ASSOCIATION OF FUNDRAISING PROFESSIONALS

CHAPTER ROAD MAPPING TOOLKIT

DESIGNED AND DEVELOPED BY:

SYMPHONIC
ROAD MAPPING

How to explain what you plan on doing or where you plan on going

Road Mapping is a unique action planning exercise developed by Symphonic Strategies to help you move from strategic vision to action. In this exercise participants will work from a shared vision, outlining the various tasks and activities required to achieve your vision.
PLACE MATTERS
Advancing Health Equity

PLACE MATTERS seeks to advance health equity by engaging leaders at both local and national levels to identify and address social, economic, and environmental contributors of good health. DCAYA, in collaboration with the Joint Center for Political and Economic Studies, leads PLACE MATTERS to de-concentrate inequities, the Joint Center and PLACE MATTERS teams seek to de-concentrate health risks and create environments and policies to support health and quality of life for all.

DCAYA’s Strategic Destination
A Youth Friendly City

This is a visual representation of the conversations around the two pathways that DCAYA intends to pursue.

The D.C. Corrections Information Council Strategic Roadmap

The road map illustrates the strategic goals and objectives of the D.C. Corrections Information Council.

Strategic Road Mapping Toolkit
The top priority for the Association of Fundraising Professionals (AFP) is to provide value for our membership. There is not a single answer to what “value” means to our diverse membership – there is not a “one size fits all” definition, especially with the COVID-19 pandemic playing out in different contexts—race, gender, places, and organizations, to name a few. As we have created a new Strategic Roadmap for AFP, our intent was to identify and develop pathways that, on their own, contribute to delivering value to our membership. Together, we intend for these pathways to further differentiate, distinguish and elevate AFP – today, tomorrow and into the next decade.

We have partnered with Symphonic Strategies to produce this Chapter Toolkit to help all of our chapters develop their own strategic road map. This action planning exercise is designed to help you move from strategic vision to action. In this exercise participants will work from a shared vision, outlining the various tasks and activities required to achieve your vision.

In this document we present what we scoped out for the AFP Global Strategic Roadmap. If some or all of the pieces do not fit with your chapter, then we invite you to use the pages that follow to sketch out your own process for each strategic pathway.

**INSTRUCTIONS**

To get started, follow the instructions below.

1. Choose your destination—Select a destination point(s) that is compelling and realistic.

2. Set the arrival time—The arrival time is the timetable or pace by which you need to move.

3. Identify the landmarks—The landmarks are the markers that you will use to determine if you’re on the right path and headed in the right direction.

4. Find the right vehicle—The vehicle is the tool or the item you will have to rely upon to get you to the destination point.

5. Choose your drivers and passengers—During this step it is important to determine not only who will drive, but who needs to be in the passenger seats.

6. Decide upon the fuel you will need—The fuel are the ingredients you need to keep the vehicle moving.

7. Draw your road map—Create an image that captures the interaction between the items listed in steps 1-6.
A STRATEGIC ROAD MAP FOR THE ASSOCIATION OF FUNDRAISING PROFESSIONALS 2021-2023

A Strategic Roadmap for the Association of Fundraising Professionals 2021-2023

Promote Inclusion, Diversity, Equity and Access (IDEA)
Provide Relevant and High-Quality Fundraising Education
Increase Capacity and Strengthen Community
Champion Ethical Fundraising Practices

Goal
Our goal will be met when we have increased our Member Value.
**Destination**

We envision a future where: AFP and its members understand the business and social value that IDEA brings to delivering on our impact; at its essence, the ongoing awareness of IDEA’s business and social value fosters inclusive behaviors, practices, and environments that become embedded in everything the association touches; and fundraising becomes a professional destination for diverse voices.

**Landmarks & Milestones**

We will rely on the following landmarks and milestones as broad-based goals throughout our journey (2021-2023):

<table>
<thead>
<tr>
<th>Demonstrate inclusion, diversity, equity and access within its staff, Board, committees, task forces and work groups.</th>
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<td>Increase the number of chapters that hold the IDEA Champion designation to reach diverse voices in local communities.</td>
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STRATEGIC PATHWAY

STRATEGIC PATHWAY
Promote Inclusion, Diversity, Equity and Access (IDEA)
To envision a future where AFP and its members understand the business and social value that IDEA brings to delivering our impact; at its essence, the ongoing awareness of IDEA’s business and social value not only includes the values, practices, and environments that become embedded in managing the association, leadership, and fundraising but also a professional development for diverse voices.

VEHICLE
1. Culturally Competent Educational Frameworks
2. Modern Teaching Practices
3. Mentoring, Coaching & Networking
4. Intentional Recruiting Practices
5. Metrics & Benchmarks

FUEL
1. IDEA-Specific Content
2. IDEA Training Workshops
3. Intentional Diverse Relationships
4. IDEA Champions
5. Actionable Data & Data Collection Tools

DRIVERS
1. AFP Global Board
2. AFP Foundations for Philanthropy
3. AFP Chapter Leaders
4. AFP IDEA Committee
5. AFP Human Resources

PASSENGERS
1. AFP Members
2. AFP IDEA Champion Coaches
3. Strategic Partners
4. Nonprofit Human Resources

KEY
FUEL
What’s propelling us toward each milestone.

DRIVER
Who’s in control as we reach each destination.

PASSENGERS
Who’s on board and vital to achieving our goal.

GOAL

- Establish an inclusive and accessible environment for AFP members and new members who identify as diverse voices and segments.
- Create and implement high-quality tools for members and chapters to replicate the value of IDEA.
- Attractions and invite new fundraising professionals who reflect the diversity of the communities served by AFP chapters and members.
- Demonstrate inclusion, diversity, equity and access within its staff, Board, committees, task forces and work groups.

- Attract and retain more fundraising professionals who reflect the diversity of the communities served by AFP chapters and members.
- Increase the number of chapters that hold the IDEA Champion designation to reach diverse voices local communities.
- Our goal will be met when we have increased our Member Value.

Our goal will be met when we have increased our Member Value.
1. CHOOSE YOUR DESTINATION

Decide upon a destination point(s) that is closely connected to your mission or strategy. The more specific the destination point, the better.

If you're not clear about your destination, don’t be surprised if others aren’t clear about it either.

Ask yourself the following questions:

- When we reach our destination, how will we know?
- Is there a single destination or multiple destinations?
- What makes the destination compelling, attractive, and meaningful?
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Think about the questions above and use the space below and on the next page to write out your destination statement.
PROMOTE INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)

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2. SET YOUR ARRIVAL TIME

The arrival time is the timetable or pace by which you need to move.

The manner by which you measure and set the arrival time will say a lot about how you feel about your plan. Give this some thought.

Ask yourself the following questions:

- How are we measuring time? In days? Months? Years? Decades?
- Have we set a window for our arrival time or is there an absolute moment?
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The landmarks are the markers that you will use to determine if you’re on the right path and headed in the right direction.

Treat your landmarks as indicators that you are headed in the right direction. An indicator can have multiple measures.

Ask yourself the following questions:

- How many indicators should I be tracking and how will I measure them?
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Common Landmarks:

- **Legal**: rules and regulations
- **Financial**: amount of money supporting your cause or solution
- **Social**: social mobility, assimilation, or social interactions
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4. FIND THE RIGHT VEHICLES

The vehicle is the tool or the item you will have to rely upon to get you to your destination point(s).

You don’t have to settle for just one vehicle. Choose a number of vehicles to give yourself some flexibility.

Ask yourself the following questions:

- Which system offers me the best choice of vehicles? The legal system? The political system? The education system?
- Which institutions and organizations have the most attractive vehicles? Faith-based institutions? Churches? Schools?
- Can I use social clubs or affinity groups in my community? If so, which ones will be most receptive and most effective?

Common Vehicles:

- Lawsuits
- Legislation
- Medicine
- Counseling and therapy
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- Movies and television programming
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PROMOTE INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)

4. FIND THE RIGHT VEHICLES
5. CHOOSE YOUR DRIVERS & PASSENGERS

Different legs of your journey may require different drivers and passengers. Different people may need to step up at different times.

Ask yourself the following questions:

- What's the difference between a driver and passenger? How do my expectations change from one to another?
- How do my destination, arrival time, path, and vehicle influence the type of people who are most suited to serve as drivers and passengers?
- Am I the right person to be driving this at this stage?

Here is a list of just some of the possible candidates:

- Clergy & Religious Leaders
- Elected Officials
- Parents & other caregivers
- Educators
- Law enforcement
- Business owners
- Youth
5. CHOOSE YOUR DRIVERS & PASSENGERS

Think about the questions on the previous page and use the space below and on the next page to write out your drivers and passengers.
PROMOTE INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)

5. CHOOSE YOUR DRIVERS & PASSENGERS
6. DECIDE UPON THE FUEL YOU’LL NEED

The fuel are the ingredients you need to keep the vehicle(s) moving

Remember the higher the demand, the higher the cost. Find a fuel source that is affordable, sustainable, and a good source of power.

Ask yourself the following questions:

- How easy will it be to acquire this fuel?
- Will it be readily available in the future?
- As I progress along my path, will it be easy to get?
- Is my fuel source sustainable? Is this something that we can rely on today and tomorrow?
- Do the fuel sources that are available to me limit the types of vehicles or the kind of paths I can take?

Fuel for your journey can take many forms, such as:

- Donations to political candidates
- New beliefs and values
- An army of volunteers
- Paid employees
- New arguments
6. DECIDE UPON THE FUEL YOU’LL NEED

Think about the questions on the previous page and use the space below and on the next page to write out your fuel.

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6. DECIDE UPON THE FUEL YOU’LL NEED
### ROAD MAPPING WORKSHEET

Use the space below to design your own road map.

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</tr>
</thead>
<tbody>
<tr>
<td>ARRIVAL TIME</td>
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<tr>
<td>LANDMARKS</td>
<td>The indicators we’ll use to confirm we’re heading in the right direction:</td>
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<tr>
<td>VEHICLES</td>
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<td>PASSENGERS</td>
<td>The stakeholders—internal and external—we need to carry with us to the destination:</td>
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<tr>
<td>FUEL</td>
<td>The resources required to power this vehicle:</td>
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PROVIDE RELEVANT AND HIGH QUALITY FUNDRAISING EDUCATION

Destination

We envision that all AFP members will have access to a tailored fundraising education experience that meets them where they are and, equally important, where they are going. Ultimately, we will promote the message that all fundraisers can find ways to demonstrate leadership, no matter their title or their role in their organization.

Landmarks & Milestones

We will rely on the following landmarks and milestones as broad-based goals throughout our journey (2021-2023):

- Increase the accessibility of professional development opportunities available to members who have limited access to quality education offerings or who lack the resources to participate in large (in-person) AFP gatherings.
- Develop a leadership development program that positions fundraisers for a wider array of leadership roles in their organizations.
- Create ongoing mechanism for assessing the needs, including emergences of new skill and competencies, and preferences of learners, as well as a process for sharing those insights with AFP chapters and members.
- Develop learning pathways for AFP members contingent on their age, stage in career, focus area or employment segment.
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**VEHICLE**
1. Instructional Design
2. Fresh Career Paths
3. Flexible Learning Journeys
4. Strategic Partnerships
5. Mentoring, Coaching, & Networking
6. Assessments & Benchmarks

**FUEL**
1. Quality Instructors & Compelling Content
2. Tailored Content
3. Leadership-Specific Content
4. Technology for Content Creation and Delivery
5. Continues Data

**DRIVER**
1. AFP Global Board
2. AFP Professional Development Team
3. AFP Foundations for Philanthropy
4. AFP Chapter Leaders
5. AFP Education Advisory Council

**PASSENGERS**
1. AFP Members
2. ACFRE Board
3. ICON Advisory Committee
4. AFP Research Council
5. Executives and Emerging Leaders
6. Early-career Fundraisers
7. Employers

**GOAL**
Our goal will be met when we have increased our Member Value.
1. CHOOSE YOUR DESTINATION

Decide upon a destination point(s) that is closely connected to your mission or strategy. The more specific the destination point, the better.

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PROVIDE RELEVANT AND HIGH QUALITY FUNDRAISING EDUCATION

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<th>The resources required to power this vehicle:</th>
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</thead>
</table>
INCREASE CAPACITY AND STRENGTHEN COMMUNITY

Destination

We envision a moment in the future when: 1) AFP meets our members where they are, with the resources they need, when they need them, while generating sustainable and comprehensive sources of revenue; 2) AFP chapters and members are engaged and committed to the growth and expansion of AFP; and 3) AFP chapters and members are leveraged to nurture and expand relationships that transform their organizations and the communities we serve.

We envision a moment when more organizations and individuals become members because of the collective power to advance favorable philanthropic policies; when AFP mobilizes our networks to convene influential partners to drive positive policies globally and protect the sector; and when government policy becomes a supportive conduit for success.

Landmarks & Milestones

We will rely on the following landmarks and milestones as broad-based goals throughout our journey (2021-2023):

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<thead>
<tr>
<th>Create tools and opportunities that cultivate a strong sense of connectedness between members.</th>
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<td>Cultivate a strong sense of community among and between AFP chapters.</td>
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<tr>
<td>Position AFP as an influential thought leader and voice for both the philanthropic community and nonprofit sector.</td>
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<tr>
<td>Create a mechanism for identifying and disseminating timely polices and laws that affect fundraisers and position AFP to influence policies and laws important to fundraisers in North America.</td>
</tr>
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<td>Secure revenue generating partnerships and sponsorships with external organizations that contribute to AFP and the AFP Foundations for Philanthropy core initiatives.</td>
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INCREASE CAPACITY AND STRENGTHEN COMMUNITY

STRATEGIC PATHWAY
Increase Capacity and Strengthen Community

We envision a moment in the future when: 1) AFP meets our members where they are, with the resources they need, when they need them, while generating sustainable and comprehensive sources of revenue; 2) AFP chapters and members are engaged and committed to the growth and expansion of AFP; and 3) AFP chapters and members are leveraged to nurture and expand relationships that transform their organizations and the communities we serve. We envision a moment when more organizations and individuals become members because of the collective power to advance favorable philanthropic policies; when AFP mobilizes our networks to convene influential partners to drive positive policy change and protect the sector; and when government policy becomes a supportive conduit for success.

GOAL
Our goal will be met when we have increased our Member Value.

VEHICLE
1. Knowledge Transfer
2. Peer-to-Peer Conversations
3. Mentoring, Coaching & Networking
4. Metrics & Benchmarks

FUEL
1. Leading Practices Database
2. Chapter and Member Profiles
3. Volunteer Management Strategies
4. Actionable Data

DRIVERS
1. AFP Global Board
2. AFP Membership and Chapters Team
3. AFP Foundations for Philanthropy
4. AFP Chapter Leaders

PASSENGERS
1. AFP Members
2. AFP Chapter Support Committee
3. Strategic Partners
4. Policy Makers & Elected Officials
5. AFP Government Relations Committee
6. Media Partners

What’s propelling us forward at each initiative.

Who’s in control as we reach each destination.

What’s vital to achieving our goal.

Create tools and opportunities that cultivate a strong sense of connectedness between members.

Position AFP as an influential thought leader and voice for both the philanthropic community and nonprofit sector.

Secure revenue generating partnerships and sponsorships with external organizations that contribute to AFP and the AFP Foundations for Philanthropy core initiatives.

Create a mechanism for identifying and disseminating timely policies and best practices to influence policies and laws important to fundraisers in North America.

Foster a strong sense of community among and between AFP chapters.

Create a mechanism for identifying and disseminating timely policies and best practices to influence policies and laws important to fundraisers in North America.
1. CHOOSE YOUR DESTINATION

Decide upon a destination point(s) that is closely connected to your mission or strategy. The more specific the destination point, the better.

If you’re not clear about your destination, don’t be surprised if others aren’t clear about it either.

Ask yourself the following questions:

- When we reach our destination, how will we know?
- Is there a single destination or multiple destinations?
- What makes the destination compelling, attractive, and meaningful?
- To whom?
- Is this a personal destination or a shared destination?
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INCREASE CAPACITY AND STRENGTHEN COMMUNITY

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The arrival time is the timetable or pace by which you need to move.

The manner by which you measure and set the arrival time will say a lot about how you feel about your plan. Give this some thought.

Ask yourself the following questions:

- How are we measuring time? In days? Months? Years? Decades?
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The landmarks are the markers that you will use to determine if you’re on the right path and headed in the right direction.

Treat your landmarks as indicators that you are headed in the right direction. An indicator can have multiple measures.

Ask yourself the following questions:

- How many indicators should I be tracking and how will I measure them?
- Will the landmarks change if we change paths?
- Will it be easy to see or to recognize these landmarks?

Common Landmarks:

Legal: rules and regulations

Financial: amount of money supporting your cause or solution

Social: social mobility, assimilation, or social interactions

Physical: quality of life

Psychological: emotional well-being, spiritual strength
3. IDENTIFY THE LANDMARKS

Think about the questions on the previous page and use the space below and on the next page to write out your landmarks.
3. IDENTIFY THE LANDMARKS
4. FIND THE RIGHT VEHICLES

The vehicle is the tool or the item you will have to rely upon to get you to your destination point(s).

You don’t have to settle for just one vehicle. Choose a number of vehicles to give yourself some flexibility.

Ask yourself the following questions:

- Which system offers me the best choice of vehicles? The legal system? The political system? The education system?
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- Can I use social clubs or affinity groups in my community? If so, which ones will be most receptive and most effective?

Common Vehicles:

- Lawsuits
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- Medicine
- Movies and television programming
- Counseling and therapy
- Elections and political campaigns
- Curriculum
4. FIND THE RIGHT VEHICLES

Think about the questions on the previous page and use the space below and on the next page to write out your vehicles.
INCREASE CAPACITY AND STRENGTHEN COMMUNITY

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During this step it is important to determine not only who will drive, but who needs to be in the passenger seats.

Different legs of your journey may require different drivers and passengers. Different people may need to step up at different times.

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- What's the difference between a driver and passenger? How do my expectations change from one to another?
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Here is a list of just some of the possible candidates:

- Clergy & Religious Leaders
- Elected Officials
- Parents & other caregivers
- Educators
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- Business owners
- Youth
5. CHOOSE YOUR DRIVERS & PASSENGERS

Think about the questions on the previous page and use the space below and on the next page to write out your drivers and passengers.
INCREASE CAPACITY AND STRENGTHEN COMMUNITY

5. CHOOSE YOUR DRIVERS & PASSENGERS
6. DECIDE UPON THE FUEL YOU’LL NEED

The fuel are the ingredients you need to keep the vehicle(s) moving.

Remember the higher the demand, the higher the cost. Find a fuel source that is affordable, sustainable, and a good source of power.

Ask yourself the following questions:

- How easy will it be to acquire this fuel?
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Fuel for your journey can take many forms, such as:

- Donations to political candidates
- New beliefs and values
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- New arguments
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Think about the questions on the previous page and use the space below and on the next page to write out your fuel.
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Use the space below to design your own road map.

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We will rely on the following landmarks and milestones as broad-based goals throughout our journey (2021-2023):

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<th>Establishment</th>
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CHAMPION ETHICAL FUNDRAISING PRACTICES

Strategic Pathway: Champion Ethical Fundraising Practices

We envision the moment when the importance of adhering to ethical fundraising practices is a notion that is embraced widely around the world; when AFP members are consistently in positions where they can effectively champion the importance of running ethical and credible organizations; when AFP is seen by nonprofit organizations as the key resource for the professional development of ethical leaders in fundraising and beyond; and when AFP’s Code of Ethics continues to be a key differentiator for the Association, serving to strengthen fundraising and increase public trust in charitable giving.

VEHICLE
1. Ethics Education
2. Training
3. Mentoring, Coaching & Networking
4. Metrics & Benchmarks

VEHICLE

FUEL
1. Content
2. Training Workshops
3. Actionable Data
4. Champions

DRIVERS
1. AFP Global Board
2. AFP Marketing and Communications Team
3. AFP Foundations for Philanthropy
4. Chapter Leaders
5. AFP Ethics Committee

DRIVERS

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1. AFP Members
2. Member Organizations
3. Nonprofit Human Resources
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PASSENGERS

KEY

VEHICLE

FUEL

DRIVERS

PASSENGERS

What’s propelling us forward at each initiative.
Who’s in control as we reach each destination.
Who’s on board and vital to achieving our goal.

Ethics Education
Training Workshops
Actionable Data
Champions

FPếc tốt các yếu tố thúc đẩy sự phát triển ở mỗi pha phát
Kẻ kiểm soát khi đến mỗi điểm đích
Người trong đoàn và quan trọng nhất để đạt được mục tiêu.

GOAL

Our goal will be met when we have increased our Member Value.

ENCOURAGE NONPROFIT ORGANIZATIONS TO ADHERE TO ETHICAL PRINCIPLES IN THEIR HIRING AND COMPENSATION PRACTICES.

PROMOTEcase studies and share practical stories that demonstrate ethical behaviors across the fundraising landscape that serve to enhance the fundraising brand.

Establish AFP as a go-to resource across the fundraising sector for ethical principles and practices.

Proactively lead and show organizations that demonstrate ethical behaviors across the fundraising landscape that serve to enhance the fundraising brand.

For more information on how to best participate in the fundraising sector.

Establish AFP as a go-to resource across the fundraising sector for ethical principles and practices.

Promote case studies and share practical stories that demonstrate ethical behaviors across the fundraising landscape that serve to enhance the fundraising brand.

Go beyond boundaries to take ethical giving and fundraising to the next level.

PROGRESS

What we need to achieve to reach our goal.

Our goal will be met when we have increased our Member Value.

Encourage more nonprofit organizations to adopt ethical principles in their hiring and compensation practices.

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STRATEGIC PATHWAY

Champion Ethical Fundraising Practices

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CHAMPION ETHICAL FUNDRAISING PRACTICES

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Ask yourself the following questions:

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3. IDENTIFY THE LANDMARKS

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Treat your landmarks as indicators that you are headed in the right direction. An indicator can have multiple measures.

Ask yourself the following questions:

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CHAMPION ETHICAL FUNDRAISING PRACTICES
4. FIND THE RIGHT VEHICLES

The vehicle is the tool or the item you will have to rely upon to get you to your destination point(s).

You don’t have to settle for just one vehicle. Choose a number of vehicles to give yourself some flexibility.

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CHAMPION ETHICAL FUNDRAISING PRACTICES

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CHAMPION ETHICAL FUNDRAISING PRACTICES

4. FIND THE RIGHT VEHICLES

4.1 Identify the different fundraising methods available

4.2 Evaluate the effectiveness of each method

4.3 Choose the most appropriate methods based on your organization's needs

4.4 Implement strategies to optimize fundraising outcomes

4.5 Monitor and adjust methods as needed

4.6 Continuously improve fundraising efforts

4.7 Stay informed about best practices and new approaches
5. CHOOSE YOUR DRIVERS & PASSENGERS

During this step it is important to determine not only who will drive, but who needs to be in the passenger seats.

Different legs of your journey may require different drivers and passengers. Different people may need to step up at different times.

Ask yourself the following questions:

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