



ASSOCIATION OF FUNDRAISING PROFESSIONALS

CHAPTER ROAD MAPPING TOOLKIT

DESIGNED AND DEVELOPED BY:



FARE's Road Map to SUCCESS

This unique visual map depicts the goals, key components, defined roles and expectations that were outlined during the action planning exercise developed by Symphonic Strategies. It should be used to help FARE move from strategic visioning to action.

LEGEND



Destination

Once we arrive, FARE will have made food allergies a public health issue; raised awareness of our mission, objectives, and brand; identified multiple treatments for food allergies.



Arrival Date

As a board (by December 2013); as an organization (in the next 3-5 years)



Vehicles

We'll use these processes to get us there:

1. A strategic dashboard
2. Strong communications
3. Transparent conflict resolution
4. Continuous board self-assessment
5. Select board committees



Co-Drivers:

CEO, Board Chair

Navigators: Management team and board trustees



Route/Path

We will take a multi-faceted approach that includes both short-term and longer-term tactics and strategies which incorporate safety, inclusion and treatment.



Fuel

In order to get moving, we'll need greater financial resources, board/management alignment and a comprehensive strategic plan.

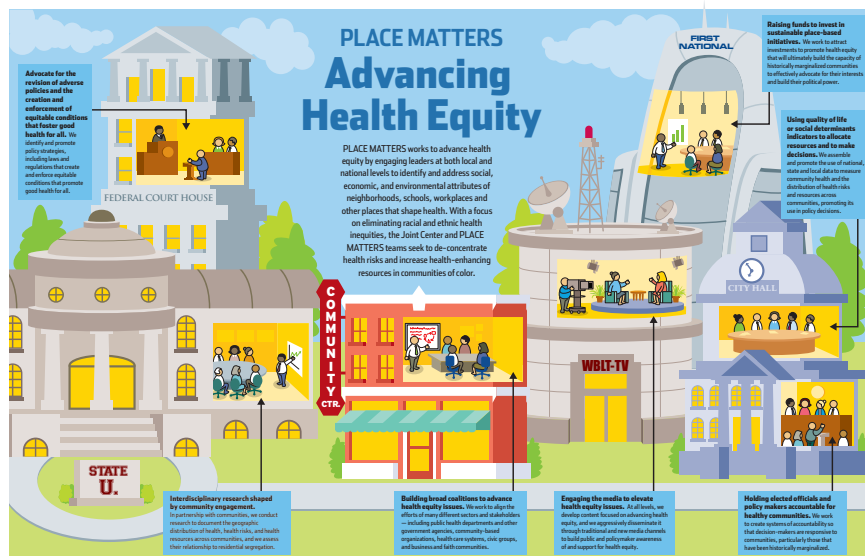


ROAD MAPPING

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.

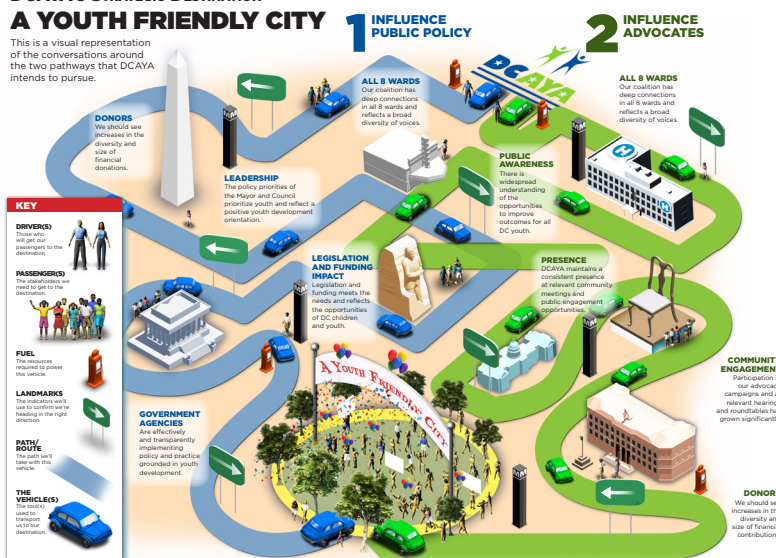
ROAD MAPPING EXAMPLES



DCAYA's STRATEGIC DESTINATION

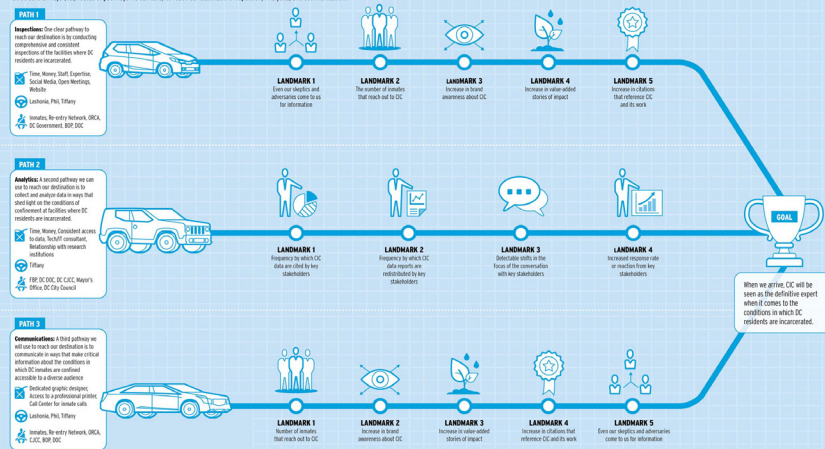
A YOUTH FRIENDLY CITY

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

We want CIC to be the definitive expert when it comes to the conditions in which DC residents are incarcerated. We have identified three critical ways (i.e., modes or pathways) we can take to reach our destination: Inspection, Analytics, and Communication.



ROAD MAPPING

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.

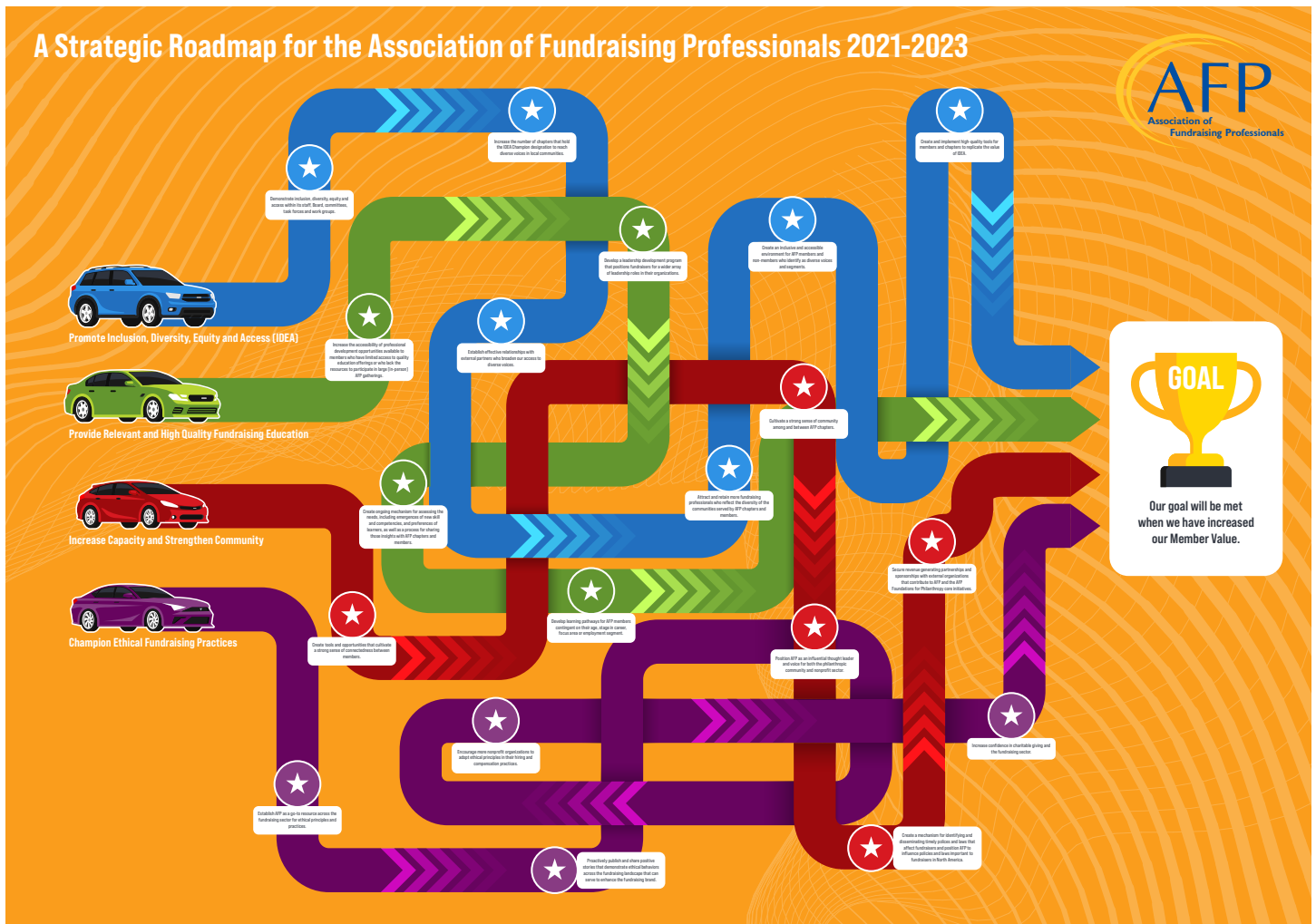
.....

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



PROMOTE INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)



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):

Demonstrate inclusion, diversity, equity and access within its staff, Board, committees, task forces and work groups.

Increase the number of chapters that hold the IDEA Champion designation to reach diverse voices in local communities.

Establish effective relationships with external partners who broaden our access to diverse voices.

Attract and retain more fundraising professionals who reflect the diversity of the communities served by AFP chapters and members.

Create an inclusive and accessible environment for AFP members and non-members who identify as diverse voices and segments.

Create and implement high-quality tools for members and chapters to replicate the value of IDEA.

PROMOTE INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)

STRATEGIC PATHWAY Promote Inclusion, Diversity, Equity and Access (IDEA)

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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 forward at each initiative.



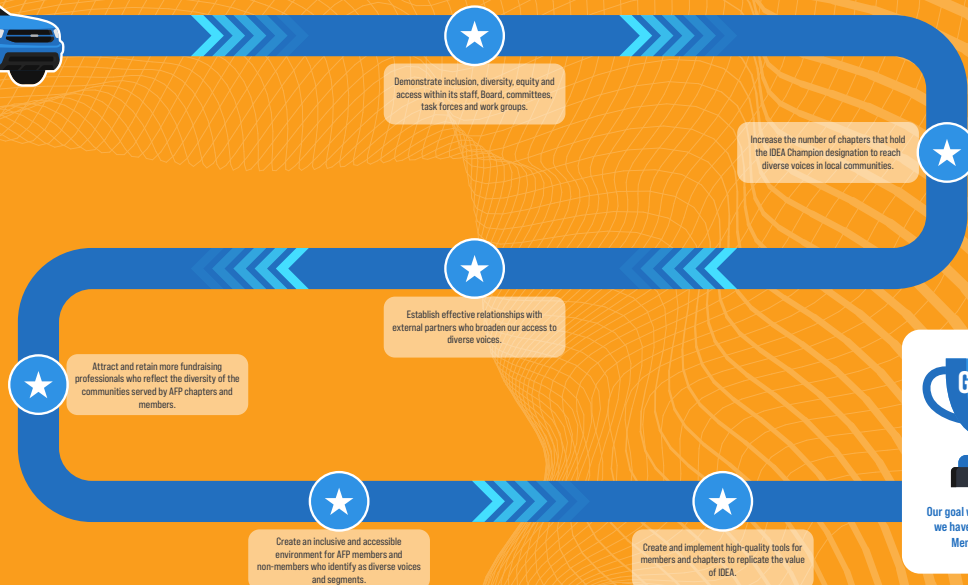
DRIVER

Who's in control as we reach each destination.



PASSENGERS

Who's on board and vital to achieving our goal.



PROMOTE INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)



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?
- Do we all have to reach it for us to consider it a success?
- Is the destination subjective or objective?

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)



1. CHOOSE YOUR DESTINATION

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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?
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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.

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.

[illegible]



3. IDENTIFY THE LANDMARKS

[illegible]



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



Counseling and therapy



Legislation



**Elections and political
campaigns**



Medicine

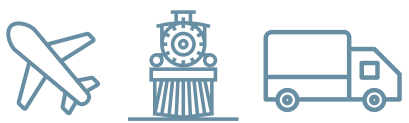


Curriculum



**Movies and television
programming**

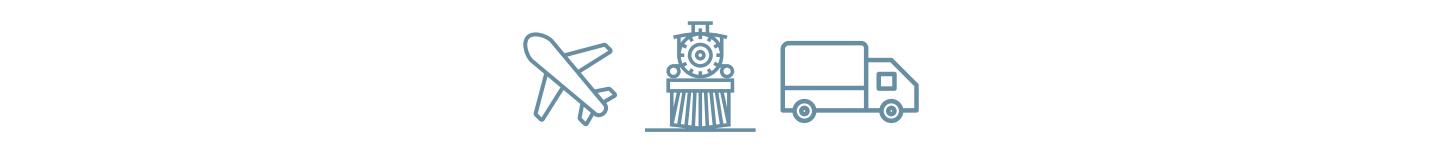
PROMOTE INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)



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.

Lined area for writing answers, consisting of 20 horizontal lines.



4. FIND THE RIGHT VEHICLES

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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:

- 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



Law enforcement



Elected Officials



Business owners



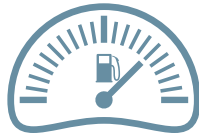
Parents & other caregivers



Youth



Educators



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



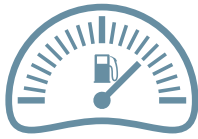
An army of volunteers



Paid employees



New arguments



6. DECIDE UPON THE FUEL YOU'LL NEED

[illegible]

PROMOTE INCLUSION, DIVERSITY, EQUITY, AND ACCESS (IDEA)

ROAD MAPPING WORKSHEET

Use the space below to design your own road map.



DESTINATION

This is where we're heading:



ARRIVAL TIME

This is when we expect to arrive:



LANDMARKS

The indicators we'll use to confirm we're heading in the right direction:



VEHICLES

The tool(s) we will use to get us to our destination:



DRIVERS

Those who are responsible for guiding our vehicle along the path toward our destination:



PASSENGERS

The stakeholders—internal and external—we need to carry with us to the destination:



FUEL

The resources required to power this vehicle:

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.

PROVIDE RELEVANT AND HIGH QUALITY FUNDRAISING EDUCATION

STRATEGIC PATHWAY

Provide Relevant and High Quality Fundraising Education

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KEY



FUEL

What's propelling us forward at each initiative.



DRIVER

Who's in control as we reach each destination.



PASSENGERS

Who's on board and vital to achieving our goal.

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. Continuous Data



DRIVERS

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



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Develop a leadership development program that positions fundraisers for a wider array of leadership roles in their organizations.



Develop learning pathways for AFP members contingent on their age, stage in career, focus area or employment segment.



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



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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



Physical: quality of life



Psychological: emotional well-being, spiritual strength



4. FIND THE RIGHT VEHICLES

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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



Counseling and therapy



Legislation



Elections and political campaigns



Medicine



Curriculum



Movies and television programming



5. CHOOSE YOUR DRIVERS & PASSENGERS

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Clergy & Religious Leaders



Law enforcement



Elected Officials



Business owners



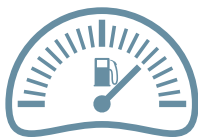
Parents & other caregivers



Youth



Educators



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New arguments

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VEHICLES

The tool(s) we will use to get us to our destination:



DRIVERS

Those who are responsible for guiding our vehicle along the path toward our destination:



PASSENGERS

The stakeholders—internal and external—we need to carry with us to the destination:



FUEL

The resources required to power this vehicle:

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):

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

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

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

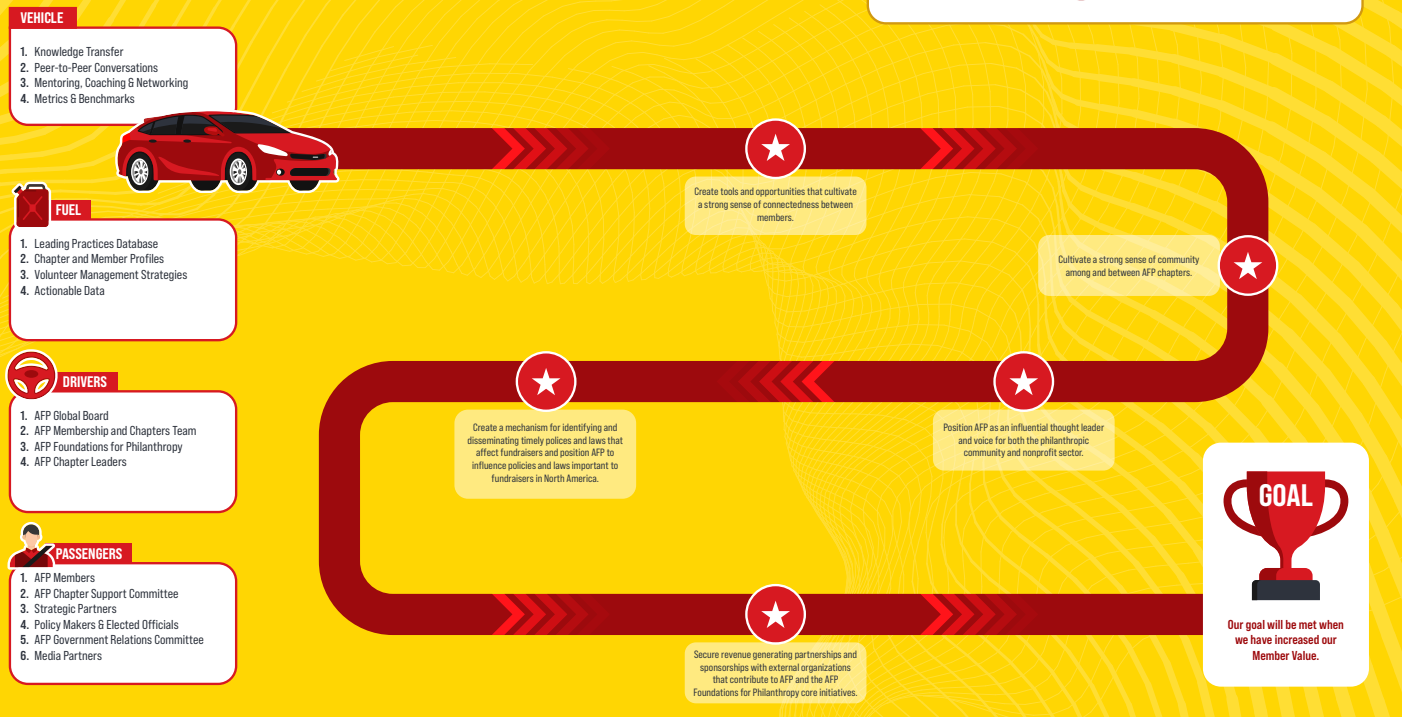
Create a mechanism for identifying and disseminating timely policies and laws that affect fundraisers and position AFP to influence policies and laws important to fundraisers in North America.

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

INCREASE CAPACITY AND STRENGTHEN COMMUNITY

STRATEGIC PATHWAY Increase Capacity and Strengthen Community

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INCREASE CAPACITY AND STRENGTHEN COMMUNITY



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INCREASE CAPACITY AND STRENGTHEN COMMUNITY



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2. SET YOUR ARRIVAL TIME

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[illegible]



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[illegible]



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INCREASE CAPACITY AND STRENGTHEN COMMUNITY



4. FIND THE RIGHT VEHICLES

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Common Vehicles:



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Counseling and therapy



Legislation



Elections and political campaigns



Medicine



Curriculum



Movies and television programming

INCREASE CAPACITY AND STRENGTHEN COMMUNITY



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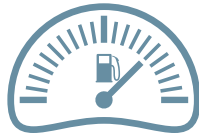
Parents & other caregivers



Youth



Educators



6. DECIDE UPON THE FUEL YOU'LL NEED

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

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



Donations to political candidates



New beliefs and values



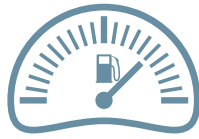
An army of volunteers



Paid employees



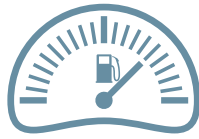
New arguments



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

[illegible]

INCREASE CAPACITY AND STRENGTHEN COMMUNITY

ROAD MAPPING WORKSHEET

Use the space below to design your own road map.



DESTINATION

This is where we're heading:



ARRIVAL TIME

This is when we expect to arrive:



LANDMARKS

The indicators we'll use to confirm we're heading in the right direction:



VEHICLES

The tool(s) we will use to get us to our destination:



DRIVERS

Those who are responsible for guiding our vehicle along the path toward our destination:



PASSENGERS

The stakeholders—internal and external—we need to carry with us to the destination:



FUEL

The resources required to power this vehicle:

CHAMPION ETHICAL FUNDRAISING PRACTICES



Destination

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.



Landmarks & Milestones

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

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

Proactively publish and share positive stories that demonstrate ethical behaviors across the fundraising landscape that can serve to enhance the fundraising brand.

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

Increase confidence in charitable giving and the fundraising sector.

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



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



PASSENGERS

1. AFP Members
2. Member Organizations
3. Nonprofit Human Resources
4. Media Partners

KEY



FUEL

What's propelling us forward at each initiative.



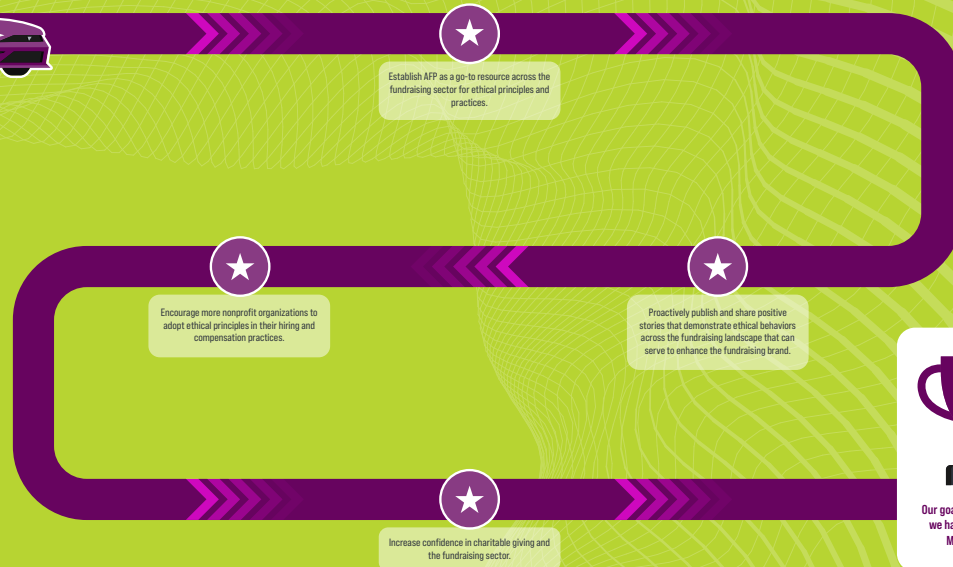
DRIVER

Who's in control as we reach each destination.



PASSENGERS

Who's on board and vital to achieving our goal.



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

CHAMPION ETHICAL FUNDRAISING PRACTICES



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?
- Do we all have to reach it for us to consider it a success?
- Is the destination subjective or objective?

Think about the questions above and use the space below and on the next page to write out your destination statement.

CHAMPION ETHICAL FUNDRAISING PRACTICES



1. CHOOSE YOUR DESTINATION

[illegible]



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?
- What dictates the arrival time: what is possible or what is needed?
- Who and what will determine whether our arrival time is realistic?

Think about the questions above and use the space below and on the next page to write out your arrival time.



2. SET YOUR ARRIVAL TIME

This image shows a full page of blank, lined paper. It features approximately 20 evenly spaced, horizontal blue lines running across the width of the page. The lines are thin and consistent in color, set against a plain white background. There are no margins, text, or other markings present.



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.

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.

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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.**

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



Counseling and therapy



Legislation



Elections and political campaigns



Medicine



Curriculum



Movies and television programming

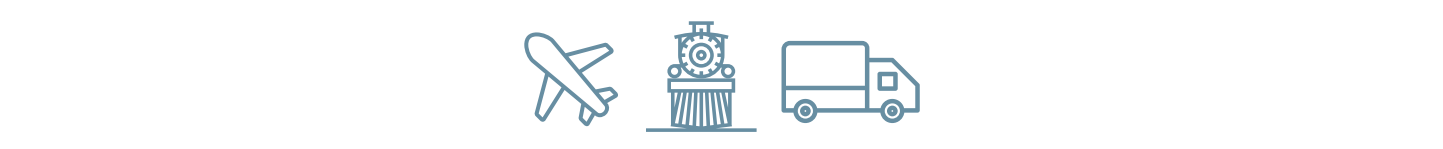
CHAMPION ETHICAL FUNDRAISING PRACTICES



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.

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4. FIND THE RIGHT VEHICLES

[illegible]



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:

- 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



Law enforcement



Elected Officials



Business owners



Parents & other caregivers



Youth



Educators



5. CHOOSE YOUR DRIVERS & PASSENGERS

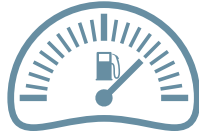
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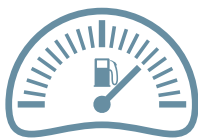
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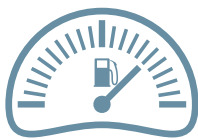
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CHAMPION ETHICAL FUNDRAISING PRACTICES

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