



**APRA Canada Strategic Plan – 2015-2018 -- FINAL**

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**For review: for approval at APRA-Canada AGM February 4<sup>th</sup>, 2015**

**Task Force Committee:**

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**Vision**

APRA Canada will be a leader and strategic partner in philanthropy, contributing to the success of its Canadian members, the non-profit community and other constituents.

**Mission**

As a premier organization for fundraising research, analytics and relationship management, APRA Canada's mission is to promote the value and impact of its members.

## THE FOUR GOALS FOR THE STRATEGIC PLAN ARE:

- **Membership**
- **Education, Resources, & Professional Development**
- **Advocacy**
- **Leadership & Succession Planning**

## MEMBERSHIP

**Draft Vision Statement:** To promote and advance the current membership benefits, and engage existing and new members by establishing APRA-Canada as a benchmark for professionalism within the prospect research, data analytics and relationship management field.

### Key Objectives:

- To promote and advance the current APRA-Canada membership benefits, and engage existing and new members by establishing APRA-Canada as a benchmark for professionalism within the prospect research/data analytics field.
- Increase the number of paid APRA-Canada memberships.
- Future considerations could include: improving access and enhancing Membership Directory to include skill sets; a more structured mentorship program; remote networking and mentoring; Canadian prospect research certification

### Other Objectives to Consider:

- Promote access to the Members Only section of the website (includes the online membership directory, discounts, and newsletter).
- Utilize as the cornerstone of Professional Development (ethics, guidelines, to develop professionally. Designed to help meet the challenges faced as a development researcher or research director.
- Clearly communicate/market the membership benefits up front to attract members (splashier) and package it differently.
- Provides opportunity to be a leader/volunteer (Board Membership; Committees; Mentor).
- Promote ethics/standards within prospect research/data analytics field. Members of APRA-C abide by the APRA International professional ethics, what profession is/is not to the public.

### **Suggested Action items/strategies for Board to consider:**

- Improve and enhance Membership Directory to encourage new membership.
- Adding skill sets (or new APRA Body of Knowledge elements) as part of Directory like APRA International so members can connect with others with similar skills or looking to advance skills, bounce ideas, problem-solve, etc.
- More structured mentor program to help potential mentors understand what is expected of them and provide a guide to follow, enhance own skills by teaching others. Issues with mentors having the time? Too hard over distance?
- Have implemented remote networking and mentorship opportunities (e.g. through Skype, Twitter Talks, LinkedIn, Panel Discussions, etc.).
- Organize and host half/full Panel discussions on “hot” research topics, best practices, tips & tricks on dealing with issues as a Prospect Researcher both in-person and online broadcasts to reach remote locations.
- For discussion: a Canadian prospect research certification. Course(s) that could be completed and certify someone as skilled in Canadian prospect research but not as in-depth a certification as CFRE. Would need to be available online/web to account for wide-spread membership.
- Do we need to create a volunteer committee to assist Director of Membership in implementing enhancements to membership?

## EDUCATION, RESOURCES & PROFESSIONAL DEVELOPMENT

**Draft Vision Statement:** APRA-Canada will support skill and leadership development of our members and volunteers to make APRA Canada an indispensable resource to both beginning and more experienced researchers

### **Key Objectives:**

- Develop relevant, innovative educational content and delivery mechanisms that correspond to member needs and reflect changing market and professional demands
- Develop a curriculum that provides fundamental professional development and aligns with the APRA International Body of Knowledge
- Future considerations could include: expanding resources to include data analytics, campaign strategy and planning, and prospect/relationship management; examining alignment with the APRA International Body of Knowledge; promoting alternate routes for making resources available to our members

### **Suggested Action items/strategies for Board to consider:**

- Identify noticeable gaps in our offerings and expand the focus of our resources to include data analytics, campaign strategy and planning, and prospect/relationship management
- Examine how our existing resources are aligned with the APRA International Body of Knowledge
- Examine and promote the archiving and delivery tools for resources, as well as alternate routes for making resources available to our members
- Expand Board Leadership in area of professional development
- Director, Resources: Main archivist for resources responsible for increasing awareness and access to information that supports our body of knowledge
- Directors, Networking and Info Sharing: Promotes active peer-to-peer sharing of information in workshop and event-based exchanges
- Expand volunteer involvement in professional development
- Identify key individuals who are willing and able to contribute to expanding APRA Canada resources
- Increase opportunities for mutual sharing and support that members provide each other

## ADVOCACY

**Draft Vision Statement:** APRA-Canada will be a national leader and strategic partner to advocate on behalf of its membership within the fundraising community and network with other like-minded professionals to enhance our organization's positive reputation.

### **Key Communities/Objectives:**

- Partnership level: CCAE, AFP Canada, AHP Canada, CAGP
- Communication level: International chapters of APRA, fundraising associations
- Service sharing could include: professional development (share ours and offer theirs), job opportunities, newsletter, inclusion in APRA-Canada communication emails, share APRA-Canada marketing materials
- Future considerations could include: discounted webinar rates, partnering with related organizations (business analysts, librarians) and with training programs to grow interest in the profession

### **Suggested Action items/strategies for Board to consider:**

- At a partnership level: start with Canadian chapters/affiliates e.g.) CCAE, AFP-Canada, AHP-Canada, CAGP – start with initial meetings as to what partnership opportunities may be of interest to both partners
- At a communication level: start with Canadian chapters of fundraising associations and international chapters of APRA in regard to professional development opportunities, job opportunities, trends in the profession and ongoing activities
- Confirm the two levels and what opportunities will be offered at each level
- Confirm the list of key partners and set dates to contact them (suggest 1-2 per quarter)
- Develop a set of opportunities we can offer to potential partners at present, such as:
  - Inclusion in APRA-Canada communication emails regarding upcoming professional development opportunities;
  - Forward APRA-Canada “marketing” materials promoting APRA-Canada and an overview of ROI of prospect research;
  - Advertisement through APRA-Canada resources of upcoming partnership professional development opportunities (especially those which have included a prospect research piece);
  - Potential to have non-prospect research webinars with different expertise from the other partnership organizations

**Future considerations may be:**

- Discounted live webinar rates for partners (there could be an APRA-member price, a non-member price, and a partner-member price as a mid-point);
- Discounted previous webinar rates for partners
- Look at related organizations, such as business analysts and librarians
- Look at training programs (such as Humber Fundraising and Volunteer Management Certificate, and MLIS programs across the country) to grow early interest in the profession by offering information and opportunities

## **LEADERSHIP & SUCCESSION PLANNING**

**Draft Vision Statement:** APRA Canada will engage members to participate, support and serve through committees, Board of Directors, and other volunteer opportunities.

### **Key Objectives:**

- Develop a pipeline of future leaders. Promote transparency with regard to leadership and volunteer opportunities.
- Increase visibility and recognition of volunteers
- Future considerations could include: membership profiles on website; increased membership recruitment; PD sessions on leadership development; job descriptions for board positions; a nominations committee; a President-Elect position on the board

### **Suggested Action items/strategies for Board to consider:**

- Membership profiles on website include information about areas of knowledge / expertise
- Recruit members by participating in MLIS career days, fundraising workshops, other outreach events
- Provide PD sessions on leadership development
- Create a job description for each board position / committee
- Create a nominations committee
- Create a president-elect position on the board