



2021 IDEA Champion Application Companion Document

The IDEA Champion (formerly Friends of Diversity) Designation recognizes those chapters who have accomplished many of the key objectives outlined in the advancing diversity strategic goal of the AFP Global Strategic Plan. This designation encourages chapters to perform specific activities designed to increase diversity and inclusion within fundraising and public awareness of the importance of philanthropy in all cultures.

This Document

This companion document to the IDEA Champion Application provides samples submitted by other AFP Chapters during previous years for the IDEA Champion Designation. There are samples from chapters of varying sizes to help you compare to your own chapter.

All questions regarding the IDEA Champion Designation can be forwarded to:

Association of Fundraising Professionals

Attn: Kelley Brown

IDEA Champion Designation

4300 Wilson Boulevard, Suite 300

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Deadline

Chapters must submit the ***online*** nomination form by the deadline date: **February 1, 2021**

Part 1: Required Goals

(Some samples from other chapters included below)

1. The chapter's Board passed or reaffirmed a Board resolution that defines the chapter's commitment to IDEA. The resolution is to be reviewed at least every three years.

Like Size 1 Chapter

WHEREAS the mission of AFP is to enable people and organizations throughout the world to practice effective and ethical fundraising through education, training, mentoring, research, credentialing and advocacy; and,

WHEREAS AFP Chapter Name is committed to encouraging its members and the nonprofit sector to better serve their respective communities and cultures; and,

WHEREAS AFP Greater Chapter's Diversity Committee exists to promote an Association that is more reflective of Chapter's diverse community; and,

WHEREAS AFP Chapter defines diversity as recognizing but not limited to one's: race, gender, gender identity, ethnicity, sexual orientation, physical/developmental abilities, and economic circumstance,

WHEREAS AFP is committed to diversity as an overarching theme in its programs, activities, committees, and structure.

THEREFORE BE IT RESOLVED THAT AFP is committed to diversity as an ongoing proactive process in its governance, chapters, committees, membership, programs and activities.

Like Size 3 Chapter

Philosophy Statement: The Chapter of AFP strives to act in accordance with the national organization's diversity and inclusion philosophy statement wherein diversity and inclusion create a strong, vital and unified force for the effective pursuit of our mission and achieving philanthropic success.

Like Size 4 Chapter

WHEREAS the Chapter embraces AFP's international goal of diversity; WHEREAS the Chapter is committed to educating and encouraging its members and the nonprofit sector to better serve the community; WHEREAS the Chapter has served as the resource for and has made significant investments in the area of inclusivity, therefore BE IT RESOLVED THAT;

The Chapter officers and Board of Directors shall be champions for inclusivity in their leadership of chapter operations, committee work and all other board related activities;

Inclusivity is recognized and embraced as critical to the mission of the Chapter and shall remain an integral, ongoing and proactive part of the organization's governance, committees, membership, programs, policies, activities, goals and priorities in the future;

The Chapter provides access and opportunities for service and leadership to all segments of our not-for-profit community;

The Chapter strives to be inclusive in its planning and programs, and inclusivity is part of its plans; and the Committee on Inclusivity helps develop guidelines for consideration in the Chapter's plans and programs;

The Committee on Inclusivity serves as a springboard for ideas and generates concepts related to the diversity of the Chapter's membership and the inclusion of all communities.

2. The Chapter Board discussed and defined IDEA in fundraising for the community that the chapter serves. This definition is in written form, is used in chapter materials, and is reviewed at least every three years.

Like Size 1 Chapter:

Diversity and Inclusion in Fundraising – seeks to achieve a broad representation of experiences, perspectives, and cultures to ensure that the best possible thinking, ideas, opportunities and solutions are considered; intentionally creates a respectful and welcoming environment that is open to all; and appreciates the unique contributions of every member of the community.

Like Size 3 Chapter:

The Association of Fundraising Professionals Chapter believes in...

- Responsiveness – Focusing on high quality service, that is open to new ideas and exceeding expectations of members, stakeholders and communities
- Inclusiveness – Embracing diversity in the fundraising community with a commitment to understanding and addressing the unique needs of all its members and ensuring the benefits we provide are accessible and affordable.
- Collaboration – Recognizing that we can accomplish our purpose only with the strong support and partnership of other individuals and groups who share our vision.
- Integrity – Conducting business according to the highest ethical principles and serving as trustworthy stewards of our resources.
- Celebration – Openly and joyfully celebrating philanthropic actions, individuals and organizations that positively transform our communities.

Like Size 4 Chapter:

The Chapter defines diversity as our commitment to celebrate our members, volunteers, officers, directors, agents, contractors, and others with whom we interact, regardless of age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, race, religion, sexual orientation, veteran status, and other characteristics that make them unique.

Like Size 4 Chapter:

IDEA: Inclusion, Diversity, Equity and Access (formerly Diversity) Committee of the Chapter promotes inclusion and mutual respect among fundraisers, the non-profits we support, and the communities we serve. We are dedicated to creating a more diverse, representative, and inclusive membership community grounded in respect, humility, celebration, and appreciation.

The IDEA Committee leads the Chapter in open, honest dialogue about our differences and cultural competencies; this benefits all of our internal and external stakeholders. The IDEA committee provides training in cultural humility best practices, panels & workshops on diversity issues, and advocates for all voices to be represented in our community.

- Inclusion is the exploration of differences in a safe, positive, and nurturing environment, personally and professionally. It is about understanding each other and moving beyond simple tolerance in order to embrace and celebrate the rich dimensions of diversity within each individual. It is the profound practice of making sure that not only do all have a seat at the table, but also that all have a voice at the table.
- Diversity means understanding each individual is unique and recognizing our individual differences, ideas, and experiences in philanthropic grant making. These can be along the dimensions of race, ethnicity, gender, sexual orientation, socio-economic status, age, physical abilities, religious beliefs,

political beliefs, or other ideologies.

- Equity is the movement toward more justice and fairness in organizational and societal practices. Fair pay for equal work, access to leadership opportunities, and ending discrimination all support the development of equity.
- Access is the concept that all people have equal chances at advancement, learning, participation, and leadership in organizations. The systematic discrimination that exists in society necessitates the conscious questioning of who is present and heard in decision making, leadership, and organizations.

3. The chapter created OR worked on implementation of a previously created written IDEA plan. (A copy of the written plan is required. Please submit a copy of the plan so we may include it in the Chapter Resources Section of the AFP IDEA Resource Guide for other chapters to have as a resource.)

Like Size 2 Chapter

Diversity and Inclusion Plan 2018

1. Goal: Hold one workshop focused on diversity
Action: Melody Pannell, Professor at Eastern Mennonite University, lead the April 19th workshop on *Cultural Competency*.
2. Goal: Survey members to determine those with years of experience who would be interested in leading a workshop and continuing to stay in engaged.
Action: Membership chair surveyed members to get feedback. It was determined that personal conversations would be more effective.
3. Goal: Continue mentorship program, with a focus on new members who may be new to fundraising profession.
Action: Membership chair continued mentorship program and offered to new members.

Like Size 3 Chapter

Diversity and Inclusion Strategic Plan
2017 – 2019

The Association of Fundraising Professionals Chapter is committed to the following three year diversity and inclusion strategic plan. This plan provides a road map for advancing the chapter's awareness of and engagement with issues of diversity within the field of philanthropy.

2017 Objectives

- I. Review and recommit to objectives at board meeting via a vote
 - a. COMPLETED: Board voted on 2.15.17
 - a.i. Philosophy Statement: The Chapter of AFP strives to act in accordance with the national organization's diversity and inclusion philosophy statement wherein diversity and inclusion create a strong, vital and unified force for the effective pursuit of our mission and achieving philanthropic success.
 - a.ii. Definition: As a regional affiliate of AFP, we seek to achieve a broad representation of experiences, perspectives, and cultures to ensure that the best possible thinking, ideas, opportunities and solutions are considered; intentionally creates a respectful and welcoming environment that is open to all; and appreciates the unique contributions of every member of the community.
- II. Review and recommit the board and chapter's commitment to the diversity philosophy statement and definition via a vote.
 - a. COMPLETED: Board voted on 3.15.17
- III. Conduct a membership demographics survey and report on survey results in December e-newsletter.
- IV. Host at least one program focused on the topic of diversity and inclusion.
- V. Complete application for the Friends of Diversity Designation by due date.

2018 Objectives

- I. Review and recommit to objectives at January 2018 Board meeting via a vote.
- II. Review and recommit the board and chapter's commitment to the diversity philosophy statement and definition via a vote taken at a chapter meeting.
- III. Create diversity initiatives into Membership strategic goals based on 2017 demographic results (i.e. increase male membership, increase representation from various ethnicities). To be proposed by Membership Chairperson and Diversity and Ethics Chairperson and adopted via vote by the Board.
- IV. Submit nomination for Charles R. Stephens Excellence in Diversity Award.
- V. Conduct a membership demographics survey and report on survey results in December e-newsletter.
- VI. Host at least one program focused on the topic of diversity and inclusion.
- VII. Complete application for the Friends of Diversity Designation by due date.

2019 Objectives

- I. Review and recommit to objectives at January 2019 Board meeting via a vote.
- II. Review and recommit the board and chapter's commitment to the diversity philosophy statement and definition via a vote taken at a chapter meeting.
- III. Report on progress made on 2018 membership diversity initiatives.
- IV. Submit nomination for Charles R. Stephens Excellence in Diversity Award.
- V. Create diversity initiatives into Membership strategic goals based on 2018 demographic results (i.e. increase male membership, increase representation from various ethnicities). To be proposed by Membership Chairperson and Diversity and Ethics Chairperson and adopted via vote by the Board.
 - a. Continue mentoring program for the purpose of increasing diversity of membership and aiding in membership retention and recruitment goals.
- VI. Conduct a membership demographics survey and report on survey results in December e-newsletter.
- VII. Host at least one program focused on the topic of diversity and inclusion.
- VIII. Develop three year diversity plan for 2017 - 2019.
 - a. COMPLETED: 2.15.17
- IX. Complete application for the Friends of Diversity Designation by due date.

Like Size 5 Chapter

Inclusion, Diversity, Equity & Access Plan

GOAL

To implement a plan that ensures Inclusion, Diversity, Equity & Access (I.D.E.A.) is encompassed in all chapter operations.

DEFINITION

The Association of Fundraising Professionals-Chapter defines I.D.E.A as follows:

Inclusion: The ability of the Chapter to attract, retain, accommodate, and involve a range of diverse people who are valued, accepted, and comfortable at the international, national, regional or local chapter level.

Diversity: The Chapter defines diversity as a core value. It is an inclusive concept encompassing, without limitation, race, color, ethnicity, gender identity, sexual orientation or identity; religion, nationality, age, economic class, educational level, language, physical, mobility and ability, geography, and marital and parental status. The state of being diverse means having the broadest possible representation of individuals, experiences, and perspectives in all-encompassing terms.

Equity: Creating a level playing field for individuals or groups according to their respective needs, which may include equal treatment or treatment that is different but is considered equivalent in terms of rights, benefits, obligations and opportunities.

Access: The commitment to foster attitudes, behaviors, and procedures to facilitate access that promotes equity and diversity, fosters inclusion and allows people to maximize their contribution to our association and communities that our members serve.

GOVERNANCE

1. The Chapter will adopt a Board Resolution on I.D.E.A.
2. The Chapter will create a I.D.E.A. Committee comprised of volunteers from every chapter committee (or as many as feasible); this philosophy ensures that a commitment to diversity and inclusion will be emphasized in all chapter activities, as well as assisting with the integration of diversity and inclusion efforts in all areas of chapter infrastructure (e.g., Membership, Education, Programming, Communications, etc.).
3. The Chair of the I.D.E.A Committee will sit on the Chapter Board; this enhances the role of the Chair as a leader and focal point for the chapter's diversity and inclusion efforts.
4. The Chapter will perform a self-assessment to determine the current status of its diversity and inclusion efforts. This assessment will be a three-part process.
 - I. Assessment of the chapter's demographic composition. The Chapter will request a summary of demographic information from IHQ's staff. This is comprised of demographic information that the member has the option of filling out. The Chapter will also conduct a separate member survey for additional information.
 - II. Conduct an Internal Survey. I.D.E.A. committee will evaluate the composition of the chapter board, membership and committees to make sure it represents the community the chapter serves; develop an assessment matrix, formal or informal, which relates to analyzing the board membership by type, ethnic group or any such category.
 - III. Culture Check of chapter activities and programs to ensure that the chapter is being considerate and inclusive of underrepresented populations within the chapter and community-at-large. Items to consider would be the location of chapter meetings, composition of attendance at chapter programs, content of programs, speakers, funds earmarked for diversity programs, etc.
5. Ensure diversity and inclusion vision and language is in the Chapter's Strategic Plan and set measurable objectives with regard to chapter diversity and inclusion efforts.

MEMBERSHIP

1. Use the peer principal to identify, cultivate and recruit diverse members. Peers not only give to peers, they recruit peers.
2. Set a chapter goal on the number of diverse individuals that will be recruited for the year.
3. Recruit committee members that are diverse and may or may not be AFP members, but have access to diverse communities in your region.
4. Understand the diversity in our community and offer incentives that will reach this audience.
 - Tailor membership recruitment material for different diverse audiences
 - Cultivate diverse individuals or organizations by inviting them to be a guest at AFP sponsored events (e.g., awards lunch, workshop, committee meeting)
5. Establish an outreach subcommittee that will focus on recruitment of diverse individuals for chapter committees and membership.
6. Allocate money in the chapter's annual budget to pay for five lunches for diverse guests. Use the opportunity to educate them about AFP. Ask their help in identifying additional diverse prospective members.

7. Participate in at least one event each year that is integral to a “diverse” community.

PROGRAM DELIVERY

1. Engage speakers and workshop leaders with diverse backgrounds for chapter programs. Some examples are:
 - a. Women, Wealth and Philanthropy
 - b. Understanding LGBTQ Donors and Prospects
 - c. Giving in Different Ethnic Groups
2. Designate one month’s educational luncheon to a topic that revolves around I.D.E.A. Possible topic: How philanthropy functions in diverse groups.
3. Establish a network of professionals with diverse backgrounds (check with national associations and get local member listings, university professors).
4. Offer scholarships to attend chapter programs to individuals with diverse backgrounds.
5. Establish a mentoring program for individuals from diverse organizations.
6. Develop one joint program/workshop in conjunction with an organization that has a diverse staff and constituency.
7. Ask chapter members to network to identify diverse professionals who can make presentations to our chapter (e.g., CPA’s, fundraisers from other chapters, attorneys, marketers, public relations professionals, members of the media, etc.).
8. Commit money (\$100) from the budget to co-sponsor an event with an organization that serves a diverse constituency.
 - a. Make sure members from our chapter attend the event to help recruit prospective new members.

COMMUNICATIONS

1. Insure all chapter material uses inclusive language and imagery that reflects AFP’s diversity goal.
2. Include the following on all chapter communications, seat sheets and e-Blast:

The Chapter is committed to Inclusion, Diversity, Equity and Access (I.D.E.A.) in all chapter activities.
3. Dedicate a section in the monthly e-Blast dedicated to I.D.E.A.
 - a. Ask a member of a diverse group to write an article for the chapter’s blog and/ or e-Blast.
 - b. Spotlight a nonprofit organization that focuses on diversity, not only with regard to ethnicity but also to the exciting differences in communities in terms of age, race, interests, values and sexuality in the chapter’s blog and/or e-Blast.
 - c. Include stats that relate to diversity and inclusion in philanthropy and/or the fundraising profession.

NATIONAL PHILTHANTHROPY DAY AWARDS

1. Dedicate an award to either an individual from a diverse background and/or an organization that focuses on diversity, not only with regard to ethnicity but also to the exciting differences in communities in terms of age, race, interests, values and sexuality.

4. The chapter has established an IDEA chair and/or committee that serves the planning and guiding role for the chapter's IDEA efforts. If the chapter does not have an IDEA chair, indicate which committee has written responsibility for the chapter's IDEA efforts.

5. The chapter's communication policy or practice calls for all chapter material to use inclusive language and imagery that reflect AFP's IDEA commitment. These practices can be documented within an IDEA plan if your chapter does not have a formal communication policy.

Like Size 5 Chapter

COMMUNICATIONS (In the IDEA Plan)

4. Insure all chapter material uses inclusive language and imagery that reflects AFP's diversity goal.

5. Include the following on all chapter communications, seat sheets and e-Blast:

The Chapter is committed to Inclusion, Diversity, Equity and Access (I.D.E.A.) in all chapter activities.

6. Dedicate a section in the monthly e-Blast dedicated to I.D.E.A.

a. Ask a member of a diverse group to write an article for the chapter's blog and/ or e-Blast.

b. Spotlight a nonprofit organization that focuses on diversity, not only with regard to ethnicity but also to the exciting differences in communities in terms of age, race, interests, values and sexuality in the chapter's blog and/or e-Blast.

c. Include stats that relate to diversity and inclusion in philanthropy and/or the fundraising profession.

6. The chapter held a planned program, webinar or other activity that either focused on IDEA or explicitly incorporated IDEA focused content within the subject matter.

Part II: Optional Goals

(Some reference info included below)

The chapter submitted a nomination for the Charles R. Stephens Excellence in Diversity Award.

The Chapter has received the Charles R. Stephens Excellence in Diversity Award within the last five years

The Chapter created OR worked on implementation of IDEA specific guidelines for its mentoring program to encourage involvement from fundraising professionals with diverse backgrounds.

The chapter sponsored or co-sponsored a joint program, webinar or other activity in conjunction with an organization that has a diverse staff or constituency (ex. United Way or AADO)

The chapter has allocated a budget specifically for IDEA initiatives focused on the chapter's membership and/or programming. (ex. Board training, affinity group events, making accommodations for members in rural locations)

The chapter has included IDEA in the chapter's written strategic plan.

Like Size 1 Chapter

Diversity and Inclusion Action Plan:

Goals	Tasks	Measure
Increase awareness of diversity in our community	Educate fundraising professionals about diversity in philanthropy through educational opportunities	Ongoing
Provide an educational opportunity to learn about diversity in philanthropy	Host a program with philanthropists from diverse ethnic backgrounds	Once a year

Like Size 4 Chapter

Measures of Success	Responsible Committee/Member
b. Define diversity and incorporate into all Chapter activities with the goal of intentionally creating a respectful and welcoming environment open to all	Chapter Leader Name

1 st Qtr	2 nd Qtr	3 rd Qtr	4 th Qtr
Diversity definition is same as AFP global	Continue to look for diverse presenters for workshops	Looking for diverse presenters for the conference	Need to recruit more diverse board members.

Like Size 5 Chapter

Partner and collaborate with the local organizations and the Mentorship Committee to increase our chapter's diversity and support the next generation of AFP leaders who are committed to inclusion, diversity, equity, and access at the Chapter and in the local area.

Embed diversity and inclusion throughout the Chapter Board and Membership Structure by: • Assigning a member of each Board Committee to serve on the IDEA Committee • Providing for IDEA program expenses in the organization's operating budget, which will be managed by the chair with support from committee members • Holding an annual Board Training on IDEA, and on anti-oppression, • Supporting close working relationships between IDEA Committee and all other committees in order to create a more inclusive, equitable, and accessible Chapter membership experience

AFP GLOBAL

PROMOTE INCLUSION, DIVERSITY, EQUITY AND ACCESS (IDEA)

AFP reflects a diverse and inclusive community, evolving and enhancing our global influence and mission impact.

Objectives:

- Engage diverse nonprofit and chapter leaders in creating an AFP vision and core principles around IDEA (Inclusion, Diversity, Equity and Access).
- Create a welcoming environment for diverse fundraising professionals. • Broaden AFP's role as an influencer, building on our skills, expertise, and the strength and impact of our chapters, members, volunteers, and strategic partners.

The chapter had at least one member actively serving on the AFP Global IDEA Committee, or one of the committee's Work Groups or Taskforces.

AFP IDEA Committee Roster:

- Ann H. Moffitt, ACFRE
- Beverly L. Herbert, CFRE
- Christina Yoon, PHD
- IMOLEYO ADEYERI
- Jessica Ford
- John W. Dawe, CFRE
- Lisa Williams-Nelson
- Manju Ramachandran
- Marco Antonio Corona
- Martha West, MA, CFRE
- Carlos A. Trejo
- Daniel Condoluci-Smith
- Darius Maze, CFRE
- Wayne Laurence Steer
- Cherrelle Duncan, BA,MPA
- Eugenia Colon, CFRE
- Nivisha Mehta
- Randi Sunshine
- Rochelle Jerry
- Mrs. Shirley Anne Smith, MPA
- John Huebler, CFRE
- Victor J Mitre Jr, CFRE
- James K. Phelps, ACFRE

AFP Chapter Mentor Workgroup Roster:

- Charmaine Torma-CHAIR
- Darius Maze
- James Tobias
- John Huebler
- Marco Corona
- Nivisha Mehta - CHAIR
- Patricia Broughton
- Rachel Rodriguez
- Wayne Steer

AFP Diversity Scholarship Taskforce Roster:

- Andrea Arthur, CFRE
- Linley Daly
- Randy Gorod
- John W. Dawe, CFRE
- James K. Phelps, ACFRE
- Shirley Anne Smith, MPA
- John Huebler, CFRE

WII Committee Roster:

- Ann M. Hale, CFRE
- Birgit Smith Burton
- Diane Elizabeth Lebson, CFRE

- Erin Cizan
- Jennifer Shin CFRE
- Jennifer Wijangco CFRE
- Kate Black
- Kathy Short Rabon, CFRE
- Laura Christine McCullough
- Leah G. Eustace, CFRE, ACFRE
- Mauria C McPoland
- Melissa Leilani Weisse, CFRE
- Michael J. Baker, CFRE
- Kerry Watterson, CFEE, MFA, MS
- Chelsea Rudisill
- Julie A. Weagraff, CFRE
- Elizabeth LeClair, MA
- Juliana Marie Weissbein CFRE
- Julie Vickerman
- Melisa Marie Watson Coetzee
- Sarah Cortell Vandersypen, MA
- Sarah Nathan
- Teresa Cheng, CFRE
- Tycely Williams, CFRE
- Karen Paul, CFRE
- Adrienne Taylor
- Melody Song, CFRE

IDEA Reflections & Workshop Taskforce Roster:

- John Huebler, CFRE
- Brenda Asare
- Karen Rotko-Wynn, CFRE
- Kimberly Hollard
- Ms. Julia L Zarccone, MA
- Tori K. Burns, CFRE
- Victor J Mitre Jr, CFRE
- James K. Phelps, ACFRE

Emerging Leader Initiative Taskforce Roster:

- Adrienne Taylor
- Catherine Comer
- Chessie Leigh Biggam
- Dr. Allison Plattsmier
- Dustin Williams
- Holly Moon
- Lynne Francis
- Melissa Daigneault Neeley
- Michelle Harpenau
- Nicholas Kulik
- Nicole Lee
- Zulia Hernandez

Chapter Optional Goal Write-In: If your chapter has met a measurable goal that is relevant to your chapter's IDEA work and/or definition of IDEA, please add it here and your submission will be reviewed by AFP Global Staff and members of the Chapter Mentor Workgroup.

The Chapter sponsors a collegiate chapter.