

Strategic Planning: Developing a Blueprint for Success

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Faculty Disclosure

Faculty Name: Jessica Wendorf

Conflicts of Interest: None

Employer: Sigma Theta Tau International

Sponsorship/Commercial Support: None



This is an interactive session. We want you to share and learn from each other as much as staff! You'll see this image throughout the presentation and are encouraged to join the conversation.

When you see this pencil, we will tell you about an upcoming session to discuss the specific content in more detail.



WHY? WHY? WHY?

**You need a
Construction CREW!**



Chapter President leads the process

Require all board members to participate

Every member segment should be reflected
(invite non-officers to participate)

Will require multiple committees and meetings



Getting
started

Prepare

Brainstorm

Create

Implement

Review

Bylaws

Governing document of the chapter, with minimum requirements for operations.

Policies & Procedures

Clearly states how the chapter will uphold the bylaws and govern itself.

Goals

Helps your chapter strive toward creating the ideal membership experience.

Strategic Plan

Creates an action plan for meeting those goals.

Define purpose and timeline

2019

January

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July

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WHAT IF...

What if ...

- What if our chapter closed? Would our members miss us?
- What if member was active?
- What if we did every activity virtually?
- What if another chapter moved in next door?
- What if we hired staff?
- What if the school of nursing doubled enrollment? Or decreased?
- What if we received a large sum of money?
- What if our chapter incurred a significant financial loss?

What have you learned?



~~Prepare~~

Brainstorm

Create

Implement

Review

S

Strengths

O

Opportunities

A

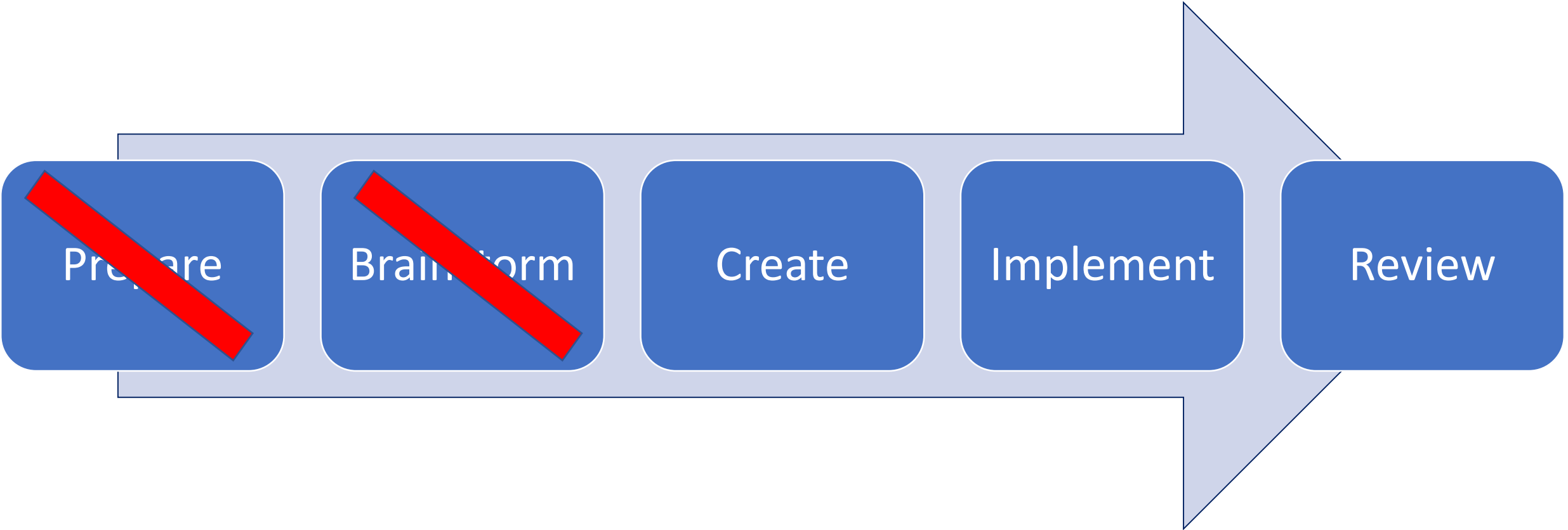
Aspirations

R

Results



What are some of your
chapter's strengths,
opportunities, or aspirations?





Develop your chapter goals



**Consult your recent
membership satisfaction
survey results to help pinpoint
goals**



Upcoming session of interest: Six Steps for Successful Surveys

**Looking for your recent membership numbers?
Consult your Chapter Health Mailing or reach
out to Chapter Services!**



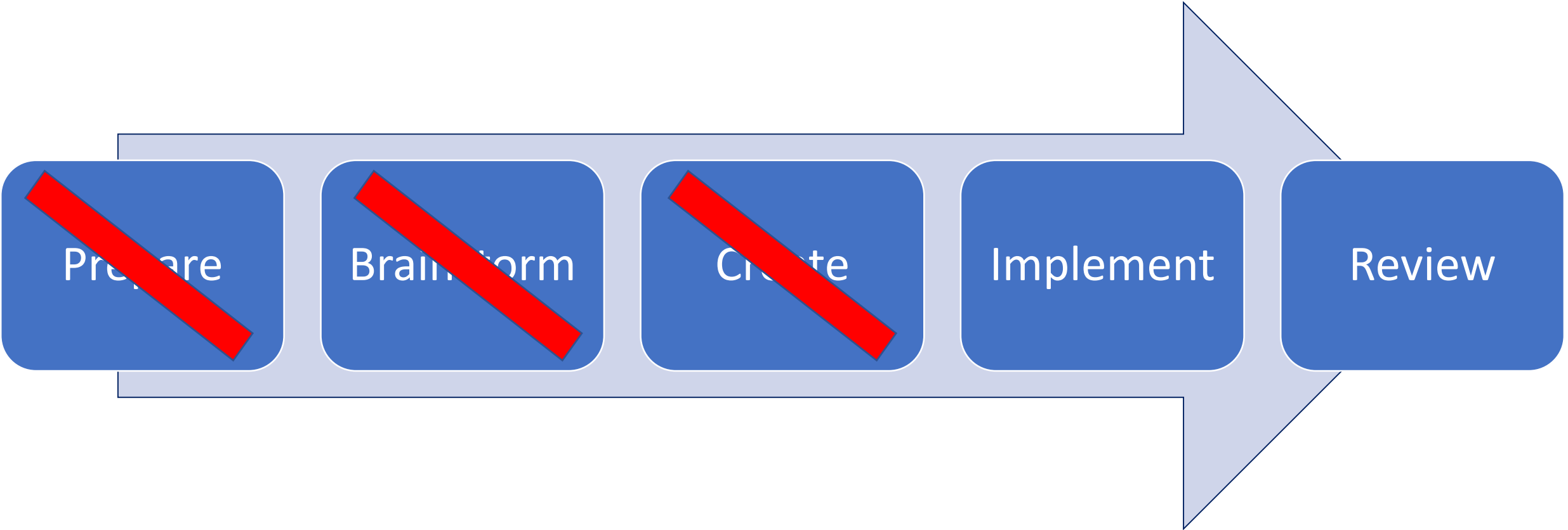
Sample Goals

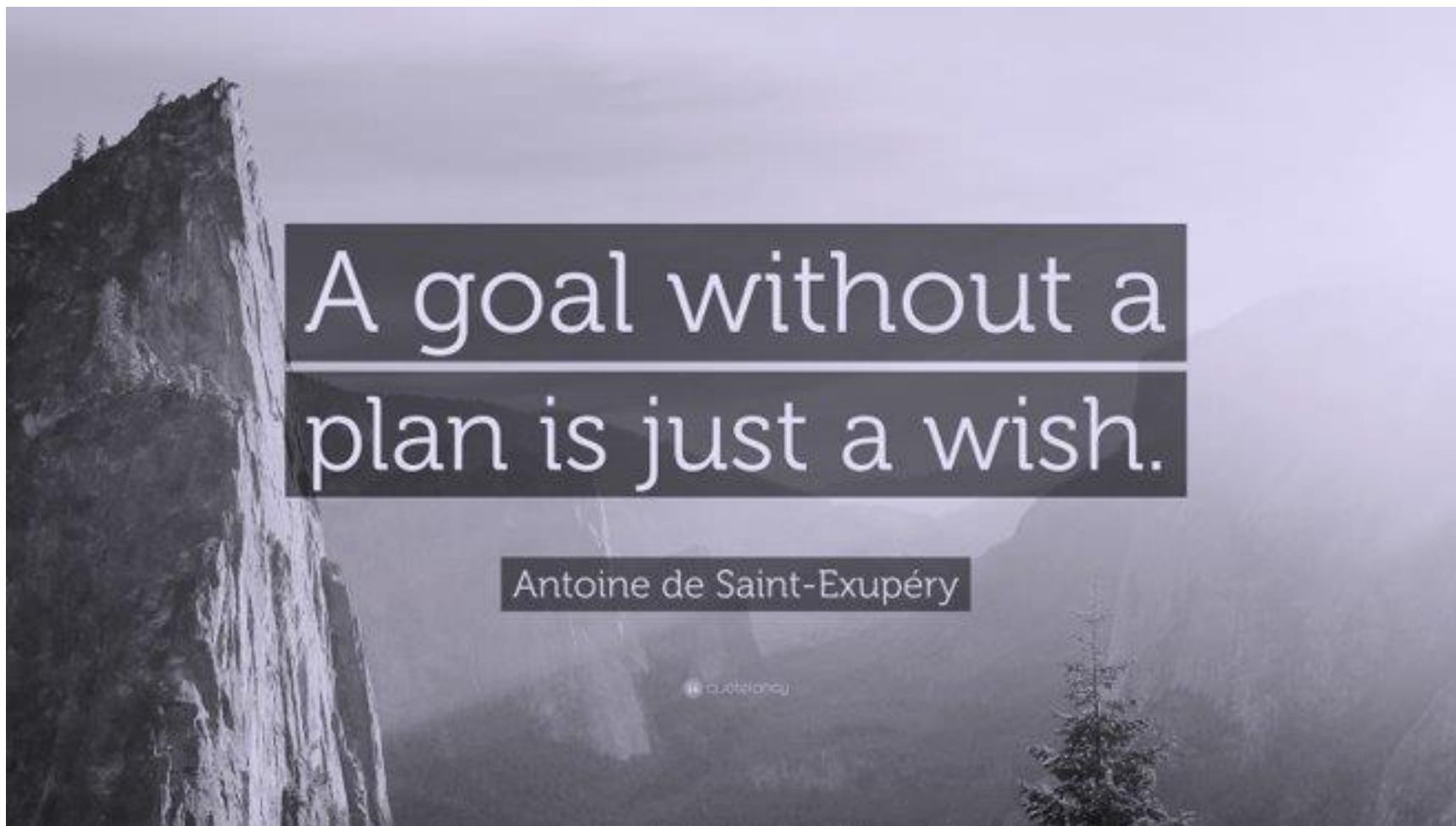
- Develop a presence in members' workplaces
- Develop chapter-specific value proposition statement
- Create well-informed and excited candidates
- Ensure new and transfer members are oriented to our chapter
- Increase participation of first-year members
- Host events to meet the needs of members
- Have knowledgeable and excited candidates on the election ballot



What are some other goals your chapter has set or considered?

APPROVED





Develop a presence in members' workplace

- KPI – Increase chapter's presence in 2-5 local workplace settings
 - Deadline: 2019 – August
- Action Item 1:
 - Utilize flyer from Sigma to promote chapter at local hospital and university settings (available on-site)
 - Counselor and Governance chair – meet with nurse managers at IU hospital to promote Sigma and chapter (complete by December 2018)
 - Provide member nameplates for active members to display

Develop a chapter-specific value proposition statement

- KPI – Have a consistent value proposition for messaging and communications
 - Deadline: 2019 – January
- Action Item 1:
 - Utilize developing a value proposition worksheet
 - Chapter board to fill out the worksheet and bring to the November 2018 board meeting

Create well-informed and excited candidates

- KPI – Increase induction acceptance by 10%
 - Current acceptance rate: 35%
 - Deadline: 2019 – July
- Action Item 1: Increase Recruitment activities by 60%
 - Utilize new Sigma recruitment poster, to promote chapter at new student orientation
 - Host at least 1 recruitment event for students and 1 recruitment event for nurse leaders
 - Provide a Prospective-Member Meeting



Upcoming sessions of interest: 45 Recruitment Ideas Your Chapter will Love

Ensure new and transfer members are oriented to our chapter

- KPI – New and transfer members feel welcome
 - Current survey satisfaction: 55%
 - Deadline: 2019 – July
- Action Item 1: Hold two new and transfer member orientations
 - Vice President, Counselor, and Membership Ambassador to plan events and invite new and transfer members
 - Secure location
 - Prepare orientation materials

Increase participation of first-year members

- KPI – Increase first year renewal by 10%
 - Current first year renewal rate: 33%
 - Deadline: 2019 – July
- Action Item 1: Survey first-year members to determine needs
 - Utilize sample survey questions
 - Prepare, send, and analyze a first-year member survey
 - Present findings to the chapter board of directors



Upcoming session of interest: Tips to Turn New Members into Lifelong Members

Host events to meet the needs of members

- KPI – Increase participation in events by 3%
 - Current event participation: 4%
 - Deadline: 2019 – July
- Action Item 1: Review membership survey results and identify member need
 - President-elect to analyze results and provide presentation to chapter board of directors
 - Based upon those results, choose a third membership event that meets the needs of members



Upcoming sessions of interest: Six Steps for Successful Surveys

Have knowledgeable and excited candidates on the election ballot

- KPI – Have at least two candidates for all open positions.
 - Current ballot with at least two candidates: 60%
 - Deadline: 2019 – July
- Action Item 1: Review Leadership Succession plan and revise
 - Each committee member to prepare thoughts about what items within the leadership succession plan need revision
 - Send to the chairperson
 - Schedule a consultation with Sigma staff to discuss our leadership succession plan

WHAT NEXT?



Align with your budget

- Ask the treasurer to provide the current budget to ensure all the action items are accounted for within it.
- Do any items in your strategic plan need to be adjusted?
- Do any items in the budget need to be adjusted?





Upcoming sessions of interest: Cash Stash: Tips for Effective Chapter Budgeting

Assign responsibility

Create well-informed and excited candidates

- Action Item 1: Increase Recruitment activities by 60%
 - Utilize Sigma recruitment poster, to promote chapter at new student orientation - Counselor
 - Host at least 1 recruitment event for students and 1 recruitment event for nurse leaders – Program Planning Committee
 - Provide a Prospective-Member Meeting – Counselor and Governance Committee

Determine a timeline

Create well-informed and excited candidates

- Action Item 1: Increase Recruitment activities by 60%
 - Utilize Sigma recruitment poster, to promote chapter at new student orientation - Counselor (September 2018)
 - Host at least 1 recruitment event for students and 1 recruitment event for nurse leaders – Program Planning Committee (October 2018 and March 2019)
 - Provide a Prospective-Member Meeting – Counselor and Governance Committee (April 2019)

Action Plan – Sample 1

- October 2018
 - 24 October – Student Recruitment Event (Program Planning Committee)
 - Location: School of Nursing Lobby; 4 to 6 pm
 - 31 October – Finalize and send IU Hospital recruitment event proposal to president. (Program Planning Committee)
- November 2018
 - 20 November – Chapter Board Meeting (President)
 - Agenda: IU Hospital recruitment event; biennial convention; student recruitment event review; strategic plan update; budget update

Action Plan – Sample 2

Goal	Action Item	Who	Cost	Timeline
Create a well informed and excited candidates	Student Recruitment Event	Program Planning Committee	USD 200	24 October
Create a well informed and excited candidates	Finalize and send IU Hospital event proposal to President	Program Planning Committee	N/A	31 October
Chapter Operations	Chapter Board Meeting	President	USD 35	20 November

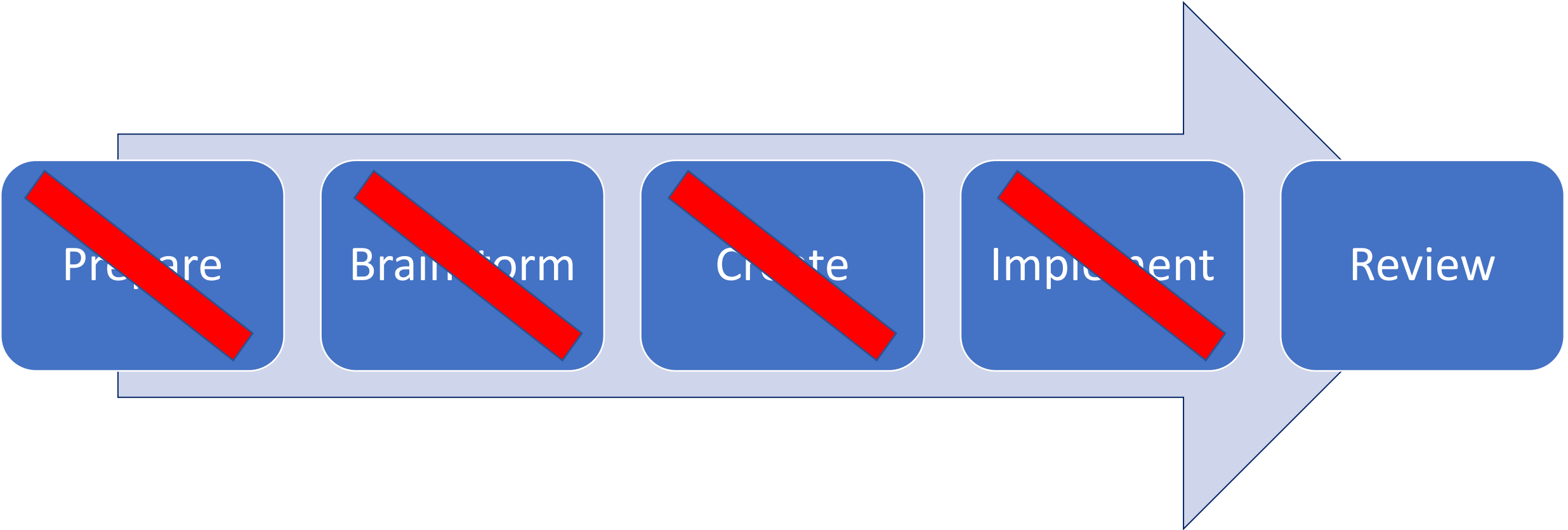
Communicate the plan

- Ensure all chapter leaders and committees are aware of the plan and how they will be part of its success
- Post the plan in the library on your chapter website, for transparency to members. (It shouldn't contain any confidential information.)
- Continually remind everyone where it can be found and to follow along with the progress!



"You are not the actions of others, nor their words. You are not responsible for their successes, their failures, their daily bliss; but you are for yours. Be accountable. Take on what is yours and trust that others are strong enough to do the same."

Amy Larson
amyjalapeno.com





**Bring your plan to
every meeting**

Adapt every year

January							February							March						
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Do any of you have any other pieces of advice for strategic planning?

Questions?