



LEADERSHIP

PRINCE WILLIAM

2020-2023 STRATEGIC PLAN

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I. INTRODUCTION

The purpose of this Strategic Plan is to establish broad policy goals for the development of Leadership Prince William (LPW) through the next 3 years. This plan provides guidelines and context for making decisions regarding future activities of LPW. The environment in which LPW operates – including economic and market forces, technology, regulatory, and a host of other factors – may change in unanticipated ways. Therefore, it is essential that this plan be periodically updated and that it permits sufficient flexibility to adapt to changing conditions. Perhaps most importantly, the plan must align with the goals and aspirations of the Leadership Prince William Board of Regents (BOR) and staff.

A. Need for a Strategic Plan

Strategic planning is a critical component of good management and governance. Planning helps assure that an organization remains relevant and responsive to the needs of its community, and contributes to organizational stability and growth. It provides a basis for monitoring progress, and for assessing results and impact. It facilitates new program development. It enables an organization to look into the future in an orderly and systematic way. From a governance perspective, it enables the setting of policies and goals to guide the organization, and provides a clear focus to the leadership and staff for organizational management and program implementation.

A strategic plan is a formalized road map that describes how an organization executes a chosen strategy. The plan spells out where an organization is going over the next year or more and how it is going to get there. It is a management tool that:

- Helps build a competitive advantage
- Communicates strategy to staff
- Prioritizes financial needs
- Provides focus and direction to move from plan to action.

B. How the Plan was Developed

The 2020 – 2023 strategic planning process for LPW began in July 2018 with the formation of the strategic planning team. The team began its process by reviewing the status of LPW, including the market(s) being served, and identifying critical issues that will affect the activities of LPW in the near future. The team had no preconceptions or any pre-determined outcome in mind: everything was “on the table” and as many points of view and options for future development as could be gathered were given full consideration. Key steps in the strategic planning process are briefly reviewed hereafter. These key steps included a data collection effort; review and refinement of organizational tenets (a value proposition and a vision statement); review and

refinement of goals, along with strategies and tactics to achieve those goals; and finally, development of key findings and recommendations.

II. THE ENVIRONMENTAL SCAN

A. History

Leadership Prince William began in 2007 as a collaboration between the Prince William-Greater Manassas Chamber of Commerce (est. 1935) and the Prince William Regional Chamber of Commerce (est. 1955). Executive members of the two Chambers met on a regular basis to share information, collaborate, and resolve differences that occasionally occurred as a result of two organizations serving the same customer base. These conversations often addressed how the two sides of the county could be brought closer together to serve local businesses and communities. A community leadership program was proposed, and a Task Force was created to explore the feasibility of creating a program to serve Prince William County (PWC) as well as the Cities of Manassas and Manassas Park.



The organization was established as stand-alone not-for-profit organization offering an innovative ten-month “signature program,” designed to assist in preparing existing and emerging community leaders for leadership positions in business, local government and community affairs. George Mason University, Micron Technology, and Dominion Energy contributed the initial funding needed to establish the program. Governed by a Board of Regents, LPW was “dedicated to the development, enrichment, and collaboration of leaders for the service and unification of the Prince William Community.”

Members of the first class (2008) were solicited from local business and community leaders, and subsequently became ambassadors for the program. Over the next decade, the Leadership Prince William Signature Program produced over 360 graduates, and has evolved to serve a more diverse



population, including high-potential managers and young professionals, in addition to the traditional base of established business and community leaders.

B. The External Environment

A. National Situation and Trends.

Community leadership programs began making an appearance in the United States in the 1970's and became firmly established in the 1980's. These programs were designed to provide information to people in communities who exhibited leadership potential or held positions of leadership. Through tours, speakers and information about the communities they lived/ worked in, participants were educated on the issues facing residents and businesses, empowering them to action.

Community Leadership Programs (CLPs) have changed somewhat over the years, adding more skills and capacity training, but their philosophy remains the same – to empower and educate people to take more active roles in their communities, in the volunteer and/or political sectors. Many CLP's are a part of a Chamber of Commerce, especially if they are located within a single community and not County or region-wide. There are also other affiliations – depending on the structure. There are those programs that are “stand alone” and not affiliated with any other entity. Many colleges have also added a *leadership studies* or *civic leadership* program within their course of study. Leadership Studies programs in colleges gear toward theory and history of leadership as well as service learning projects. Colleges cater to students who do not necessarily live or work in the community where they are attending school.

There are over 750 CLP's in the United States where thousands of business people, local government officials, not-for-profits and individuals participate and graduate. The traditional view of community leadership rests with a single or small group of individuals who control and direct others. The contemporary view emphasizes the need for many leaders to become empowered as “facilitators.”

2. Local Situation and Trends. Leadership Prince William is a private, not-for-profit 501c(3) organization whose mission is to inspire and engage adult and youth leaders who want to make a difference in the Greater Prince William Area. Graduates of the Signature Program have undertaken leadership roles in business, government, the non-profit sector and community affairs. LPW serves Prince William County, the City of Manassas and the City of Manassas Park. Leadership Prince William programs focus on introducing current and future community leaders to their community, their peers, and themselves in a

comprehensive experiential learning environment. The overall purpose of Leadership Prince William is simple but powerful – to make our community a better place through collaborative leadership.

3. Summary of Opportunities and Threats. Opportunities and threats generally relate to external factors that affect an organization and include the environment in which the organization operates (political, economic, social, technological, legal, and environmental), its market, ecosystem, and all of the third parties involved.

Opportunities:

- Do more with Emergenetics: Sell it + utilize it to better engage with our Alumni ;
- Respond to changing face/status of our program participants by evolving the Signature Program to meet new needs;
- Increase our “outbound” presence/marketing/PR efforts;
- Continue developing policies/procedures; establishing mature organizational practices;
- Increase recruitment efforts – go beyond our normal pools of applicants;
- Expand/enhance Summer Youth Academy;
- Respond to Alumni suggestions as appropriate. Some of those include:
 - Events with a purpose (Fewer Social Events/Breakfast or lunch events/Don’t cut into family time),
 - Service Projects,
 - Provide professional development opportunities,
 - Develop ways for alumni to connect (online),
 - Ask alums for help (Make them feel needed),
 - Refresher day/Experiential (Recapturing the magic),
 - Problem-solving think tank,
 - Alumni Directory/Categorize alumni skills & interests,
 - Leadership Forum/Book Club,
- Celebrate the Successes of our Alumni;
- Partner with other organizations to increase our reach and influence;
- Diversify revenue streams
 - Micro-funding
 - Grants



- Develop relationships with new corporate partners
- Continue to improve the membership program;

Threats:

- Time/Other Commitments/Priorities of our Constituents;
- Alumni Retiring/Relocating out of area;
- Many local organizations competing for the same minutes and dollars;
- Changing face/status of class members;
- May be viewed as TOO exclusive an opportunity;
- Possibility of stagnancy if not careful;
- Staff burn-out

C. The Internal Organization

IV. Governance. A 27-member Board of Regents governs LPW, each of which is appointed to serve a 1 to 3-year term. The *Current Class* and *Chairman's Selections* each serve 1 year terms, all others serve 3 years with an optional second term.

2. Operating Model. LPW operates as an independent 501c3, separate from the Chamber of Commerce or any other organizational entity.

3. Management.

- Executive Director
- Executive Committee (BOR Officers and other members at the discretion of the Chair)
- Board Members

4. Scope of Activities.

LPW activities focus in three primary areas: the Signature Program, Summer Youth Academy and fund-raising activities. These are described in more detail as follows:

The LPW *Signature Program* is a 10-month program during which participants develop personal and professional leadership skills that serve them long after completion of the class year. Session topics include Economic Development & Tourism, Education, Arts & Culture, Public Safety and more. The program provides information, hands-on learning and networking activities. Each class also undertakes a year-long project to enrich the local community.

The *Summer Youth Academy* is designed to nurture the next generation of leaders in our community through mentoring, skill development, education and

engagement. Our youth program, targeted to rising 7th-9th graders, is a two-week summer camp, provided through partnerships with other community organizations. Scholarships are often made available through the generosity of our Signature Program graduates.

Fund-raising activities are conducted annually to offset LPW's operating costs, and to help provide full or partial scholarships for program participants. Traditional fund-raising activities have included:

- Gourmet Guys Give Back
- Bowling 4 Scholarships
- Evening of Excellence Gala & Awards Dinner

5. Summary of Strengths and Weaknesses. Strengths and weaknesses generally relate to internal factors that affect an organization and should be evaluated in terms of how they compare to those of competitors. Strengths are internal characteristics of a company such as skills, resources, capabilities and brands. Weaknesses are internal characteristics such as sources of customer or employee dissatisfaction.

Strengths:

- Emergenetics (understanding those we serve) ;
- 33% engagement of Signature Program Alumni (as defined by alumnus, this may include volunteerism, event attendance, donations and ongoing interactions with one's own classmates) ;
- Graduates overwhelmingly say that they loved their *Signature Program* experience;
- Our program is unique in this community;
- Sound management of resources;
- Stories of alumni who have gone on to great success;
- Excellent reputation in the community;
- Strong *Signature Program* participation;
- Impassioned core of volunteer leaders.

Weaknesses:

- Lack of established policies/procedures (still learning as we go) ;
- Returning to the same wells financially;
- Reliance on government participation;
- Insular;
- Lack of Board engagement;
- Reliance on events for alumni engagement;
- Misconceptions about what our program offers;

- *Summer Youth Academy* has not yet hit its stride;
- Alumni may not feel we are giving them enough “meat/reason” to stay involved;
- Alumni who cannot support us financially.

III. MISSION, VISION, VALUES

A. Mission. Engage and inspire individuals, organizations and alumni to enrich the community through collaborative leadership.

B. Vision. Provide a trusted nexus where diverse leaders gather to collaborate, evolve and strengthen the community.

C. Values

- **Passion-** LPW values people that are driven to engage in the process of making the greater Prince William region the best it can possibly be. LPW strives to ignite this drive, if not already present, by introducing *Signature Program* class attendees to challenges currently facing all aspects of community development as well as many successes the community has achieved through historical leader collaborations.
- **Inclusiveness-** LPW strives to include as many perspectives and experiences as possible in our *Signature Program* and *Summer Youth Academy* programs during class selection and also in the development of all program activities.
- **Action** – LPW values members, alumni and stakeholders that take the knowledge and inspiration gained through LPW experiences and interactions, then apply their new-found knowledge and connectivity to lead local efforts to solve community problems.

D. Value Proposition

LPW exists to “build the bench” of influential leaders in the community. These leaders are informed and empowered to contribute in a more thoughtful and meaningful way. These leaders are armed with interpersonal skills that transcend modern barriers to communication and collaboration such as partisan politics. These leaders are trained to identify and value individual skills and attributes that lead to better problem solving.

IV. GOALS AND STRATEGIES

The GOST model stands for Goals, Objectives, Strategies and Tactics. There are a few important distinctions in the model. The first is a focus on outcomes versus activities; what versus how. A goal is a finite outcome and not a specific activity. The GOST model distinguishes between high level and low-level details. This provides both consistency of direction and flexibility to change direction as needed. The high-level detail provides a consistent general direction. The low-level details are specific and can change without altering the high-level general direction.

These distinctions are represented in the following diagram

| | <i>What</i> | <i>How</i> |
|---------------------|-------------|------------|
| <i>High Level</i> | Goals | Strategy |
| <i>Detail Level</i> | Objectives | Tactics |

A successful business plan should incorporate all four components: goals, objectives, strategies and tactics. These components are described as follows:

- **Goal.** A goal is a broad, intangible and abstract primary outcome. It is qualitative rather than quantitative in nature, and describes what an organization hopes to achieve. Goals can be short-term or long-term and focus on 'What' you want to achieve and not on 'How' you want to achieve it.
- **Objective.** An objective is a specific, tangible, and measurable step taken to achieve a strategy. Objectives are always targeted and numbers focused, unlike goals which talk about the bigger picture. Objectives must be able to be accomplished and measurable in order to help determine whether we are making progress.
- **Strategy.** A strategy is the approach taken to achieve a goal. It is 'Why' an organization is doing something. The strategy is the plan that will help to achieve goals. It can also be the solution to a problem.
- **Tactic.** Tactics are the specific tools and techniques used in pursuing an objective associated with a strategy. Tactics are tricks and patterns developed to drive and support the strategy and to get closer to the objective.

IV. GOALS AND STRATEGIES (Continued)

Following is a listing of Leadership Prince Williams' Goals & Strategies. The Metrics Scorecard (Appendix C) highlights our Objectives and Tactics as well.

Goal 1: *Develop Community Leadership*—

- Strategy #1: Initiate Engagement “Welcome to the Family”
- Strategy #2: Grow Commitment- Alumni / Board
- Strategy #3: Expand Partnerships - Create Continuing Opportunities

Goal 2: *Increase LPW Program Awareness and Reach*

- Strategy #1: Create a defined and specific Marketing Plan
- Strategy #2: Leverage the reach of other organizations

Goal 3: *Improve and Sustain Organizational Efficiency & Effectiveness*

- Strategy #1: Focus on Communication, Coordination and Feedback Processes
- Strategy #2: Dynamically scale the application of LPW Resources (Time/Talent/Treasure)
- Strategy #3: Leverage Board of Regents

Goal 4: *Improve and Sustain Fiscal Health and Responsibility*

- Strategy #1: Align and balance resources with production
- Strategy #2: Generate multiple and diverse revenue streams
- Strategy #3: Pursue and practice Governance and Fiduciary Responsibility

IV. APPENDICES

APPENDIX A: DATA COLLECTION SOURCES

- A. Survey.** The LPW Marketing Committee conducted an online/email survey (via Survey Monkey) regarding Alumni Engagement in January 2019. Data trends are available here: <https://www.surveymonkey.com/results/SM-3DTMKXBS7/>
- B. Interviews.**
- a. From March-November 2018 Executive Director Andrea Money conducted a “Listening Tour” interviewing a little over 100 past graduates of Leadership Prince William. Questions included asking about each person’s level of engagement, their Signature Program experience and how we could better serve/engage with them as individuals. Results are available here: https://netorg2155761-my.sharepoint.com/:b:/g/personal/andrea_leadershipprincewilliam_org/EbnsgRHunyREs421KPAD6c0BRP7VgFZfvMQeXVmMA-NNPw?e=aDk80q
 - b. The Strategic Planning Task Force additionally conducted interviews with members of the Leadership Prince William Board of Regents, including Chairman Jacqueline Krick.
- C. SWOT Analysis.** The SWOT Analysis was done in three parts:
- a. 2019 Board of Regents Annual Retreat
 - b. Staff input
 - c. Staff culled the feedback from the Executive Director’s “Listening Tour” for additional patterns from alumni feedback

IV. APPENDICES (Continued)

APPENDIX B: SURVEY, INTERVIEW & SWOT QUESTIONS

Alumni Engagement Survey Questions:

1. LPW Graduation Year
2. How would you describe the impact that LPW has had on you, professionally and/or personally?
3. How engaged are you in Leadership Prince William?
4. How often do you participate in LPW events, to include any scheduled by your class liaison?
5. What would cause you to increase your involvement in LPW?
6. What type of events are you most likely to participate in through LPW? Check all that apply. (Choices: Service Projects/Community; Happy Hour/Networking-Continuing Conversations; Lunch/Networking; Lunch/Speaker Series; Breakfast/Speaker Series; Annual Gala/Evening of Excellence; Bowling 4 Scholarships; Emergenetics Workshop; LPW Working Committee; Other)
7. In which part of Greater Prince William do you find it most convenient to attend events? Please select all that apply. (Choices: Manassas; Manassas Park; Mid-County; Gainesville/Haymarket; Route 1 Corridor; Occoquan/Lake Ridge; Dale City);
8. How do you typically stay up-to-date on LPW news and events? Select up to three. (Choices: LPW Website; Emails from LPW; Word of mouth; LPW Facebook; LPW LinkedIn; Direct Mail from LPW; Communications from my class liaison; My class Facebook group; Articles about LPW in other media; N/A, I do not follow LPW news)
9. What type of news or information would you most like to see in LPW newsletters, social media and website? Check any that apply. (Choices: Alum Spotlights; LPW events; Volunteer opportunities-community; Volunteer opportunities-LPW; Articles on leadership & professional development; Emergenetics topics; local business news; N/A, I have no preference)
10. If you could change one thing about LPW alum programming, what would it be?

Listening Tour Interview Questions:

1. Name:
2. Class year:
3. Emergenetics Profile:
4. Do you consider yourself to be engaged with LPW? If yes, how?

5. Do you have any suggestions for how we might improve? Suggestions can be in reference to any aspect of our programming, events, communications and/or alumni engagement.

SWOT Analysis:

STRENGTHS: What do we do best; What unique knowledge, talent, or resources do we have; What advantages do we have; What do other people say we do well; What resources do we have available; What is our greatest achievement?

WEAKNESSES: What could we improve; What knowledge, talent, skills and/or resources are we lacking; What disadvantages do we have; What do other people say we don't do well; In what areas do we need more training; What customer complaints have we had about our service?

OPPORTUNITIES: How can we turn our strengths into opportunities; How can we turn our weaknesses into opportunities; Is there a need in our agency that no one is meeting; What could we do today that isn't being done; How is our field changing? How can we take advantage of those changes; Who could we support? How could we support them?

THREATS: What obstacles do we face; Could any of our weaknesses prevent us from meeting our goals; Who and/or what might cause us problems in the future? How; Are there any standards, policies, and/or legislation changing that might negatively impact us; Are we competing with others to provide service; Are there changes in our field or in technology that could threaten our success?

IV. APPENDICES (Continued)

APPENDIX C: METRICS/SCORECARD

Goal #1: Develop Community Leadership

| Strategy 1: Initiate Engagement “Welcome to the Family” | POC | Y1 | Y2 | Y3 | Future | Complete |
|---|-----|----|----|----|--------|----------|
| ○ Objective: Critically Evaluate the Signature Program w/ Goal of Achieving Self-Sustainability/ Maintaining Relevance | | | | | | |
| ○ Tactic: Optimize cost/benefit and adjust tuition accordingly | | | | | | |
| ○ Tactic: Capture program impact on individuals and organizations | | | | | | |
| ○ Tactic: Conduct Formal end-of-program evaluation w/ each Class | | | | | | |
| ○ Tactic: Explore/Implement accreditation by year 3 (15 th year of program) | | | | | | |
| ○ Objective: Establish a Young/ Emerging Professionals Program | | | | | | |
| ○ Tactic: Assess the Need and Interest for such a program (Year 1) | | | | | | |
| ○ Tactic: Enlist program development support (Staff & Resources) (Year 2) | | | | | | |
| ○ Tactic: Develop “Business Plan” for board Review (Year 1) | | | | | | |
| ○ Tactic: Launch program (Year 2) | | | | | | |
| ○ Objective: Refine the Summer Youth Academy | | | | | | |
| ○ Tactic: Assess impact of current program | | | | | | |
| ○ Tactic: Assess sustainability of current program | | | | | | |
| ○ Tactic: Develop modifications | | | | | | |
| Strategy 2: Grow Commitment- Alumni / Board | POC | Y1 | Y2 | Y3 | Future | Complete |

| | | | | | | |
|---|--|--|--|--|--|--|
| ○ Objective: Establish Personal/Professional Development Opportunities for Alumni | | | | | | |
| ○ Tactic: Plan an annual Speaker Series to be rolled out in August of each year (Net goal: \$2500/year) | | | | | | |
| ○ Tactic: Conduct 2-3 Emergenetics forums/events per year | | | | | | |
| ○ Tactic: Seek opportunities to leverage other Leadership Programs in the region to provide additional opportunities to our constituents | | | | | | |
| ○ Tactic: Explore the establishment of a Continuing Education Program | | | | | | |
| ○ Objective: Facilitate and track LPW Alumni acceptance into community opportunities | | | | | | |
| ○ Tactic: Develop a means to collect areas of interest and expertise to store on alumni profiles in our CRM (Year 1) | | | | | | |
| ○ Tactic: Begin tracking opportunities (Open Board Seats/ Committees/Volunteer Needs) (Year 1) | | | | | | |
| ○ Tactic: Begin actively connecting LPW Alumni with right-fit opportunities (By year 2) | | | | | | |
| ○ Tactic: Year 2/3: Invite Community Boards to an Alumni Open House (Board Fair) | | | | | | |

| Strategy 3: Expand Partnerships–Create Continuing Opportunities | POC | Y1 | Y2 | Y3 | Future | Complete |
|--|------------|-----------|-----------|-----------|---------------|-----------------|
| ○ Objective: Establish a Community Problem-Solving Forum | | | | | | |
| ○ Tactic: Establish a planning task force to identify Community Challenges | | | | | | |
| ○ Tactic: Identify and Engage Talented Facilitators | | | | | | |
| ○ Tactic: Plan at least 3 gatherings of subject-matter experts in year 2 to pilot the program | | | | | | |

| | | | | | | |
|---|--|--|--|--|--|--|
| ○ Objective: Facilitate the creation of joint initiatives with other organizations | | | | | | |
| ○ Tactic: Assess the success and mutual value of existing partnerships | | | | | | |
| ○ Tactic: Identify interested organizations/potential future partners | | | | | | |
| ○ Tactic: Develop initiative proposals for BOR review (at least 2 per year – may be reoccurring) | | | | | | |

Goal #2: Increase LPW Program Awareness and Reach

| Strategy 1: Create a defined and specific Marketing Plan | POC | Y1 | Y2 | Y3 | Future | Complete |
|---|------------|-----------|-----------|-----------|---------------|-----------------|
| ○ Objective: Embed the LPW Value Proposition into the LPW Brand (Year 1) | | | | | | |
| ○ Tactic: Draft and approve the value proposition narrative | | | | | | |
| ○ Tactic: Incorporate the value proposition into marketing products | | | | | | |
| ○ Tactic: Teach the value proposition to stakeholders | | | | | | |
| ○ Objective: Introduce individuals, local business and community leadership/influencers to the LPW value proposition (Years 2 & 3) | | | | | | |
| ○ Tactic: Enlist Alumni for help in identifying/connecting with target audience members | | | | | | |
| ○ Tactic: Establish mutual interest/Partnership with at least 1 new entity per year (new sponsor) | | | | | | |
| ○ Tactic: Circulate Testimonials as follow-up to partnerships | | | | | | |
| ○ Objective: Capture, share, and recognize success stories | | | | | | |
| ○ Tactic: Develop a Submission Process | | | | | | |
| ○ Tactic: Develop Criteria for recognition | | | | | | |
| ○ Tactic: Solicit for Submissions | | | | | | |
| ○ Objective: Develop and advertise a refined website | | | | | | |

| Strategy 2: Leverage the reach of other organizations | POC | Y1 | Y2 | Y3 | Future | Complete |
|--|------------|-----------|-----------|-----------|---------------|-----------------|
| ○ Objective: Annually identify community and values-based organizations with whom we align well (May be sought for a partnership or sponsorship) | | | | | | |
| ○ Tactic: Identify and connect with at least one for-profit sector organization per year. This should be an organization with whom we have complimentary Missions, Customers and/or Goals | | | | | | |
| ○ Tactic: Identify and connect with at least one not-for-profit sector organization per year | | | | | | |
| ○ Tactic: Identify and connect with at least one public sector organization per year | | | | | | |
| ○ Tactic: Utilize mutual interest to gain additional time, talent, treasure or influence for LPW (10% increase year over year). | | | | | | |
| ○ Objective: Annually capitalize on common interests, track successes, and tell the stories in our newsletter and annual report | | | | | | |
| ○ Tactic: Develop Mission-Focused Effort | | | | | | |
| ○ Tactic: Develop Customer-Focused Effort | | | | | | |
| ○ Tactic: Develop Goal-Focused Effort | | | | | | |

Goal #3: Improve and Sustain Organizational Efficiency and Effectiveness

| Strategy 1: Focus on Communication, Coordination and Feedback Processes | POC | Y1 | Y2 | Y3 | Future | Complete |
|---|------------|-----------|-----------|-----------|---------------|-----------------|
| ○ Objective: Create publicly available synchronization tools by year 3 | | | | | | |
| ○ Tactic: Establish a publicly visible synchronization calendar with monthly Themes / Goals / Challenges (i.e “Volunteer | | | | | | |

| | | | | | | |
|---|--|--|--|--|--|--|
| Recruitment and Appreciation Month) | | | | | | |
| ○ Tactic: Sync communications (such as the newsletter) with calendar highlights and program future communications well in advance | | | | | | |
| ○ Tactic: Establish a readily available historical newsletter library with electronic links to key information (Events, Volunteer Opportunities, Sponsorship Opportunities, Board Opportunities) | | | | | | |
| ○ Objective: Engage in structured communication tailored to each target audience, track and report on communications metrics (i.e. reach, interest, engagements) | | | | | | |
| ○ Tactic: Evaluate and leverage CRM tools | | | | | | |
| ○ Tactic: Integrate website w/key communication and synchronization tools | | | | | | |
| ○ Tactic: Outsource and report on website analytics | | | | | | |

| Strategy 2: Dynamically scale the application of LPW Resources (Time / Talent /Treasure) | POC | Y1 | Y2 | Y3 | Future | Complete |
|--|------------|-----------|-----------|-----------|---------------|-----------------|
| ○ Objective: Increase Capacity by 5% year over year | | | | | | |
| ○ Tactic: Identify and engage volunteers; leverage these resources to free the ED to work more ON the organization vs IN the organization (at least 3 hours more per month) | | | | | | |
| ○ Tactic: Engage the Finance Committee to utilize the budget to assess and report on progress. Focus limited or newly available resources on most valuable programs and events. (Quarterly) | | | | | | |
| ○ Tactic: Focus communications on resourced program goals or on the establishment of resources to reach a stretch goal – identify one per quarter | | | | | | |
| ○ Objective: Annually measure, report and take action based on the success of each programmed/budgeted activity. Eliminate waste. | | | | | | |

| | | | | | | |
|---|--|--|--|--|--|--|
| ○ Tactic: Assess resources required vs. value added in the form of time, talent, treasure and organizational mission accomplishment. Understand the “net” value to the organization. | | | | | | |
| ○ Tactic: Increase high net value activities and eliminate/diminish low net value activities | | | | | | |
| ○ Objective: Leverage Alumni as a Resource | | | | | | |
| ○ Tactic: Recruit Alumni volunteers using targeted techniques outlined in the Strategic Plan (Time) | | | | | | |
| ○ Tactic: Leverage Alumni Skills and connections to obtain high net value capabilities (Talent) | | | | | | |
| ○ Tactic: Leverage Alumni Sponsors and potential sponsors in their networks (Treasure) | | | | | | |
| ○ Tactic: Begin Alumni engagement early in the program recruiting process and integrate engagement expectations in all organizational activities. | | | | | | |

| Strategy 3: Leverage the Board of Regents | POC | Y1 | Y2 | Y3 | Future | Complete |
|---|------------|-----------|-----------|-----------|---------------|-----------------|
| ○ Objective: Establish a Committee Emeritus with 10 engaged Members by year 2 | | | | | | |
| ○ Tactic: Enlist a Committee Emeritus Champion / Chair | | | | | | |
| ○ Tactic: Chair, Chair-Elect and ED document focus topics/problems for committee to address | | | | | | |
| ○ Objective: Structure all Board Meetings to be productive and engaging | | | | | | |
| ○ Tactic: Report out on decisions and results at the end of the meeting and in written follow-up prior to the next meeting | | | | | | |
| ○ Tactic: Establish a document outlining BOR member standards | | | | | | |

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|--|--|--|--|--|--|--|
| and expectations - recruit and retain active and engaged members accordingly | | | | | | |
| ○ Objective: Link Board engagement to Strategic Plan Execution | | | | | | |
| ○ Tactic: Quarterly: Solicit feedback from the Board on the status of specific goals and objectives | | | | | | |
| ○ Tactic: Bi-Annually: Create short-term focus committees to brainstorm and problem solve | | | | | | |
| ○ Tactic: Monthly: Document board input/action and have members endorse their recommendations and report to the whole board | | | | | | |

Goal #4: Improve and Sustain Fiscal Health and Responsibility

| Strategy 1: Align and balance resources w/production | POC | Y1 | Y2 | Y3 | Future | Complete |
|---|------------|-----------|-----------|-----------|---------------|-----------------|
| ○ Objective: Establish a growing Annual Budget (at least 5% year over year) | | | | | | |
| ○ Tactic: Bi-Annually identify & report on unresourced requirements | | | | | | |
| ○ Objective: Establish guidelines to clarify benefits of sponsorship | | | | | | |
| ○ Tactic: Establish multiple sponsorship tiers – packaged and published by end of year 1 | | | | | | |
| ○ Tactic: Explore the syntax of sponsorships – Is partnership a better word? | | | | | | |
| ○ Tactic: Clearly define intent and audience of each sponsorship/partnership | | | | | | |
| ○ Objective: Establish benefits for partnerships | | | | | | |
| ○ Tactic: Conduct cost/ benefit analysis in coordination with partners | | | | | | |
| ○ Tactic: Assign 1 staff and 1 Board member to oversee benefits delivery | | | | | | |

| Strategy 2: Generate multiple and diverse revenue streams | POC | Y1 | Y2 | Y3 | Future | Complete |
|---|------------|-----------|-----------|-----------|---------------|-----------------|
| ○ Objective: Establish a Grant Program | | | | | | |
| ○ Tactic: Find a grant “hound” to identify at least one new grant opportunity each year | | | | | | |
| ○ Tactic: Ensure that all financials and documents are in line and easily accessible to make grant applications less cumbersome. | | | | | | |
| ○ Tactic: Apply for at least one new grant each year | | | | | | |
| ○ Objective: Establish a Micro-Funding Program | | | | | | |
| ○ Tactic: Make online giving platform easy to find & accessible to all | | | | | | |
| ○ Tactic: Ensure that giving platform allows for automatically reoccurring monthly donations | | | | | | |
| ○ Tactic: Engage 200 alumni/donors to give at least \$10/month for one year | | | | | | |
| ○ Objective: Establish business lines as revenue streams | | | | | | |
| ○ Tactic: Emergenetics for a fee | | | | | | |
| ○ Tactic: Leadership training / with tuition (Future Goal) | | | | | | |
| ○ Tactic: Board skills training for a fee (Future Goal) | | | | | | |

| Strategy 3: Educate and Practice Governance and Fiduciary Responsibility | POC | Y1 | Y2 | Y3 | Future | Complete |
|---|------------|-----------|-----------|-----------|---------------|-----------------|
| ○ Objective: Begin working with an Accounting Firm (Year 1) | | | | | | |
| ○ Tactic: Engage in monthly review of financials (Year 1) | | | | | | |
| ○ Tactic: Identify areas where LPW needs to improve policies and procedures (Year 1) | | | | | | |
| ○ Tactic: Develop a handbook of financial policies (No later than year 2) | | | | | | |
| ○ Objective: Conduct an Internal Audit | | | | | | |
| ○ Tactic: Year one, Quarterly Compiled | | | | | | |
| ○ Tactic: Year one, Annual Review | | | | | | |

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|---|--|--|--|--|--|--|
| ○ Tactic: Year two, Internal Audit | | | | | | |
| ○ Objective: Conduct Bi-Annual External Audit | | | | | | |
| ○ Tactic: Year two, External Audit | | | | | | |
| ○ Tactic: Further refine policies and procedures | | | | | | |
| ○ Tactic: Schedule second audit for year four | | | | | | |