

EAPA Chapter Toolkit

Strategic Planning for Chapters

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Introduction

Developing a strategic plan can be a challenging task, but not an insurmountable one. Associations have a unique challenge in that volunteer leaders with limited time of service do the work of developing and implementing a strategic plan. With the certain changing of the guard, it can be difficult to execute and sustain the plan from one administration to another. However, if the chapter leadership and members make a commitment to see the plan through to completion, new leaders can use it as a stepping-stone of continuity, rather than reinventing the wheel with every election.

Developing the Plan

The first and most important part of the process is visualizing what you would like to achieve. Like the Southwest Airlines slogan you must be able to determine “where you want to go today.” In the initial stages of development, it is helpful to approach the process with brutal honesty, asking the members and chapter leadership, “what has worked in the past and what has not?” Secondly, you should review EAPA’s strategic plan (*see attachment*), so that your chapter’s plan will align and support that of the Association’s. This is not to say that point for point you should imitate the Association’s strategic plan, but that it should be an integral part of yours. Thirdly, be sure to access the assistance you need in working out the plan. You may even want to utilize an association management executive or consultant with expertise in this specific arena. This one-time investment may prove to be far-reaching and offer a viewpoint you may not have considered. Lastly, allot a generous time period for brainstorming the initial points of the plan—possibly a one or two day planning session where chapters leaders can collaborate to complete a draft of the plan.

Core Components of the Plan

Bear in mind that a good strategic plan should include the following core sections: a mission and vision statement, identification of the constituents served, goals that support the mission and vision, and specific strategies and tasks to achieve success. Shaping a mission and vision statement is one of the most important tasks, as it sets the tone for the future and helps define the purpose, intended direction, and the short and long term goals of the chapter. Also any mission and/or vision statement of an EAPA chapter should support the Association’s, [mission and vision](#).

After setting the foundation for the plan, an equally important task is clearly defining the identified target audience or constituency group that will be served by the strategic plan. Chapter leaders can evaluate their member constituency group or target audience by meticulously examining the composition of the chapter, professional community, and those affected by your advocacy and programming initiatives. Additionally, in completing this area of the plan, leadership should also identify external influences (opportunities and threats), and internal influences (strengths and weaknesses).

Now that the two major components of your plan have been outlined, you are prepared to expand them into specific goals. This phase can be somewhat tricky, as the optimistic tone of the process can prompt leadership to set too many goals for the time period allotted for the implementation and execution of the plan. For this reason, leaders are encouraged to set no more than 3 major goals for inclusion in the strategic plan. Given the challenges currently facing the Association as well as the desire of chapters to

remain viable and promote the value of the EA profession and professional, it may be prudent to include the following topics among your goals:

- Increase chapter membership by certain percentage.
- Increase member retention rate by certain percentage.
- Gain increased visibility for the EA profession and professional in various mediums (government, media, and selected publics)
- Use technology to better communicate with members and create a variety of forums for knowledge exchange (on-line publications, virtual meetings, list serves, distance learning, etc.)

Also closely tied to these goals are objectives, strategies and tasks that must be carried out to achieve them. This is the area where committees and members are involved and where the “grassroots” work really comes into play. Therefore, it is extremely important to hold an extensive review session so that your major stakeholders—*the members*, have the opportunity for input and the ability to influence and reshape the plan as necessary.

Reviewing the Plan

The next phase of the strategic planning process should allow for a review of the initial document drafted by leadership. As stated previously, the plan should be distributed to the membership so that leadership can ask the hard questions, and obtain the answers that will ultimately determine the viability and ultimate success rate of the strategic plan. A few questions the chapter may put forward are:

- Will the objectives, strategies or programs outlined meet the needs of the constituency?
- Does the chapter have the financial resources to execute the plan effectively?
- Can the goals of the strategic plan be realized within the time frame outlined in the strategic plan?
- Does the chapter have resources (willingness, ability, member support) to achieve the goals?
- Will the plan produce the desired results?

If there is tremendous opposition or if it is determined that some of the goals are not feasible, then the chapter should take this review period as an opportunity to refine or amend the plan to produce the results needed. However, if these pertinent questions or those defined by the chapter have been asked and affirmed, then the chapter can proceed towards the implementation stage.

Implementing the Plan

Once the final version has been accepted, the last phase of the strategic plan process is actual implementation. Copies of the plan should be disseminated to the membership and included on the chapter website and newsletter if available. The key factor at this point is awareness. The entire chapter must be cognizant of the focus and aim of the body as outlined in the strategic plan. Simply put, if you are *aware*, then you can *execute*. Though chapter leaders are responsible for the accomplishment of the tasks, membership can and should support the actual execution of the plan.

Another key component task in the implementation stage are periodic updates and evaluation. In other words, perform check-ups to gauge progress and areas that may need additional resources to be successful. Chapters may include periodic updates at chapter meetings, as well as an annual review. It is essential that the strategic plan be included in membership packets and other correspondence with new members and those re-connecting after a significant period of absence. If at this delicate stage of their affiliation, they can see an innovative plan of action, their connection with the chapter may be strengthened.

Lastly, it is vital for chapter officers to remember that though the strategic plan has a specific agenda and an expectation of certain results, it is a living document and should allow for growth, changes and

developments within the market. That said it is important to always include flexibility and the ability to adapt as one of your core standards of operation. With honest evaluation, innovative thinking, and a willingness to act, your strategic plan should provide your chapter with results you can be proud of. So ready, set, execute!