Get Strategic, Part 2: How to Develop a Strategic Plan that Empowers your Group
Hosts and Presenters

Hosts

Maricarmen Smith-Martinez  RPCV Costa Rica,
    Affiliate Group Network Coordinator, NPCA Board of Directors
Anne Baker  RPCV Fiji, Vice President, NPCA

Presenters

Katie Muller  RPCV Cambodia,
    Philadelphia Area Peace Corps Association
Don Drach  RPCV Liberia, Friends of Liberia,
    Peace Corps Community for Refugees
Patricia Wand  RPCV Colombia, Friends of Colombia,
    Committee for a Museum of the Peace Corps Experience
1. Welcome and introductions  - Maricarmen
2. Review of webinar #1 and objectives for webinar #2 - Katie
3. Planning in “Lite” Mode - Katie
4. Planning in a re-vitalizing organization - Don
5. Planning for an ambitious project and growing organization - Pat
6. Questions and discussion - Maricarmen
Participants will

- Understand what a strategic plan is, what’s in a plan, and how it can benefit their group
- Learn a vocabulary and process, enabling them to undertake strategic planning
- Be introduced to three different approaches to strategic planning based on each group’s purpose and needs
What is a strategic plan?

- A process and a document….and a way of thinking
- Road map that tells you
  - where you are and where you want to go
  - how you’re going to get there, and,
  - when you get there
- Vehicle for communicating internally and externally
Context
- Waning membership
- Leadership transitions
- NPCA changes

Planning “Lite” = 1 day Board retreat

Keys to success
- Plan ahead: Agenda and background materials
- Start from mission
- Use the right tools
- Realistic evolution
- Built-in accountability for measurable outcomes
Friends of Liberia (FOL)
Strategic Planning Process: Essentials

- Communication
- Consultation
- Consensus
- Impact - answers the ‘so what?’ question
<table>
<thead>
<tr>
<th>March 2012:</th>
<th>April</th>
<th>May</th>
<th>June</th>
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</thead>
<tbody>
<tr>
<td>Board creates strategic planning task force (TF)</td>
<td>TF drafts vision, mission and core values - Environmental scan/SWOC begins</td>
<td>Environmental scan</td>
<td>Environmental scan</td>
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<tr>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October - December</th>
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<tbody>
<tr>
<td>Interim report to board - Vision, mission, core values approved and SWOC analysis agreed</td>
<td>Four strategic issues and supporting goals and objectives drafted by TF</td>
<td>Draft strategic plan presented and discussed at board meeting.</td>
<td>Communication - Consultation - Consensus</td>
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<tr>
<th>January 2013</th>
<th>February</th>
<th>March</th>
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<tr>
<td>Final draft sent to board</td>
<td>Final updates made and re-circulated to board for fatal flaw review</td>
<td>Board adopted FOL Strategic Plan 2013-2018</td>
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# FOL - Environmental Scan

## Strengths
- 50+ year presence in Liberia
- Brand awareness/credibility
- Strong personal and professional relationships
- Motivated members

## Weaknesses
- Overhead/admin costs too high
- No program M&E
- Aging membership, no membership database
- U.S.-based, U.S.-centric
- Uneven levels of commitment by board members
- Lack of funds
- No shared vision/mission
- No long-term plan

## Opportunities
- President Ellen Sirleaf ("international darling")
- Peace Corps returning to Liberia
- The Liberian people

## Challenges
- Liberia 14-year civil war
- Corruption
- Identifying and recruiting new FOL leadership
- Funding
- Challenge ourselves:
  - Become a small organization that thinks big
  - Turn talk into action, and action into results
<table>
<thead>
<tr>
<th>Task</th>
<th>Point of Contact</th>
<th>Status</th>
<th>Documentation</th>
<th>Issues/Concerns</th>
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<tbody>
<tr>
<td>Complete case statement, landscape paper and mapping</td>
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<td>[New Orleans Board Meeting .ppt]</td>
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<tr>
<td>Develop strategic work plan and design evaluation</td>
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<td>[Education Working Group Folder Dropbox]</td>
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<td>Start with a radio program</td>
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<td>Complete Ashoka nominator training</td>
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<td>Explore you/adult literacy via text messaging</td>
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<td>Research family literacy as a target audience</td>
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<td>Identify a promising community for pilot</td>
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<td>Develop initial budget</td>
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Committee for a Museum of the Peace Corps Experience (CMPCE)

Context for planning

- Founded as 501(c)3 in Portland, Oregon, 1999
- Expanding from regional to national focus - beginning 2016
- Ten widely dispersed members, dependent on Zoom
- Decided on realistic museum program - virtual & physical
- Established programmatic topics - collections, development, website, bylaws, etc.
Scheduled Planning Retreat - Denver, pre-PCC, August 2017

Delegated responsibilities to plan details, e.g.
- Retreat schedule/Social functions/Facilities/Food/Supplies

Decided on facilitator

Topic groups formulated discussion questions

Agreed on Retreat purpose
- Get to know one another
- Strategize and plan expansion of Museum program
- Write strategic and business plans
- Determine goals and objectives for immediate future
10 CMPCE members joined by 3 ‘consultants’

Introductions included ice-breaker

Environmental Scan -
  - SOAR – Strengths, Opportunities, Aspirations, Results
    (Source: Appreciative Inquiry)

Combined plenary and small group discussions

Vision / Mission exercise

Discussions lead to ‘strategic initiatives’
• Wrote Vision and Mission statements - adopted Feb 2018
• Wrote the Strategic Plan, incl goals - adopted Feb 2018
• Lead to Operations Plan with goals & detailed actions - adopted Feb 2018
• Impact of Strategic Plan
• Impact of Operations Plan
  ○ Helps each Subcom focus on its commitments
  ○ Keeps group moving forward toward common goals
GUIDING PRINCIPLES

● Strategic planning is not about perfecting the past but creating the future

● Process is as important as the final product

● Be inclusive

● Keep it real

● Strategic planning is an evolutionary, not revolutionary, process
QUESTIONS & DISCUSSION

- Ask questions
- Share concerns
- Tell examples of planning from your experience

How can NPCA help your group plan and expand?
Thank you for participating

Hosts

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