

# AGF STRATEGIC WORK PLAN 2010 – Update on goals

## As of January 1, 2010

### Goal 1: FOSTER EDUCATION: BE ARIZONA’S CLEARINGHOUSE FOR INFORMATION AND EDUCATIONAL PROGRAMS SERVING THE PHILANTHROPIC SECTOR

OBJECTIVE	2009 Results	Status
1. Provide quality programs/services to AGF members that address internal and external aspects of foundation mgt. <ul style="list-style-type: none"> <li>• Conduct 10 luncheon programs               <ul style="list-style-type: none"> <li>○ Average rating of at least 4.0 out of 5.0</li> <li>○ Average attendance of at least 40</li> </ul> </li> <li>• Offer 1-2 longer programs               <ul style="list-style-type: none"> <li>○ Average rating of at least 4.0 out of 5.0</li> <li>○ Average attendance of at least 25</li> <li>○ Revenues at least match expenses</li> </ul> </li> <li>• Conduct at least 1 program/year in Flagstaff/Sedona and Tucson</li> <li>• Conduct and/or make available 2 or more teleconferences</li> <li>• Sponsor 2 or more affinity groups</li> <li>• Promote/support a peer mentoring program for interested members</li> <li>• Produce bi-monthly MemberExchange</li> <li>• Continue to promote funder/nonprofit dialogue about responses to the economic crisis</li> </ul>	12 programs 4.47 –Avg. rating 30.3 – Avg. attendance  No longer programs  1 program in Flagstaff Video feed to Tucson Hosted 3 Sponsored 3 Did promote twice  Produced 6	
2. Provide vital & timely information to general public <ul style="list-style-type: none"> <li>• Conduct 1-2 public programs</li> <li>• Market AZ Business Giving Workbook</li> <li>• Conduct research for AZ 2010 Giving Report</li> <li>• Update website regularly with new, relevant resources</li> <li>• Maintain webpage on funder response to economic crisis</li> </ul>	1 public program No No Yes Yes	

### Goal 2: STRENGTHEN ORGANIZATIONAL CAPACITY: DEVELOP/SUPPORT ADEQUATE RESOURCES TO SUSTAIN AGF’S MISSION

OBJECTIVE	2009 Results	Status
1. Expand membership <ul style="list-style-type: none"> <li>• Enroll 5-10 new members</li> <li>• Highlight member benefits on regular basis</li> <li>• Maintain 90% member retention rate</li> <li>• Maintain 90 % member satisfaction rate</li> </ul>	8 Yes 85% 97%	
2. Generate adequate financial resources to fully support strategic plan <ul style="list-style-type: none"> <li>• Generate dues revenue of \$136,125</li> <li>• Generate at least \$85,000 in membership grants (includes in-kind)</li> <li>• Solicit underwriting for AGF special events totaling at least \$22,000</li> <li>• Explore a range of other funding options to increase revenues</li> </ul>	\$137,062 \$88,676 \$36,500	
3. Ensure strong, visionary board <ul style="list-style-type: none"> <li>• Attract broad representation of AGF membership</li> <li>• Conduct orientation for new board members</li> <li>• Encourage participation –Average board member attendance</li> </ul>	Yes Yes	

of 75% at board meetings	70%	
4. Maintain outstanding staff <ul style="list-style-type: none"> <li>Encourage staff to attend at least one professional development session</li> <li>Provide competitive compensation package</li> <li>Conduct annual, constructive employee performance reviews</li> </ul>	Yes Yes Yes	
5. Maintain effective management systems/processes <ul style="list-style-type: none"> <li>Update Administrative Procedures Manual on as needed basis</li> <li>Review AGF Bylaws and Policies and update accordingly</li> <li>Review Employee Handbook and update as necessary</li> <li>Conduct annual review of Strategic Plan</li> <li>Annually update 3-year financial plan</li> </ul>	Yes Yes Yes Yes 1 yr. update	

**GOAL 3: ENHANCE NETWORKING:** PROVIDE AGF MEMBERS WITH ONGOING OPPORTUNITIES TO SHARE AIDEAS AND EXPERIENCES, LEVERAGE RESOURCES AND COLLOBARATE

OBJECTIVE		Status
1. Encourage member networking <ul style="list-style-type: none"> <li>Provide 2-3 informal networking opportunities for AGF members</li> <li>Build out website to encourage and foster connections between members</li> <li>Encourage expanded use of the Member Listserv</li> </ul>	3 sessions Yes Yes	
2. Support Collaboration <ul style="list-style-type: none"> <li>Offer minimum of 1 program on collaboration</li> <li>Collect and share examples of local funder collaborations</li> <li>Collect data on member funding areas and post to website</li> <li>Work with members to coordinate philanthropic responses to critical AZ needs</li> </ul>	Yes Yes Yes	

**Goal 4: EXPAND COMMUNITY INFLUENCE AND IMPACT:** EXTEND AGF AND MEMBER INFLUENCE AND IMPACT TO THE LARGER COMMUNITY

OBJECTIVE		Status
1. Conduct a minimum of 2 programs that involve nonprofits and funders <ul style="list-style-type: none"> <li>Collaborate with Lodestar Center and Alliance of AZ Nonprofits around AGF programs</li> <li>Provide assistance to Alliance on securing funders to present at Grants Forums</li> <li>Encourage use of online community calendar listing philanthropic education events</li> </ul>	2 programs Yes Yes Yes	
2. Encourage dialogue between funders and other community leaders <ul style="list-style-type: none"> <li>Monitor key state and local issues via various news media</li> <li>Inform AGF members about state and local forums addressing key issues</li> <li>Actively engage with Governor’s Philanthropy Roundtable (if applicable)</li> </ul>	Yes Yes N/A	

<p>3. Publicly promote the importance of philanthropy</p> <ul style="list-style-type: none"> <li>• Enlist staff/members to write editorials</li> <li>• Respond to community requests for speakers/resources</li> <li>• Distribute press releases on national philanthropic research</li> <li>• Produce bi-monthly AGF News &amp; Notes distributed to general public</li> <li>• Explore ways to educate general public about AGF web resources</li> </ul>	<p>2 columns Yes No Yes Yes</p>	
<p>4. Advocate for the growth of institutional and individual giving</p> <ul style="list-style-type: none"> <li>• Educate federal, state and local leaders about Arizona's philanthropic sector</li> <li>• Work with Alliance of AZ Nonprofits to educated political candidates about the importance of the nonprofit sector</li> </ul>	<p>No No</p>	
<p>5. Continue to seek opportunities for innovation/growth</p> <ul style="list-style-type: none"> <li>• Monitor innovative programs implemented by other Regional Associations</li> <li>• Assess local needs and explore options for program expansion</li> </ul>	<p>Yes Not really</p>	