



# 2024-2027 Strategic Plan

**Approved by the PAFN Executive and Membership Sept 2024**

## Introducing our New Strategic Plan

We are excited to present our new 3-year Strategic Plan to the Peterborough Area Fundraisers' Network (PAFN) membership. Our new plan is a tool that will be used by the Executive Leadership Team to focus core functions and guide decision-making over the next few years.

With the goal of creating a dynamic plan, grounded in the long history of PAFN, and relevant to the work needed to move forward in the sector, the Executive determined that engagement with members should be a meaningful part of the planning process. We are thankful to the **49 individuals** who took the time to participate in the online survey.

We took what we heard and have established three new strategic priorities. We have also refined our mission and identified new vision and values statements to guide our work. What is important to note, is that with this plan we are not changing what we do. Instead, this plan will provide clarity on where we should focus our limited resources and volunteers so that we can continue to offer relevant and meaningful professional development to our members.

As we look to the future, we recognize and are grateful to the many past and current members who have shared their time, skills, and energy to cultivate a strong community of fundraisers. We are excited for what lies ahead and will strive to continue to build a diverse membership who support each other and our important work in the community.

### Our History

In the mid-1990s a group of fundraisers in Peterborough gathered to discuss issues related to CRA guidelines. What they realized during the discussion was that smaller charities, some working only with volunteers, were unable to keep up with legislated changes. This was a concern as it could lead to local charities violating CRA guidelines and possibly losing their charitable status. The group decided that getting together on a formal basis would be advantageous for many reasons. In 1997, the Peterborough and Area Fundraisers' Network (PAFN) was formally created with the passing of its By-Laws, Code of Ethics, and Professional Practices.

### Our Governance Structure

PAFN is governed by a volunteer Executive Leadership Team who provide strategic and financial oversight of PAFN operations on behalf of PAFN members. PAFN currently has two standing committees; the Equity, Diversity, and Inclusion Committee; and the Professional Development Committee.

## Implementing Our Plan

To ensure the successful implementation of our strategic priorities, PAFN Executive commits to the following actions:

1. Using the strategic plan as a guide, create annual operational plans that identify annual goals, objectives, key measures, and responsibilities. Support committees to create corresponding work plans.
2. Monitor the progress of the strategic priorities on a regular basis and communicate the progress of the plan to our members at least annually.
3. Complete an annual review of the strategic plan. Discuss external and internal changes that may impact the plan and amend objectives and strategies as needed.

## Our Mission, Vision, and Values

As part of the strategic planning process, we have refined our mission statement and defined a vision and new values to guide our work.

### Our Mission/Purpose

Peterborough and Area Fundraisers' Network (PAFN) exists to strengthen fundraising excellence within our local social profit sector through career and personal development, and networking opportunities.

We foster a welcoming and supportive community for fundraisers and related professions to grow and feel valued.

### Our Values

Our values reflect the shared beliefs and principles that shape our relationships and guide our work. We will use them as a compass to guide decision-making and interactions with our members and partners.

**Collaborative.** We respect and value our relationships with each other, and our partners, drawing on our collective strengths to effectively support the local social profit sector.

**Engaged Community.** We celebrate and welcome members' unique skills and contributions and foster an interconnected community of practice that honours all voices and levels of expertise.

**Excellence.** We promote and amplify fundraising best practices, including ethical and equitable fundraising practices, and as a network, are transparent and accountable to our members.

**Welcoming.** We celebrate diverse knowledge, skills, identities, and perspectives and will strive to create a welcoming and inclusive space that is open to everyone interested in our work.

## Strategic Priorities in Chart Form

	Offerings to Members	Outreach & Advocacy	A Sustainable Organization
Goals	Promote excellence in fundraising by supporting a local community of fundraisers in a welcoming and inclusive environment.	Be the lead voice for fundraising expertise locally and continue to leverage relationships with partners to advocate and advance best practices within the profession.	Sustain an engaged and diverse membership through strong governance and volunteerism.
Objectives	<p>Evaluate the format, timing, and topics of PD sessions.</p> <p>Consider developing a member survey to better understand issues, topics of interest, accessibility needs, skills, and diversity of members.</p> <p>Host additional networking and social events to strengthen relationships and to celebrate members and volunteers.</p> <p>Develop an online community of practice to support member knowledge exchange.</p> <p>Develop a mentorship program for members new to fundraising.</p>	<p>Research best practices and conduct primary research to better understand the local fundraising landscape (i.e. salary survey).</p> <p>Amplify best practices, trends, and key issues impacting the sector. Promote ethical fundraising practices and fundraising as a career.</p> <p>Host an open house/member showcase to promote PAFN and the value of charities. Consider doing this in partnership with another organization.</p> <p>Build relationships with Indigenous organizations and communities.</p>	<p>Actively recruit members by intentionally connecting with underrepresented groups and organizations.</p> <p>Consider how to engage more members in the day-to-day management of PAFN through ‘burst volunteerism’.</p> <p>Continuously review PAFN’s by-laws, finance and communications strategies and update as necessary. Consider the need for a reserve.</p> <p>Review the committee structure to ensure committees meet the ongoing needs of the organization.</p>

	<b>Offerings to Members</b>	<b>Outreach &amp; Advocacy</b>	<b>A Sustainable Organization</b>
	<p>Develop a plan to attract new and diverse speakers. Consider offering flexible speaker fees.</p> <p>Develop a Fundraising 101 toolkit for members who are new to the profession, Boards, EDs, etc.</p> <p>Create dual memberships between PAFN and other local organizations.</p> <p>Create a resource hub and determine where a physical library could be hosted.</p>	<p>Strengthen relationships with local government representatives.</p> <p>Leverage relationships with partners to share resources and research, and to collaborate on advocacy efforts.</p> <p>Develop marketing materials and build relationships with local media to better promote PAFN.</p> <p>Update the website and create supplementary marketing materials to promote the benefits of PAFN membership, including the ability to earn CFRE credits through PAFN.</p>	<p>Consider how to leverage technology to streamline administration processes.</p> <p>Develop resources to support the Executive including orientation, skills matrix, DEI training, etc.</p> <p>Review key volunteer roles. Streamline responsibilities with the goal of stability and efficiency. Consider succession planning.</p>