

AFP VISION TASKFORCE SURVEY RESULTS AND RECOMMENDATIONS

AFP Board Approved Task Force charge

The task force is to examine, evaluate and propose changes to the overall role of our AFP chapter in our local philanthropic marketplace. Special emphasis will be given to making recommendations about future AFP chapter membership services, taking into account the ever expanding offerings being marketed to area fundraising practitioners by local community foundations and others.

Taskforce Members: Zoltan Karpathy, chair, Laura Breeze, John Elbare and Jim Harman. Alex Quarles also participated.

Process: A professionally designed survey was developed. Seven (7) groups in two categories, local and non-local, were surveyed. Non-local groups included Association CEOs; Florida AFP Chapter Presidents. Local groups included business leaders, AFP members (current and lapsed), CEO's of nonprofit organizations, philanthropic foundation leaders and individual philanthropists. Three groups represented the majority of responses to the survey: AFP members (current and lapsed); CEO's of nonprofit organizations; and individual philanthropists

SIGNIFICANT SURVEY OPINIONS AND RESPONSES

1. A majority of respondents agree that community foundations lead philanthropy in our communities.
2. Community foundations and individual charities are equally looked to for information about donating.
3. There is strong agreement on a 3-year goal to have AFP be better recognized in our community.
4. The public needs a trusted source to evaluate and monitor charitable organizations and activities.
5. AFP members view media as only moderately important yet wish AFP to collaborate with media, and others, whenever possible

6. Ethical fundraising is of key interest to most.
7. Cost of fundraising is a high priority for philanthropists; significantly less so for AFP members and nonprofit CEOs
8. Neither AFP membership nor certification are important to nonprofit CEOs and are only moderately important to AFP members.
9. A major concern for nonprofit CEOs is that philanthropy (overall donations) is not increasing.

SUMMARY OF SURVEY RESPONSES CATEGORIZED IN ACCORDANCE WITH AFP STRATEGIC PLAN INITIATIVES

PARTNERSHIPS

We are partnering too much with vendors
We are too Sarasota based in all we do
Collaboration is important and should be a focus of AFP
Geography is a major issue for all we do

EDUCATION

Vendors are driving too many of our programs
Consider requiring CFRE for all members
Certification is too expensive to achieve and maintain
Ethics and Standards of Practice are critical elements of AFP
educational programs
Educational Programs need to go beyond fundraising basics
Educate about the Philanthropic Tradition
Educate non-donors
Communicate with non donors

IMAGE

Become the "go to" organization for media and others when it comes
to fundraising and philanthropy
Stop being invisible
Lead public opinion regarding fundraising and philanthropy
Communicate beyond membership

Make a presence for AFP
Publicly state our case
Be recognized as an important organization in the community
Show the “benefits” of philanthropy

MEMBERSHIP

Affordability is key issue
Encourage organizations to pay membership dues
Career development is important issue
Networking opportunities with philanthropists is important

GOVERNANCE

AFP needs steady leadership
AFP leadership needs succession plan
Enforce ethics and standards

VISION TASKFORCE RECOMMENDATIONS CATEGORIZED IN ACCORDANCE WITH AFP STRATEGIC PLAN INITIATIVES

General Recommendations for Implementation

We recommend that the AFP Board host a special workshop to review survey results and taskforce recommendations. The Board may wish to prioritize and/or discard taskforce recommendations, as well as add their own or other recommendations from survey respondents.

We recommend that the AFP Board report to the membership the major survey findings and taskforce recommendations, along with results of its workshop.

We recommend that the Board Strategic Planning Committee develop strategies for implementing the accepted recommendations.

We recommend that any changes to AFP operations resulting from the above be discussed at several luncheon meetings before formal implementation.

We recommend that implementation of changes occur over a minimum one year period to allow for membership adjustment.

EIGHT SPECIFIC RECOMMENDATIONS

Recommendation Number One - EDUCATION

1. AFP becomes the local media's most accessible and reliable source of information regarding fundraising and philanthropy.

A start to accomplish this is to resource an AFP media relations position. (Such positions are SOP for business and professional associations.)

Through its membership, AFP has access to the broadest, most in-depth and up-to-date information regarding local fundraising and philanthropy of any organization! Additionally, increased public recognition of AFP was one of the strongest desires of survey respondents. Public recognition of AFP requires AFP to offer "value" to our community beyond member benefits. As important, the public needs to know that "value" through effective communication. Media provides the most common and effective communication for the public. Therefore, it is essential that AFP become intentional in establishing a strong, continuous, reliable and active relationship with Media by investing in a media relations position.

Recommendation Number Two - EDUCATION

2. AFP becomes the most accessible and reliable source of information regarding fundraising and philanthropy for local donors.

A start to accomplish this is to produce a "local charity guide" for the public. (One such guide is produced by the State of FL.)

The public is overwhelmed by the proliferation of charities and charitable requests. Local donors making local gift decisions would welcome a one-stop, comprehensive, trusted, easy to access and understand resource for local gift making information. AFP should provide that resource through a local charity guide. Philanthropic foundations appropriately evaluate grant proposals and the charities' ability to meet proposal outcomes. AFP can perform a broader function by helping the public evaluate the appropriateness of

supporting the local charities themselves. Specifically, the charity guide would provide an annually updated review of local charities' performance in relation to a matrix of basic standards and AFP's own list of what local donors expect of effective philanthropy.

Recommendation Number Three - IMAGE

3. AFP engages in an ongoing public information effort which emphasizes the mutual interdependence of donor, charity and fundraising professional for effective philanthropy.

A start to accomplish this is to develop branding and marketing campaigns in conjunction with a media relations initiative.

A hierarchy appears to be developing among local funders and charities. Additionally, donors and the general public appear to be assigning a hierarchy to charities meeting various community needs. The right balance is essential to a community's philanthropic health. AFP and its member fundraising professionals have an important role in establishing that balance.

Donors (whether individuals, foundations, government or business) and charities (regardless of mission) need each other; need to respect each other; cannot be effective agents of the community's philanthropy without each other. Fostering open, honest communication between donors and charities promotes the understanding, mutual respect and equal-based collaboration that lead to good stewardship of the philanthropic dollar and public trust of all concerned.

An AFP branding and marketing initiative is needed which emphasizes mutual interdependence and appropriate roles of donor, charity and fundraiser in a philanthropic society.

Recommendation Number Four - MEMBERSHIP

4. AFP becomes *the* regional voice for encouraging local donors to keep their philanthropy local.

A start to accomplish this is to launch a marketing and promotion subscription program with its member organizations. (Local restaurateurs have formed THE ORIGINALS program.)

AFP members recognize that their donors contribute substantial dollars to non-local charities. Most often these charities have local equals (in mission and effectiveness) who meet local community needs with the help of AFP members. The marketing and promotion subscription program's top goals would be to have donors recognize local needs and create donor relevance and affinity to the organizations meeting those needs. Increased membership and donations will follow!

Recommendation Number Five - MEMBERSHIP

5. AFP provides its programs and services regionally.

One way to accomplish this is to conduct monthly meetings in four geographic markets: Lakewood Ranch, Bradenton, Sarasota and Venice.

Monthly luncheon programs are *the* driving force that sustains AFP membership. Travel and time costs to access and benefit from the programs are of major concern to members. Additionally, community identity is very much bound up with program location. Not having multi-location programs already has splintered membership and public recognition of AFP.

Recommendation Number Six - PARTNERSHIP

6. AFP develops formal collaborations, especially with local community foundations.

One way to accomplish this is to partner with local community foundations in conducting monthly AFP luncheons.

American Free Enterprise has changed the fundraising landscape. And the career-minded, fundraising professional's world is a better place for it. For fundraiser and general public alike, access to education, information, communication and resources regarding fundraising and philanthropy have never been easier or more abundant. There is real competition in the provision of programs. In fact, choice of programs has replaced the search for programs. Trusting the provider and the content of these programs, along with budgeting for their cost, have become critical problems. Collaboration has become an accepted

solution, and more and more an expectation, within the nonprofit community.

One such collaboration between AFP and community foundations would consist of having the four local community foundations in AFP's service area host and fund AFP monthly luncheon meetings. Quarterly, one foundation would host a multi-hour, special topic workshop and present an annual update of its programs at the luncheon portion of that quarterly meeting. All members would be encouraged to travel to that location and meeting. There would be no other luncheons conducted that month.

Members would pay the equivalent of luncheon costs, possibly built into the local AFP annual membership fee structure, and these revenues would help support the salary of an AFP executive director.

Recommendation Number Seven - GOVERNANCE

7. AFP operates more professionally.

One way to accomplish this is to hire an executive director.

AFP membership is critically dependent on membership services. Providing the current level of services, and new programs and services recommended by this taskforce, will require increased professional management. The number one priority of the director would be to manage the organization and conduct all AFP meetings and programs. (Clearly, a multi-year budget and resource plan for this position would need to be developed first.)

Recommendation Number Eight - GOVERNANCE

8. AFP establishes a formal leadership succession plan and in the process promotes agency sponsorship of AFP membership dues.

One way to accomplish this is to provide clear leadership identification and advancement for the top three chapter officers – immediate past president, president and president-elect.

Effective, available leadership is essential for AFP's future. Attracting and building such leadership must be intentional. A

succession plan for AFP's top three officers, based on member-voted criteria, should include the following:

- a) these officer positions are one year terms,
- b) the immediate past president chairs the Board Nominating Committee,
- c) the president is a member of Board Nominating and Strategic Planning Committees,
- d) the president-elect chairs the Board Strategic Planning Committee,
- e) the president and president-elect ascend without further vote (election),
- f) the president must be either a development professional or a nonprofit CEO,
- g) the president-elect position alternates annually by location (Manatee, Sarasota and Charlotte Counties), i. e. if the current president-elect works for an organization headquartered in Manatee County, then the next president-elect must work for an organization headquartered in either Sarasota or Charlotte Counties,
- h) the president-elect position alternates at least every 3 years by job title- nonprofit CEO or development professional (who is not also a nonprofit CEO).

Opening AFP leadership to nonprofit CEOs, and successfully identifying and enlisting them, will go a long way in promoting agency sponsorship of their and their development staff's AFP membership dues.