



**LEADERSHIP  
AND  
ADVOCACY  
SUMMIT**  
LEAD. ENGAGE. INSPIRE.

# Keep Calm and Carry On: Seeing Your CO through Strategic Planning

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# Disclosures

- I am an AAPA staff member



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# Learning Objectives

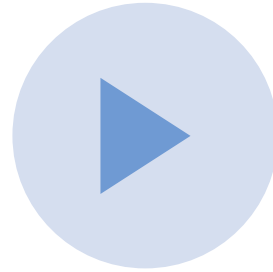
Participants will be able to:

- List the phases of a strategic planning process;
- Describe tools for moving forward with strategic planning; and
- Discuss why conducting a strategic planning process is important.

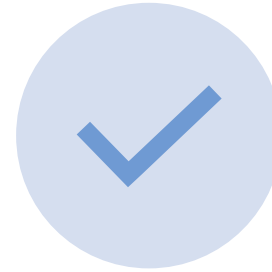
# Agenda



WELCOME



KICKOFF



REVIEW  
EACH PHASE



CLOSURE

Why do we plan?



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**BORDERS**®

*Beyond Books*

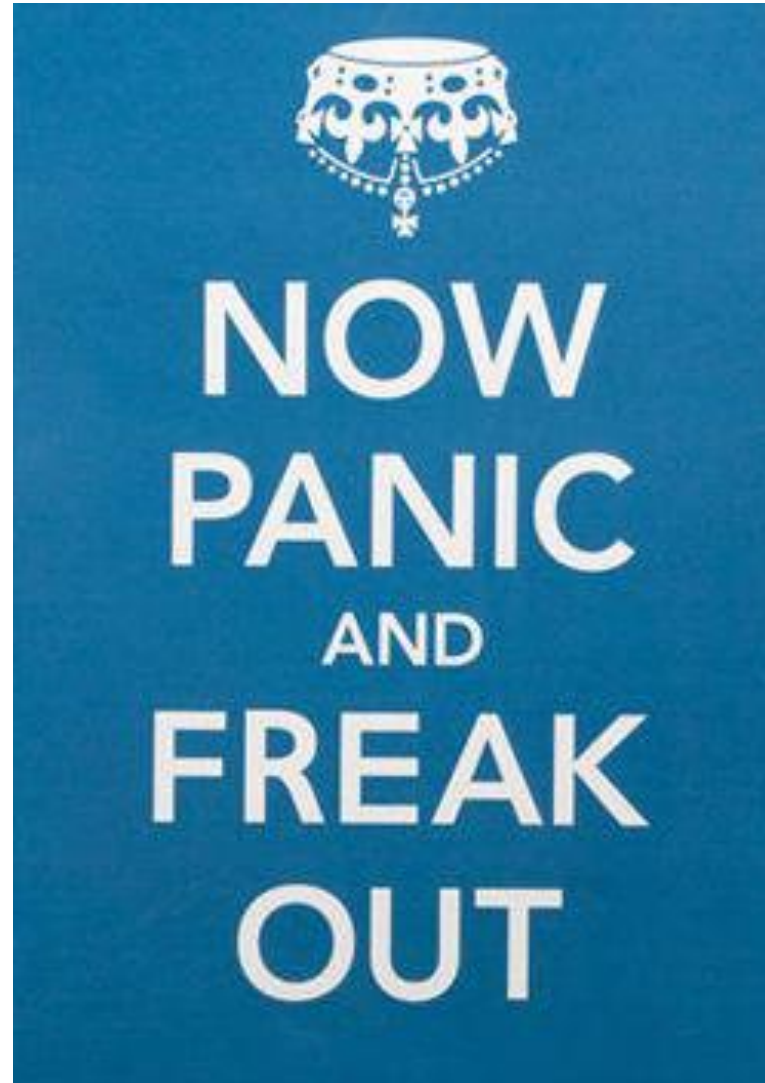
# Getting Buy-In



# Getting Volunteer Leader & Staff Buy - In

1. Involve & Communicate
2. Share Your Association's Vision
3. Allow for Engagement with the Plan
4. Gather Feedback
5. Cascade Plan Messaging
6. Constantly Evaluate and Tweak

# Now what?!





# What have I gotten myself into?



# Phases



Plan to Plan



Vision, Mission, and Values



Environmental Scan



Themes and Goal Setting



Making it Real



Integration

# Phases



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# Plan to Plan

Who

Timeline

Capacity

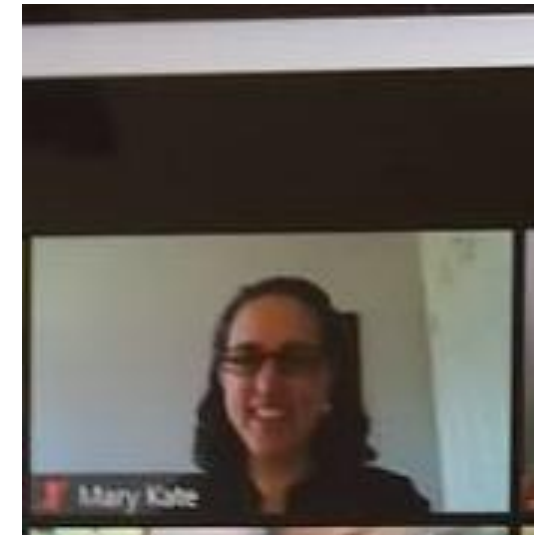
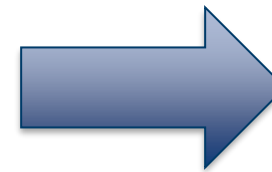
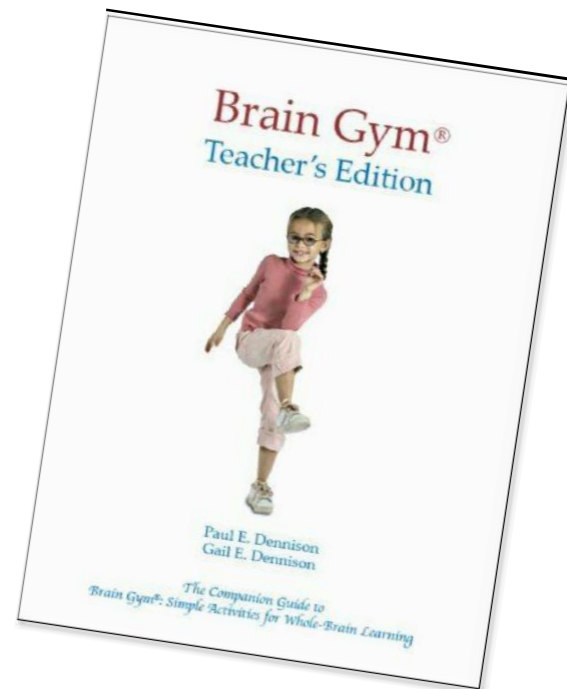
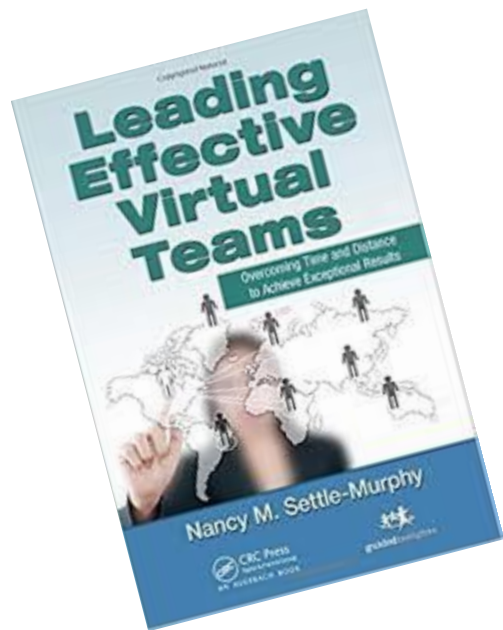
Data  
sources

Gathering  
information

# 10 Fun Virtual Icebreakers to Take Remote Working to the Next Level

<https://productcoalition.com/10-fun-virtual-icebreakers-to-take-remote-working-to-the-next-level-d764122e2e14>

Easy-to-do. No special tools required. Just group chat.



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Integration



- **Make-A-Wish:** To grant the wish of every eligible child.
- **Smithsonian:** By 2022, the Smithsonian will build on its unique strengths to engage and to inspire more people, where they are, with greater impact, while catalyzing critical conversation on issues affecting our nation and the world.

\*Tip: search “word cloud”

**Google:** To organize the world's information and make it universally accessible and useful

**Rothy's :** We create beautiful comfortable, washable shoes – sustainably





Leadership and Service



Unity and Teamwork

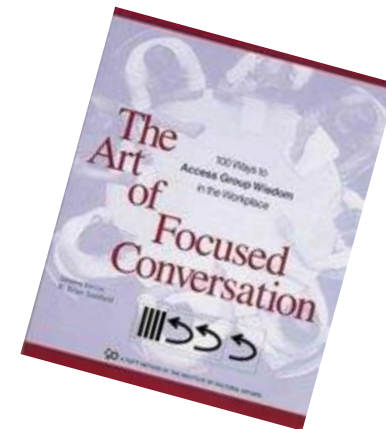


Accountability and  
Transparency



Excellence and Equity

What do we want to see in place in 3-5 years in our jurisdiction as a result of our actions?



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# Environmental Scan

- Previous surveys
- Member surveys
- Nonmember surveys
- Focus groups
- One-on-one interviews
- Strengths, Weaknesses, Opportunities and Threats analysis (SWOT)
- And more!

## Focus Group Sample Questions

**As you think about being a PA, what are 1-2 words that resonate with you? What feelings do you have about being a PA?**

**Where do you see the PA profession going in the next five years?**

**What opportunities could support advancements in the PA profession?**

**What are limitations to the advancements of the PA profession?**

**What changes should the CO make to help PAs advance in the future?**

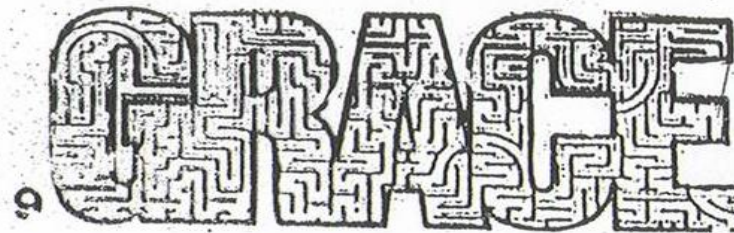
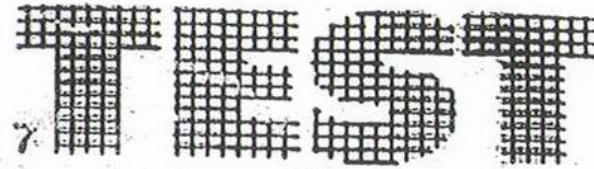
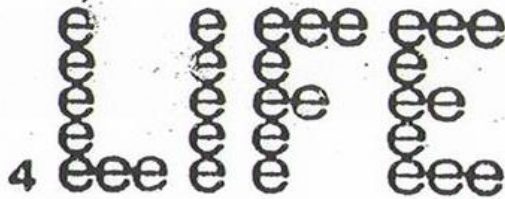
SWOT

Strengths

Weaknesses

Opportunities

Threats



# Phases



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Themes and Goal Setting



Making it Real



Integration



# Themes and Goal Setting



- Determine the method for completing this phase
- Brainstorm
- Prioritization
- 3-5 themes
- Goals

# Example Themes

Enhancing	Enhancing educational opportunities for PAs and PA students
Positioning	Positioning the constituent organization to create new and build upon partnerships
Updating	Updating membership engagement efforts
Initiating	Initiating advocacy efforts to support PA-positive legislation
Increasing	Increasing revenue generation channels

# Example Themes

Enhancing	Enhancing educational opportunities for PAs and PA students
Positioning	Positioning the constituent organization to create new and build upon partnerships
Updating	Updating membership engagement efforts
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Increasing	Increasing revenue generation channels

## Example Goals



Increase membership marketing efforts and channels



Create a process for managing the pipeline of students to early career PAs



Develop a membership onboarding program

# Phases



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Making it Real



Integration

Inventory

Brainstorm

Prioritization

Ownership

What innovative, substantial actions will deal with our challenges and move us toward our vision?

# Prioritization





# 90-Day Action Plan

Theme/Goal:		
Start Date: End Date:	Activity:	
<u>Implementation Steps</u>	<u>Who</u>	<u>When</u> <u>Where</u>
1.		
2.		
3.		
4.		
5.		
6.		
Lead:	Partners:	Evaluation Measures:
		Next Meeting Date:

\*Modified from Technology of Participation

# Phases



Plan to Plan



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Integration

- **Theme: Updating membership engagement efforts**
  - **Goal: Increase membership marketing efforts and channels**
    - By March 15, 2021, identify 1 social media manager for all chapter social posts.
    - By April 1, 2021, get placement (letter to editor, ad, opinion piece, story, etc.) in 4 prominent medical newsletters or newspapers.
    - By June 15, 2021, make 4 presentations at PA programs “selling” our constituent organization to students.
    - By June 30, 2021, revamp the website.

# Expect the Unexpected



Individual Reflection

**HOW WILL YOU BUILD THE  
RIGHT GROUP FOR YOUR  
STRATEGIC PLAN?**

**HOW WILL YOU GET THEM TO  
PARTICIPATE?**

**WHAT WILL BE  
CHALLENGING?**

## Take Home Points

*I can do things you cannot, you  
can do things I cannot; together  
we can do great things.*

Mother Teresa



Ensure you have engaged your team



Use data



Create a document that is broad enough  
that can accommodate day-to-day  
changes



Keep your strategic plan alive

## Build in Celebration!



**MEMBERS ONLY – LOG IN HERE**

## CO Resources

With the resources on this page, COs can improve organizational practices and operations, and at the same time enhance programs and services delivered to members.

American Society of Association Executives

(<https://www.asaecenter.org/>)

- How to Grow and Evolve Your Strategic Plan

Mobilizing for Action through Planning and Partnerships

([www.naccho.org](http://www.naccho.org))

Staying Up To Date

Awards

Continuing Medical Education

Programs and Events

Organizational Management

Marketing and Communications

Advocacy



# Thank you!

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1. Writers block
2. Spring fever
3. Me and my shadow
4. Easy life or life of ease
5. Holy mackerel
6. All star game
7. Screen test
8. Rule of thumb
9. Amazing grace
10. Dead sea scrolls