



## Strategic Plan 2016 - 2018 Administrative Years

**VISION:** To be the organization that empowers young professionals to engage and actively participate in the betterment of Baton Rouge, while producing the next generation of community leaders.

**MISSION:** Forum 35 is a community of young men and women improving Baton Rouge.

**CORE PILLARS:** Forum 35 achieves its mission through initiatives focused around leadership, arts and culture, and diversity.

Since its founding in 1993, Forum 35 has grown into the largest young professional's organization in Baton Rouge. This strategic plan aims to strengthen its framework and set the organization on the path to a healthy, sustainable future. As an all-volunteer organization with relatively short leadership terms, the strategic plan was left intentionally broad to allow for future leadership to accomplish goals in the context of their term. The goals below are not necessarily in order of importance, yet goals one through four are essential for goal five to be achievable.

**GOAL ONE:** Strengthen Forum 35's financial position.

STRATEGIES	DELIVERABLES	RESPONSIBLE PARTY
Assess current resources as they relate to our core pillars	2016 <ul style="list-style-type: none"> <li>● Process established for annual review of data</li> <li>● Community impact metrics established</li> <li>● Current initiatives analyzed for community impact</li> <li>● Advisory Board re-engaged for guidance on where to focus efforts</li> </ul> 2017 <ul style="list-style-type: none"> <li>● Strategy for integrating community impact into organizational fundraising and communications established</li> </ul> 2018 <ul style="list-style-type: none"> <li>● Community impact threshold for initiatives developed</li> </ul>	Treasurer President President-Elect VP of Projects
Establish development committee to focus on organizational level fundraising	2016 <ul style="list-style-type: none"> <li>● Development Committee successfully formed</li> <li>● Development needs and focus areas determined</li> <li>● Organizational level development strategy created</li> <li>● Annual giving campaign established for general support</li> </ul> 2017 <ul style="list-style-type: none"> <li>● Comprehensive development package finalized</li> <li>● Current projects evaluated and transitioned to revenue-generating, where possible</li> <li>● Internal development calendar created with funding opportunities, grant opportunities and deadlines/strategy for grant asks</li> </ul> 2018 <ul style="list-style-type: none"> <li>● Endowment strengthened</li> </ul>	VP of Development VP of Projects
Identify partnerships for non-cash support	2016 <ul style="list-style-type: none"> <li>● Audit of current organizational non-cash support completed, analyzed for potential consolidation</li> </ul> 2017 <ul style="list-style-type: none"> <li>● Organizational non-cash contracts established</li> </ul>	Executive Committee

	<ul style="list-style-type: none"><li>• Calendar for non-cash support deadlines established</li></ul> 2018 <ul style="list-style-type: none"><li>• Partnerships for non-cash support fully realized</li></ul>	
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**GOAL TWO:** Improve membership retention and engagement.

STRATEGIES	DELIVERABLES	RESPONSIBLE PARTY
<p>Create a member stewardship plan</p>	<p>2016</p> <ul style="list-style-type: none"> <li>● Current stewardship practices analyzed for effectiveness</li> <li>● Specific communications and actions around onboarding new members</li> <li>● Method and benchmarks for tracking member engagement developed and implemented</li> </ul> <p>2017</p> <ul style="list-style-type: none"> <li>● Path to leadership within Forum 35 developed and communicated with membership</li> </ul> <p>2018</p> <ul style="list-style-type: none"> <li>● Comprehensive member stewardship plan implemented</li> </ul>	<p>President-Elect VP of Individual Membership VP of Communications</p>
<p>Strengthen our voice on community and organizational issues</p>	<p>2016</p> <ul style="list-style-type: none"> <li>● Process to poll membership on key issues developed and communicated</li> <li>● Areas to focus organizational voice established via membership polling</li> <li>● Membership voice expressed to community by Forum 35 leadership on key issues</li> </ul> <p>2017</p> <ul style="list-style-type: none"> <li>● Process for recording outcome of issues Forum 35 participates in established; outcomes communicated internally and externally</li> </ul> <p>2018</p> <ul style="list-style-type: none"> <li>● Forum 35's reputation as the voice of young professionals in Baton Rouge fully realized</li> </ul>	<p>Executive Committee Board of Directors Committee Chairs</p>
<p>Strengthen the brand of Forum 35 in the community</p>	<p>2016</p> <ul style="list-style-type: none"> <li>● Community impact highlighted in communication internally and externally to combat the strictly social stigma of the organization</li> </ul>	<p>President President-Elect Immediate Past-President VP of Communications</p>

	<p>2017</p> <ul style="list-style-type: none"><li>• Targeted communication plan to educate membership and community on role established and implemented</li><li>• Communication plan geared toward current and future members over the age of 35 established</li></ul> <p>2018</p> <ul style="list-style-type: none"><li>• Mission and organizational impact understood and embraced by membership and community</li></ul>	
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**GOAL THREE:** Strengthen leadership development opportunities.

STRATEGIES	DELIVERABLES	RESPONSIBLE PARTY
<p>Establish key partnerships with other community organizations that align with our core pillars</p>	<p>2016</p> <ul style="list-style-type: none"> <li>● Advisory Board re-engaged for guidance on best use of partnerships</li> <li>● Current partnerships defined and analyzed for consistency with core pillars</li> <li>● Communication plan for partnership activity developed</li> </ul> <p>2017</p> <ul style="list-style-type: none"> <li>● Process created for members to serve on the board of key community organizations as ex-officio board members</li> <li>● Partner organizations identified</li> </ul> <p>2018</p> <ul style="list-style-type: none"> <li>● Community partnerships established and known to membership and community at large</li> </ul>	<p>President President-Elect Immediate Past-President VP of Corporate Membership</p>
<p>Position the John W. Barton, Sr. Community Leadership Program as the premier non-profit board training program in Baton Rouge</p>	<p>2016</p> <ul style="list-style-type: none"> <li>● Process for tracking graduates of the Barton Program developed and implemented</li> <li>● Plan to engage Barton Program alumni developed and implemented</li> <li>● Additional fund sources for the Barton Program identified and secured</li> <li>● Communication plan to increase awareness of the Program established</li> <li>● Benchmarks of success established</li> </ul> <p>2017</p> <ul style="list-style-type: none"> <li>● Process for Barton Program alumni to alert Forum 35 of board vacancies in the community developed and implemented</li> </ul> <p>2018</p> <ul style="list-style-type: none"> <li>● Reputation established and communicated with membership and community</li> </ul>	<p>VP of Projects Barton Chair</p>

<p>Expand professional development programs</p>	<p>2016</p> <ul style="list-style-type: none"> <li>● Potential new programs identified by Board of Directors and presented to membership via poll</li> <li>● Implementation of one new professional development program</li> </ul> <p>2017</p> <ul style="list-style-type: none"> <li>● Professional development benefits of Committee Chair and Board service formalized and understood by the membership and corporate partners</li> </ul> <p>2018</p> <ul style="list-style-type: none"> <li>● Member perception of professional development opportunities improved</li> </ul>	<p>VP of Projects  VP of Corporate Membership  Board of Directors</p>
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**GOAL FOUR:** Establish standard operating procedures.

<b>STRATEGIES</b>	<b>DELIVERABLES</b>	<b>RESPONSIBLE PARTY</b>
Create comprehensive policies and procedures	2016 <ul style="list-style-type: none"> <li>● Current strategies and resources evaluated for effectiveness</li> <li>● Comprehensive role descriptions for Executive Committee and Board Members developed, distributed, and understood</li> <li>● Accountability plan for Executive Committee and Board of Directors adopted</li> <li>● Organizational project management calendar developed and understood by leadership</li> </ul> 2017 <ul style="list-style-type: none"> <li>● Process manual for each major initiative created for successful yearly transitions and historical reference</li> </ul> 2018 <ul style="list-style-type: none"> <li>● Comprehensive policies and procedures manual completed, understood, and adopted</li> </ul>	Executive Committee Board of Directors Tatman
Develop procedure to collect standardized data	2016 <ul style="list-style-type: none"> <li>● Current data metrics and method of collection analyzed</li> <li>● Standard data metrics across initiatives identified and method for collection established</li> </ul> 2017 <ul style="list-style-type: none"> <li>● Standardized data metrics and method of collection adopted by Board of Directors, Committee Chairs, and Committee members</li> <li>● Standardized data reported quarterly to Board of Directors</li> </ul> 2018 <ul style="list-style-type: none"> <li>● Standardized data process fully adopted by organization</li> </ul>	President-Elect Secretary Tatman
Develop a communications plan	2016 <ul style="list-style-type: none"> <li>● Communications Committee established</li> <li>● Organizational communication priorities identified</li> </ul>	VP of Communications President President-Elect



	<ul style="list-style-type: none"> <li>• Comprehensive marketing calendar created</li> <li>• Organizational communications binder started</li> </ul> <p>2017</p> <ul style="list-style-type: none"> <li>• Processes as outlined by the Communications Committee adopted by Board of Directors, Committee Chairs and Committee Members</li> <li>• Organizational communications manual components finalized</li> </ul> <p>2018</p> <ul style="list-style-type: none"> <li>• Communications plan fully implemented</li> </ul>	Immediate Past-President
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**GOAL FIVE:** Hire an Executive Director.

<b>BENCHMARKS</b>	<b>RESPONSIBLE PARTY</b>
<p>2016</p> <ul style="list-style-type: none"> <li>• Job description for the position of Forum 35 Executive Director finalized, including salary and benefits, with the help of the Tatman staff</li> <li>• Community partners approached for a three-year commitment to fund the Executive Director position</li> </ul> <p>2017</p> <ul style="list-style-type: none"> <li>• Confidential review process of the Executive Director's performance established</li> <li>• Transition plan with Tatman to move main responsibilities from Tatman staff to Executive Director developed</li> <li>• Search committee established</li> </ul> <p>2018</p> <ul style="list-style-type: none"> <li>• Interview process for top candidates for the Executive Director position established</li> <li>• Executive Director is interviewed and hired</li> </ul>	<p>Executive Committee Board of Directors Tatman</p>