

## Strategic Planning Session 2017 - Summary

*During two meetings in March 2017, several Chapter members discussed the future of the Cascade Chapter, including the Chapter's responsibilities, current situation, and goals for the next five years. Below is the documentation of these meetings and the plan for the Chapter's future, as reviewed by all interested members.*

*This document is meant to be reviewed and updated on a yearly basis to help inform the work that the Chapter undertakes.*

### **Cascade Chapter**

The Cascade Chapter of the International Association for Public Participation USA (IAP2 USA) includes members and friends within Oregon and SW Washington (outside Puget Sound – Seattle/Tacoma/Olympia). The Chapter's roles and responsibilities are outlined below.

#### *IAP2 USA Mission Statement:*

##### **Our vision**

We envision a country where public participation is deeply embedded and widely applied, and where equitable, efficient, and informed decision-making processes improve the quality of our democracy.

##### **Our mission**

IAP2 USA leads, advances, and advocates for best practices in public participation.

##### **Our plan**

IAP2 USA improves and supports the field by advancing and advocating for public participation that aligns with our Core Values and Code of Ethics.

#### *Chapter Roles (from 2012 USA Charter):*

- Encourage the growth and development of the public participation field as practiced by IAP2.
- Improve the quality and professionalism of public participation practitioners, with increasing emphasis on creating an equitable and inclusive culture that reflects the communities served.
- Promote the exchange of information about public participation with Chapter practitioners, government agencies, clients, and the general public.
- Provide practitioners with programs and trainings that further best practices and the professional development.
- Facilitate communication among IAP2 USA and Chapter officers, members, and stakeholders.

#### *Chapter Responsibilities (from 2012 USA Charter):*

- Notify members of Chapter activities and events.
- Contact Chapter members at least twice annually.
- Maintain a responsive Chapter liaison to interact with IAP2 USA's office, the

- board of directors, and members within the Chapter's geographic area.
- Maintain Chapter finances to meet legal and fiducial requirements. Submit an annual activity report to IAP2 USA summarizing Chapter activities through the year.
  - Meet relevant state and federal filing requirements.
  - Provide access to Chapter and USA affiliate bylaws and guiding documents.
  - Provide access to Chapter and USA affiliate best practice resources, examples, and documents.
  - Seek opportunities to create and enhance partnerships with sister organizations, agencies, and non-profits.
  - Provide notice of professional development trainings including IAP2 Facilitation Training opportunities.

## Understanding our current situation

*At the first meeting, five Executive Committee members outlined the current state of the Chapter by listing the strengths, weaknesses, opportunities and threats of the group. This work fed into the goal development.*

### *Strengths*

- Willing to be involved/show up (usually a coalition of 8)
- Active network (not critical mass)
- Good money making experience/strategies
- Consistent and persistent
- Professionals with experience (high level employees)
- Willingness to collaborate and share; friendly
- Good/wonderful programs
- Long track record and history with strong institutional knowledge
- Good/free meeting locations
- Affordable (food, vending, transportation)
- Compact group of people
- Diversity in age of members

### *Weaknesses*

- Need more diversity and worldviews (ability, culture, race, ethnicity, income, political, sexual orientation, etc.)
- Few partnerships with existing/other organizations
- Geographies don't get covered; hard to serve Eugene, Salem, further south
- Lack of capacity to meet up beyond programs and Executive Committee meetings
- Technologies untapped (presentations, social media, online trainings)
- PINetwork attendance is inconsistent
- Chapter isolation (in-kind and money); missed opportunities to share information, skills, tools. We aren't asking for help or getting USA involved
- Executive Committee roles and expectations/commitments aren't clear, the

structure and succession planning is missing

### *Opportunities*

- Interested people
- Local membership fee/volunteer for in-kind
- Mobilizing groups
- Large pool to tap into/ mailing list
- Reach out to larger government agencies for targeted outreach/ask/involvement (Metro/Washington County)
- Road show/IAP2 101
- IAP2 cross pollinations with other career paths (planning, engineering)
- USA Chapter grant
- Encourage diversity and participation
- Provide information to practitioners, bring groups to us, “collaborating,” diversity and technology are of interest
- Use technology better for geographic representation
- We have funding
- Partnership with other organizations
- Fill needs in practitioners lives/measurable outcomes for our organizations

### *Threats*

- Federal policies, political issues and changing political landscape
- People may not feel comfortable being involved
- Organizational budgets
- Lack of focus and unclear talking points about P2
- Volunteer burnout
- Inconsistent attendance at PI Networks and the Executive Committee meetings. Loss of new members by not following up and cultivating them.
- Lack of succession planning
- Competition, other organizations that divert money, attention, and membership away from IAP2
- P2 gone bad, credibility for the practice
- Polarization of the public
- Political isolation viewpoint
- Lack of diversity/presentation topics/style that shed poor light on IAP2 (equity-wise)
- Professor viewpoints that put down P2 and devalue the practice for students
- Training is expensive, cost of membership is a barrier

### **Setting goals for the next five years**

*The group discussed high level goals for the next five years at the first meeting, which included the following list:*

- Diversity/equity/inclusion
- Succession planning

- Technology
- Targeted partnerships
- Promote values of IAP2 (marketing)
- Education
- Best practices/reflect/influence; how to make a difference and impact people
- Networking
- Career development
- A couple of “new” things each year; challenge ourselves
- More members/participation (select a metrics)
- Inspire current and future practitioners

*These goals were expanded upon and prioritized during the second meeting. The participants decided to group all of the goals into three categories, which will allow the Executive Committee to select a goal in each category to highlight each year. The Three categories are programs, organization, and outreach. The full list of goals is shown below. Additionally, the Executive Committee will measure success of these various goals and activities each year.*

### *Programs*

- How to make a difference and impact in our Chapter (and beyond) through programs that are equitable, efficient and use informed decision making
- The use of technology (including utilizing USA programs for webinars, surveys, go-to meetings, etc.)
- Best practices and fundamental programs focused on relevant training for members and friends
- Program offerings that facilitate networking between people at all career stages in P2
- Career development through training and education
- Reflection and influence
- Continue with current functions of general programming / PI Networks
- Facilitate next generation leaders and build capacity of P2 community through student scholarships (or community grants) and speaker compensation.

### *Organization*

- Each Executive Committee cycle will embed succession planning
- Try a couple of “new things” each year to keep the Chapter challenged with new information and to keep our practice up-to-date
- Develop a fundraising and membership fees plan, as part of a larger Chapter budget cycle

### *Outreach*

- Become known as expert organization/resource bank, through organizational relationship building and communications strategies.
- Promote values of IAP2 through marketing and education
- Develop a plan for targeted partnerships to leverage existing resources and

- reach a wider audience
- Encourage more members/participation
- Inspire current/future practitioners

### *Measuring success*

- Identify appropriate performance criteria for each goal/initiative
- If necessary, identify sub-tasks to achieve goal/initiative and phased implementation with an assigned champion
- Include yearly goals in the annual report to IAP2 USA, including the goals for each year, what level/percent each is complete, the benefit to membership, resource expended (volunteer time and funding), barriers encountered (and proposed revisions to address barriers), and recommendations for next steps.

### **Five year goals**

*The goals for the next five years (as developed in 2017) are as follows. This document is meant to be evaluated each year and modified as the Executive Committee sees fit, with help from the general membership.*

#### *2017:*

*The 2017 goals are expanded further to reflect the Chapter's current work. A subtask is assigned for each goal, along with the champion for each task.*

#### **Programs: Best practices**

- Continue the PINetwork program with bi-monthly speakers on a variety of topics
  - Julie Rawls
- Advertise/promote USA affiliate and partner webinars and trainings through cross-promotion on social media platforms, as well as co-hosting PINetworks with partners - **Need name**

#### **Organization: Diversity and inclusion**

- Create work plan, goals, and approach through the use of an equity and diversity sub-committee - Arwen Bird
- Identify regional and national partnering organizations, agencies, and non-profits - **Need name**
- Create evaluation template/tool to use when selecting speakers for future conferences that reflect the Chapter's desire for a more inclusive range of speakers and topics - **Need name**
- Examine use of chapter funds/micro grant program - Francesca Patricolo and Mike Dahlstrom
  - Create a list of past awards and current activities to extent possible
  - Identify Chapter and USA affiliate mission and goals applicable to scholarships
  - Articulate volunteer time dedicated to scholarship outreach, contracting (with universities), compilation and initial evaluation, review and selection, interview process, final selection and award, notification to all applicants, and follow up with awardees

- Discuss fund allocation options
- Estimate potential volunteer resources required for each option
- Identify applicable Chapter and USA affiliate mission and goals to each option
- If an option is identified, create work plan for further exploration leading to executive committee decision point.
- Consider potential leveraging opportunities for options (i.e., if the option is small grants to non-profits, is there opportunity to pursue philanthropic additions?)

#### **Outreach: More members and participation**

- Post PINetworks on social media before event, as well as photos and video after event to continue the dialogue and build interest - Brandy Steffen
- Continue to build momentum on social media - Brandy Steffen
- Continue to build momentum and keep members/friends informed through the email list - Jen Colbert
- Build on cross-promotional PINetwork events (such as March event that was advertised/organized with PEN) - Julie Rawls
- Each Executive Committee member will reach out to their other networks and help educate them about IAP2 - all members
- Utilize IAP2 USA marketing materials to educate people about IAP2 and membership benefits - **Need name**

#### **2018:**

- **Programs:** Host the Bend Conference (June)
- **Organization:** funding strategy/how to spend funds
- **Outreach:** targeted partnerships

#### **2019:**

- **Programs:** Technology
- **Organization:** succession planning
- **Outreach:** promote values of IAP2 (USA is working on materials 2017)

#### **2020:**

- **Programs:** Host the Bend Conference (June)
- **Organization:** “new things”
- **Outreach:** inspire current/future practitioners

#### **2021:**

- **Programs:** Career development
- **Organization:** Re-evaluate the strategy used over the past five years and understand the current direction for the next five years. The group may decide to continue focusing on these goals or select from other goals identified above that were not satisfactorily reached.
- **Outreach:** become known/resource bank

## Next steps

The next steps for the Cascade Chapter include:

- Implementation of strategic plan (this document)
  - Send draft to Executive Committee for review (by 05/08/17)
  - Send final draft to members for confirmation that we are on the right track (by 05/22/17)
  - Implement the three goals for 2017 (start working on them by 06/01/17)
- Finalize Executive Committee structure document and conduct elections
  - Send draft to Executive Committee for review (by 05/08/17)
  - Conduct elections in October 2017 for half of the positions (by 10/01/17)
  - Reassess in 2018; hold elections in October 2018 for second half of positions (by 1/18; 10/18)
- Start a communications approach to communicate with members and non-members to meet the other goals
  - Connect with USA to secure their marketing materials