



STRATEGIC PLAN

2023-2026

January 2023 – December 2026

ABSTRACT

The Apra Canada Strategic Plan 2023-2026 outlines the key themes that will drive the association's strategy in the coming years. The plan provides the framework for developing Apra Canada's operational goals from year to year and reaffirms the association's commitment to the prospect development profession in Canada.

Overview

The purpose of the plan will be to guide Apra's initiatives to enhance our value proposition to members and the external fundraising community at large. This plan will be developed by year-end 2022, with operationalization planning and execution beginning in 2023. The plan will guide Apra's work through to year-end 2026, at which point a new strategic plan can be created. The content of this plan was developed from member feedback, community consultation, and input from the Apra Canada Board of Directors. This plan provides guidance and sets priorities for this planning period. The Apra Canada Board of Directors is expected to develop specific activities and initiatives and to measure them against the strategies outlined in this plan on a regular basis.

Mission

Apra Canada is committed to being a leader in the philanthropic community and to building an inclusive, active, and future-ready member association for professionals in philanthropic research and development.

Vision

As a leading organization in the philanthropic sector, Apra Canada will be an advocate and champion for its members and continue to build a welcoming and inclusive community of professionals in prospect research and development. This will be accomplished through the following strategic priorities.

Strategic Priority #1: Member and Volunteer Engagement

Apra Canada will ensure its sustainability through an active and engaged membership and pipeline of volunteers.

Critical Success factors:

- Retain exiting members and recruit new members
- Delivering on all advertised member benefits
- Creating a welcoming and inclusive environment for all professionals in the sector
- Clarification and strengthening of volunteer requirements, such as minimum commitments, participation expectations, repercussions, accountability mechanisms, ongoing recruitment and maintenance of a volunteer pipeline.
- Revitalize the mentorship program.
- Strategize new recruitment methods to solicit membership from individuals of diverse groups

Strategic Priority #2: Leadership Development and Future-Proofing

Apra Canada will strive to develop leadership from within its membership to advance the association's priorities and be future-ready in the face of a rapidly changing environment.

Critical Success factors:

- Develop a board succession plan and actively recruit new leaders to address any gaps.

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- Identify, engage, and develop champions in our community to advocate for our association and profession
- Support leadership development for our members within the profession and the philanthropic sector at large in tangible ways
- Provide a roadmap for professionals to take control of their careers and expand their job responsibilities
- Provide visible leadership and/or development opportunities for professionals from diverse communities and backgrounds

Strategic Priority #3

Apra Canada will create, facilitate, and disseminate meaningful content through a variety of channels and methods

Critical Success factors:

- Soliciting content from members on topics identified in the member survey, and on foundational topics that we historically have delivered
- Building a pipeline of content creators and recognition strategy for content creators
- Expanding our content to cover topics that go beyond the basic functions of prospect research and development
- Strategize an effective way to utilize all communication channels that are available to us to promote content and other member benefits
- Actively soliciting and amplifying new voices in the profession to share their knowledge and experience with the association.
- Continually soliciting feedback on content and evaluating audience engagement
- Taking risk and experimenting with new content or delivery methods
- Developing a signature initiative that reimagines how professional development opportunities are delivered.

Strategic Priority #4

Apra Canada will strive to be a leading voice in the philanthropic sector and the premier representative of the interests of professionals in prospect research and development.

Critical Success factors:

- Formalize and recognize the specific skillset of members of Apra Canada through a credentialing system managed by Apra Canada that can be recognized and respected throughout the philanthropic sector.
- Forge new relationships with other associations in the fundraising sector where we can co-deliver content and recruit new members
- Strengthen existing relationships with associations in the fundraising sector, including other Apra chapters, develop opportunities for collaboration with partner associations and other Apra Chapters
- Develop a set of partnership benefits and strategies for working with external organizations to maximize benefits for all association members

Strategic Priority #4

Apra Canada will ensure it has the financial resources to execute its strategic and operational objectives

Critical Success factors:

- Set clear expectations and financial plans for operational expenses, reserve funds, and capital investments
- Review revenue streams and identify new opportunities for revenue-generation
- Increase membership fees according to operational needs and forecast gradual fee increases to avoid sudden changes
- As needed, plan targeted investments in resources that benefit the association's membership and supports its strategic priorities.

Appendix 1: SWOT Analysis Summary

Strengths

Apra Canada is unique in its position as a Canadian association serving Canadian prospect research professionals with Canadian content. **We are currently the only association of this kind and are considered thought leaders in our industry.** Our strongest value offerings include our conference, resource/knowledge-sharing, and opportunities to network and socialize with fellow research professionals, all for a low annual membership fee. We offer a strong community of highly skilled professionals who are willing to help one another and advance the association, whether it be through official (involvement with Apra as a volunteer) or unofficial channels (connecting with other members for knowledge sharing).

Weaknesses

Apra Canada suffers from low member and volunteer engagement – this applies to volunteers in official and unofficial capacities. It is not uncommon for volunteers to abandon their duties, and we currently do not have any contingency plans or repercussions in place for these scenarios.

We are seeing a shortage of members or industry professionals who are willing and able to provide content for Apra or champion the association, which puts the onus on a maxed-out volunteer board. This results in low activity, or inactivity, and inconsistent communications from Apra to our members.

We are lacking diversity on a few fronts. We are also noticing a circular pattern in the way we recruit for new members and new volunteers, as we are seeing the same individuals putting their hands up or being asked to participate. Based on our member survey self-disclosed information regarding member diversity, it appears that our constituency lacks in racial and gender diversity, as well as regional diversity.

Opportunities

Members want more content and more opportunities to get together with like-minded peers – this includes but is not limited to opportunities for knowledge-sharing, learning, and socializing. Some event ideas include: meet and greet nights for new members; ‘minglers’ for all members, or separate events for members in specific fields or regions; facetime with the board; facetime with potential mentors/mentees, etc. They want to see more content from members, for members. They want to see Apra Canada become more active on social media and our website.

Our members want to be involved. Forming committees or sub-groups of volunteers who can advise on major topics in our field and where a clear objective is set that aligns with the enhancement of Apra would be beneficial for member engagement. Our mentorship program is often cited as a key member benefit – we should look to formalize and grow this program by reaching out to new members regarding mentorship opportunities and providing avenues for former mentors/mentees to provide testimonials or share their experiences from the program.

We can expand our horizons and reach when it comes to recruiting new members and inviting member participation. To do this, we can forge partnerships with other associations and organizations to

promote our brand and member benefits. (Hilborn, AFP, AHP, and CAGP were all suggested. Vendor partnership was also suggested.) We can also increase our partnerships with other Apra chapters.

We can improve the way we engage members from diverse groups, especially those who are racialized and multi-lingual. We also need to encourage more membership from provinces across Canada where membership numbers are typically low – at the moment, that would consist of identifying new members from the Atlantic provinces, the Prairie Provinces, and Quebec.

We can expand the way we frame prospect research and provide new resources to align with this shift. Our job functions are changing. Providing learning opportunities that position our members as information professionals with varied technical skill sets (not ‘just’ researchers) will positively impact the career trajectory of many members and keep our jobs relevant.

Threats

Apra has traditionally suffered from low participation from the Board of Directors and from other volunteers. We currently do not have any succession plan in place for our board, and we lack any structure or system that would allow us to stay afloat in the face of an absent or unengaged director. We have also seen dipping levels of member engagement in recent years, likely due to burn out and inactivity from the association.

AI is a threat to research professionals – it could soon replace many key job components of a researcher role. Even without the advancement of AI, the role of researcher is slowly becoming irrelevant – to survive, our roles will need to expand to take on more responsibility. We have a duty to prepare our members for this shift and provide them with the toolkit to navigate the transition successfully.

The fees we collect are too low for the growth we want to see, but we need to increase our value proposition if we want to increase our fees.