

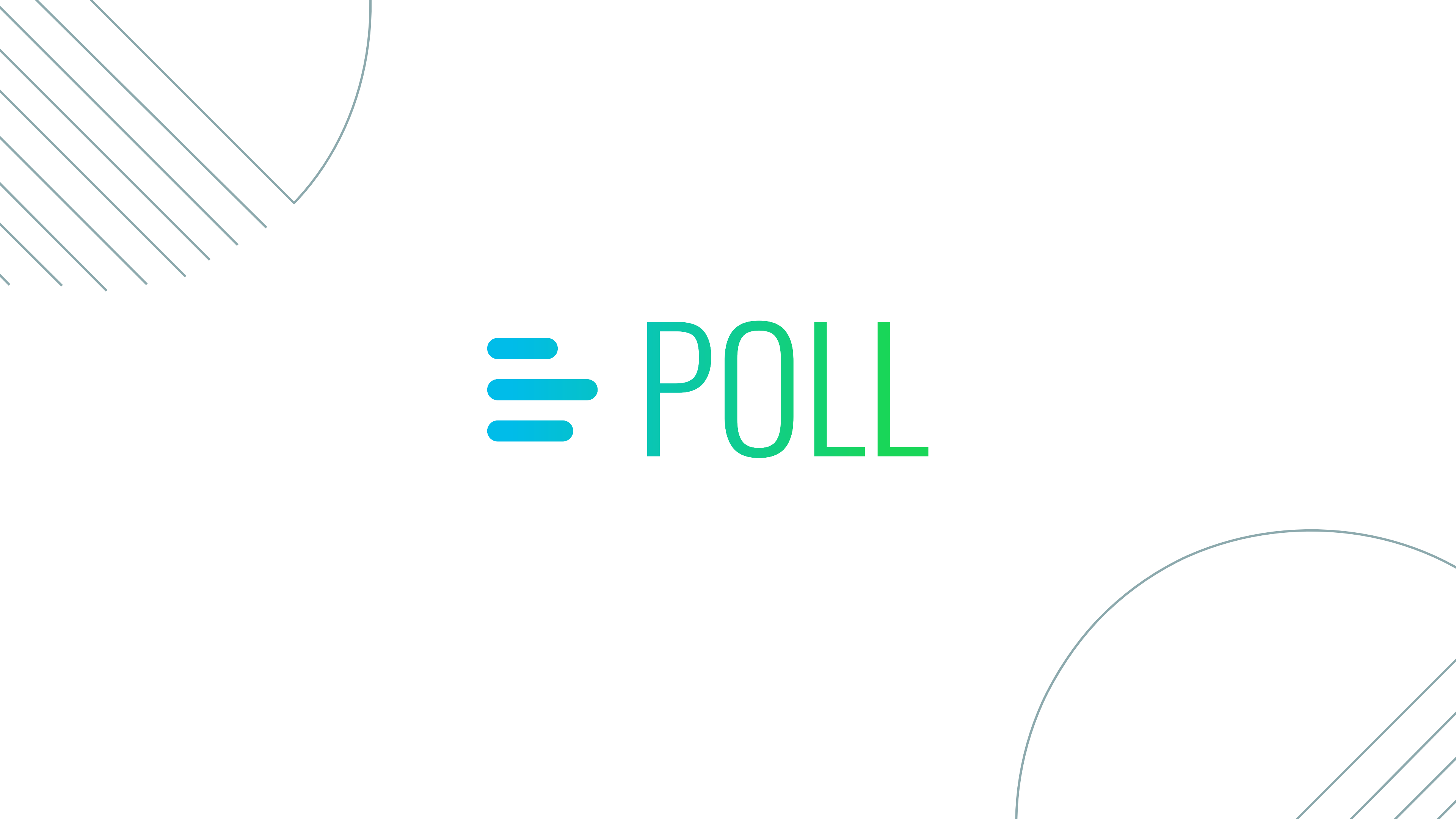


DESIGNING FOR *success*

STRATEGIC PLANNING TOOL KIT
FOR CHAPTER LEADERS



**"THE BEST WAY TO
PREDICT THE FUTURE
IS TO INVENT IT"**



≡ POLL



WHAT IS STRATEGIC PLANNING?

- Strategic planning is like creating a roadmap for your chapter's future.
- It helps you see where you are, where you want to go, and how to get there.
- It's about making sure every effort counts toward a bigger goal.

*With a plan, you're not just moving,
you're moving with purpose and vision.*



Focus Areas



01 - RELEVANCE

Strategic planning helps chapters **stay connected** to what members need. By checking in regularly and setting goals, your chapter will always **offer something valuable and meaningful**, staying relevant as things change.

02 - RESILIENCE

Having a plan makes your chapter **strong** and **ready** to face challenges. It guides you through tough times, ensuring your chapter remains **stable** and can keep **making an impact** for years to come.

03 - INNOVATION

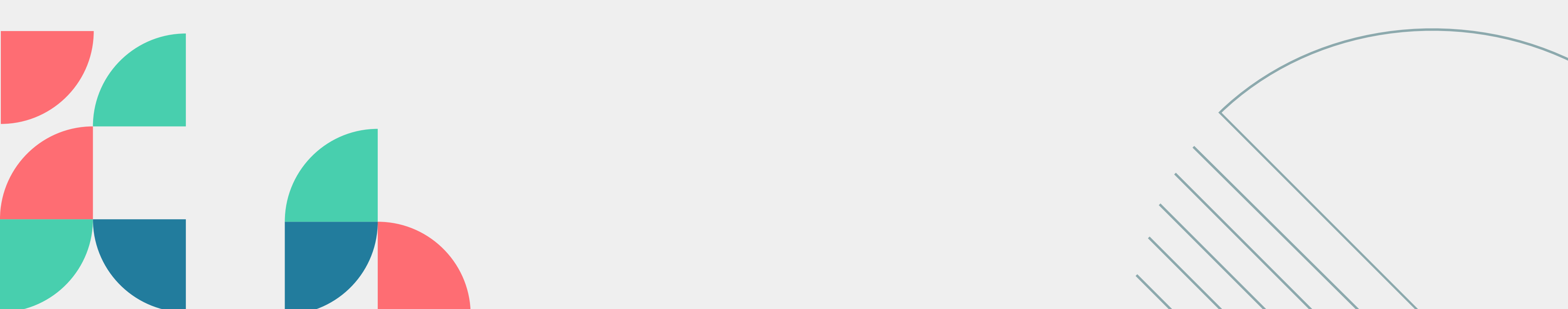
Strategic planning encourages **fresh ideas** and new ways of doing things. It creates space to **explore** and try innovative solutions that keep your chapter **ahead of the curve**, always ready for what's next.





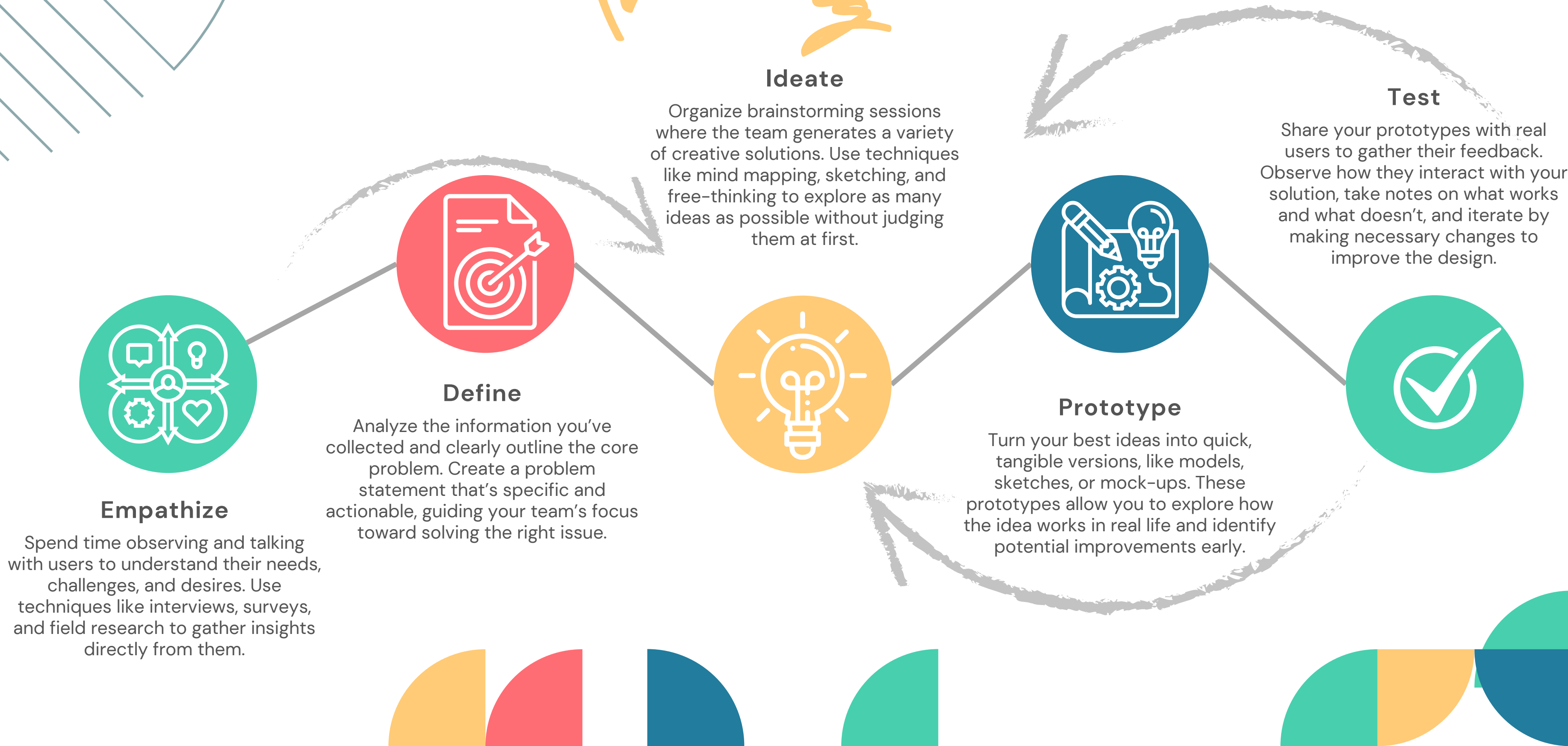
DESIGN THINKING

Design thinking is about understanding people's needs and coming up with creative solutions to help them. It encourages teams to think big, work together, and try new ideas to create something that truly makes a difference.



DESIGN

Thinking



YOUR INVITE WAS LOST IN THE MAIL



Individuals who tend to dominate conversations, overshadowing others and not allowing space for diverse ideas.



Those who are quick to criticize or dismiss ideas without offering constructive feedback, which can stifle creativity and collaboration.



People who are inflexible and resistant to new perspectives or unconventional solutions, making it difficult to explore diverse approaches.



Those who want quick results and lack the patience for iterative or exploratory processes, which are key to design thinking.



Individuals focused on personal recognition or advancing their own ideas at the expense of team collaboration, which can derail collective progress.



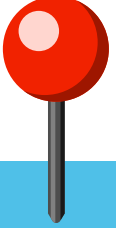
THE ROOM WHERE IT HAPPENS



*Representation &
Diversity of Perspectives*

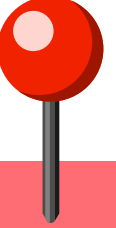


CREATE RULES OF ENGAGEMENT



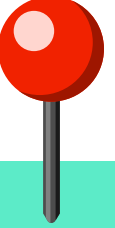
*Say
"Yes, And"*

Build on others' ideas to keep the conversation collaborative and constructive.



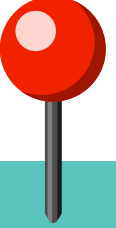
*Suspend
Negative
Judgment*

Encourage an open-minded approach where ideas can flow freely without immediate criticism.



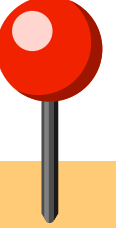
*Listen
Actively and
Empathetically*

Understand the perspectives of others fully before responding, fostering better communication and solutions.



*Stay Focused
on the User*

Keep the user (member or customer) at the center of the discussion to ensure solutions are human-centered.



*Ask "How
Might We"
Questions*

Frame challenges positively, encouraging a mindset focused on possibilities and solutions.

POWERFUL QUESTIONS

How might we ?

What is a "How Might We" Question?

- A creative problem-solving tool that encourages open-ended thinking.
- Begins with "How might we" to frame challenges as opportunities.

Why Use "How Might We"?

- Invites collaboration by focusing on possibilities, not limitations.
- Shifts thinking from a problem-focused to a solution-oriented.

*Encourages optimistic exploration, focus on what can be done,
opening up pathways for creative solutions!*

Examples:

- How might we make our member benefits more accessible to emerging professionals and new talent?
- How might we recognize agency accomplishments?
- How might we ensure sustainable fundraising?



TECHNOLOGY TO SUPPORT COLLABORATION



Hide Search Add Poll Add Survey

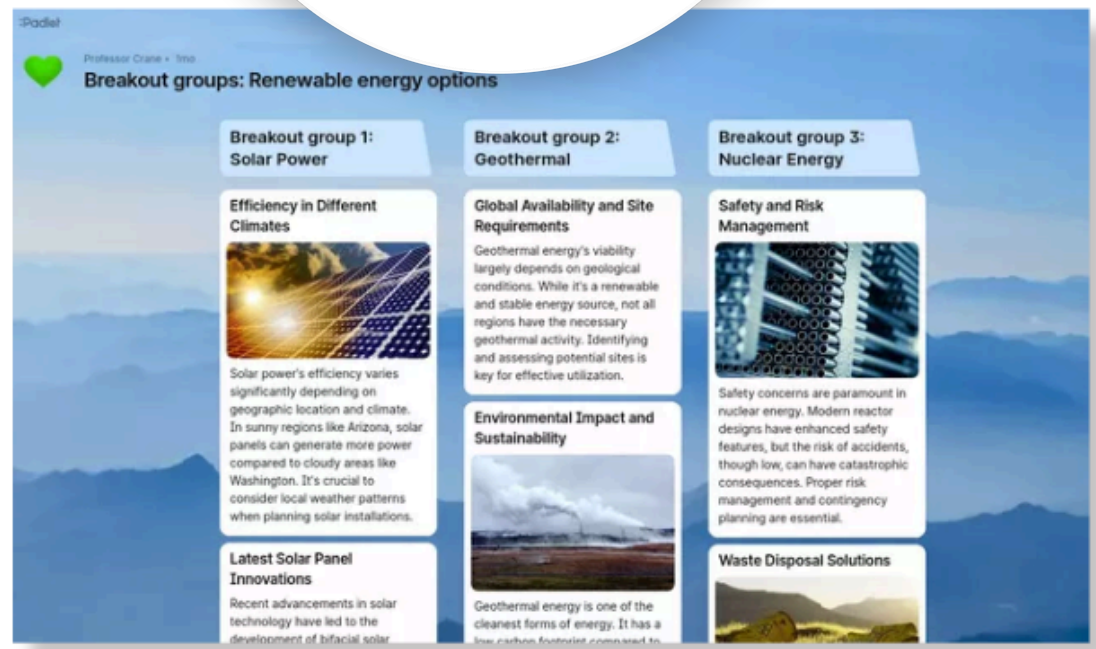
Search For Surveys

Category < All Categories >

Active Only ☐ Search

Search Results

Title	Category	Last Updated	Status	Resp. Count
Member Needs Analysis	Feedback	9/11/2024	Closed	0
2024 Board President Election	Elections	1/9/2024	Active	0
All-Time Favorite (Poll)	Polls	4/26/2022	Active	0



PRACTICE MAKES PROGRESS

Example:

How might we better *encourage seasoned
professionals* to *mentor new talent*?



padlet

How might we

_____to
(ACTION YOU WANT TO ACHIEVE)

_____to
(SUBJECT TO BE INFLUENCED)

_____?
(WHAT YOU WANT TO ACHIEVE)



ANALYSIS

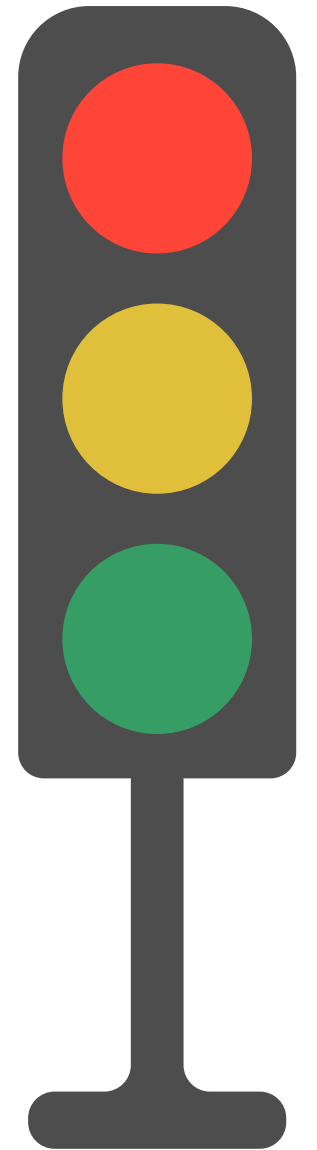
Start by focusing on the people you're solving for—understand their needs, challenges, and perspectives. Break down complex problems into manageable pieces and think creatively about solutions.

MOMENTUM SHIFT

Stop. Start & Continue

What are we doing right? When should we consider going left?

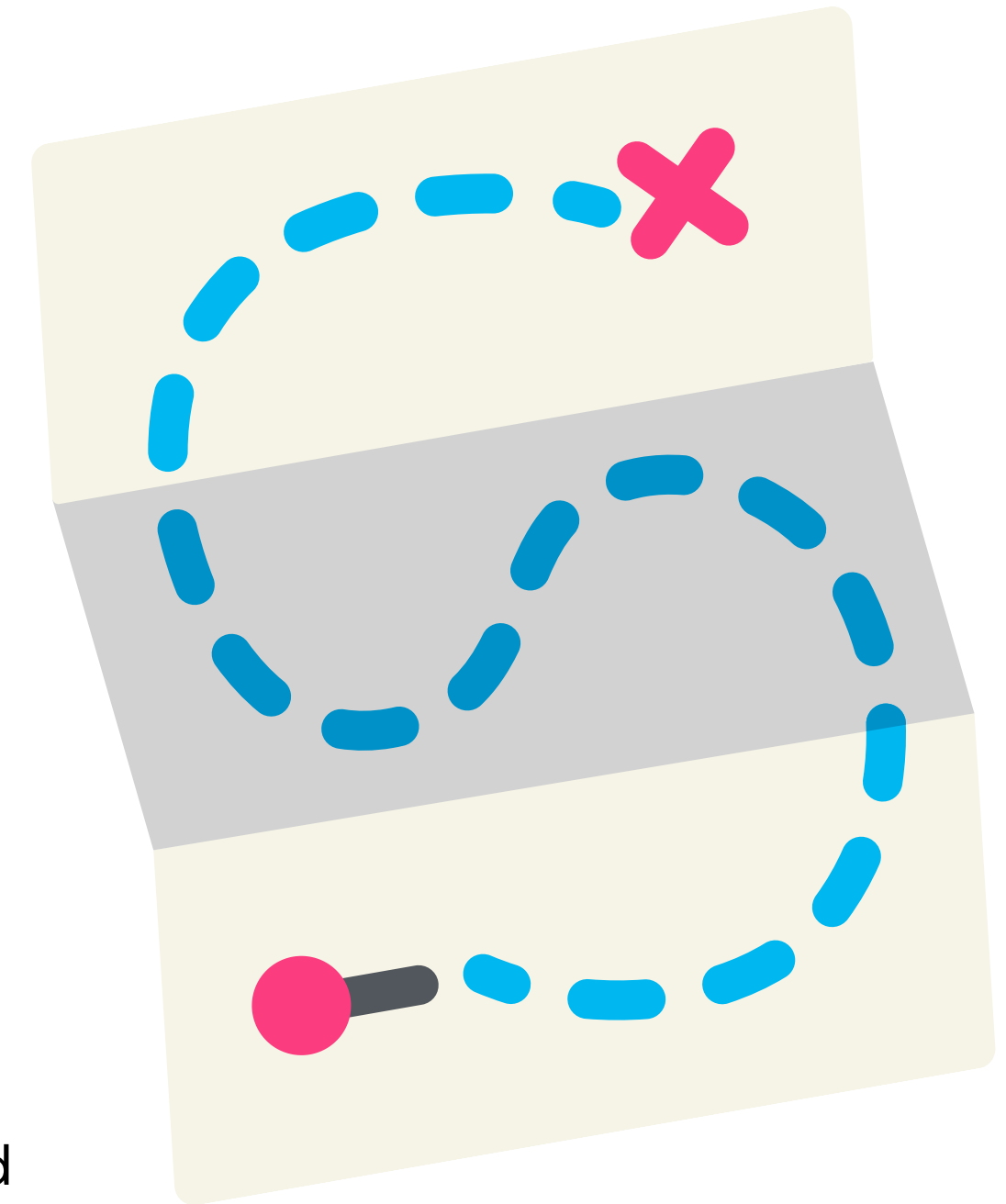
- Organize participants based on core activities and key member benefits. Explain that each group will evaluate chapter actions within their focus area.
- In each group, brainstorm under three categories:
 - *Stop: Ineffective practices to discontinue.*
 - *Start: New initiatives to improve their area.*
 - *Continue: Successful practices to maintain or expand.*
- Facilitate a discussion to identify common themes and important differences.



EXPERIENCE *Navigator*

**Where do our members' journeys begin?
What paths do they follow?
How can we create a fulfilling experience?**

- Guide participants through creating a journey map for a member's interaction with the chapter.
- Focus on key touchpoints, such as joining the chapter, participating in events, recognizing achievements or becoming a volunteer.
- This exercise will highlight both positive experiences and areas for improvement.

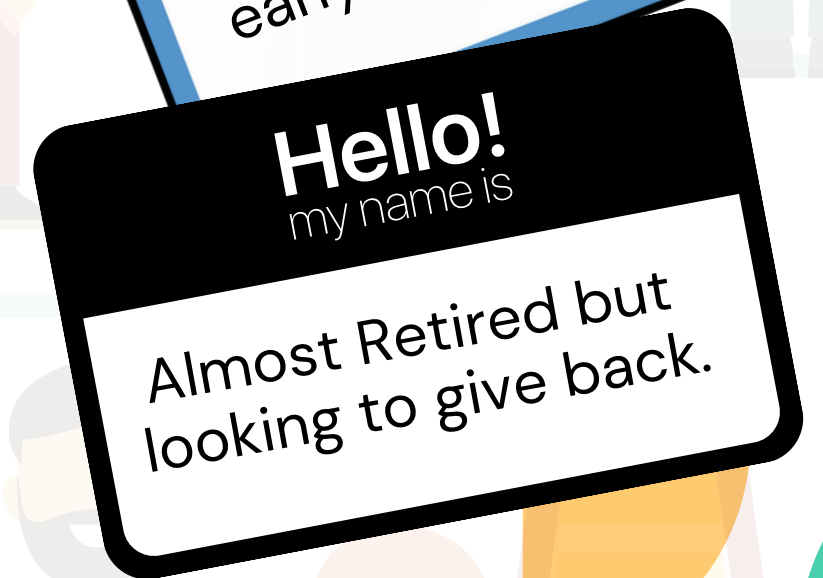


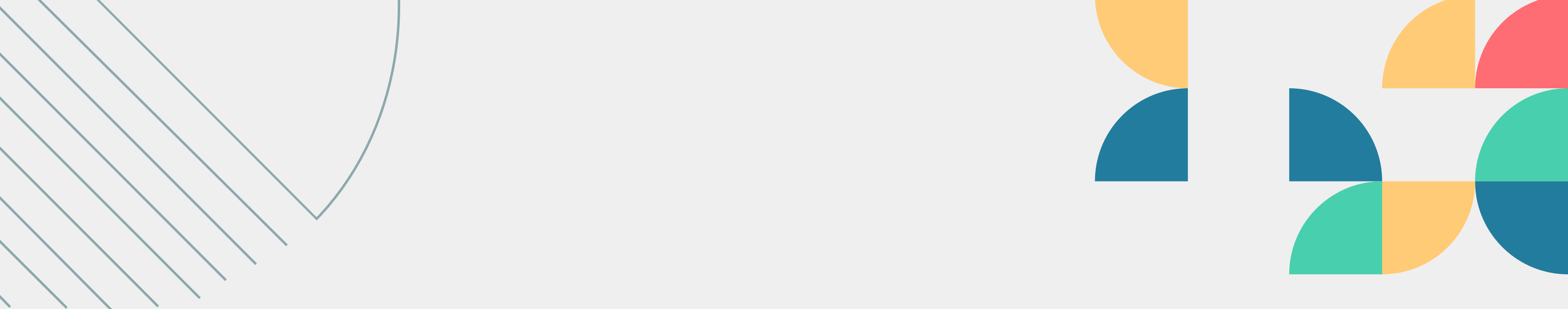
GUESS WHO?

you and me too!

Who are our members today, and who will they become tomorrow?

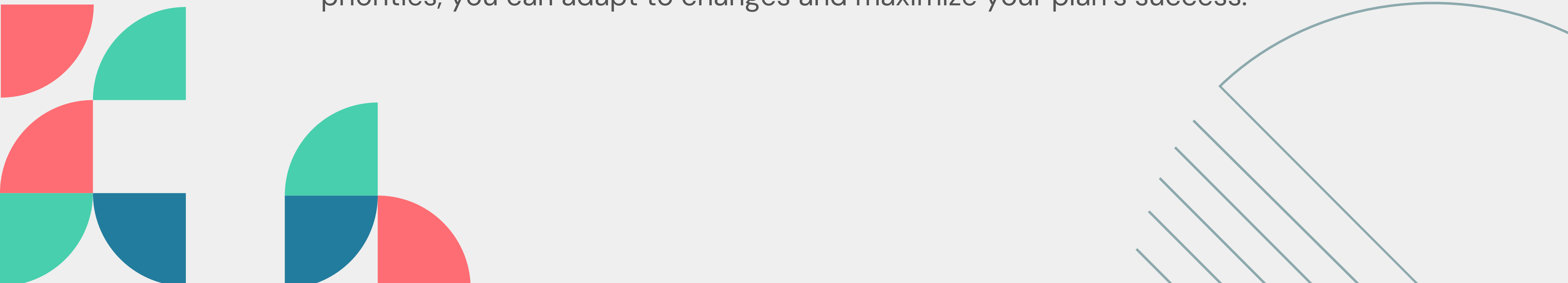
- Develop personas representing the diverse members of the chapter, such as long-time members, new members, non-engaged members, young professionals and chapter leaders.
- These personas help ensure that strategic decisions align with the real needs and expectations of different groups within the chapter.
- Discuss member activities and benefits to ensure that each of these provide a service to your membership.





PRIORITIZING

Prioritizing in your strategic plan ensures you focus on the most impactful actions, using your resources and time effectively. It helps you address key goals first, preventing distractions and keeping you aligned with your vision. By setting clear priorities, you can adapt to changes and maximize your plan's success.



SHOW ME *The Money*

Have a list of ideas or initiatives? How do you decide?

- Provide each participant with a budget of \$50.
- Participants can use their budget to “fund” the improvements they find most advantageous.
- Determine which initiatives have crowdsourced the most funding.

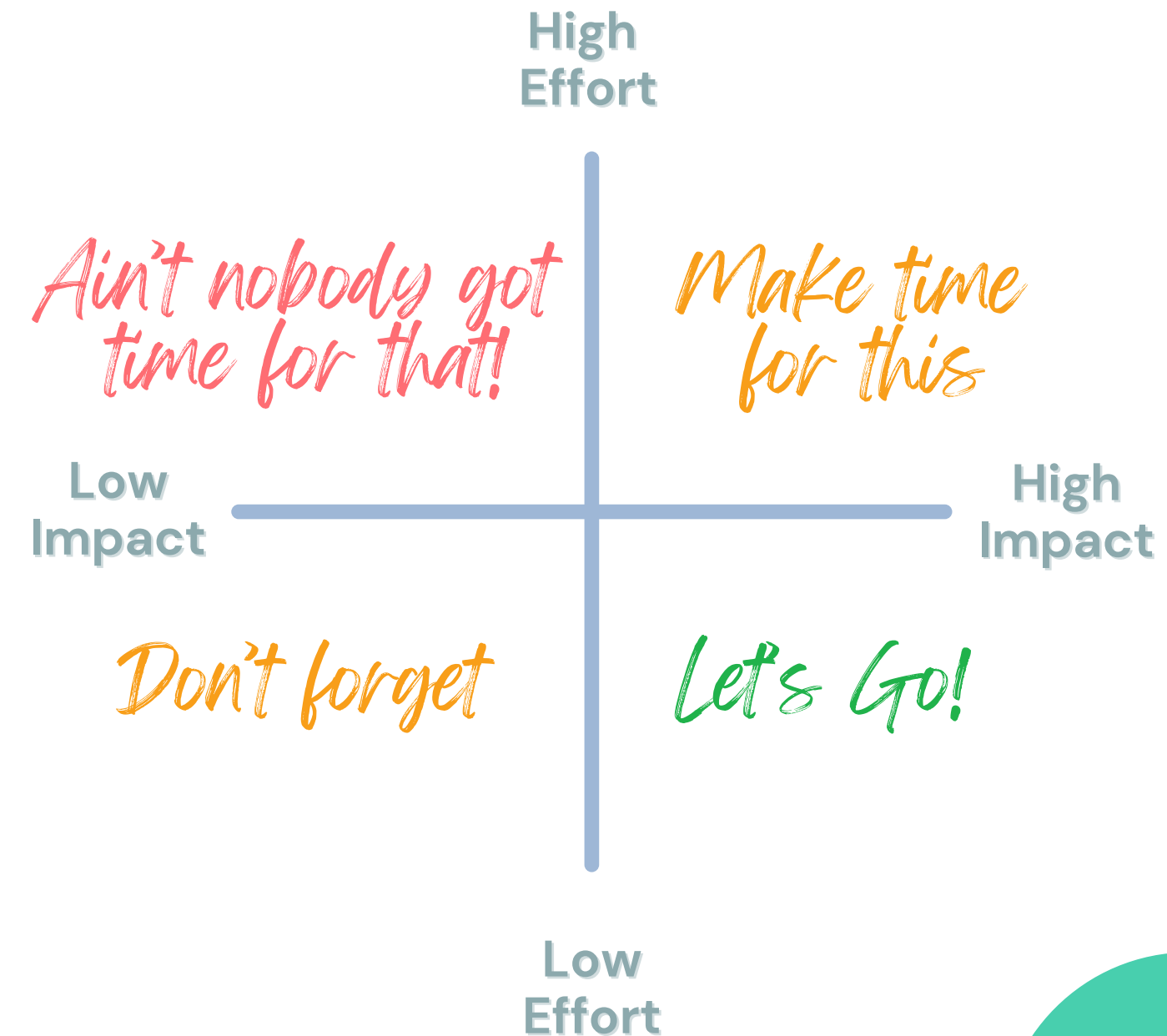


IMPACT

Over Effort

Have a list of ideas or initiatives? How do you queue them?

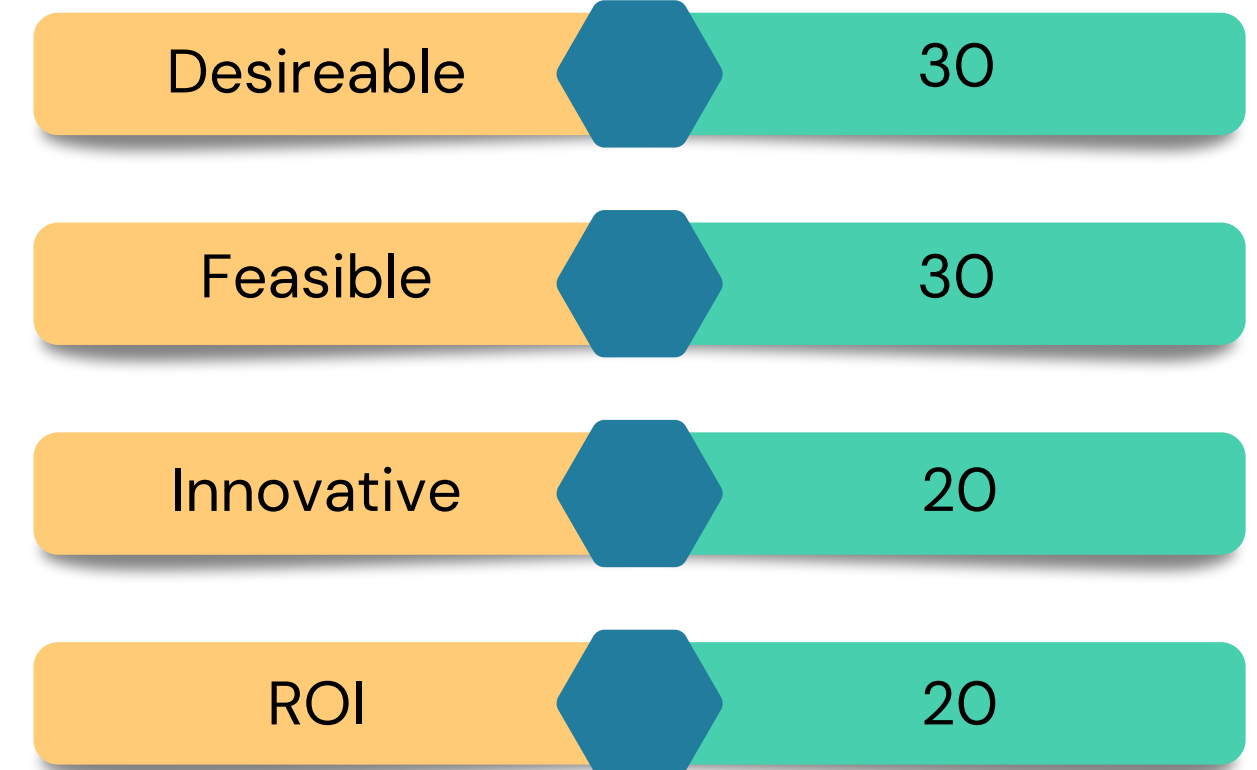
- Evaluate Initiatives based on the impact they provide versus the effort required.
- Items that have high impact and low effort are the first priority.
- Items that are high impact and high effort are the second priority. These require thoughtful planning.
- Items that are low impact and low effort may still be worth doing as a third priority. Even small initiatives contribute to valuable member benefits.
- Items that are low impact and high effort should be on the chopping block!

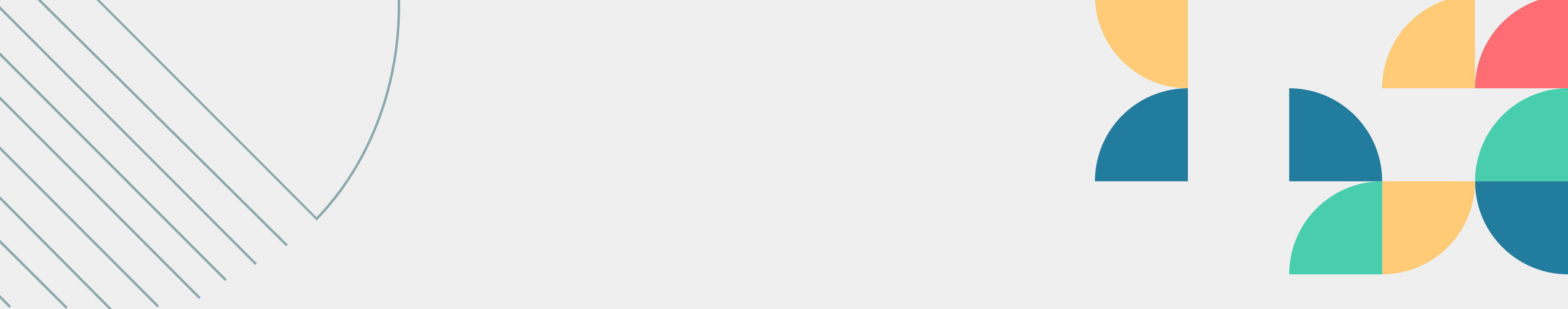


IT'S TIME TO *Weigh In*

Have a list of ideas or initiatives? How do you evaluate them?

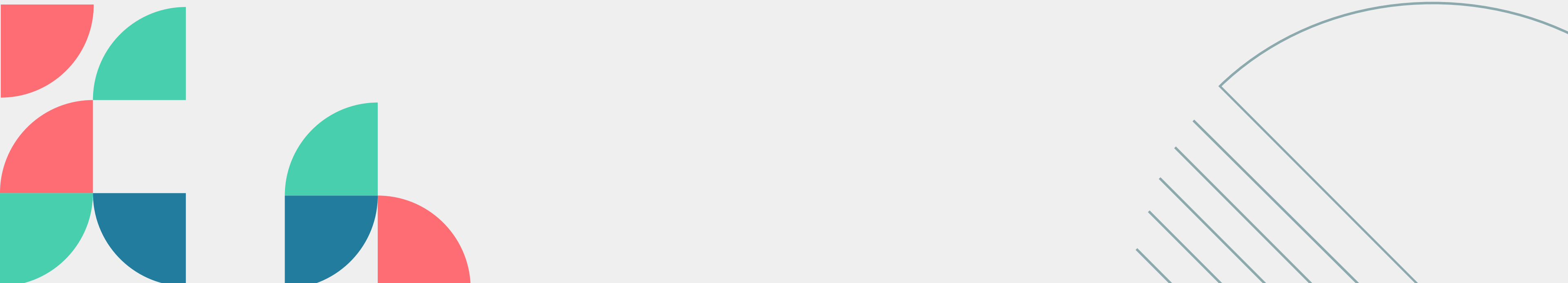
- Evaluate Initiatives based on the impact they provide by assigning weighted criteria.
- Facilitate a discussion to either come to consensus or move to average.
- Select initiatives with the highest weighted score for consideration to advance.





ENGAGEMENT

Facilitation is key to creating an engaging experience that provokes buy-in. It requires fostering open dialogue, encouraging diverse ideas, and making participants feel heard. By guiding discussions with empathy, clarity, and inclusivity, facilitators inspire ownership of outcomes, ensuring that every voice contributes to the shared vision and solution-building process.



FACILITATION Templates



FACILITATION

Recipes

Low

- Survey the membership on existing member benefits and desired benefits. (1 Hour)
- Facilitate a discussion with the Board to evaluate the feedback. (1 Hour)
- Rank recommendations from the members using weighted criteria and select three initiatives with the highest weighted score for consideration to advance. (1 Hour)

-

- Hold a Focus Group with representative group before a chapter meeting (1 Hour)
- Facilitate a discussion with the Board to evaluate the feedback. (1 Hour)
- Rank recommendations from the members using weighted criteria and select three initiatives with the highest weighted score for consideration to advance. (1 Hour)

Medium

- Hold a Focus Group with representative group (4 Hours)
- Facilitate a discussion with the Board to evaluate the feedback. (1 Hour)
- Facilitate a prioritization exercise with the Board. (1 Hour)

-

DAY 1

- Hold a Focus Group with representative group (4 Hours)
- Complete a post-work exercise or Survey (1 Hour)

DAY 2

- Facilitate a discussion with the Board to evaluate the feedback. (2 Hour)
- Facilitate a prioritization exercise with the Board. (2 Hour)

High

PREWORK

- Facilitate a pre-work Exercise or Survey (1 Hour)

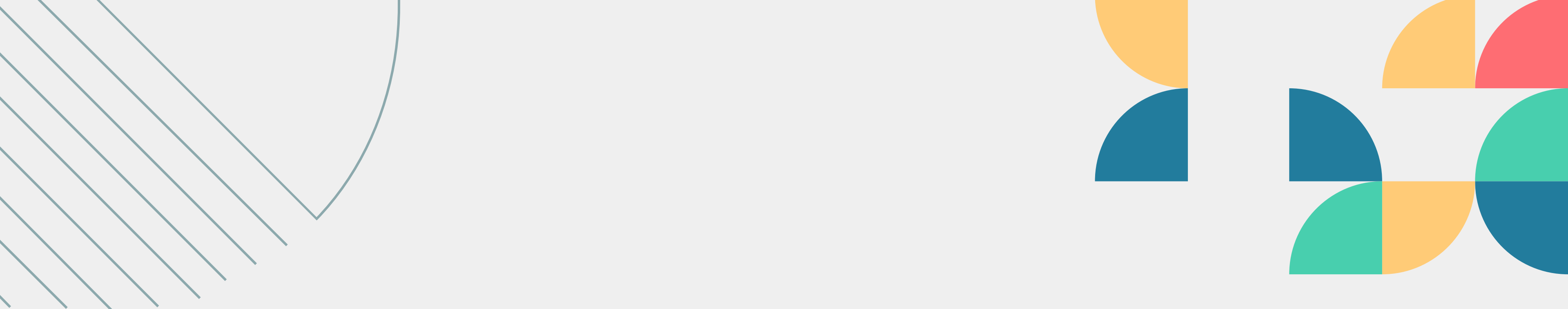
DAY 1

- Hold a Focus Group with representative group (4 Hours)

- Complete a post-work exercise or Survey (1 Hour)

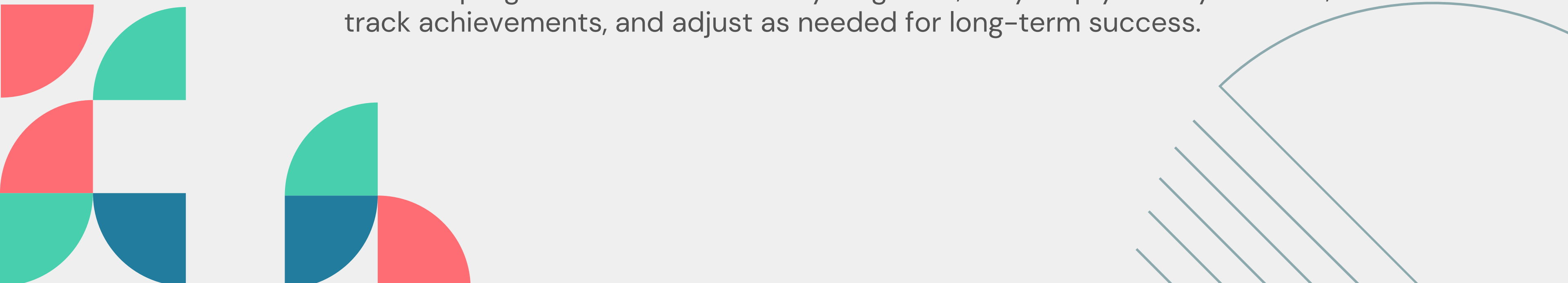
DAY 2

- Facilitate a discussion with the Board to evaluate the feedback. (2 Hour)
- Facilitate a prioritization exercise with the Board. (2 Hour)



VISIONING

Visioning and setting a timeline are crucial in your strategic plan because they give you a clear direction and measurable milestones. A strong vision guides your actions, while a timeline ensures progress and accountability. Together, they help you stay focused, track achievements, and adjust as needed for long-term success.





If you're struggling to find volunteers to help execute your plan.

Your plan is not ready.



Achievable Plans

Generally, limit your strategy to two terms for agility, relevance, and sustained progress.
Shorter plans help your chapter stay adaptable and focused on achievable goals.

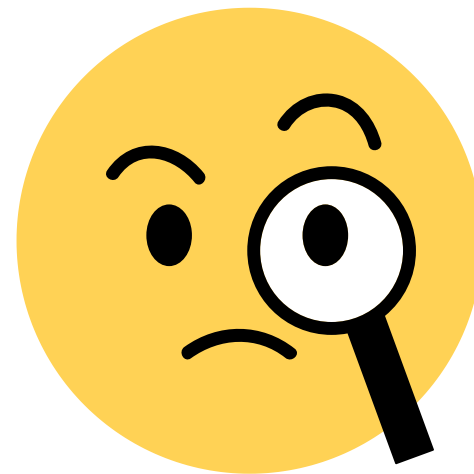
1

**CREATE
AND MAINTAIN
EXCITEMENT**



2

**SET CLEAR,
GOALS AND A
SHARED VISION**



3

**LEAVE CAPACITY
FOR NEW
IDEAS**



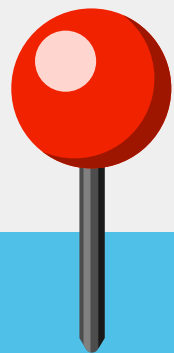
Keep it Simple

Strategic Plan
Board Recommendations

STRATEGIC PLAN ACTIONS

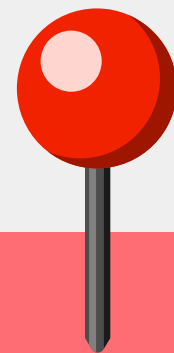
NO.	OBJECTIVE	INITIATIVE(s)	PRIORITY (High/Mod./Low)	CHAMPION (Prototype/Test)	2024	2025	2026
1	Succession & Leadership						
2	Resilience						
3	Innovation						

Final Thoughts



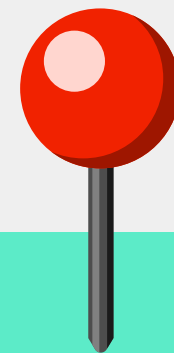
*Lead with
Empathy*

Understand your members' needs and put their experiences at the center of decisions.



*Embrace
Vulnerability*

Create a safe space for tough questions, bold ideas, and open feedback.



*Prototype
Boldly*

Test ideas early, learn from results, and adapt quickly. Fail forward! Be fearless.



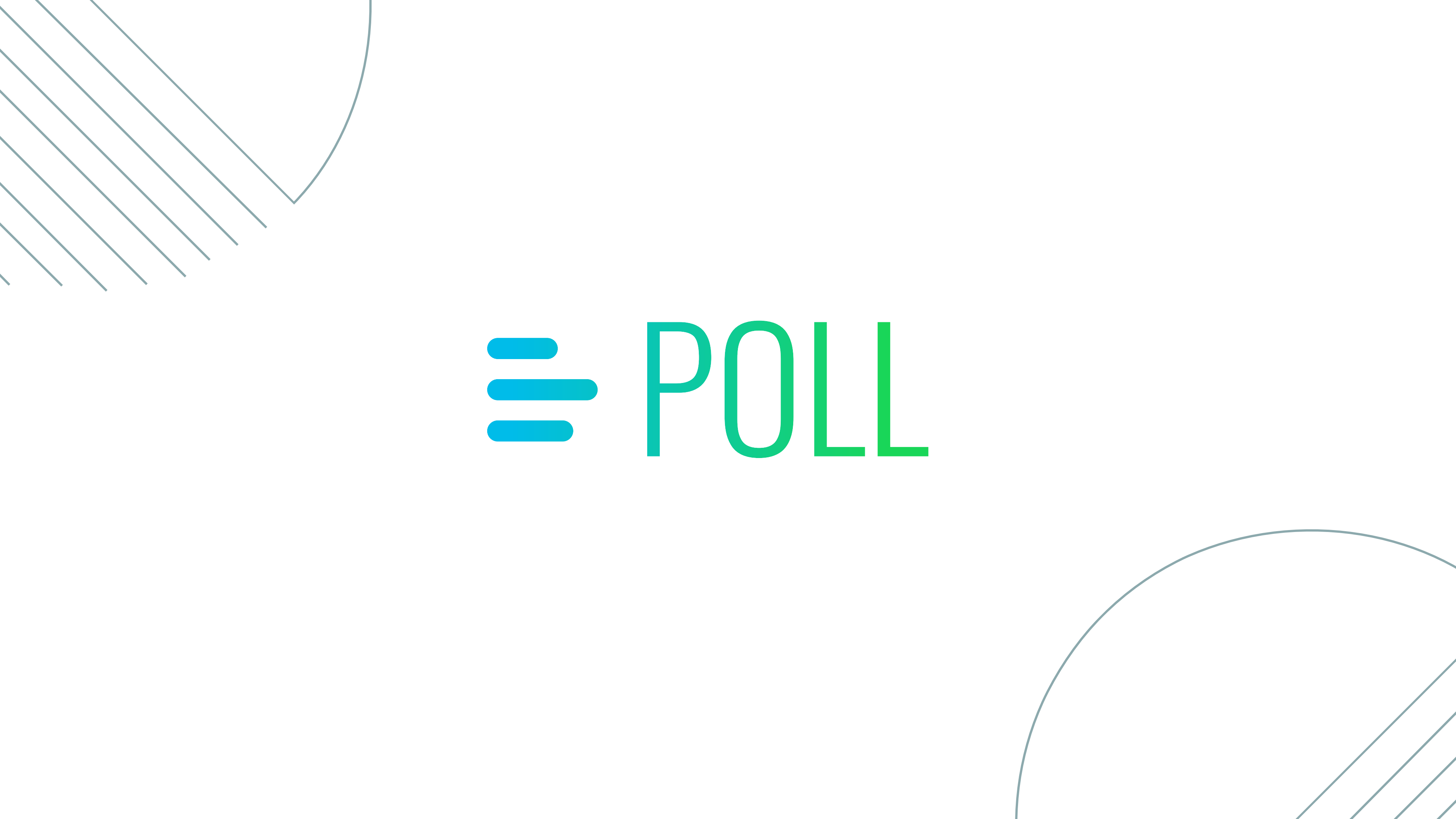
*Design for
Tomorrow*

Create adaptable strategies to ensure your chapter stays relevant.



*Commit to
Innovation*

Continuously evaluate and evolve to create lasting value for members.



≡ POLL



THANK YOU

<https://www.nigp.org/chapters/chapter-resources>

Subject Matter Expert
Request Form





[QR CODE]