



Canada

Strategic Plan 2019-2021 DRAFT

Task Force Subgroups:

Advocacy

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Leadership Development

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Membership

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Mentorship, Education & Professional Development

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Strategic Plan: Advocacy

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

Strategy: Champion the prospect development profession in fundraising and other relevant sectors.

Objective: 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.

Strategy: Build and strengthen connections with similar organizations and associations (i.e. local AFP, CAGP, higher education institutions that offer fundraising courses/programs)

Objective: Define “partnership”, key messages, and outline benefits that Apra Canada can provide other organizations.

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

Strategy: Provide accessible resources (i.e. toolkit, templates) for members through Apra Canada’s website.

Objective: Post links to resources recently developed by Apra International. (need permission)

Strategy: Tailor professional development offerings to educate members about how to promote their work.

Objective: Schedule at least 1 webinar and 1 roundtable session each year that are focused on advocacy.

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

Strategy: Designate board support and resources to ensure progress on advocacy work.

Objective: Establish a committee to develop an advocacy plan by Nov 2019.

Strategy: Integrate Apra Canada chapter advocacy into each Director’s responsibilities.

Objective: Assess current Board Director job descriptions and ensure advocacy work is specified as a shared responsibility with progress updates shared at each Board meeting.

Notes from previous discussions:

- 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

Strategic Plan: Leadership Development

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.

Objective: Create a President-elect position or embed President-elect in a current board position.

Objective: Revise the job description for the Member-at-large position to include capacity building towards leadership.

Objective: Strike a nominations committee to recruit new board members.

Objective: Create a matrix of skills/attributes for the board, to be updated yearly when new members join, and others leave. Matrix could include:

- (1) Demographics (such as new or young researchers, mid-career researchers, diversity of regions, backgrounds, languages spoken, gender)
- (2) Skills (such as accounting, public relations, web design, public speaking, event organization, writing, social media savvy)

Goal: Increase and diversify pool of volunteers.

Strategy: Utilize the existing strengths of Apra Canada board members and volunteers to increase and diversify the pool of volunteers.

Objective: 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, with an indication of who should ask them to volunteer.

Objective: Make members aware of various volunteer opportunities, including timelines and scope of work.

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

Objective: Develop a plan for communicating the benefits (both concrete and 'soft') of volunteering with Apra C.

Goal: Provide leadership development opportunities for Apra Canada members.

Strategy: Offer professional development webinars/conference sessions on leadership development.

Objective: Consult with all board members once a year to identify and select professional development opportunities for the upcoming year.

Objective: Consult Apra Canada members through membership surveys, email blasts, through the Canada Prospect-L to identify and select professional development opportunities.

Strategic Plan: Membership

Goal: Promote and advance current membership benefits.

- Strategy: Create a proactive membership recruitment plan.
Develop a proactive social media strategy.
Create a plan for promoting membership benefits throughout the year.
- Objective: Create a process to ensure APRA-C volunteers are actually members (e.g.) regional reps; mentors; etc.
Enlist a volunteer, or group of volunteers to actively use social media channels to promote APRA-C and membership benefits.
- Tactic(s): Partner with other organizations to offer discounts.
 - CASE book discounts to APRA-C members
 - AFP webinar discounts
 - APRA International PD discountsPrepare 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: Develop new benefits to engage existing and new members.

- Strategy: Develop a new suite of membership benefits.
- Objective: Create a plan for promoting membership benefits throughout the year.
- Tactic(s): 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.
When individuals decline to renew, create a process to track why (e.g.) an “exit” survey.
Grant new members that join 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.

- Strategy: Gain an increased understanding of our profession as a whole, not just APRA-C members (e.g.) location; industry; age; gender; experience; etc.
- Objective: 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, in order to develop membership benchmarks and targets.

Tactic(s): 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).

Goal: Attract members whose primary role may not be Prospect Research (those who wear multiple hats).

Strategy: Develop and Implement a strategy to identify potential new members. Gain an increased understanding of our profession as a whole, not just APRA-C members (e.g.) location; industry; age; gender; experience; etc.

Objective: Enlist existing volunteers, such as the Regional Reps, to assist in identifying new potential members.

Tactic(s): Develop a plan to utilize existing volunteer 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: Create and maintain streamlined membership renewal process.

Strategy: 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 (e.g.) purchase software to assist with maintaining membership list; etc.

Tactic(s): Partner with Membership Director to implement review of renewal process.

Strategic Plan: Mentorship

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

Strategy: 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

Objective: In conjunction with the objective in the Education & Professional Development section, carry out a comprehensive survey by Spring 2019 (?). Survey to include current members at minimum, but consider including lapsed/past members as this may also provide insight as to why members have left, as well as provide an opportunity to encourage rejoining.

Strategy: Ask and encourage potential mentors in a systematic fashion during existing touchpoints, such as the annual renewal process.

Objective: Include an option during membership purchase/renewal for people to express their interest in mentorship, either as a mentee or mentor

Strategy: 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. This may help 'de-mystify' and normalize mentorship among members.

Objective: 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. 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.

Goal: Facilitate mentorships by enabling long-distance support.

Strategy: Explore free options for long-distance contact as well as document/screen sharing.

Objective: Investigate the possibility of investing in Zoom for membership use, as it supports document-sharing.

Goal: Lay groundwork for future program expansion by investigating and evaluating other forms of mentorship that can be offered.

Strategy: Consider mentorship through study groups – by region, by sector, by level of experience

Strategy: Explore virtual book clubs (Online reading group and book discussion forum)

Strategy: 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

Strategic Plan: Education/Professional Development

Goal: Gain a better understanding what members want from education and professional development.

Strategy: Seek input from members as to what they are most interested in learning from Apra Canada (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: In conjunction with the objective in the Mentorship section, carry out a comprehensive survey by Spring 2019 (?). 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 and leverage Apra-C's knowledge repository through training and technology.

Strategy: Leverage existing Apra International materials

Objective: Designate an Apra Canada representative to connect with Apra International by (date?) to discover what as a Chapter we have access to and can share

Strategy: Investigate and evaluate with webmaster existing repository and determine options for easier access

Objective: Curate existing repository for Prospect Research University

Strategy: Investigate and evaluate with webmaster/Apra-C board options for collaborative online space; Sharing documents, open forums, using tags

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

Strategy: Ensure PD events have greater diversity of geography and sector representation by proactively engaging and recruiting members and potential members in target regions and sectors. Recruitment should focus on seeking out new and diverse presenters, with accompanying support and promotion to ensure success.

Objective: With Apra-C board, establish at least one PD event per geographic region in-year.

Objective: With Apra-C board, establish at least one PD event moderated by a non-dominant sector (not healthcare or higher ed)

Previous Group Discussions:

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.

Strategic Plan Template

Instructions

- Each Strategic Plan Task Force sub-group to develop 3-5 goals with 2-3 related strategies by the end of August 2018.
- Objectives and tactics can be included so we do not lose the ideas discussed (like the ones covered in Task Force meetings). Once the Strategic Plan is approved, specific objectives and tactics will be established by the Board, with input from committee members.

Definitions

- Goal: A broad primary outcome. This is what we expect to accomplish over a specific period of time.
- Strategy: The approach we take to achieve a goal. Strategy is the how, not what.
- Objective: A measurable and specific step we take to achieve a strategy. (SMART criteria: Specific. Measurable. Achievable. Relevant. Time-bound.)
- Tactic: An action or tool we use in pursuing an objective associated with a strategy.