial goal in 2007 but not 2008

Government Relations

- Board and members made aware as issues arise.

Mentorship

- Mentorship program re-activated in last two years

Fundraising Day

- Held annually for last 14 years
- Attendance in 2009 was 200 and though not the highest attendance (270 in 2004) it achieved the highest profit of \$20,000
- Aim of event is to raise funds to subsidize our educational programs.
- Offered a “Fundraising 101” Session for first time in 2009

Philanthropy Awards

- Organized annually for last 15 years
- Various formats over the years, with increased overall participation.
- 2009 achieved highest attendance of 300
- Recent format change to encompass a broader community appeal
- Financial goal has generally been to break even

AFP Ottawa Chapter SWOT Analysis, August 2010

Strengths:

- Involvement of senior professionals on the board
- Administrator with eight years experience at AFP Chapter
- Stable financial situation (reserve in place; stable annual income)
- Consistent slate of educational offerings
- Consistent growth in membership
- Financial growth in both Fundraising Day and Philanthropy Awards
- Members represent a cross section of the non-profit sector
- Succession planning in place for the executive positions for next three years

Weaknesses:

- Weak to non-existent committee structure in most portfolios
- Corporate/organizational knowledge and history weak, due to board and staff turnover
- No longer term work plans in place for various portfolios
- Lack of analysis in various portfolios limits ability to plan strategically and for longer term
- Underrepresentation of francophones on Board and within membership
- Exact role of Administrator unclear to Chapter committees and better performance feedback processes required

Opportunities:

- Location in Ottawa gives us good access to the Federal Government; opportunity for partnerships with AFP Canada, GR Committee, etc
- Growing the membership
- Involving Francophone community
- Communication between Board and members
- Large geographic areas to draw from, serve
- Outreach to top management/CEOs
- Collaborate with other associations/organizations
- Reach out to senior professionals
- Mentorship program as a model for other chapters
- Market the benefits of membership in new and creative ways
- Expand EMC participation
- Obtain 10 Star Diversity
- Increase educational offerings including the Fundamentals of fundraising

Threats:

- Economy (many organizations facing cutbacks so AFP membership may be cut)
- Competitor organizations (GAGP, AHP, CASE)
- CRA (potential changes that disadvantage charities)
- Large charities not participating proportionately in AFP
- Negative press about charities in general

AFP Ottawa Chapter Stakeholders, Communications Messaging Suggestions

(Developed by task force during communications discussions and intended as a starting point for Communications task force)

Membership

- Promote the profession of fundraising
- AFP Ottawa can help you reach your fundraising and career objectives
- By association with AFP Ottawa you gain credibility as a fundraising professional.
- Inform members of current industry trends
- Provide a forum of collaboration, peer to peer sharing and professional development through their AFP membership
- Encourage the spirit and behaviour of philanthropy and our Code of Ethics

Prospective Members

- Inform of benefits of AFP membership, plus all of above

Other not-for-profit organizations and associations

- Let them know that resources are available to them through AFP
- Inform of benefits of AFP membership
- Promote the profession of fundraising
- Encourage the spirit and behaviour of philanthropy and our Code of Ethics

Philanthropists (individual, corporate, organizations)

- Provide the forum(s) to involve, celebrate, encourage and support the spirit of philanthropy

Youth

- Promote fundraising as a career path available to them.
- Encourage the spirit of philanthropy through various engagement opportunities.

Other AFP bodies and Allied Professionals

- Align communications with AFP IHQ
- Identify and collaborate on activities to promote fundraising
- Leverage partnerships to create education and promotional opportunities
- Encourage the spirit and behaviour of philanthropy and our Code of Ethics

Groups identified as “Diversity” groups for Ottawa Chapter

- Identify what “diversity” means to the Ottawa Chapter and work towards communicating with this group.

Media

- AFP Ottawa to position itself as the industry example of best practices in philanthropy.
- To provide support to AFP National and International, as required.
- Use media as a tool to communicate key messages, specifically promoting the profession of fundraising and encouraging the spirit and behaviour of philanthropy and our Code of Ethics.

Government (City, Provincial, Federal)

- Support the National and International Government Relations Committees in their efforts.

