



Canada

Strategic Plan 2019-2021 DRAFT

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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 nonprofit 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.

ADVOCACY

Goal 1: Establish Apra Canada as the national expert in prospect development.

Goal 2: Enable prospect researchers to self-advocate for their role as a strategic partner in fundraising.

Goal 3: Continue to promote Advocacy as a critical element of Apra Canada and the prospect development profession.

LEADERSHIP DEVELOPMENT

Goal 1: Create a succession plan for Apra Canada's Board of Directors.

Goal 2: Increase and diversify the pool of volunteers.

Goal 3: Provide leadership development opportunities for Apra Canada members.

MEMBERSHIP

Goal 1: Promote the value of current membership benefits.

Goal 2: Increase the level of member engagement.

Goal 3: Increase the number of members, especially across underrepresented regions and industries.

Goal 4: Streamline the membership renewal process for improved user experience.

PROFESSIONAL DEVELOPMENT

Goal 1: Understand what members want from education and professional development.

Goal 2: Expand and leverage Apra-C's knowledge repository through training and technology.

Goal 3: Expand diversity in professional development, particularly outside of the GTA and education/healthcare.

Goal 4: Promote and expand Apra-C's mentorship pool and range of mentorships options.

Advocacy

1. GOAL: Establish Apra Canada as the national expert in prospect development.

Strategies:

- Champion the prospect development profession in fundraising and other relevant sectors;
- Build and strengthen connections with similar organizations and associations.

Objectives:

- Take advantage of 3-5 opportunities each year to promote prospect development at conferences (as a speaker or vendor), career fairs, joint publications (i.e. Imagine Canada), etc.;
- Define “partnership”, key messages, and outline benefits that Apra Canada can provide other organizations.

2. GOAL: Enable prospect researchers to self-advocate for their role as a strategic partner in fundraising.

Strategies:

- Provide accessible self-service resources for members through Apra-C’s website;
- Tailor professional development offerings to educate members about how to promote their work.

Objectives:

- Post (with permission) links to resources recently developed by Apra International;
- Schedule at least 1 webinar and 1 roundtable session each year that are focused on advocacy.

3. GOAL: Continue to promote Advocacy as a critical element of Apra Canada and the prospect development profession.

Strategies:

- Designate board support and resources to ensure progress on advocacy work;
- Integrate Apra-C chapter advocacy into each Director’s responsibilities.

Objectives:

- Establish a committee to develop an advocacy plan by Nov 2019;
- Assess current Board Director job descriptions and ensure advocacy work is specified as a shared responsibility with progress updates shared at each Board meeting.

Leadership Development

1. **GOAL: Create a succession plan for Apra Canada's Board of Directors.**

Strategy:

Develop methods and mechanisms to identify, recruit and develop the leadership potential of board members.

Objectives:

- Create a President-elect position or embed President-elect in a current board position;
- Revise the job description for the Member-at-large position to include capacity building towards leadership; (i.e. involvement with conference planning)
- Strike a nominations committee to recruit new board members;
- Create a matrix of skills/attributes for the board, to be updated yearly when new members join, and others leave.

2. **GOAL: Increase and diversify the pool of volunteers.**

Strategy:

Use the existing strengths of Apra Canada board members and volunteers to increase and diversify the pool of volunteers.

Objectives:

- Hold peer review meetings with all board members, once or twice a year, to identify potential volunteers and board members among their personal networks;
- Build and maintain a list of potential volunteers for year-round recruitment efforts, with an indication of who should ask them to volunteer;
- Develop a plan for communicating the benefits (both concrete & 'soft') of volunteering with Apra-C;
- Make members aware of various volunteer opportunities, including timelines and scope of work

3. **GOAL: Provide leadership development opportunities for Apra Canada members.**

Strategy:

- Offer PD webinars/conference sessions on leadership development.

Objectives:

- Consult with all board members at least once a year to identify and select professional development opportunities for the upcoming year;
- Consult Apra-C members through membership surveys, email blasts, through the Canada PRSPCT-L to identify and select professional development opportunities.

Membership

1. **GOAL: Promote the value of current membership benefits.**

Strategy:

Create a proactive membership recruitment plan that includes promotion of membership benefits throughout the year and a proactive social media strategy.

Objective:

Create a process to ensure Apra-C volunteers are actually members. (E.g. regional reps; mentors; etc)

2. **GOAL: Increase the level of member engagement.**

Strategy:

Develop a new suite of membership benefits to enhance the value of membership.

Objective:

Gain a better understanding of what benefits members and non-members find valuable.

3. **GOAL: Increase the number of members, particularly across underrepresented regions and industries.**

Strategies:

- Gain an increased understanding of our profession as a whole, (i.e. members and non-members, location, industry, age, gender, experience, etc.) and include individuals whose primary role may not be prospect development;
- Identify potential new members and implement strategy to recruit them.

Objectives:

- Create and administer a lapsed membership survey;
- Increase Apra-C membership by 5%-10% by 2021 across key regions and industries;
- Survey the prospect research industry as a whole, (not just Apra-C members) to develop membership benchmarks and targets;
- Enlist existing volunteers, such as the Regional Reps, to assist in identifying new potential members.

4. **GOAL: Streamline the membership renewal process for improved user experience.**

Strategies:

- Analyze existing process to identify areas for improvement;
- Review software and automation options.

Objective:

Improve the renewal process by finding ways to streamline the process and make it more efficient.

Professional Development

1. **GOAL: Understand what members want from education and professional development.**

Strategy:

Seek input from members as to what they are most interested in learning from Apra-C, (as opposed to other sources) with respect to education and professional development, and the ways they would like to receive and interact with content.

Objective:

Carry out a comprehensive survey by Spring 2019.

2. **GOAL: Expand and leverage Apra Canada's knowledge repository through training and technology.**

Strategies:

- Leverage existing Apra International materials;
- Investigate and evaluate with webmaster existing repository and determine options for easier access;
- Investigate and evaluate with webmaster/Apra-C board options for collaborative online space, sharing documents, open forums, using tags.

Objectives:

- Designate an Apra-C representative to connect with Apra International to discover what as a chapter we have access to and can share;
- Curate existing repository for Prospect Research University.

3. **GOAL: Expand diversity in professional development, particularly outside of the Greater Toronto Area and education/healthcare.**

Strategies:

- Ensure professional development events have greater diversity of geography and sector representation by proactively engaging and recruiting members and potential members in target regions and sectors;

Objectives:

- Establish at least one PD event per geographic region per year;
- Establish at least one PD event per year moderated by a non-dominant sector.

4. GOAL: Promote and expand Apra Canada's mentorship pool and range of mentorship options and opportunities.

Strategies:

- Seek input from members who are potential mentors and/or mentees to better understand what people want out of mentorship, and thereby be able to better define the role as well as consider delivery options and alternate potential structures;
- Ask and encourage potential mentors in a systematic fashion during existing touchpoints, such as the annual renewal process;
- Allow members to self-promote their willingness to be a mentor or available for less formal questions and one-off support options, and also publicize the program in multiple formats
- Facilitate mentorships by enabling long-distance support such as free/low-cost options for long-distance contact as well as document/screen sharing;
- Lay groundwork for program expansion that is aligned with trends in mentorship.

Objectives:

- In conjunction with the member and non-member survey, carry out a comprehensive survey by Spring 2019.
- Include an option during membership purchase/renewal for people to express their interest in mentorship, either as a mentee or mentor;
- Revise the member directory, have an option for members to self-identify as interested in mentoring/being mentored, or that they are willing to be contacted for questions.
- Investigate the possibility of investing in Zoom for membership use, as it supports document-sharing;
- Investigate and evaluate other forms of mentorship that can be offered.

APPENDIX

General Notes

- Stated goals and strategies are areas of focus approved by the Board
- Timelines, suggested Objectives and Tactics are flexible and to be further developed by the Board/Committees
- Overall themes: increase member engagement; strategic and year-round volunteer recruitment; use of tech to achieve goals; expand/reach beyond existing Apra-C network

Advocacy Notes

Goal: Establish Apra Canada as the national expert in prospect development.

- Partners could include local AFP, CAGP, higher education institutions that offer fundraising courses/programs
- Partnership benefits/exchange could include: professional development (discounted rates?), job opportunities, newsletter, inclusion in Apra Canada communication emails, share Apra Canada marketing materials
- Related organizations: business analysts, librarians

Leadership Development Notes

Goal: Create a succession plan for Apra Canada's Board of Directors

- Skills matrix could include:
 - Demographics such as new or young researchers, mid-career researchers, diversity of regions, backgrounds, languages spoken, gender
 - Skills such as accounting, public relations, web design, public speaking, event organization, writing, social media savvy

Goal: Increase and diversify the pool of volunteers.

- Create a page on the Apra-C website describing all available volunteer positions
- Add volunteer recruitment to job descriptions of the board
- Resume profiling volunteers in The Scoop

Membership Notes

Goal: Promote and advance current membership benefits.

Tactics:

- Enlist a volunteer, or group of volunteers to actively use social media channels to promote Apra-C and membership benefits
- Partner with other organizations to offer discounts (i.e. CASE books, AFP webinars, Apra International professional development)
- Prepare a quarterly report on membership benefits and circulate to members
- Develop a Volunteer one-pager indicating opportunities for members (use it as a draw to engage and attract members)
- Create welcome package sent to new members and renewing members

Goal: Increase the level of member engagement.

Tactics:

- Survey lapsed and known, select non-members to find out more about why they are not part of Apra-C and thereby identify possible new benefits to attract members

- Research what other associations offer as benefits and determine what Apra-C can offer
- When individuals decline to renew, create a process to track why (e.g. an “exit” survey)
- Grant new members that join in January or later a free year of membership (e.g. if someone joins January 2018, rather than being forced to renew on July 1, 2018, we would grant them a grace period until July 1, 2019. Would apply to new members only, not renewing, or formerly lapsed members)
- Improve the online Membership Directory to allow users to identify areas of expertise, years in the field, etc

Goal: Increase the number of members, particularly across underrepresented regions and industries.

Tactics:

- Hire a translation service to translate website and key Apra-C documents into French to attract more Researchers from Quebec (and maybe France!)
- Focus on building membership locally (perhaps utilizing Regional Reps), which will then roll-up into the broader membership (assumption people are looking to network with others in their region first vs anywhere in Canada)

Tactics:

- Develop a plan to use existing volunteers to identify potential new members
- Partner with Apra-C Education Director to promote and market Apra-C webinars and membership to sister organizations (e.g.) AFP, CAGP, CCAE, etc.

Goal: Streamline the membership renewal process for improved user experience.

Tactics:

- Partner with Membership Director to implement review of renewal process
- Purchase software to assist with maintaining membership list; etc.

Professional Development Notes

Goal: Understand what members want from education and professional development.

- Survey to include current members at minimum but consider including lapsed/past members as this may also provide insight as to what lapsed members may have been seeking and not finding, as well as provide an opportunity to encourage rejoining.

Goal: Expand diversity in professional development, particularly outside of the Greater Toronto Area and education/healthcare.

- Recruitment should focus on seeking out new and diverse presenters, with accompanying support and promotion to ensure success.

Goal: Promote and expand Apra Canada’s mentorship pool and range of mentorship options and opportunities.

- Survey to include current mentors at minimum but consider including lapsed/past mentors as this may also provide insight as to why mentors have left, as well as provide an opportunity to encourage rejoining;
- As well, add years of experience, sector, interests, areas of expertise for members to be able to find others with similar interests or areas of expertise;
- Examples: mentorship through study groups – by region, by sector, by level of experience; virtual book clubs (online reading group and book discussion forum); mentorship through “speed dating” – build a “speed dating” mentorship time into any Apra-C gathering, such as the conference, holiday parties, or in-person PD events.

- Based on membership statistics suggesting a nearly 50/50 split between new and experienced prospect researchers, it may be beneficial to develop a two-tiered program of professional development offerings
- While there are Apra International resources we could leverage to help fill this need, we need to be able to determine what is available to be shared/republished for the Apra Canada members (issue of access)
- There are opportunities for collaboration and co-ordination with such organizations as KCI
- Formalizing study group activity could be a means of development and engagement
- Canada PRSPCT-L is not easy to use and requires a significant upgrade in capabilities (similar to work recently done by Apra International). Similarly, future development of the Apra Canada website could focus on using it as a platform for online communities of members
- Possibility of a Prospect Research University – online courses through the website
- Recent roundtable efforts have been seen as successful as the format allows for flow in discussion, takes away the pressure of being “the expert.” Expand the roundtables/focus on geographic segments to allow members to hear about what is currently happening in their region