



The Links, Incorporated

Strategic Planning Tool Kit

**A deliverable from the National Strategic Planning Committee
2006-2010**

Our Dear Link Sisters:

In 2006 we eagerly agreed to take a journey with our National President Link Gwendolyn Lee to make The Links, Incorporated a World-Class organization. Our contribution to the journey was to develop an inclusive strategic plan and to include tools for assisting Chapters across Linkdom on their strategic quest. One of the 2011 Action Plan goals is that all Chapters will develop a strategic plan. This compilation of tools, references and resources reflects our offering of support as you develop and implement strategic planning processes for your Chapters.

In this toolkit you will find proposed processes, templates and resources that you can adapt and use immediately. We are hopeful that web-based training modules will soon be available to provide training that complements the tools we are sharing with you. The bottom-line message we want to make certain you receive is that: *“With these tools, Chapters can effectively engage their members in a dynamic process that enables Chapters to positively, proactively transform the communities they serve.”*

With respect and confidence,



Link Patricia Larkins Hicks, Chair

National Strategic Planning Committee

The Committee Members

CENTRAL AREA

Patricia Larkins Hicks, Chair
Jacqueline McLemore, Co-Chair
Gwendolyn Kenner-Johnson
Carolyn McDougle
Jacquelyn Heath Parker

EASTERN AREA

Terri Johnson Hackett
Brenda Irons-LeCesne
Sandra McFarlin
Teresa Oakley

SOUTHERN AREA

Brenda Jamerson
Norma Solomon White
Dorothy Crowser Yancy

WESTERN AREA

Ida Seymour Daniel
Karla Smith Fuller
Deborah Beavers Watford

Vision, Outcomes, Keys to Success

Our Vision 2015

We envision The Links, Incorporated... An organization...

Empowered by its rich legacy and providing world class service through its circle of friendship that is a model of excellence and innovation.

Recognized throughout the world as a collective voice of talented and professional women committed to improving the quality of life of its global citizens.

Our Desired Outcomes

- Increased diversity of members with regard to age and skills
- Increased member satisfaction
- Areas and Chapters aligned with National focus
- Streamlined, focused programs that benefit African Americans and individuals of African descent
- Increased brand awareness of The Links, Incorporated at all levels (National, Area, Chapter)
- Increased community involvement in The Links, Incorporated programs

Our Keys To Success

#1 Member Relationships

The heart of Linkdom is its members. The organization's primary focus is recruiting and retaining members of varied ages, backgrounds and skills who through their friendship are committed to providing quality, impactful service.

#2 Valued Service

Links serve their communities by providing programs that impact the quality of life of African Americans and persons of African descent.

#3 Organizational Effectiveness

The Links, Incorporated establishes direction, develops tools and defines processes that facilitate continual organizational transformation for the purpose of achieving its mission, outcomes and goals.

#4 Leverage Partners

The Links, Incorporated cultivates and maintains mutually beneficial relationships with member networks, community based organizations and institutions to achieve its mission, outcomes and goals.

Maintaining a brand that is recognized by key constituent groups is essential and drives the success of all key areas. Branding is being managed by the Committee on Communications/Public Relations.

Our Strategies

- **Create and utilize a friendship model that builds a membership base that values diversity, embraces member talents, and develops leaders.**
- **Align National, Area, and Chapter programs to ensure relevancy and community impact.**
- **Equip members and chapters with tools that will ensure they are operating efficiently, effectively and implementing the National Strategic Plan.**
- **Cultivate and maintain relationships with partners that have common goals which will advance the mission of The Links, Incorporated.**

Our Long-Term Goals (2015)

Member Relationships

- 90% of members are satisfied with their involvement in The Links, Incorporated
- Increase the number of members 45 years and younger that hold leadership positions at the National, Area, and Chapter levels

Valued Service

- The most effective programs have been identified and recognized at the National, Area, and Chapter levels
- All Chapters have implemented programs that reflect the needs of their communities

Organizational Effectiveness

- National, Area, and Chapters are in alignment (on the same page) and operating efficiently and effectively

Leverage Partners

- Relationships with appropriate partners have been sustained
- All partners are satisfied with their relationship with The Links, Incorporated

Definitions

Strategic Planning is a systemic process through which an organization *agrees on and builds commitment to priorities* that are essential to its mission and responsive to its environment.

A Strategic Plan documents where a chapter will invest its time and resources over a specified period of time. The length of a strategic plan may range from two to five years. As a result of strategic planning processes, members and other stakeholders (community partners and vendors, for example) know what the Chapter's priorities are. There are many methods for developing a strategic plan however most processes engage chapter members in collecting data that are used to develop goals, strategies and action plans. Strategic plans are based on a scan of factors in both the internal and external environment. Effective strategic plans are based on a range of data that includes, but is not limited to the following:

- Census data
- Service area demographics
- Economic data
- Membership data
- Assessments of the chapters strengths, weaknesses , opportunities and threats (SWOT Analysis)

Methods used in the planning process may include quantitative data analysis, qualitative analysis (focus group or interview data for example), scenario planning and appreciative inquiry.

Other basic definitions that might help you:

Long Range Planning: Focuses on what an organization will look like over a given period of time (i.e., "Where does the organization want to be?").

Operational Planning: Focuses on the specific tactics the organization will implement in the coming year to move toward the future described in its strategic plan.

Vision: An organization's desired future state. It may be lofty, unobtainable and can change over time. It drives action.

Mission: The purpose of an organization; why the organization exists. It can withstand the test of time. It drives practices and behaviors and impacts daily decision-making.

Stakeholders: Individuals/groups that have a stake in what an organization does: customers, employees, volunteers, funders, regulators, community groups, etc.

Success Indicators: Factors that determine an organization's ability to achieve its Mission and move toward its Vision.

Strategy: Links purpose to behavior and identifies the action that must be taken in order to be successful and to out perform competitors.

Goals: Statements that are measurable, identify the anticipated impact/outcome of an action the organization will pursue connected to a strategy and its mission, and include a specific timeline.

Objectives: Statements tied to goals that are specific, measurable, and identifies what specifically will be done and when it will be accomplished.

Activities: Actions that enable an organization to move towards attaining objectives and fulfilling its mission. Each activity must be relates to one ore more objectives and should be monitored.

Resources: The person power, materials, equipment, financial elements, etc. needed to carry out activities.

Responsibilities: Specific tasks that an individual(s) in a given role must do in order to ensure that an activity is completed.

Impact: A measure of “breadth” of importance. How basic is the factor? How many other things depend upon it or are related to it? A measure related to relationships.

Consequences: A measure of “depth” of importance. How bad or good will it be? A measure related to intensity.

Immediacy: A measure of the importance of opportunity and sequence. How much time is available? Is there a chronological order? A measure related to time.

Monitoring: The activity undertaken on a regular basis to compare the planned status of activities with the actual status of activities at a given point in time.

Evaluation: A qualitative and/or quantitative assessment to determine impact, effectiveness, and efficiency.

The Chapter Level Strategic Planning Committee

Roles and Responsibilities: The Chapter Strategic Planning Committee is responsible for guiding an inclusive strategic planning process for the Chapter. The Committee designs and manages the process of developing a strategic plan, identifies resources and tools and ensures that the plan is properly positioned for implementation.

Typically the Chapter President appoints the Strategic Planning Chairperson. A Co-Chair is an optional role left to the discretion of the Chapter. The Chairperson should have some understanding of and experience with strategic planning, though they need not be an expert. Primary qualities of the Chair:

- Strong communication skills (necessary for clearly articulating the process, acquiring and listening to diverse perspectives)
- Ability to organize information
- Ability to lead and manage a committee in an inclusive, relational manner
- Interest in and understanding of National, Area and Chapter operations and procedures

Other Skills and Qualities for Committee Members

- Technology Skills (word processing, internet research)
- Documentation and writing
- Facilitation Skills (small and large group)
- Ability to think creatively
- Big picture thinkers
- Systematic task trackers and implementers

Diversity is important on this Committee. Be sure to include newer members because they bring important perspectives to this process. The Committee does not need to be large because the strategic planning process should include every Chapter member at some point.

The Chapter Level Strategic Planning Committee

Preparation and Planning

1. Before the first meeting: Review National Strategic Plan, Core Values and prior Chapter plans.
2. First meeting:
 - a. Get to know each other. Do what is necessary to build a relational framework for the analytic work you will be doing. For example: What skill sets do you each bring? What positive and negative strategic planning experiences have you had? What dreams do you have about your community? Your chapter? What factors in your life can support or might hinder your contributions on the committee? What guidelines and ground rules might you need as a committee?
 - b. Assign roles – make sure there is someone documenting your meetings , decisions and plans.
 - c. Develop a work plan for the committee that details key tasks on a timeline. (This may take two meetings)
3. Communication Planning – How will you keep Chapter members involved and informed? Think beyond emails and website postings to the personal messaging you will need to keep people engaged and involved.
4. Have a conversation with the Parliamentarian about how the strategic plan needs to be presented. Will Bylaws need to be amended? What kind of motion is the Committee expected to bring to the Chapter once a final plan is drafted? Ask these questions early and plan for them so you won't be caught unprepared.

Elements of the Strategic Plan

The format can vary. Some Chapters prefer a narrative format—a plan that tells a strategic story of their future, for example. Others prefer a bulleted, briefer format that has the essentials.

- I. **National Vision, Desired Outcomes, Keys to Success, Strategies & Long Term Goals** (With the exception of the strategies, these components can be taken from the National plan and included in your plan. Review the strategies and adapt to your organization. Also, review and discuss each one to make certain there is shared understanding of these foundation elements.)
- II. Option: **Chapter Mission**
- III. **A SWOT analysis** or other type of assessment that systematically provides information on Chapter Strengths and Weaknesses, Environmental Opportunities and Threats
- IV. Option: **Benchmark other organizations** in your service area and include what you learn in your plan. This can be a separate section or it may be included under Opportunities and Threats
- V. Option: **Data on Chapter Strengths and Weaknesses** may come from surveys or focus groups
- VI. **Action or Implementation Plan** which includes short term goals (typically one year), objectives, activities, person(s) responsible, timeline for completion and metrics. There are options here: You may have short term goals, objectives, activities, responsible persons, timelines and metrics. Another option is to have the metric or outcome included in the objective. You may also choose to have either objectives or short term goals, not both.

Sample Format I

These sample formats are intended as a guide and template. Make modifications to fit your Chapter's needs.

- I. National Vision
- II. Desired Outcomes – customize for your Chapter
- III. Keys to Success
- IV. Strategies – Customize for your Chapter
- V. Long Term Goals
- VI. Short Term Goals
- VII. Activities with timelines, responsibilities and outcome measures

Sample Format II

- I. National Vision
- II. Desired Outcomes – customize for your Chapter
- III. Keys to Success
- IV. Long Term Goals
- V. Strategies to accomplish the goals
- VI. Objectives for each goal
- VII. Action Steps with timelines, responsibilities and outcome measures

Survey Tools and Resources

Survey Monkey: www.surveymonkey.com

Google Survey: <http://www.seochat.com/c/a/Google-Optimization-Help/How-to-Build-an-Online-Survey-with-Google-Docs/>

<http://www.census.gov/>

<http://pewsocialtrends.org/>

Local health and human service data sources

YouTube has several videos on strategic planning. There is a good one on doing a SWOT analysis. Enter Strategic Planning or SWOT in the search engine.

An Environmental Scan survey is included in this tool kit but don't forget partner or vendor surveys.

Chapter Strategic Planning Workshops

SAMPLE WORKSHOP 1 – FOCUS GROUP WITH APPRECIATIVE INQUIRY ORIENTATION

REFERENCE NOTE: Appreciative Inquiry (AI) is a method of inquiry that opens up thinking about the best in people, their organizations, and the relevant world around them. It involves systematic discovery of the qualities and characteristics of a “living system” (community, chapters, other organizations) when it is most alive, most effective, and most constructively capable in economic, ecological, and human terms. (Definition adapted from: <http://appreciativeinquiry.case.edu/intro/whatisai.cfm>) Many of the questions included in the Focus Group Workshop have an appreciative inquiry focus.

GETTING STARTED

Opening /Welcome/

Meeting Purpose: Data gathering, discovery

Supplement information obtained from written questionnaire

Provide additional opportunities for input on the Chapter’s strategic planning process

This meeting is not for problem solving!

Introductions

Member Introductions/ice breaker

Discussion Guidelines

No statement is more “right or wrong” than another

No judgments

Confidentiality: No reporting who said what to other Chapter or non-Chapter members

Additional guidelines added by group

FOCUS GROUP QUESTIONS

Opening Questions (Select questions that are low risk; hear one answer from everyone)

1. Why did you join Links?
2. When have you felt most energized and engaged as a Link?
3. What do you envision as the newspaper headline you would like to see about (our Chapter) in the year 20xx?

Middle Phase Questions

Use as many of the following as can be answered in approximately 1 ¼ hours. Pose the priority (P) questions first:

4. When (our Chapter) is at its best, what is going on? What is it like?
5. When our Chapter is at its worst, what is it like?
6. (P) How is (our Chapter) known/perceived in the community? How would you like (our Chapter) to be known/perceived in the community?
7. (P) What things (issues/circumstances) in the community should our Chapter be responding to? Why?
8. (P) What are the opportunities that we need to be positioned to take advantage of? How might we do this?
9. What qualities/behaviors are important for moving us forward as a chapter?
10. Describe an ideal partnership for our Chapter. What makes it ideal?

Closing Phase Question

Use the last 10-15 minutes of the session to have participants respond to the following:

11. If you had a magic wand and could use it once for the chapter, what would you do with it?
12. How has it been to participate in this focus group session?

CLOSURE

Any final remarks by facilitators or participants

Sample Workshop II

SWOT

Meeting Purpose: Gather information on the Chapter's Strengths, Weaknesses, Opportunities and Threats. This data will be included with other information to create a picture of where the Chapter is currently and what directions it might take.

- Have everyone review the vision, mission, and keys to success.
- Present SWOT Framework

If our intention is to be a Chapter with this vision, mission and these keys to success,

- (1) What are our current strengths?
- (2) What are our weaknesses?
- (3) What opportunities are there for our Chapter in our external environment (community, region, area)?
- (4) What threats must we be aware of and understand?

Internal	External
Strengths	Opportunities
Weaknesses	Threats

Process Options for SWOT workshop:

1. Put members in small groups with the SWOT framework on a large piece of flip chart paper. Give each small group 20 minutes to complete their own SWOT.
2. Have each small group present their chart. As they do, start entering data in a composite chart. Note the themes and differences as the small groups report.
3. If there are a lot of items for each quadrant, use sticky dots to prioritize. Everyone receives x number of dots to use to prioritize each section.
4. Wrap up with a discussion about the implications of this discovery conversation for strategic planning.
5. Incorporate this data with other environmental scan data for your plan
6. Another option is to have the large group work together to complete the SWOT grid. You can still divide the group and have one group work on strengths, another on weaknesses, a third on opportunities and the fourth on threats. You will still need to wrap with a discussion about what this data means for your Chapter.

Sample Workshop III

Pulling it all together

Meeting Purpose: To finalize the plan and get buy in.

Options: The Committee can draft long term goals and bring them to the meeting for feedback or the Committee can bring a summary of the data and let the group develop long term goals.

Use a prioritization process to narrow the goals to no more than 4 or 5.

Assign smaller groups to develop short term goals and action plans for each of the goals. This small group work can be done in the workshop or at a later time. If it is the latter, timelines are needed for when and how the subcommittees bring their work back to the body.

BENCHMARKING The Links, Incorporated

Benchmarking is a useful process for examining where and how either local Chapters or the National organization measure against similar organizations. Some of the basic benchmarking categories are included in the charts. Please adapt and update to suit your interests and needs. These data are a part of your environmental scan.

	MISSION
The Links, Inc.	
Alpha Kappa Alpha	
Delta Sigma Theta	
Jack and Jill	
Top Ladies of Distinction	
Black Women’s Agenda	
National Council of Negro Women	

	Member Size	Member Levels	Chapters	Chapter Location
The Links, Inc.	12,000	Active Alumna Platinum Honorary	270	42 states, District of Columbia, Commonwealth of the Bahamas
Alpha Kappa Alpha				
Delta Sigma Theta				
Jack and Jill				
Top Ladies of Distinction				
Black Women’s Agenda			-	
National Council of Negro Women				

Environmental Scan

What is your service area? (Identify by zip code)

CREATE A PROFILE YOUR SERVICE AREA (Use www.zipskinny.com or another data source to obtain data about the service area)

1. What is the racial/ethnic composition

African American
Hispanic/Latino
Caucasian
Multiracial
Native American
Asian
Other

2. What is the marital status?

Never been married
Married
Separated
Widowed
Divorced

3. What percent males live in the area by age?

0-9 yrs.
10-19 yrs.
20-29 yrs.
30-39 yrs.
40-49 yrs.
50-59 yrs.
60-69 yrs.
70-79 yrs.
80 yrs. +

4. What percent females live in the area by age?

0-9 yrs.
10-19 yrs.
20-29 yrs.
30-39 yrs.
40-49 yrs.
50-59 yrs.
60-69 yrs.
70-79 yrs.
80 yrs. +

5. What is the educational achievement?

Less than 9 th grade
9-12 th grade non graduate
High School graduate
Some college
Associate's degree
Bachelor's degree
Other
Graduate degree

6. What is the household income?

Less than \$10,000
 \$10,000- \$14,999
 \$15,000- \$24,999
 \$25,000- \$34,999
 \$35,000- \$44,999
 \$45,000- \$54,999
 \$55,000- \$74,999
 \$75,000- \$99,999
 \$100,000- \$149,999
 \$150,000- \$199,999
 \$200,000+

7. How many residents live below the poverty line?

8. How many residents are unemployed?

9. What is the most prevalent health issue for each targeted group?

Infants
Youth
Teens
Young Adults
Adult Female
Adult Male
Geriatric Female
Geriatric Male

10. Which of the following groups has the Chapter partnered with to implement its programming?

- Schools
- High Education Institution
- Sororities, Fraternities
- Professional Associations
- Healthcare Institutions
- Community Organizations
- Faith-based Institutions
- Corporations
- Other (specify)

11. Which of the following groups have goals similar to yours?

- Jack-n-Jill
- Sororities
- Coalition of 100 Black Women
- Top Ladies of Distinction
- Black Women’s Agenda
- Other (specify)

12. Overall, how do the public schools in your service area compare to state standards?

- Below state standards
- At state standards
- Exceed state standards

13. Is there an HBCU in or near your service area?

- Yes (Identify _____)
- No

14. Who are your media partners?

15. What economic development initiatives are underway in your service area?

16. Who are your local corporate/business partners?

17. What cultural institutions or centers in your service area or near it?

Conduct a S.W.O.T. of Your Service Area

<p>STRENGTHS</p>	<p>WEAKNESSES</p>
<p>OPPORTUNITIES</p>	<p>THREATS</p>



MEMBER SURVEY

Chapter Year:

Chapter Name:

Date Completed:

1. What is your age?

- 20-29 yrs.
- 30-39 yrs.
- 40-49 yrs.
- 50-59 yrs.
- 60-69 yrs.
- 70-79 yrs.
- 80-89 yrs.

2. How long have you been a Link?

- 0-3 yrs.
- 4-8 yrs.
- 9-15 yrs.
- 16-25 yrs.
- more than 25 yrs.

3. How long have you been a member of this Chapter?

- 0-3 yrs.
- 4-8 yrs.
- 9-15 yrs.
- 16-25 yrs.
- more than 25 yrs.

4. Have you been a member of another Link Chapter?

- Yes
- No

5. Are/were any of your family members Links?

- Yes
- No

If yes, is the family member an heir-o-link?

- Yes
- No

6. Are you an Heir-o-Link?

- Yes
- No

7. Are/Have you held an office at the Chapter level?

- Yes
- No

8. Are/Have you held an office at the Area level?

- Yes
- No

9. Are/Have you held an office at the National level?

- Yes
- No

10. Are/Have you served on the National Governance level?

- Yes
- No

11. Are/Have you been a Committee Chair at the Chapter level?

- Yes
- No

12. Are/Have you been a Facet Chair at the Chapter level?

- Yes
- No

13. To what degree are your skills and interests utilized in the Chapter?

- To a great extent
- Sufficiently
- To some extent
- Minimally
- Not at all

14. Identify the skills that you believe would contribute value to the Chapter?

15. How satisfied are you with your membership?

- Very satisfied
- Satisfied
- Somewhat satisfied
- Dissatisfied
- Somewhat dissatisfied
- Very dissatisfied

16. Identify two things that you would like to change in the Chapter?

What do you see as the Chapter's Strengths, Weaknesses, Opportunities, and Threats?

<p>STRENGTHS</p>	<p>WEAKNESSES</p>
<p>OPPORTUNITIES</p>	<p>THREATS</p>

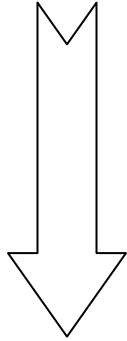
Implementation Planning Considerations

Once the strategic plan is accepted by the chapter, more decisions have to be made:

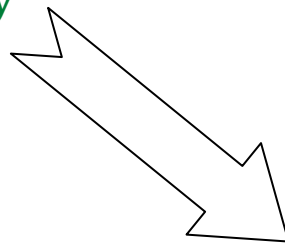
- Each facet and operational committee must review the Plan and decide what they will start or stop doing as a result of this plan.
- The plan needs to be handy at Chapter meetings so that it can be referenced in discussions umbrella and facet programming.
- The plan should be used as a guide for making funding and budget decisions
- Make certain a responsibility chart is completed as part of the plan or as a separate implementation process. The responsibility chart should include:
 - **Task/Activity ♦ Timeline ♦ Who is Responsible ♦ Success ♦ Measures**
- Review the plan at least once a year and make adjustments as necessary

A Strategic Planning Map

Preparation

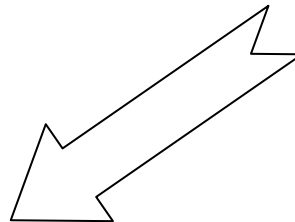


Discovery



Documentation

Implementation



An evolving, “implementable” plan leads to Chapters known for their world class service!