

# **Arizona Grantmakers Forum's Strategic Plan**

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**2011-2013**

**MISSION:**

The mission of AGF is to increase, enhance, and improve philanthropy in Arizona.

**VISION:**

Arizona's expanding philanthropic community, working collaboratively, invests their resources wisely to make a profound positive difference for Arizona's communities.

**AGF ORGANIZATIONAL VALUES:**

<b>Collaboration</b>	We support members working together to address community needs.
<b>Excellence</b>	In all of our work we reflect a commitment to excellence.
<b>Inclusiveness</b>	We believe in the rich diversity of the Arizona grantmaking community and Arizona communities generally, and will promote inclusiveness in the way we work.
<b>Integrity</b>	We value and promote ethical grantmaking practices.
<b>Results</b>	We celebrate compassionate and results-driven philanthropy that improves the many communities of Arizona.
<b>Service</b>	We value our members by providing services that are practical, informed, stimulating, and relevant.

**STRATEGIC GOALS:**

**Goal #1: Enhance member impact by expanding their capacity to effectively and collectively serve the communities and issues they care about**

**Goal #2: Serve as a resource to members and the broader community on issues affecting philanthropy**

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## **Goals, Objectives & Metrics**

### **Goal #1: Enhance member impact by expanding their capacity to effectively and collectively serve the communities and issues they care about**

#### **A. Expand AGF's programs and services to members statewide**

##### **1. Facilitate funding collaboratives and partnerships as appropriate**

###### **Activities/Strategies**

- Respond to member requests for support of emerging funder collaborative ideas
- Share innovative models of collaboration
- Inform members about collaboration opportunities with national funders
- Inform members about local collaboration opportunities

###### **Metrics**

- Present two models of collaboration being used by other funders
- Share possible collaborative opportunities with national funders when available

##### **2. Increase dialog with nonprofits to better understand how to work most effectively together**

###### **Activities/Strategies**

- Share strategic plans with ASU Lodestar and the Alliance of Arizona Nonprofits to identify overlap and gaps
- Explore partnering opportunities with nonprofits
  - Meet with Alliance of AZ Nonprofits board to discuss nonprofit survey results
  - Partner with other organizations, e.g., ASU Lodestar Center, to offer at least one funder/nonprofit program that addresses critical issues.
- Invite nonprofits to brief funders about the current environment, e.g., Children's Action Alliance

###### **Metrics**

- One AGF meeting annually which promotes dialogue between funders and nonprofits
- One AGF sponsored program/year that involves funders and other thought leaders that address critical issues

##### **3. Expand number of affinity groups as appropriate**

###### **Activities/Strategies**

- Develop a fact sheet that describes the benefits and requirements for establishing new affinity groups including sponsorship and affinity group chair and/or steering committee
- Solicit AGF members to identify interest in additional affinity groups

###### **Metrics**

- Offer to broadcast 25% of AGF's affinity group meetings via the Internet to other regions of the state where AGF members operate
- Support at least six affinity groups
- Hold at least two programs per year for each affinity group

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### 4. Provide quality programs to AGF members

#### Activities/Strategies

- Offer at least six general programs per year plus multiple affinity group programs
- More fully engage board members to extend program reach outside of Maricopa County
- Explore new technologies to increase member awareness and access to programs

#### Metrics

- Hold at least six general programs per year
- Maintain minimum average AGF program ratings of 4.0 out of 5.0
- Continue to promote use of AGF's Online Community tool
- Offer to broadcast 50% of all AGF programs live via the Internet to other regions of the state where AGF members operate

### B. Expand AGF's organizational capacity

#### 1. Grow AGF's membership by retaining existing and recruiting new members

##### Activities/Strategies

- More fully engage board members as ambassadors of AGF
- Explore the opportunity to allow former funders to join AGF as "Alumni/Friends of AGF"
- Explore the opportunity to allow professional advisors to join AGF
- Explore outreach opportunities with wealthy individual donors
  - Partner with other organizations (ASU, ACF, and wealth management professionals) to reach potential members
- Increase and broaden the AGF member base
- Ensure high member satisfaction and customer service

##### Metrics

- Establish a baseline of membership data, i.e., members by region, funder type, etc. to improve future member-specific reporting.
- Membership of the top 25 grantmaking entities in AZ increases from 60% to 75% by 2013
- Increase number of members outside of Maricopa County from eight to twelve.
- Maintain membership retention of 90% annually.
- Maintain member satisfaction of 90% or higher
- Send six issues of Member Exchange per year
- Present to at least one group of wealth management professionals

#### 2. Ensure adequate resources to sustain AGF's mission

##### Activities/Strategies

- Generate sufficient resources to appropriately grow/support AGF staff
- Maintain diverse engaged board
- Maintain outstanding staff
- Maintain effective management systems/processes

##### Metrics

- 100 % of AGF board members take on at least one activity each year that helps promote AGF (promote AGF programs in their regions, contact potential members, etc.)
- Maintain board that reflects membership diversity

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- Hold an annual board retreat and conduct annual review of strategic plan
- Average board attendance at meetings of 75%
- Staff attends at least one professional development program per year
- Conduct annual employee performance reviews

### **Goal #2: Serve as a resource to members and the broader community on issues affecting philanthropy**

#### **1. Partner with other organizations to promote philanthropy in Arizona**

##### **Activities/Strategies**

- Develop a communication plan to promote AGF to the broader community
- Create and market the 2010 Arizona Giving Report
- Produce the Arizona Giving Report annually and explore the possibility of including advertising as a revenue generating mechanism

##### **Metrics**

- Develop and implement AGF communications plan
- Distribute the 2010 Arizona Giving Report

#### **2. Educate members on the critical issues being made by policymakers at the federal, state and local level, so they have the knowledge and tools they need**

##### **Activities/Strategies**

- Establish a public policy committee
- Provide educational opportunities for AGF members, so they get an understanding of public policy, how the pieces of public policy fit together and how decisions regarding public policy affect their funding priorities
- Convene meetings with policy experts and foundation/nonprofit leaders on critical topics to keep the membership informed

##### **Metrics**

- Establish a public policy committee
- Working with the public policy committee, plan at least one event per year
- AGF staff increases the number of public presentations from an average of two per year to four per year