



## Strategic Plan 2017



**VAFRE Board of Directors, 2016-17**

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## I. Background

For more than 35 years, VAFRE – the Virginia Association of Fundraising Executives - has provided a forum for networking and education for fundraising professionals at all levels. The welcoming and collegial environment that is the hallmark of VAFRE helps development professionals stay current on important issues in philanthropy and in the Central Virginia nonprofit community. Friendships and mentor relationships strengthen the nonprofit community.

“One of the beauties of VAFRE is that it has a spirit of helping everyone.”

- Senior Development Professional

As the VAFRE Board considered the organization’s next steps, discussions revolved around the central questions of,

*“How do we support our members?”*

and

*“How do we support our nonprofit community?”*

## II. Overview of a Strategic Plan

A strategic plan provides the focus and framework for VAFRE to carry out its work. The strategic plan has two sections:

- The high-level strategic plan should last roughly five years, perhaps more.
- The implementation section should be refreshed annually.

The strategic plan includes:

**The Mission:** Who are we and what do we do?

**The Vision:** What will we achieve if we are successful in our mission?

**Core Values:** What are the values that guide our behaviors?

**Strategy:** How will we accomplish our mission?

**Focus Areas:** What are our primary goals?

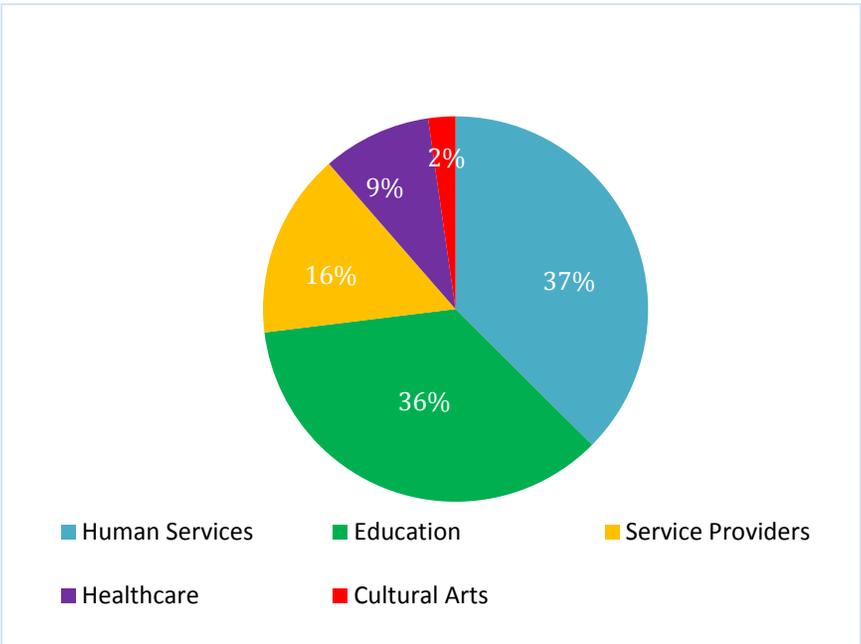
The implementation section addresses:

- How will we reach each goal?
- What actions will we take in the next year?
- When will we take the steps?
- Who is responsible?
- What do we hope to see as outcomes?

**III. Current Position**

VAFRE has a stable membership of 250 that represents a broad base of nonprofit sectors as well as consultants and other service providers. In August 2016, an analysis of membership showed representation in the distribution shown in the chart below.

**Membership Analysis By Sector**



Attendance by members and their guests at monthly luncheons and workshops is strong, with luncheon attendance ranging between 80 and 100 members and guests. The financial position remains solid, with a modest reserve fund.

The membership survey during the summer of 2016 indicated that 99% of respondents were satisfied or very satisfied with their VAFRE memberships. Their top three reasons for being a VAFRE member were:

- Professional development
- Networking
- Interaction with experienced professionals / mentors.

**IV. Environmental Scan**

Interviews with foundation, nonprofit, and community leaders explored the questions:

- “What are the key needs / challenges of nonprofits?”*
- “What are specific fund development needs?”*
- “What should be done to address those needs?”*

### ***Key Needs / Challenges of Nonprofits***

Individuals interviewed consistently identified “Leadership” as the most important need and challenge for nonprofits, starting with the Board and including the CEO and management teams. They acknowledge the difficulty of building good boards that understand how to support the development needs of an organization. Not all CEOs really understand how to bring the boards along while supporting the needs of their development professionals to build a sustainable financial model.

They pointed out that the budgets of so many nonprofits are stretched to the point that it is difficult to support talent development for their professionals. The result is that boards may not be strong enough, CEOs may not understand what is needed to support the development function, and there is no money for external resources.

“Nonprofit organizations are no different from for-profit; they need strong leadership for the staff and board. Issues are complex; competition for funds is intense; and demonstrating impact is important. Things are more sophisticated today.”

*- Corporate Foundation Director*

### ***Fund Development Needs***

Comments about specific needs of fund development needs centered on talent development for development professionals, especially those new to the field, to develop a pipeline of professionals. The less experienced professionals often do not know the “rules and roles” and, therefore, ask for funding that is not reasonable or possible. Foundation leaders end up providing the training, one declination at a time.

In addition to a limited number of experienced “superstars,” respondents noted the high turnover of development professionals. Many funders want to develop long-term relationships with organizations, but that is more difficult if there is a new development professional every few years.

“We can’t seem to stop the revolving door. It’s hard when there’s a new person every 18 month. The Foundation is thinking 5-10 years down the line but the people we develop relationships with leave in two.”

*- Private Foundation CEO*

### Addressing the Needs

When asked what should be done to address the needs of nonprofits and of development functions in particular, three suggestions stood out:

- Collaborate with other groups to provide the best continuing education possible. We have so many groups that have programs; it can become confusing.
- Help nonprofit CEOs understand how to build the development function. It's more than hiring a development director.
- Help development professionals learn how to assess a job opportunity so they are more likely to make good choices and remain in place longer.

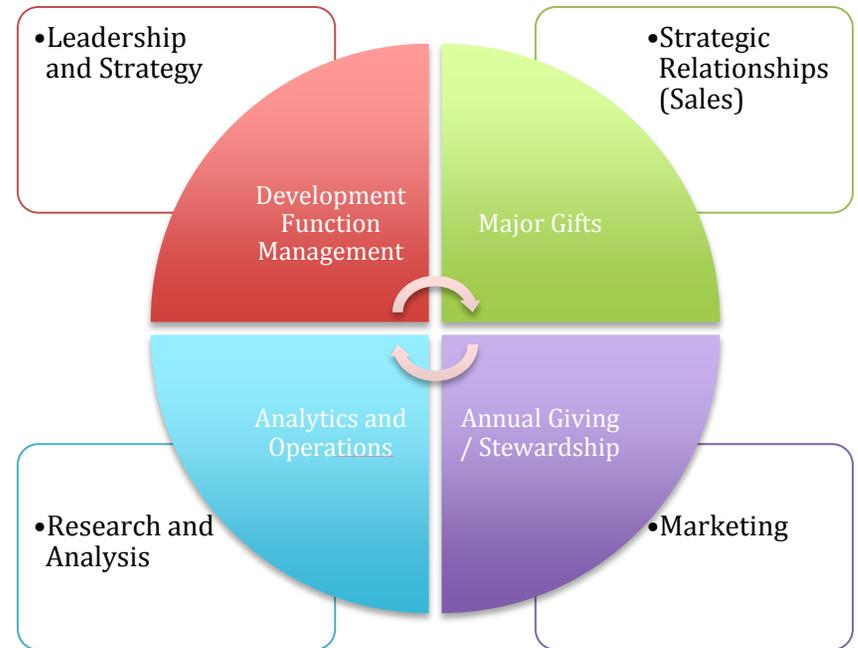
“Candidates don’t know what questions to ask in a job interview. They end up taking the wrong job and then start looking for the next opportunity.”

- *Development Consultant*

The skills and competencies required for a major gifts officer are different from those required by an annual fund manager

or a donor researcher. Many nonprofits can only hire one person to be responsible for all of the functions.

### Job Function / Competencies (credit: Samantha Marrs, VCU)





## V. VAFRE's Strategic Plan

Using the analysis of VAFRE's current position and the environmental scan, the organization has identified the strategy and goals for each of three key areas of focus that support the organization's mission and vision.



people, passion & philanthropy

vafre

## Vision and Mission

*We envision a vital philanthropic community continually strengthened by our members.*

*VAFRE is a regional organization that advances the talents of our members, fostering an effective, sustainable fundraising community.*

VAFRE's vision and mission position it as an integral part of the philanthropic community in Central Virginia with a responsibility to strengthen its members' skills, with the expectation that VAFRE members will use their talents to serve the nonprofit community.

The Central Virginia focus welcomes those from outside of the Greater Richmond Area. At this point, VAFRE does not have plans to make a concerted effort to reach beyond Central Virginia.

## Strategy

**VAFRE will achieve its mission by providing networking opportunities, educational programs, and resources focused on helping professionals advance their skills and helping nonprofit leaders understand how to support them. VAFRE will collaborate with other organizations to strengthen this strategy.**

VAFRE's strategy builds on its current approach of providing networking and educational opportunities. The strategy adds a focus for educational efforts that improve the abilities of nonprofit leaders and development professionals to create strong and effective development departments. The plan also highlights increased collaboration with other organizations serving the philanthropic community.

## Key Areas of Focus

To support VAFRE's vision, mission, and strategy, the board identified the following key areas of focus and associated goals:

### 1. *Collaborating:*

**Goal: Collaborate with related organizations to strengthen development-related programs in Central Virginia.**

There are many good organizations in Central Virginia that support the development community, including:

- AFP – Association of Fundraising Professionals (Central Chapter and 4 others in VA)
- VFRI – VA Fundraising Institute (A now separate entity formed by the 5 AFP Chapters)
- Institute on Philanthropy at the University of Richmond
- PNE – Partnership for Nonprofit Excellence (Now a part of the Community Foundation)
- APRA – Association of Professional Researchers for Advancement - Prospect Research
- GRAVA – Greater Richmond Association for Volunteer Administration - Volunteer Management
- VA Gift Planning
- VCU – Ask 101 (in formation)
- Nonprofit Learning Point

By finding ways to work together, coordinate programs, just get to know each other better, it is likely that we can strengthen resources available to the nonprofit community.

VAFRE’s first steps will be an internal analysis of VAFRE programs to determine which are appropriate for collaboration, which should continue to carry the “VAFRE brand,” and which could be appropriate for co-branding. Next, one-on-one or small group meetings to get to know the organizations better will create a better understanding of opportunities for collaboration. These could come in the form of:

- joint programming,
- supportive programming where two or more organizations provide different perspectives or levels of depth on a selected topic, or
- increased communication about the availability of planned programs.

Instead of being established as a separate VAFRE program, the collaboration effort should become integrated into VAFRE’s culture. It should become a part of the way VAFRE leadership thinks and conducts business. As such, responsibility for achieving the goal rests with the Board, culminating with the Executive Committee.

Evidence of success will be seen through coordinated programs and an increased communication about what programs are available through other organizations.

## 2. *Building the Development Function*

### **Goal: Improve the retention of development professionals.**

The environmental scan showed a general hypothesis that many nonprofit CEOs do not have a complete understanding of how to build a development function. Therefore, they hire development professionals without knowing how to support them. At the same time, professionals new to the area do not have a good understanding of how to evaluate a job opportunity to help ensure it is a good match for the individual's skills and experience. Together, these factors lead to higher turnover among development professionals.

VAFRE will develop resources and provide educational programs that help both nonprofit CEOs and development professionals do a better job of building the development function. The expectation is that improvement in this area will decrease job turnover.

Many nonprofits, especially the smaller ones, do not have a Human Resources function. The administrative HR responsibilities fall to another position, but there is no one with the organizational analysis experience to establish realistic expectations for a position, identify the competencies required, and assess those competencies in candidates. VAFRE can help fill this gap by compiling sample job descriptions, associated competencies, and compensation

information. Those resources can be enhanced through workshops and P3 groups open to nonprofit CEOs.

For the development professional, resources that describe nonprofit development needs at different stages in the organization's life cycle along with sample questions to ask to evaluate an organization's needs can provide a foundation that will make the hiring process less one-sided. A mentoring relationship could also provide support to a new professional who is considering a job transition.

There will always be turnover in jobs. VAFRE can help provide guidance to CEOs to help them move the development function forward while acknowledging that there will likely be changes in professionals every few years. Best practices in building development infrastructure will provide helpful guidelines.

This goal will become the responsibility of a new VAFRE committee that will:

- coordinate gathering information,
- work with the program committee to weave the topic into program planning, and
- collaborate with other organizations on programs that support the goal.

This area will become a long-term, ongoing focus of VAFRE.



### ***3. Increasing Membership***

**Goal: Increase membership by 50 to a consistent membership of 300.**

VAFRE's membership has remained stable at 250 members. This represents solid support but is still a small percentage of the nonprofit professionals in Central Virginia focused on fundraising at some level.

Approaches to increase membership will revolve around increased communications to reach potential members. A refreshed web site that highlights reasons to join VAFRE, more use of social media, and continuing to invite professionals to sample VAFRE programs will be among the first steps.

The corollary to adding new members is to retain members. VAFRE will develop a deeper understanding of the reasons individuals join and leave the organization so that future programs can address members' needs even better. In addition, board members will continue to help new members feel welcomed and become engaged through the Ambassadors Program, launched in October 2016, which matches Board members with new members for their first three months of membership. Board members will help new members meet other VAFRE members and understand the opportunities available to get involved.

Responsibility for increasing membership will rest with the membership committee, working with the communications committee and the Board.

### **Conclusion**

VAFRE will remain a vibrant resource for the nonprofit community by modeling a culture of collaboration and by providing resources that strengthen the profession.

The direction gives both newer members and long-time members the opportunity to be engaged in the organization at a deeper level. That, along with deeper resources, will help to form bonds that make membership strong.

**FOCUS AREA: Collaboration**

**Goal: Collaborate with related organizations to strengthen development-related programs in Central Virginia.**

Strategies / Action Steps	Timing	Point	Outcomes	Notes
<p>1. Within VAFRE, determine which programs should be “VAFRE-branded,” which could be joint-programs with another organization, and which could be moved to another organization.</p> <ul style="list-style-type: none"> <li>a. Review member surveys, program SWOT analysis to assess VAFRE programs.</li> <li>b. Review programs hosted by other organizations that could be good for VAFRE members. Summarize / map offerings.</li> <li>c. Articulate the value of collaboration, what it would mean for VAFRE members, and what good collaboration looks like.</li> <li>d. Present to VAFRE board for feedback and consensus.</li> </ul>	<p>First Quarter 2017/18</p>	<p>Ad Hoc Task Force appointed by the President. Perhaps two members of the program committee and two members of the executive committee, with the vice president taking the lead.</p>	<p>Recommendations re VAFRE programs that would be good for collaboration opportunities.</p>	

Strategies / Action Steps	Timing	Point	Outcomes	Notes
<p><b>2.</b> Explore collaboration opportunities with other organizations focused on philanthropy.</p> <ul style="list-style-type: none"> <li>a. Meet with the leadership of selected organizations to learn about mission, programs and goals.</li> <li>b. Host an opportunity to bring the boards of two or three organizations together.</li> <li>c. Identify collaboration opportunities for programs or other initiatives.</li> <li>d. Develop a collaboration plan for board approval.</li> </ul>	<p>Second and Third Quarters 2017/18</p>	<p>Vice President</p>	<p>Collaboration plan.</p>	<p>Identified Organizations:</p> <p>AFP VFRI IOP PNE APRA VA Gift Planning GRAVA VCU – Ask 101 NLP</p>
<p><b>3.</b> Promote a culture of collaboration within VAFRE.</p> <ul style="list-style-type: none"> <li>a. Include “collaboration” as a regular board agenda item. Maintain a focus on the strategy behind the collaboration.</li> <li>b. Highlight / cross promote collaboration opportunities and successes to members through the newsletter, social media, etc.</li> </ul>	<p>2017/18 ongoing</p>	<p>Board President</p>	<p>Discussion re collaboration in at least half of board meetings.</p>	



**FOCUS AREA: Building the Development Function**

<b>Goal: Improve the retention of development professionals.</b>				
<b>Strategies / Action Steps</b>	<b>Timing</b>	<b>Point</b>	<b>Outcomes</b>	<b>Notes</b>
<p><b>1.</b> Identify / create information to make available through VAFRE’s web site, including:</p> <ul style="list-style-type: none"> <li>a. Job descriptions, skills, and competencies associated with various development positions.</li> <li>b. Organizational charts that show a department at various stages of growth.</li> <li>c. Sample questions both for CEOs and for candidates for a job interview.</li> <li>d. Recommendations / stories from leaders of successful nonprofits that outline key success factors in building a department.</li> <li>e. Articles or white papers on building a department (from article searches or written by members and reviewed by the committee)</li> </ul>	<p>End of fourth quarter 2017/18.</p> <p>Ongoing effort to build resources.</p>	<p>New Committee: Building the Development Function</p> <p>The committee would review / approve resources before they are posted to the VAFRE web site.</p> <p>VAFRE leadership may be able to generate points a-d.</p>	<p>List of types of information to add to the web site.</p> <p>A minimum of three new resources each quarter.</p>	<p>The 2015 UST Nonprofit Employee Engagement &amp; Retention Report could be an article of interest.</p>

Strategies / Action Steps	Timing	Point	Outcomes	Notes
<p><b>2.</b> Identify VAFRE programs that help CEOs understand how to build a development function and nonprofit Board members understand their roles in supporting development efforts. Work with the VAFRE program and P3 committees to integrate topics. Consider:</p> <ul style="list-style-type: none"> <li>a. Periodic (quarterly) luncheon programs.<sup>1</sup></li> <li>b. Developing consultation opportunities with human resources / organizational experts for CEO members before they begin the hiring process.<sup>2</sup></li> <li>c. Piloting a P3-type partnership groups for CEOs.</li> </ul>	<p>Begin offering programs in 2017/18.</p>	<p>Program</p>	<p>Recommendations for specific programs and details of implementation.</p>	<p><sup>1</sup> Consider developing a “Building the Development Function” mark or indicator so that when invitations go out for programs on this topic, people will begin to recognize the topic.</p> <p><sup>2</sup> Would need to investigate / design this. Perhaps use an RFP process to choose an HR professional. VAFRE might pay for 1 hour of consultation for a CEO who is a member.</p>
<p><b>3.</b> Collaborate with other organizations to offer talent development opportunities.</p> <ul style="list-style-type: none"> <li>a. Identify two to four topics that are important for development professionals to master.</li> <li>b. Work with other organizations to develop continuing education opportunities.</li> </ul>	<p>First Quarter 2017/18</p> <p>Ongoing</p>	<p>Executive Committee</p>	<p>Plan in place for talent development opportunities to be offered beginning in 2018.</p>	

Strategies / Action Steps	Timing	Point	Outcomes	Notes
<p><b>4.</b> Increase awareness of the need for a greater understanding of how to build a sustainable development department.</p> <ul style="list-style-type: none"> <li>a. Include the topic in two or three newsletter articles each year and on the web site.</li> <li>b. Suggest the topic to CEO roundtables (e.g., Captain’s Table or other groups)</li> <li>c. Suggest that other organizations highlight the topic through their communications channels.</li> <li>d. Advertise programs, workshops and educational opportunities through the website, social media, etc. Attempt to reach CEOs to raise their awareness of need and resources.</li> </ul>	<p>By Third Quarter 2017/18</p>	<p>Communications Committee</p>	<p>Published articles, presentations, etc.</p>	

**FOCUS AREA: Membership**

**Goal: Increase membership by 50 to a consistent membership of 300.**

Strategies / Action Steps	Timing	Point	Outcomes	Notes
<p>1. Review member benefits and recommend any changes to the VAFRE Board.</p> <ul style="list-style-type: none"> <li>a. Review member pricing for VAFRE events.</li> <li>b. Work with the new committee focused on Building the Development function to determine which resources should be available to members only and which should be open to all.</li> <li>c. Consider reciprocal benefit opportunities.</li> <li>d. Compile recommended member benefits for Board review.</li> </ul>	<p>First Quarter 2017/18 to take effect for members beginning in 2018/19.</p>	<p>Membership Committee</p>	<p>Refreshed list of member benefits.</p>	





Strategies / Action Steps	Timing	Point	Outcomes	Notes
<p><b>4.</b> Develop a better understanding of the reasons people join and leave VAFRE.</p> <ul style="list-style-type: none"> <li>a. Conduct an annual survey of non-renewing members to determine their reasons.<sup>1</sup></li> <li>b. Continue to explore what members want from VAFRE in the annual survey.</li> <li>c. Review a summary of responses at a membership committee meeting, a programs committee meeting and a board meeting each year.</li> </ul>	<p>By End of 2017/18 and annually thereafter</p>	<p>VAFRE Administrator with Membership Committee</p>	<p>Annual report on reasons for joining / leaving.</p>	<p><sup>1</sup> Explore whether surveys can be sent efficiently several times per year so they are received closer to the date of membership expiration.</p>