



LIGHTHOUSE
Consulting Services, LLC



*Bringing effective insight
to your organization SM*


Open Line

Guest,

Welcome to:

Leveraging The Value of Your Association Through Effective Strategy

Presented by
Lighthouse Consulting Services, LLC

To print program slides, click here: 



Featured Guest:

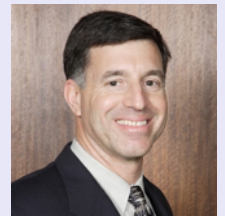
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](#)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC



*Bringing effective insight
to your organization SM*

Open Line

Agenda/Outline

- Some Realities and Perceptions of Associations
- Setting the Stage – Some Common Points of Discussion
- What is our Association Trying to Accomplish
- The Strategic Planning Process – A view into Ourselves and Overall Direction
- Measuring Results and Strategy Implementation



Featured Guest:

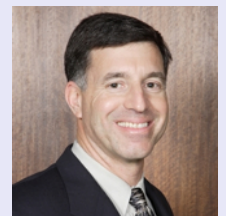
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](#)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC



*Bringing effective insight
to your organization SM*

Open Line

Setting the Stage – Oh Really?

- We basically know where we're going, we just need to clarify and communicate the strategy to the organization
- To meet our goals we will need to fundamentally change the way we operate - Our issue is 20% strategy and 80% execution
- We know where and how to improve; our challenge is to prioritize, have a plan, and hold people accountable
- We have a good strategy (even if we haven't stated it very explicitly); we need better alignment in the organization in order to support it



Featured Guest:

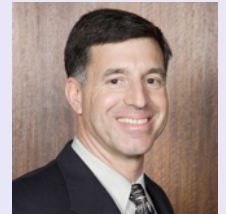
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](#)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC



*Bringing effective insight
to your organization SM*

Open Line

What Our Association Wants To Accomplish

- Provide value to the community it serves either directly or through chapter affiliation
- Energize a volunteer community that allows more dollars to go directly to those who need the service
- Ensure an open door of communication through multiple venues including the Internet
- Minimize operational expenses to maximize funds available for the community
- Hold itself accountable to assure compliance with governance and compliance
- Focus to take advantage of history and to leverage programs that work across chapters
- National associations – measure its effectiveness



Featured Guest:

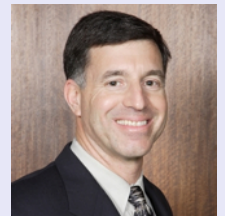
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](#)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC



*Bringing effective insight
to your organization SM*

Open Line

Strategic Planning – Some Issues for the Board

- National Considerations
 - Do we have appropriate strategy in place
 - What are the key roles of the executive board
 - Examine staff versus volunteer role
 - Measure effectiveness
 - National conventions – make sure we bring value
 - Promote regional differences but use national synergy
 - What fund raising programs can we implement without diminishing revenue opportunities at a chapter level



Featured Guest:

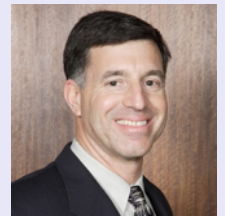
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](#)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC

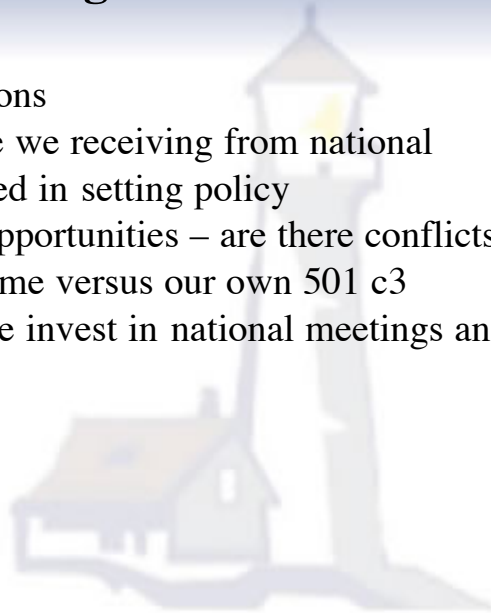


*Bringing effective insight
to your organization SM*

Open Line

Strategic Planning – Some Issues for the Board

- Chapter Considerations
 - What value are we receiving from national
 - Are we involved in setting policy
 - Fund raising opportunities – are there conflicts
 - What's in a name versus our own 501 c3
 - Why should we invest in national meetings and conferences



Featured Guest:

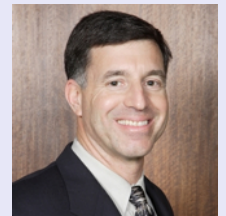
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](#)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC



*Bringing effective insight
to your organization SM*

Open Line

Benefits of Strategic Planning

- Establish a roadmap that allows for focus – don't bite off more than we can chew
- Seek concurrence from the Board so everyone is on the same page
- Lay the foundation for productive committees
- Establish definite goals that can be shared with chapters
- Assure compliance and appropriate governance
- Establish a transition and continuity plan that recognizes Board changes and specific responsibilities
- Put the "fun" back into an organization that is your passion



Featured Guest:

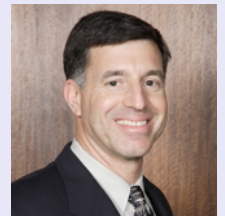
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](http://www.crackingthepersonalitycode.com)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC



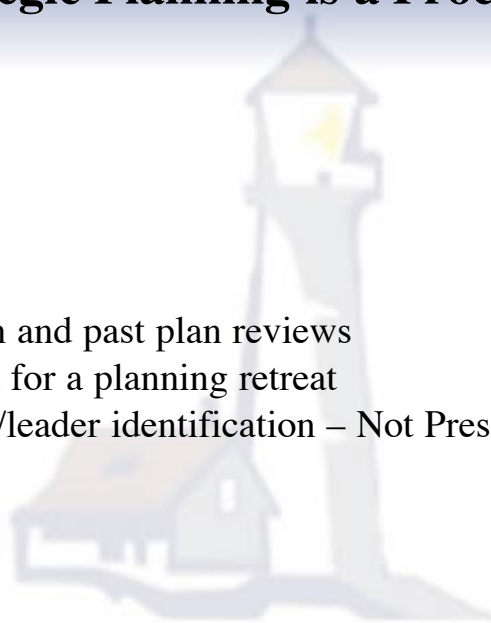
*Bringing effective insight
to your organization SM*

Open Line

Strategic Planning is a Process

Stages of Planning

- Preparation
 - Interviews
 - Questionnaires
 - Documentation and past plan reviews
 - Setting agenda for a planning retreat
 - Co-facilitation/leader identification – Not President!



Featured Guest:

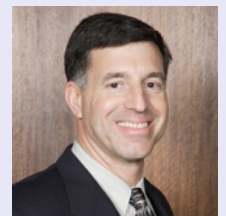
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](http://www.crackingthepersonalitycode.com)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC



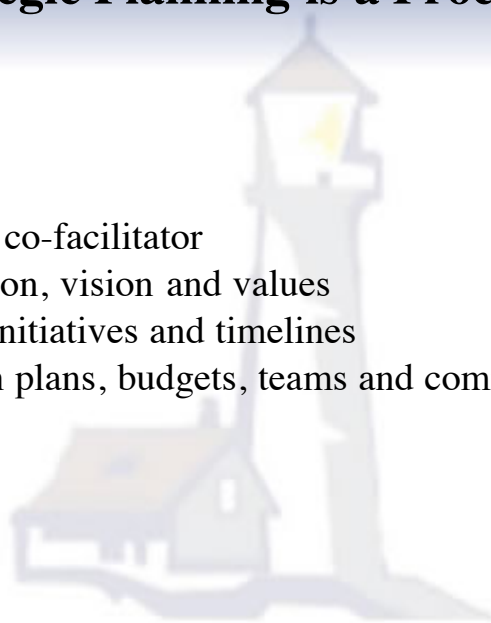
*Bringing effective insight
to your organization SM*

Open Line

Strategic Planning is a Process

Stages of Planning

- Planning Retreat
 - Facilitator and co-facilitator
 - Reaffirm mission, vision and values
 - Establish key initiatives and timelines
 - Develop action plans, budgets, teams and committees



Featured Guest:

David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](http://www.crackingthepersonalitycode.com)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC



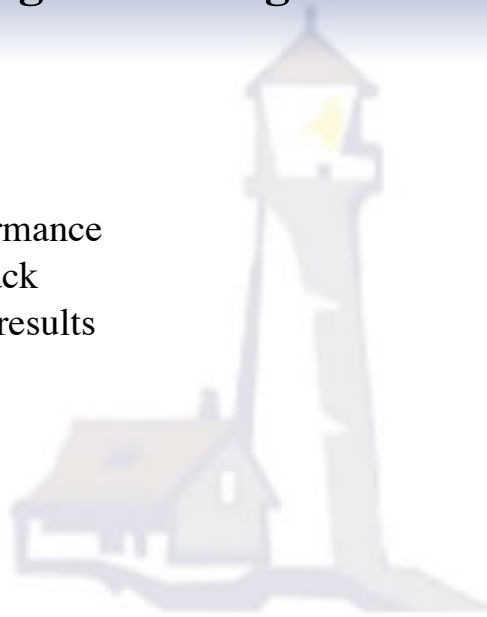
*Bringing effective insight
to your organization SM*

Open Line

Strategic Planning is a Process

Stages of Planning

- Implementation
 - Monitor performance
 - Provide feedback
 - Communicate results



Featured Guest:

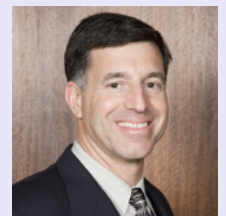
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](http://www.crackingthepersonalitycode.com)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC



*Bringing effective insight
to your organization SM*

Open Line

Components of the Strategic Plan

- Mission – Why we exist
- Values – What we believe in
- Vision – What we want to be
- SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats)
 - Build upon our strengths
 - Take advantage of opportunities
- Key Strategies
 - Key Strategies
 - Financial considerations – Budget worst case, most likely and best case



Featured Guest:

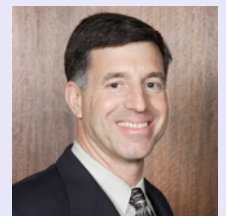
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](http://www.crackingthepersonalitycode.com)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC



*Bringing effective insight
to your organization SM*

Open Line

Components of the Strategic Plan (cont.)

- Key Initiatives (Charters)
 - Growth Opportunities
 - Critical Few
- Implementation Strategy
 - Chartering - a proven and successful process
- On-Going Monitoring and Communication
 - Central system for reporting and control



Featured Guest:

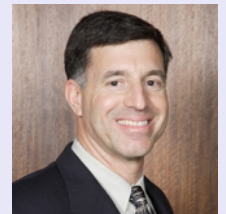
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of *Cracking The Personality Code*

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC



*Bringing effective insight
to your organization SM*

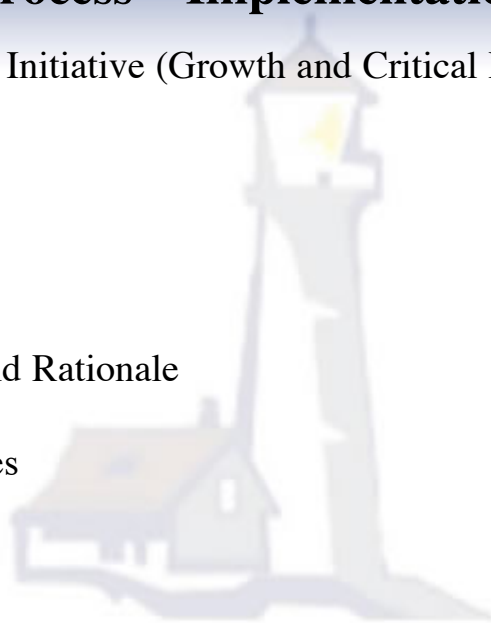
Open Line

Chartering Process – Implementation Strategy

Create a Charter for Each Initiative (Growth and Critical Few)

What's in a charter?

- Background
- Key Challenges
- Project Overview and Rationale
- Approach
- Scope and Objectives



Featured Guest:

David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of *Cracking The Personality Code*

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC



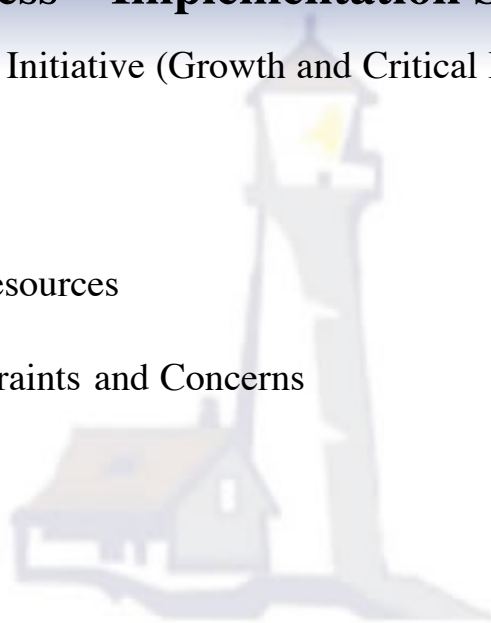
*Bringing effective insight
to your organization SM*

Open Line

Chartering Process – Implementation Strategy (cont.)

Create a Charter for Each Initiative (Growth and Critical Few)

- Major Milestones
- Major Deliverables
- Shareholders and Resources
- Project Budget
- Assumptions, Constraints and Concerns



Featured Guest:

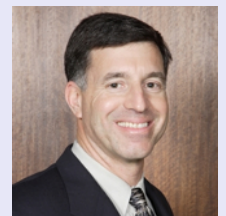
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of *Cracking The Personality Code*

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC



*Bringing effective insight
to your organization SM*

Open Line

Some Implementation Thoughts

- Keep the number of charters manageable
- Be realistic in timelines as you will rely on volunteers
- Get “buy in” from Board before you start – if uncertain then setup a charter to explore viability of an initiative
- Maintain communication – in all directions
- Make sure you have measurements in place
- Balance the load – too many Boards rely on the few rather than leveraging



Featured Guest:

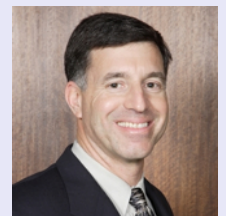
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](http://www.crackingthepersonalitycode.com)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC

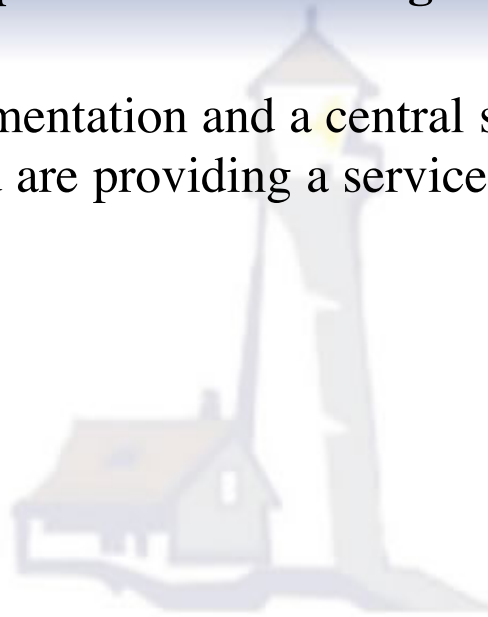


*Bringing effective insight
to your organization SM*

Open Line

Some Implementation Thoughts (cont.)

- Maintain documentation and a central source
- Have fun – you are providing a service for the needy



Featured Guest:

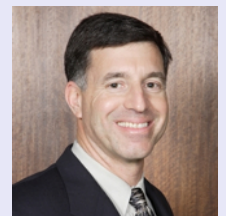
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](#)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC

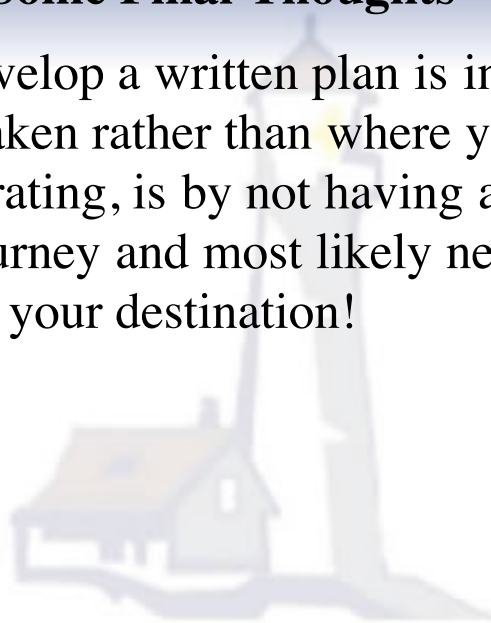


*Bringing effective **insight**
to your organization **SM***

Open Line

Some Final Thoughts

Choosing to not develop a written plan is in itself a plan to go where you are taken rather than where you want to go. Perhaps more frustrating, is by not having a plan you will be on a constant journey and most likely never know when you have arrived at your destination!



Featured Guest:

David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](#)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance



LIGHTHOUSE
Consulting Services, LLC



*Bringing effective insight
to your organization SM*

Open Line

Thank you for attending our Leveraging The Value of Your Association Through Effective Strategy

[Click Here](#) to contact our Featured Guest directly.

Presented by
Lighthouse Consulting Services, LLC



Featured Guest:

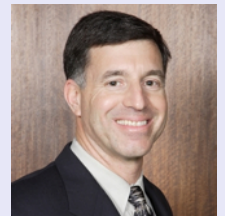
David Shaffer
Business Consultant

Phone: 714-330-0678
Email: dshaffer@pebblellc.com
Website: www.pebblellc.com

Host:

Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of [Cracking The Personality Code](#)

Phone: (310) 453-6556, ext. 403
Email: dana@lighthouseconsulting.com
Book: www.crackingthepersonalitycode.com



© 2011 Lighthouse Consulting Services, LLC All Rights Reserved

3130 Wilshire Blvd. Suite 550
Santa Monica, CA 90403
T 310.453.6556
F 310.828.6987

reception@lighthouseconsulting.com

- In-depth Workstyle & Personality Assessments
- Interpersonal Coaching
- Workshops - Cracking The Personality Code
- Career Guidance