



## Why the need for a Vision and Strategic Plan?

As a result of changes in leadership, the business environment, and chapter membership, the Potomac Chapter has been in a steady decline for several years.

In January 2008, Sarah Ward, the current Chapter President organized a task force of past presidents and chapter thought leaders to assist in addressing the imminent threats to the chapter's existence. Three meetings were held from February to May with 6 – 12 Chapter members responding.

The task force documented the “pain” – which was obvious and identified the “drivers” (excellent programs in good locations, recapturing long time members, attracting younger and “new to HPT” members, an excellent website, etc.) that would rejuvenate the Chapter.

Volunteers, led by the Chapter President, addressed the immediate issues identified by the task force. At this point we are pleased to report:

- An excellent slate of programs for the entire 2008-2009 year has been created and communicated
- The membership process has been rejuvenated (60 paid members, fixed membership year)
- The website is under renovation (new website, easier to navigate, new service provider, easier to update)

In addition, the Chapter President identified the need and requested assistance from representative members of the Chapter to assist in developing a Chapter Vision and Strategic Plan.

# The approach used in creating the Vision and Strategic Plan

A team of six volunteers took on the task of creating the Vision and Strategic Plan for the Chapter. Over the course of four intense meetings, we:

- Thoroughly documented the pain
- Chose a four year horizon for our Vision (July 2008 - 2012)
- Completed an environmental scan for that timeframe
- Identified our organizational strengths
- Projected that list of strengths into the scan to create potential “Breakthrough Opportunities”
- Created a Vision for July 2012 that included a mix of breakthrough opportunities and previous Chapter “best practices/outcomes”

The team felt it was important to also draw a visual/graphical picture of how we would get to the “end state”.

We created a Strategy Map using a Balanced Scorecard framework – where we identified all the **enablers** in the Organizational Capacity (people, technology, and infrastructure) and Internal Processes areas and the cause and effect relationships where *those things (OC & IP) present and done well* -would lead to **results** in the Financial/Resources, Customer/Member, and Vision areas.

You may be wondering “Where’s the Strategic Plan?”. Loosely, we believe that the Vision is the “what” and the Strategic Plan is the “how”.

We created year-by-year plans (2008-09, 2009-10, etc.) where each year’s plan was a 25% “baby step” enroute to the Vision. So the Strategy Map and the year-by-year plans give our members two ways to view (the content is the same) how we will get to the Vision.

The Vision and Strategic Plan consists of “stretch” and aggressive goals - needed if we are going to survive and be successful.

Clearly it will take energy and hard work from a lot of engaged and talented volunteers. It will require many new members from traditional as well as non-traditional sources.

It will take a serious commitment to the long-term view (we didn’t get to our current state overnight). The recent signs are positive and very encouraging. We’ve come a long way since January.

At this point, what we need most is agreement with, approval of, and commitment to the plans. We’ll need to get a total “engagement effort” of current, lapsed, past, and new members to fulfill the components of the plan. Thank you for your support and participating where you can add value.

**Vision & Strategic Plan**  
 The Vision is our end state in July 2012. It describes the “what” of our Chapter. The Strategic Plan is organized year by year and defines “how” we will achieve the Vision.

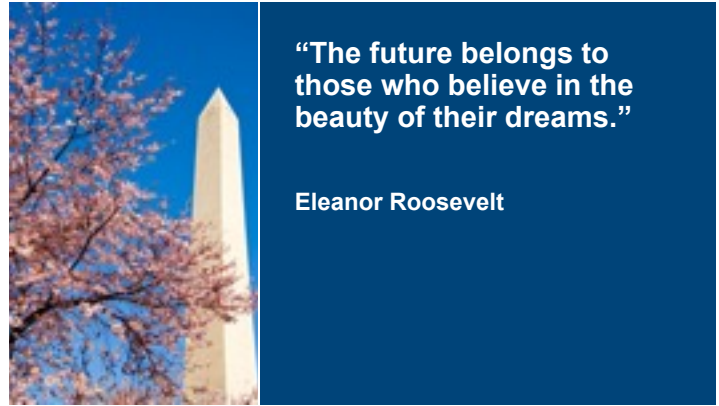


# 2012 Vision

## Our desired end state

Using the Balanced Scorecard model, we identified our desired end state in four areas:

- Programs
- External Reputation
- Chapter Infrastructure
- Finances



“The future belongs to those who believe in the beauty of their dreams.”

Eleanor Roosevelt

### Programs:

Programs are at the heart of every chapter. The program topics need to meet the needs of its members, event locations need to be convenient, and the program structure must offer networking opportunities.

- We hold at least 50% of our programs at engaging locations unique to the Washington area
- We market to and conduct targeted sessions for executives in business and non-profit associations
- We offer 25% of our programs virtually using collaborative technologies
- Each program averages 50 attendees
- Program costs are self-sustaining over the course of the year

### External Reputation:

The Potomac Chapter has a long and distinguished reputation. Our Vision had to address that legacy.

- The chapter is recognized by its reputation and performance as the leading expert in HPT in the Washington DC metro area
- The chapter is recognized as the premier professional association in the DC metro area in supporting the development and growth of its members through networking, mentoring, coaching, job placement, etc.
- We have established a mutually beneficial relationship with the International office of ISPI
- We have institutionalized an annual outreach program through an embassy to take HPT Beyond Our Borders
- We have completed two pro-bono projects using our unique HPT skills and experience

### Chapter Infrastructure:

Our Vision must address the long term health of the chapter with a focus on diversity, developing chapter leadership, and volunteerism.

- Our membership and attendance is diverse in composition and thinking
- All groups are engaged, contribute, and learn from each other
- We have implemented a development, succession, and transition plan for chapter leaders
- 80% of our business (board and committee) meetings are virtual
- The chapter consists of 300 paid members

### Finances:

Long-term health and success requires creating a financial vision for the chapter and planning how we'll get there.

- The chapter finances have improved annually with a cash reserve of 12 months worth of operating expenses



## 2008 - 2012 Year to Year Strategic Plan

### 2008 - 2009 Goals

- Identify business, academic, & non-profit organizations to target
- Re-establish a successful Position Referral Service
- Create a list of targeted embassies
- Hold one meeting at an engaging location which may be an embassy
- Member recruitment needs to focus on Activist Members
- Re-evaluate and define board positions and volunteer opportunities
- Contact all old members, rejuvenate chapter, & update contact
- One program that can be attended virtually
- 80% of Board Meetings conducted virtually using collaborative technology
- Re-establish recognition & reward structure
- Update database & outsource maintenance
- Develop new member on-boarding program
- Improve timeliness & reach of programs & communications
- Identify Academic institutions & develop scholarship program for interns
- Develop list of engaging and boring affordable program venues
- July 2009 – 100 members
- Establish chapter server & back up for document management

# 2008 - 2012 Year to Year Strategic Plan (continued)

### 2009 - 2010 Goals

- Establish a formal mentoring & development program
- Conduct two virtual program meetings
- Hold one meeting at an embassy
- Establish corporate recruiting plan
- Successfully conduct a targeted program to business & non-profit executives
- Conduct first pro bono project
- Evaluate & revise role definition for Chapter volunteer board and officer positions
- Identify activist members for leadership positions
- Invite International to participate in one of our meetings
- Develop comprehensive academic outreach program
- July 2010 – 150 members

### 2010 - 2011 Goals

- Focus on diversity of membership
- Begin discussions with International ISPI about sponsoring a conference
- Hold a second targeted program for business, & non-profit executives
- Succession plan task force recommendations are implemented
- Review success & revise outreach programs as required
- Submit for Chapter Award of Excellence
- July 2011 – 200 members

### 2011 - 2012 Goals

- Conduct second Pro Bono project
- Institutionalized an annual outreach program through an embassy to take HPT beyond our borders
- We will have held one program meeting at either the White House, Capitol, Supreme Court, or Library of Congress
- July 2012 – 300 members



# ISPI Potomac’s Strategy Map

In the course of creating the Chapter’s vision and Strategic Plan, the Strategic Planning team identified the need for more detail, granularity, and focus to assist in the implementation.

**“{Break through results} = {Describe the strategy} + {Manage the strategy}**

Kaplan and Norton

The team was looking for areas of criticality and leverage. Kaplan and Norton’s Balanced Scorecard and Strategy Map offered a tool that would graphically capture relationships and importance in implementing the Strategic Plan.

The plan is designed to move the Chapter along a well crafted and soundly designed path. The Strategy Map provides a single page view of how objectives in all four areas combine to achieve a single strategy.

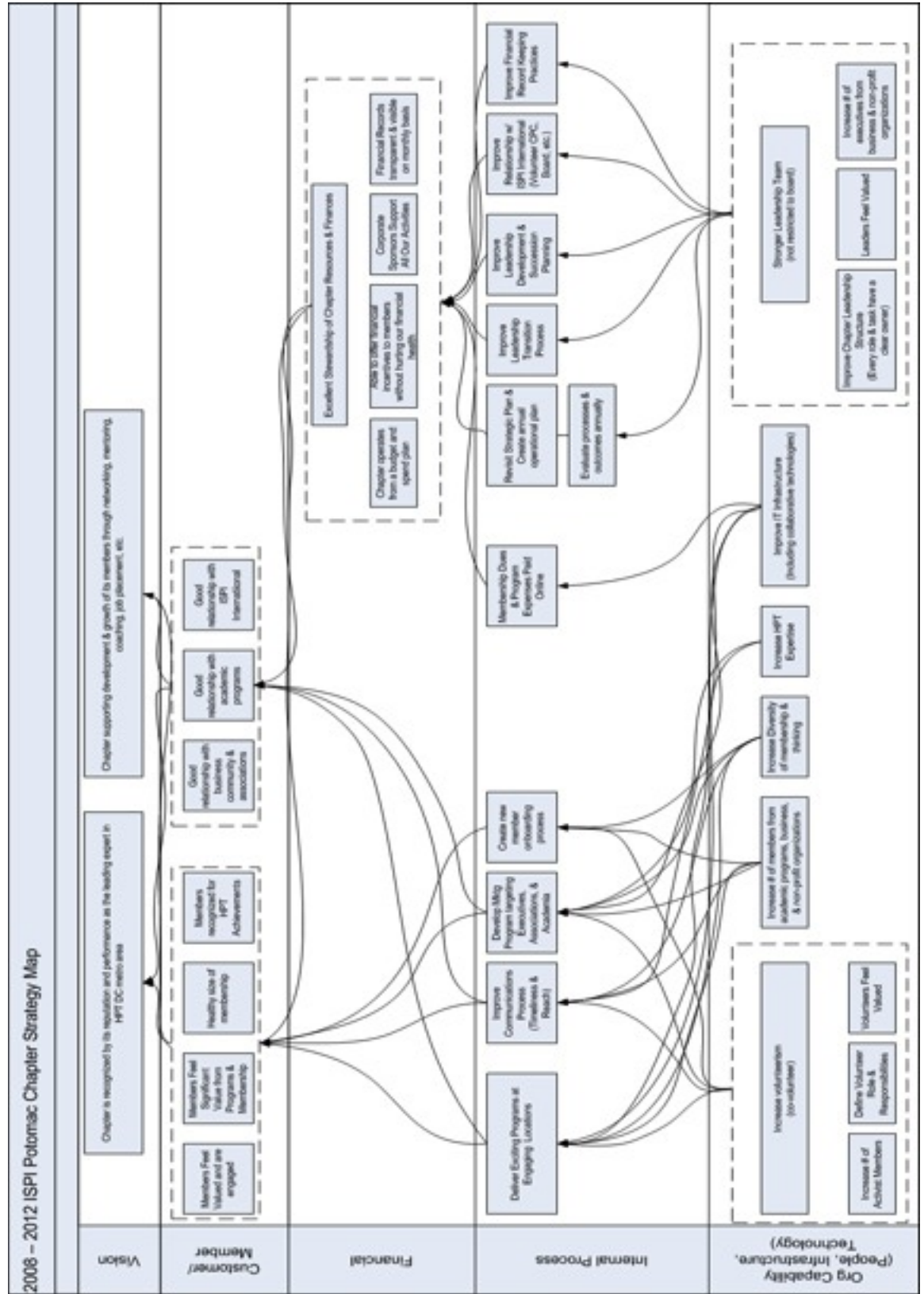
The Strategy Map illustrates the cause and effect linking the Chapter’s Vision with its infrastructure, internal processes, financial requirements, and its members.

**“If we all did the things we are capable of, we would astound ourselves.”**

Thomas Edison



# ISPI Potomac Chapter Strategy Map



# Acknowledgement

The Vision and Strategic Plan is the result of several talented, inspired, and committed members of the ISPI Potomac Chapter.

Sarah Ward identified the immediate need to create a Chapter Vision and Strategic Plan to sustain and grow the Chapter. Sarah deserves special recognition for all the time, energy, and dedication she has provided to the Chapter and to this team.

Jeff Parks was invaluable in making this project happen. Seeing the issues and challenges, he volunteered to facilitate and guide the team in creating the Chapter's Vision and Strategic Plan. The quality and the speed at which the project was completed is the direct result of Jeff's expertise.

The Chapter owes a very special thanks to the team members who gave up their weekends to craft the Plan. Those members are Karen Medsker, Sandy Henderson, Terry Goodwin (who also made his office conference room available for the sessions), and Al Folsom.

We as a Chapter are indebted to these individuals and we thank them for all that they've offered to our community.

**John Fox**  
2008 Strategic Planning Team Lead  
ISPI Potomac Chapter

