



AFP CHAPTER MEMBERSHIP MARKETING PLAN

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Developed by the AFP Chapter Membership Marketing Plan Task Force – a joint Task Force of the Marketing & Communications Committee and the Chapter Support Subcommittee

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Marketing Plan Goals & Objectives

GOAL:

To assist chapters in membership outreach acquisition and retention efforts.

OBJECTIVES:

- Growth. Increase total membership through acquisition of new members and improve retention rate among existing.
- Diversity. Focus efforts on expanding AFP membership among individuals from diverse and underserved constituencies.
- Increase Appreciation for the Value of AFP Membership. Educate members and prospects about AFP services and product offerings that address and meet member needs at various points in their career and with respect to the practice settings in which they work.
- Increase Awareness of AFP's Role in the Profession. Educate constituents on the value of the AFP body of knowledge and its role in driving the evolution of the profession, providing the basis for continuing education and underpinning curriculum development.
- Promote AFP's Role as the Ethical Standard Bearer of the Profession. Continuously promote the ethical foundation of AFP and AFP members' commitment to uphold those ethical standards to outside audiences, including the entire nonprofit community, funders, government legislative and regulatory bodies and the media.
- Promote AFP Resources as Invaluable Tools to Your Professional Development. Focus marketing efforts on promoting AFP as a source for information, training, career development and management, and products and services for the nonprofit community; and promote the opportunities to communicate and network within the AFP community.
- Highlight the AFP Community. Explain the depth of AFP's membership across all types of organizations and at all skill levels within the profession in your local area and across the globe.
- Expand and Improve Chapter/International Collaborations. Develop marketing and communications tools to expand the relationship between AFP international headquarters and chapter leaders.

AUDIENCES BASED UPON MEMBERSHIP CATEGORIES

1. PROFESSIONAL MEMBERS

Full membership in AFP is available to those who hold some degree of accountability for income-generation within the fundraising process, who hold some degree of responsibility directly for fundraising and who are compensated for their services. The member must subscribe to the *AFP Code of Ethical Principles and Standards* and promote the *Donor Bill of Rights*. This membership is owned by the individual member and it travels with them if they leave their employer.

Key Messages/Value Proposition

- Credibility – “Professionalizing the profession”
- Professional development at both the chapter and international levels
- Every member subscribes to the *AFP Code of Ethical Principles and Standards* which is enforced
- Influence in public policies
- Connections with other professionals at both the chapter and international level
- Resources at both the chapter and international level, member survey results say these are the highest rated benefits:
 - Chapter Level – Networking, educational programs, Fundraising Days or local conferences, National Philanthropy Day® and leadership opportunities.
 - International Level – *Code of Ethics*, *Donor Bill of Rights*, Resources and Trends, *Advancing Philanthropy* and National Philanthropy Day®
- Credentials offered like “CFRE” and “ACFRE”, the education that is provided at both the chapter and international level provide valuable points for certification
- Inside track – access locally – job opportunities
- Collegiality
- Partnerships
- Leadership opportunities at both the chapter and international level

Tactics

- Send a letter to the CEO thanking them for their support of participation and dues in AFP
- Communicate our *Code of Ethics*
- Plug into community of established fundraisers - leverage those with longer tenure/more experience – have recognized fundraisers invite others
- Testimonials from local/experienced fundraisers on website/social media
- Leverage word-of-mouth campaigns through bring-a-friend, etc.

Target Audiences

- Individual member
- CEO’s of the organization
- Fundraisers
- Young Professionals who are “aging up” to 31. Develop a specific plan for this demographic insuring they are involved in the chapter as a Young Professional so when it is time to renew as a Professional member, it is an easy decision. Chapters should consider a specific scholarship to assist Young Professionals with this first year bump in membership dues when they move from a Young Professional to a Professional member.

2. YOUNG PROFESSIONAL MEMBERS

Open to persons who hold some degree of responsibility directly for fundraising, are compensated for their services and are age 30 or younger. They must subscribe to the *AFP Code of Ethical Principles and Standards* and promote the *Donor Bill of Rights*. This membership is owned by the individual.

Key Messages/Value Proposition

- AFP provides a competitive edge to help you build your network and career as a fundraising professional
- Learn from experts – fundraising best practices and leadership principles
- Reasonable membership fee of \$75 provides an extremely high ROI Includes Chapter Dues

Tactics

- Emphasize professional development opportunities available through AFP that will assist young professionals early in their career
- Bridging tactics between a collegiate chapter and the professional chapter
- Provide mentoring support – online program is piloting now
- Create (or use the one that already exists) curriculum and disseminate to chapters to reach out to the local colleges – see the collegiate chapter survival guide
- Provide less structured/inexpensive ways to reach young professionals
- Create networking events for young professionals
- Provide leadership responsibilities for young professionals, including committee involvement, committee leadership, Young Professionals affinity groups and board positions
- Use social media for key messages
- Share the depth of career opportunities available within the fundraising profession as a career path, for example, that many fundraising professionals move into the Executive Director role in an organization.

Target Audiences

- Universities/Colleges, particularly programs related to fundraising and nonprofit management
- Collegiate Chapters of AFP
- Fundraising Professionals age 30 and under
- Leaders of young professional groups, particularly those in related fields (nonprofit organizations, marketing, etc.)

3. SMALL NONPROFIT ORGANIZATIONAL MEMBER

Open to nonprofit organizations who can answer yes to all the following criteria:

- Must be a nonprofit organization
- Has an operating budget of less than \$1,000,000
- Has a fundraising department with less than two full time equivalents staff
- Individually incorporated or otherwise organized as a separate entity in the laws of the specific country and
- Not affiliated with a larger institution supporting their operations

One person per small nonprofit may be a member in this reduced dues membership category. The nonprofit owns the membership, so if the designated individual leaves, the nonprofit may transfer the membership to someone else.

Key Messages/Value Proposition

- In recognition that the majority of small nonprofit organizations, do not have a lot of resources, and that it is important to provide resources to this constituency, this category has been created
- AFP's committed to small nonprofits, so we created a membership priced just for you. There is value for \$150. This is the lowest cost you can pay to get valuable resources.
- Recognition of different needs for small nonprofits, more than just fundraising.
- Your payoff is in the networks you make; relationships with vendors, colleagues, research, tools, etc.
- Tools/ programming/ resources for the small organization

Tactics

- Affinity groups for small nonprofits at chapter level for sharing tools, resources, networks.
- Make introductions between small – larger groups for mentoring relationships.
- Targeted chapter programming for small nonprofits.
- Nonprofit management associations – market programs/ this membership to them.
- Mailing to small nonprofit organizations, based off 990 filing
- Chapters should consider the variety of needs of small nonprofits as they plan their educational programs throughout the year.

Target Audiences

- Both Executive Directors and the Development Manager
- Small Nonprofit Board Members
- Chapters that have large number of small nonprofits

4. LARGE NONPROFIT ORGANIZATIONAL MEMBERS

Open to nonprofit organizations who wish to have multiple members in the association. The organization will designate a minimum of eight members to receive Professional member benefits. The nonprofit owns the membership, so they may be transferred if the designated member leaves the nonprofit.

Key Messages/Value Proposition

- Tiered discounts for large organizations can lower your overall cost of staff membership.
- Your organization owns the memberships...they stay in-house, even when staff don't.
- Customized programming from AFP can bring high-level educational opportunities *specific to your organizational needs and current objectives*.
- Cross-pollination of influences will make your fundraising staff more effective. They'll have the opportunity to learn about best practices from other fundraising sectors, broadening their experience and effectiveness.
- Great fundraisers are getting harder to find. At AFP events, you'll have the opportunity to meet and connect with talented, engaged people who may be a perfect fit for your department.
- Organizational Membership can help you build and maintain a culture of excellence and high ethical standards among staff *and volunteer fundraisers alike*.

Tactics

- Targeted messages delivered face-to-face to the institutional decision-maker
- Testimonials from and listings of present Large Nonprofit Organizational members.
- Ask made by present Large Nonprofit Organizational members.
- Review participation at professional development opportunities; if a current member from a large nonprofit sends large numbers of their staff to professional advancement events, they should be approached to consider a membership in this category.
- Chapter Membership Chair should visit the potential Large Nonprofit Organizational members and explain the member benefits available to them.
- In your chapter membership marketing strategy, make the large Nonprofit Organizational membership a priority in your efforts — having members from these organizations provides credibility and growth to the chapter.

Target Audiences

- Senior Person in Development Leadership
- CEO
- Current organizations with at least four current AFP members
- Large nonprofits in community that have no or only a couple members in AFP

5. ASSOCIATE

Open to individuals or volunteers who are engaged in fields related to fundraising and fundraising support or who have mutual interests with fundraising professionals and who subscribe to the *AFP Code of Ethical Principles and Standards* and promote the *Donor Bill of Rights*. This membership is owned by the individual member and it travels with them if they leave their employer.

Key Messages/Value Proposition

- Access to decision makers in the fundraising profession
- Every member subscribes to the *AFP Code of Ethical Principles and Standards* which is enforced
- Connections with other professionals at both the chapter and international level
- Partnerships
- Leadership opportunities at both the chapter and international level

Tactics

- Ask people representing chapter sponsors to join
- Ask people representing chapter exhibitors to join

Target Audiences

- People who work for donor recognition companies
- People who work for fundraising software companies
- Staff at banks specifically those with an interest in planned giving
- Employees of printing companies, direct mail houses, or other suppliers to nonprofit organizations

6. GLOBAL E-MEMBERSHIP

Open to members outside of the U.S. or Canada who wish to join in an electronic only based membership category and who subscribe to the *AFP Code of Ethical Principles and Standards* and promote the *Donor Bill of Rights*. This membership is owned by the individual member and it travels with them if they leave their employer.

Key Messages/Value Proposition

- Credibility – “Professionalizing the profession”
- Professional development at both the chapter and international levels
- Every member subscribes to the *AFP Code of Ethical Principles and Standards* which is enforced
- Connections with other professionals at both the chapter and international level
- Electronic resources at both the chapter and international level, member survey results say these are the highest rated benefits:
 - Chapter Level – Networking, educational programs, local conferences, National Philanthropy Day® and leadership opportunities.
 - International Level – *Code of Ethics*, *Donor Bill of Rights*, Resources and Trends, *Advancing Philanthropy* and National Philanthropy Day®
- Leadership opportunities at both the chapter and international level

Tactics

- AFP website as a resource including the online Resource Center
- Everything at your fingertips through the online resources
- Online Fundamentals of Fundraising curriculum

Target Audiences

- Individual fundraising professionals who reside outside of the U.S. and Canada

7. BUSINESS MEMBERSHIP

Open to for-profit organizations whose work complements the fundraising profession. There are two levels of benefits: Executive Circle and Endorser with different benefits and dues amounts. The *AFP Code of Ethical Principles and Standards* was modified in 2009 in order to accommodate standards relevant to the for-profit community supporting the fundraising profession.

Executive Circle

Business entitled to designate two employees to receive full benefits as an Associate member of the Association. If the employee leaves, the business may designate a different person to assume the membership.

Endorser

Business entitled to designate one employee to receive full benefits as an Associate member of the Association. If the employee leaves, the business may designate a different person to assume the membership.

Key Messages/Value Proposition

- Access to decision makers in the fundraising profession
- Every member subscribes to the *AFP Code of Ethical Principles and Standards* which is enforced
- Connections with other professionals at both the chapter and international level
- Partnerships
- Leadership opportunities at both the chapter and international level

Tactics

- Ask people representing chapter sponsors to join
- Ask people representing chapter exhibitors to join

Target Audiences

- Donor recognition companies
- Fundraising software companies
- Banks specifically those with an interest in planned giving
- Printing companies or other suppliers of nonprofit organizations
- Consulting companies

8. COLLEGIATE MEMBERS

Open to students in a two or four year full-time degree granting, certificate or diploma program at an accredited college or university. You must be affiliated with an existing AFP Collegiate Chapter to join in this category. Students who are already working in a nonprofit are not eligible, they should join in one of the other categories.

Key Messages/Value Proposition

- Resume builder
- Networking with professionals in the field
- Develop leadership skills
- Collegiality
- Philanthropic projects lead to real life experiences
- Job placement help

Tactics

- Collegiate chapter certificate program
- Scholarships available to attend The Fundraising Conference
- Leadership opportunities to serve on a Collegiate Chapter Board

Target Audiences

- Students interested in nonprofit management
- Various clubs on university campuses that have a fundraising responsibility

9. RETIRED MEMBERS

Full membership in AFP is available to those who no longer practice as a paid fundraising professional but who at the time they seek Retired member status have been members of the Association for the immediate past five consecutive years. The member must subscribe to the *AFP Code of Ethical Principles and Standards* and promote the *Donor Bill of Rights*. This membership is owned by the individual member.

Key Messages/Value Proposition

- Stay connected with your colleagues/friends
- Credibility – “Professionalizing the profession”
- Every member subscribes to the *AFP Code of Ethical Principles and Standards* which is enforced
- Collegiality
- Leadership opportunities at both the chapter and international level

Tactics

- As a chapter learns of a colleague retiring, encourage them to remain in AFP
- Recruit them as mentors for your chapter members
- Ask them to serve on the awards selection committee for National Philanthropy Day®

Target Audiences

- Individual member who have retired

Frequently Asked Questions

Q: How can I join AFP?

A: There are several ways you can join AFP. Online at www.afpnet.org, click on the "Join AFP" tab and you can either join online or download an application which can be mailed or faxed in. Additionally chapters have printed applications that are available at chapter events and those can be mailed or faxed in as well.

Q: Is the membership owned by me or the organization I work for?

A: It depends on the type of membership that you purchase. Professional, Young Professional, Global e-member, Collegiate, Retired and Associate memberships are owned by the individual fundraising professional. It is your responsibility to update your contact information with AFP if you change employment so you continue to receive your member benefits. The large and small Nonprofit Organizational Memberships as well as the Business Memberships are owned by the nonprofit and if you leave their employ, they can re-assign the name on the membership.

Q: Is there a payment plan option for AFP membership?

A: Yes, there is the Membership Installment Payment Plan available for renewing members. The first payment must be the chapter dues in full plus a \$6.00 surcharge. Then the member will pay the international portion of the dues over the next five months. A credit card number must be given to sign up for the plan. Contact AFP Membership Services at afp@afpnet.org

Q: Can I join just the international association or just the chapter?

A: No, when you join AFP you must join at both the international and the chapter level. There are many benefits and resources provided by both entities and it provides a well-rounded experience for your membership. Belonging to both the chapter and the international association provides you with benefits and resources at each level for example, at the chapter level; members consistently rate networking, educational sessions, and local Fundraising Days or Conferences, National Philanthropy Day® and leadership opportunities as some of the highest benefits. Similarly, at the international level, the *Code of Ethics*, *Donor Bill of Rights*, the resources on the international website, our magazine *Advancing Philanthropy* and educational opportunities along with National Philanthropy Day® were what they valued the most.

Q: I can't remember my login – now what?

A: If you click on the upper right hand corner of the AFP website where it says "Login" it will take you to a screen where you can click on "I Don't Know My Password". If the email you enter matches what is on file in our database, a link will be emailed to you to reset your password. If your email has changed, please contact AFP Membership Services at afp@afpnet.org

Q: The renewal paperwork I have has someone else's name on it – can I use that to join?

A: No, we assign a unique ID number to every person who has ever been a member of AFP. If your name doesn't appear on the renewal form, you'll need to either call us to get your personalized renewal form or, if you've never been a member with us, join as a new member through the website at www.afpnet.org.

Q: What are my options for paying for my renewal?

A: AFP has different ways of paying for your renewal. They are:

- a. Paying for it online with a credit card
- b. Paying for it with the renewal notice with either a credit card or a check
- c. Applying for the installment payment plan option. Contact AFP Membership Services at afp@afpnet.org

Q: What about joining as a new member again? Can't I just do that?

A: This will result in you having multiple membership accounts with us meaning that your member number will change and you won't have your history of being an AFP member if you go that route. Please contact Membership Services so we can provide you with the appropriate paperwork, or login, to renew your membership so you can keep your original member ID number and history with us intact.

Q: How long will the renewal process take before my membership is renewed?

A: Online transactions take a couple of hours to process to be completed and physical transactions usually take between 5 to 7 business days.

Q: Will my dues be different from last year?

A: Membership categories have the same dues amount from year to year. These amounts will generally stay the same unless the chapter or international changes their dues amounts.

Q: Is there a grace period if my membership should lapse?

A: We currently don't give a grace period once a membership has lapsed at the end of the expiration month.

Q: Can I still renew online if I've been lapsed for six months or longer?

A: Unfortunately, at that point, the online system won't recognize you and you won't be able to renew online. All you'll need to do is to contact Membership Services and they'll work with you to reinstate your membership and then send you a renewal notice for you to fill out.

Q: Will AFP charge me for any year(s) that my membership was lapsed and do you charge a reinstatement fee?

A: While common in some associations, AFP does not charge a reinstatement fee if you are a lapsed member. We also don't charge you for the years you might have missed with us—we'll only charge you for the upcoming year (or years) of membership for which you are currently renewing.

Q: Am I able to renew online for more than one year or use a coupon online?

A: At this time, we can't accept coupons for any of the special programs, like the Two Year Discount or the Installment plan. In order to take advantage of these different programs, you would need to physically send in your renewal with the coupon, or paperwork, in question. There are options to use discount codes for the Anniversary and NPD coupons.

Q: Does AFP accept Purchase Orders for payment?

A: No. While AFP does accept credit cards, checks, and cash in order to pay for someone's membership, we are not able to process a membership renewal payment using a Purchase Order.

Q: What does being independently incorporated mean when referring to an organizational membership?

A: Legally the organization that is joining AFP holds the incorporation for itself. There is no parent organization or chapters and the organization joining is a solo entity. An example would be a theatre or a museum.

If a chapter or affiliate holds the incorporation, then they would be the entity that could join AFP as a large Nonprofit Organizational member. If this structure is the case, then each of the chapters would have to join separately. (i.e., United Way) The entity joining *is* the parent organization and the chapters that fall under it are financially attached. (i.e., Canadian Cancer Society) In this case all members would fall under this one entity.

Appendix

- Chapter Membership Development Plan

ASSOCIATION of FUNDRAISING PROFESSIONALS

CHAPTER MEMBERSHIP DEVELOPMENT PLAN 2014

CHAPTER	2014 MEMBERSHIP OBJECTIVES	ACTION STEPS
<i>Name of Chapter</i>	<ul style="list-style-type: none"> Where we were at the end of 2013 	<i>List the strategies, action steps, or tasks that the committee or additional volunteers will undertake in each of these three areas. You may list things you are already doing that are successful and that you intend to continue. Try to add at least one new action in each area. Each area can have three to five - or more if your chapter has good volunteer support.</i>
2014 MEMBERSHIP CHAIR	<p><i>For example . . . We ended 2013 with 120 members including 100 Professional Members, six Young Professional Members, four small Nonprofit Organizational, nine Associate Members, and one Retired Member. We achieved a retention rate of 75%, with an overall growth rate of 5%, and a growth rate of 7 % for Active members</i></p> <ul style="list-style-type: none"> Chapter's Overall Membership Goal 	<ul style="list-style-type: none"> Recruitment <ol style="list-style-type: none">
2014 MEMBERSHIP COMMITTEE	<p><i>Insert a description of your membership committee for 2014. Along with the Membership Chair/VP for Membership, the committee may include at least one other person (or more) responsible for:</i></p> <ul style="list-style-type: none"> Recruitment Retention Membership Marketing <p><i>Insert description (name and role) of committee:</i></p>	<ul style="list-style-type: none"> Retention <ol style="list-style-type: none">
	<ul style="list-style-type: none"> Marketing/communications Objectives for 2014 <ul style="list-style-type: none"> Timeline 	<ul style="list-style-type: none"> Membership Marketing <ol style="list-style-type: none">
		<ul style="list-style-type: none"> Competing Organizations <ol style="list-style-type: none">
		<ul style="list-style-type: none"> Strategic Partners <ol style="list-style-type: none">

ASSOCIATION of FUNDRAISING PROFESSIONALS

CHAPTER MEMBERSHIP DEVELOPMENT PLAN 2014

MEMBERSHIP INDICATORS	2011 Actual	2012 Actual	2013 Actual	2014 Targets	2015 Target
Total Membership					
Professional Category Members					
New Members					
Lapsed/lost Memberships					
Net Membership Gain					
Retention Rate					
Growth Rate					
Renewed/Reinstated Members					
Other					
OPTIONAL INDICATORS					
AFP Foundation Donors					
Average Regular Attendance					
Average Special Attendance					
# Members with Certification					
Financial					
Other					

That's it! Think simple - your plan should take just two pages at most. This written plan will simplify your reports to the board. Hopefully you will have all or most of the information at your fingertips. Access AFP's Information Central for additional data.