

Chapter Strategic Planning

A strategic planning process provides the chapter with a working document that serves as a “road map” to a determined destination. The plan transcends changes in the chapter’s leadership and gives the chapter direction and focus. The finalized strategic plan defines where the chapter is today, where it is going and how it is going to get there. As a result, the completed strategic plan becomes a valuable functional document that current and future leadership can use to allocate its volunteers and members as well as financial resources. Use it to guide the chapter from one year to the next.

The following section provides you with greater detail on the process of developing a strategic plan for your chapter.

Chapter Strategic Planning

On the surface, developing a chapter strategic plan may be a daunting process, when in fact it is as simple as accurately answering these questions:

- Where are we today?
- Where are we going?
- How are we going to get there?

It is the development of the information to answer these questions that makes the process somewhat complicated. And before you even consider answering these questions, make sure you consider this one: does the chapter need a strategic plan? Although the answer to this question is probably 'yes,' only take on the process if the chapter board is fully dedicated to complete and execute the plan. Without a firm commitment to develop and execute the plan, you may be engaging in what will become a frustrating and worthless exercise.

Assuming that you have made the decision to develop a strategic plan for your chapter, let's first look at what the final document will look like. This will give you a better perspective on how the strategic plan will play a significant role in the functioning of the chapter.

The end result of the strategic planning process is a working document that the chapter can use as a chart to its destination with check points to gauge its progress. When properly developed, the strategic plan will be made up of the following sections, preferably in a three-ring binder for flexibility:

- I. Chapter Background Information
 - a. Date founded
 - b. Chapter charter
 - c. Bylaws
 - d. Board/Committee Structure (organization chart)
- II. Purpose for Chapter Strategic Plan
 - a. Why created
 - b. When
 - c. Strengths
 - d. Weaknesses
 - e. Opportunities
 - f. Threats
 - g. Strategic priorities
 - h. Industry trends
- III. Chapter Vision Statement
- IV. Chapter Mission Statement
- V. Chapter Goals (no more than 3 or 4)

- VI. Action Plans (each plan is directed toward completing one or more of the goals)
 - a. Resource considerations
 - b. Current/projected budget
 - c. Current/projected personnel (support) needs

A skilled facilitator can lead the group in accomplishing I through V in one day and potentially assist the chapter board with writing an effective action plan. Although much can be accomplished in one day with a dedicated and alert group, the real work begins when the facilitation is completed; writing the action plans and executing the plan complete the process.

Developing and executing action plans at the chapter level is, in many cases, further complicated by the fact that most of the work will be done by unpaid volunteers who have full-time jobs. This complicating factor can only be offset through skilled leadership and enthusiasm from the members to achieve the chapter's established vision, mission and goals.

Steps in Developing a Chapter Strategic Plan

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After the chapter has carefully considered the value and commitment of a strategic plan and has made the decision to move forward, there are some time-tested steps that the chapter can use to maximize its chance of success.

- Step 1. Obtain a positive (unanimous, if possible) vote from the chapter board to develop a strategic plan including the allocation of resources that will be necessary.
- Step 2. Form a Strategic/Long-Range Planning Committee with a strong leader (current Chapter President). The balance of the committee should consist of four to five forward thinking chapter members, in addition to a recent past president. The committee's task is to develop a chapter strategic plan and present it to the chapter board for approval.
- Step 3. The committee should initially determine if it is able to identify a strong unbiased facilitator from the chapter or the industry; it's possible the chapter will need the services of an experienced independent facilitator from the outside. The cost of an outside facilitator will range from \$2,500 to \$10,000 or more depending on the scope of the assignment.
- Step 4. The chairman of the committee should gather all of the current and historical information about the chapter. This would include such things as:
 - Membership statistics
 - Any prior planning
 - Chapter charter
 - Bylaws
 - Financial data

This information should be circulated to all committee members in preparation of the organizational committee meeting. This material will be necessary whether the committee uses an internal or external facilitator.

Step 5. Create and circulate a Strategic Planning Facilitation Workbook. The workbook should contain many of the subjects that will be used by the facilitator to lead the group in the creation of the strategic plan ingredients. The typical workbook should include probing questions that the participants are asked to think about in advance of the facilitation. Below are a few of the critical questions that the committee should think about asking the membership prior to the facilitation.

What is the purpose of the chapter?

What is the history of the chapter?

What are the current capabilities of the chapter?

What are the current limitations of the chapter?

Where is the chapter going?

What are the opportunities for the chapter?

What is going on in the industry that impacts the chapter?

What are the external influences that impact the chapter?

What are the internal influences that impact the chapter?

What “products and services” do we provide to chapter members?

What changes can we make to our “products and services” to enhance our chapter and members?

How do our members view the chapter?

Do our strengths line up with the trends in the industry?

How do the participants rate the chapter on a scale of 1 (worst) to 10 (best)?

What should our priorities be based on the resources available?

Step 6. Hold a one-day facilitation with all committee members and selected guests. The ideal number of participants is 10. The facilitator’s goals are to have the participants agree on a vision statement, a mission statement, critical goals (prioritized strategic opportunities) and have a clear understanding of what the action plans are.

This is the critical meeting at which a great deal of valuable information will be revealed and the cornerstones of the strategic plan will be created. Each participant should have an opportunity to provide his or her input into the plan so at the end of the day it will become a plan created and endorsed by the committee. They will have ownership of the plan and a vested interest in its completion. The facilitator will use many of the questions in the workbook to uncover valuable information from the participants. The facilitator’s objective is rather simple – determine where the chapter is today, where it is going and how it is going to get there based on the learned information from the participants. This is why selecting the right participants is such an important part of the process. Their input will be the basis of the strategic plan.

Step 6a. Based on the information gathered from the participants, the facilitator will be able to guide the group to develop a **vision statement**. The vision statement is a long-term vision of what the chapter can be based on the collective “dreams” of the participants. For example, a vision statement might read:

“The ABC Chapter is committed to the professionalism of its members and is recognized by National Headquarters as a leader among all CMAA chapters.”

Vision statements should be short, memorable and have enduring value. The stronger the vision statement, the better, but it must be realistic. Everything that the chapter does should be with an eye to achieving the chapter's vision statement. Typically, a well-developed vision statement may never change in the life of the organization.

Step 6b. Unlike the vision statement, the mission statement is short-term by definition and is measurable. The mission statement will generally span from one to three years and when it will be refined or completely replaced by another mission statement at the end of its term. The mission statement is developed only after the group has settled on its vision for the chapter. The mission is a statement of what needs to be accomplished over the next one to three years in order to reach or approach the chapter vision. An example of a mission statement for a chapter might read:

The ABC Chapter is dedicated to enhancing the professionalism and growth of its membership through:

1. Four structured educational meetings annually.
2. Semi-annual gatherings to promote healthy interchange among members.
3. Promotions to encourage greater member participation.

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Step 6c. Identify the chapter's goals (strategic opportunities). Generally a chapter will have between three and five goals such as education, financial stability, membership growth, etc. The goals that are developed during the facilitation are those that are necessary to accomplish the mission, to get closer to the vision. An example of a goal might read:

Education Goal – The ABC Chapter will hold four educational meetings over 12 months featuring outside experts on subjects that are germane to the managers' needs such as management training, team development, leadership and effective planning.

Strategic planning is a bottom to top-oriented process. Every action feeds up to the ultimate goal of achieving the vision statement. The value of creating a strategic plan should now be more obvious. Once you have defined the chapter vision statement, the mission that is necessary to get closer to achieving your vision and the goals necessary to accomplish your mission, stay on task. Issues or opportunities that come along that do not fit with the mission and/or vision are superfluous and can be ignored without wasting valuable resources.

Step 7. Once the committee has completed the major components of the strategic plan (vision, mission and goals) it is now in a position to assign the task of writing action plans. Action plans should be written by the person responsible for completing the plan. This gives that person ownership in the plan and a vested interest in its accomplishment. Each action plan should be a SMART plan: Specific, Measurable, Achievable, Realistic and Time Defined.

A detailed action plan becomes the road map to achieve the identified goals. Action plans are essential to the strategic plan – they make the plan a working and functional document. Action plans should be reviewed at each board meeting with the responsible person reporting on the state of the plan. Although there are numerous types of action plan formats, here is a typical sample:

ABC Chapter

DATE: _____

PROJECTED COMPLETION DATE: _____

GOAL TITLE:

PLAN TITLE:

PLAN:

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Action Step

Obstacle

Responsible Person

Completion Date

Step 8. Implementation

Congratulations, you now have a completed strategic plan!

The first item in implementation is to have the chapter board formally approve the strategic plan so that everyone knows that it is official and has their full endorsement. One of the side benefits of a strategic plan is that it will give newly elected board and committee members a foundation. Strategic plans transcend boards and management changes.

The next step is to share the vision statement with all of the stakeholders (members, etc.). Ideally the vision statement should be printed on all of your material including your letterhead. This is the “dream” for the chapter and it should be shared with everyone who has any association with the organization.

Since the mission statement is of shorter-term duration, it does not need the same limelight as the vision statement. Frequently, the mission statement is printed under the vision statement and given the same treatment as the vision statement. This will largely depend on the content of the mission statement and how germane it is to all of the stakeholders.

The action items (goals and action plans) should be reviewed at each board meeting. This takes just a short time but has the impact of making the strategic plan a working document and keeps everyone’s focus on the direction of the chapter.

The final step in the implementation process is to remain flexible. Things change and organizations must to be nimble enough to change to meet any contingency that may come along. What should not change is the chapter’s resolve to achieve the vision that has been carefully crafted to give the chapter the edge to reach its dream. With a clear vision, there is direction; with direction, there is focus; and with focus, there will be success.

Chapter Dashboard Indicators: Measuring Your Chapter's Performance

Indicators mark significant issues so that you can go deeper into the underlying causes. For example, your car's dashboard helps you monitor the status of critical functions and allows you to make quick safety/operational decisions. Like your car's gauges, a Chapter Dashboard Indicator offers a visual signal of chapter's health and warnings of problems. Once identified, these measures become the areas you want to assess first and monitor regularly – they become the chapter's core "watch" list.

What's the difference between successful and unsuccessful chapters? And how can you gauge that quickly and effectively? Four key areas to note are:

- Leadership – Vibrant leadership with a clearly defined and operational succession plan.
- Administrative Structure – Supportive structure that establishes and implements policies and procedures, provides identity and assures continuity.
- Member Involvement – High commitment and energy; it's not the number of members, but the level of commitment and engagement.
- Member Services – A menu that meets members' needs.

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