Guest,

Welcome to:

Leveraging The Value of Your Association Through Effective Strategy

Presented by
Lighthouse Consulting Services, LLC

To print program slides, click here:
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
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.
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:
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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

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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

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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

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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!

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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

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Strategic Planning is a Process

Stages of Planning

- Implementation
  - Monitor performance
  - Provide feedback
  - Communicate results

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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

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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

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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

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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
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
certificate 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

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Some Implementation Thoughts (cont.)

- Maintain documentation and a central source
- Have fun – you are providing a service for the needy
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!
Thank you for attending our
Leveraging The Value of Your Association Through
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Click Here to contact our Featured Guest directly.

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