# NFBV Greater Alexandria - Strategic Planning Retreat

## Recap and Outputs

###  Date/Time: Sunday, August 26, 1 PM-5 PM Eastern

### \*\*\*A big thanks to The Meridian for donating the space. This is a significant donation; please like them on FB to show our love.

# Introduction and overview of report

On August 26, members of the NFBV Greater Alexandria chapter met with the board. Their ennobling purpose:

* To gain consensus on strategic priorities for NFBV-Greater ALX;
* To create prioritized and measurable action plans that will guide the organization to achieve the overall strategic priorities; and,
* To build a more cohesive leadership team to guide the organization to success.

The following document recaps the activities of the day and presents the outputs for review by the chapter. The next step is to adopt the actions and strategies from this document as the chapter’s strategic plan at the October meeting, setting the stage to begin strategic implementation in November and impower new and existing leadership to own strategic priorities and actions identified at the retreat.

## Table of Contents with Jump Links

[Introduction and overview of report 1](#_Toc527468208)

[Table of Contents with Jump Links 2](#_Toc527468209)

[Introductions and Telling Our Stories 3](#_Toc527468210)

[What was common in what was shared among your group? 3](#_Toc527468211)

[What was unique to one or two people? 4](#_Toc527468212)

[What the NFBV Greater Alexandria Chapter needs to accomplish over the next three years for us to know we are most successful is? 4](#_Toc527468213)

[Setting Organizational initiatives—A quick way to strategic framework 6](#_Toc527468214)

[NFBV Greater Alexandria—Strategic Priority Areas 6](#_Toc527468215)

[Turning Strategic Initiatives into Action—process overview followed by action plans and brainstorm 7](#_Toc527468216)

[1. Building engaged membership 8](#_Toc527468217)

[Current Strategies 8](#_Toc527468218)

[Brainstorm on actions we Could take 8](#_Toc527468219)

[Action Plan—Building Engaged Membership 9](#_Toc527468220)

[2. Community Engagement and Education 10](#_Toc527468221)

[Current Strategies 10](#_Toc527468222)

[Brainstorm on actions we Could take 10](#_Toc527468223)

[Action Plan—Community Engagement and Education 11](#_Toc527468224)

[3. Fundraising 12](#_Toc527468225)

[Current strategies 12](#_Toc527468226)

[Actions brainstormed that we could do 12](#_Toc527468227)

[Action plan--Fundraising 13](#_Toc527468228)

[4. Building Our Internal Capacity 14](#_Toc527468229)

[Action plan-Building Internal Capacity 14](#_Toc527468230)

# Introductions and Telling Our Stories

Following a meal of Popeye’s chicken and other fixins, President Brian Miller opened the day by setting the stage for the discussion, building a spirit of collaboration within the group, an impowering Jerry Jayjohn, of [S&G Endeavors](http://www.sgendeavors.com), as the facilitator for the day. Participants were divided into two groups to begin the day’s work and introduce themselves with the purpose of building commonality around their desires for NFBV-Greater ALX going forward.

Each person used the following questions to introduce themselves to each other:

1. Who am I? What do I do? The reason(s) that I care about the work of the NFBV Greater Alexandria Chapter is…
2. As I think about the accomplishments of the NFBV Greater Alexandria Chapter over the past year, I am most proud that we have… What most excites me about these successes is......
3. as I think about the NFBV Greater Alexandria Chapter over the past year, some concerns that I have are…
4. If I had a magic wand that would make us most successful in our work, I would…
5. What the NFBV Greater Alexandria Chapter needs to accomplish together over the next five years for me to know we are most successful is...

After listening to each person share “the story” through the questions above, each of the smaller groups then reported out to the whole group using the following questions:

1. What was common in what was shared among your group?
2. What was unique to one or two people?
3. What the NFBV Greater Alexandria Chapter needs to accomplish over the next three years for us to know we are most successful is?

The following reflects the combined outputs of what was reported out to the larger group.

## What was common in what was shared among your group?

* we don’t meet enough
* we need money
* involving youth
* community outreach
* growth
* open-minded
* Good support system for everyone
* Community activities and outreach are desirable
* Educating the public on what NFB is and what they do.
* Educating sited people on how to work it blind ppl.
* How we can get along with each other.
* Educate that blindness is nothing to be afraid of.
* Some folks are losing vision that also need to learn ideas about blindness because they are not educated and are operating on narrow-minded ideas or unawareness.
* Those in blind community who do not know about NFB and philosophy.
* Reaching out to other blind folks.
* Our chapter is energy, creativity, willingness to try new things that are different, make mistakes.
* Goal to grow membership.
* Improve organization and processes.
* More frequent meetings.

## What was unique to one or two people?

* family oriented
* we are less formal
* we are engaged in the community
* we would like to be more engaged,
* Activity for white cane month.
* Provide advice to others who are losing vision.
* Promote braille literacy.
* Mentoring program.
* Better connection to national level.
* Growing chapter leaders.
* Leading major program in area beyond our own membership.

## What the NFBV Greater Alexandria Chapter needs to accomplish over the next three years for us to know we are most successful is?

* we would like to see more people with full-time jobs and in management positions and in entrepreneur positions
* staying connected and checking in with people
* more activities
* chapter overall involvement
* we are all very busy
* how do we ask for more money?
* we are accessible to various sectors of the community
* education and awareness,
* Expanded membership.
* Bigger presence and visibility in community.
* Have hosted a large event.
* Have ligistic things worked out.
* Have raised some more funds to support specific things that are important to the chapter.
* Identify areas where we can have an impact (e.g., project 0, or other accessibility).
* Advocate for braille menus at restaurants.
* Full participation and engagement, and not just on a select few.
* Become the go-to resource in Alexandria area to provide answers.
* Blindness training resources.

# Setting Organizational initiatives—A quick way to strategic framework

Following the introduction exercise, the group took a break to connect with each other and continue building the personal relationships needed to help move work forward. The facilitator, with input from some key leaders, then presented a strategic framework that build on the accomplishments brainstormed from the introductory activity. The following is the strategic framework presented to the group; the group gained consensus to use this framework to plan actions for the chapter over the coming years.

## NFBV Greater Alexandria—Strategic Priority Areas

1. Building Engaged membership
2. Community engagement and education
3. Funding our efforts
4. Building Our Internal Capacity

# Turning Strategic Initiatives into Action—process overview followed by action plans and brainstorm

Following an overview by the facilitator explaining the theory behind the planning process, the whole group divided into three teams. Each team built on the day’s discussion to create an action plan targeted to their respected initiative area. The questions guiding each of the teams through the activity included:

1. What are current strategies currently used by the chapter to advance movement toward this topic?
2. What are additional actions that you would like to implement for this initiative to help NFBV Greater Alexandria Chapter be most successful. (brainstorm first and then narrow it down to the top 4-6)
3. For each of the 4-6 action items you identified in #2, identify how you will measure that we have achieved each action.
4. Now, based on your actions and identified measures from question #2 and #3, what is a one-sentence statement that describes success for your initiative.

The following pages capture the outputs from each of the team; the board completed an action plan for initiative #4 as well, which has been included in this outputs document.

Following each team creating their plans, each group was asked to share outputs with the whole group. Brian then closed the session by committing that the board was finalize the plan with inputs from the attendees and that we would share the outputs with the chapter prior to the October meeting, encouraging that we adopt the strategic plan at that meeting.

**\*\*\*reminder, individual action plans are below\*\*\*\***

## Building engaged membership (Evelyn and Terry)

### Current Strategies

* Quarterly meeting
* Emails
* Activities
* Word of mouth.
* Through googling on state affiliate page.
* Facebook page.
* List serves

### Brainstorm on actions we Could take

* We need to get word out of our existence to groups like AARP and department of blind and visually impaired, school systems., eye doctors, prevention of blindness groups.
* Devising new ways of using Facebook and other social media like weekly posts. Sending request to everyone on our list serve to like our page and get updates/create event invites on Facebook.
* Have a spokesperson for our chapter to introduce us an make a promo YouTube video and talk about our initiatives.
* Could use meet up to create meet up group and events with freebies like braille cards to get both blind and sited people involved as well.
* Ask for feedback from membership, especially new members to see what they like/don’t like/how to get them to come and get involved?
* Assign someone in chapter to be a meet and greet person officially in charge of meeting new folks.
* People take turns during each meting bringing a mid-meeting snack.
* Have a sunshine person, who will reach out phone call or bring cards if a member is ill.
* Call or text people to remind them of the meetings.
* Specifically ask new people to help with certain initiatives because new people want to do something.

### Action Plan—Building Engaged Membership

**Goal: building a larger and more diverse membership where the load is shared amongst everyone.**

1. Define a membership process, which identify how we are getting new members and how we court existing members.
	1. Process is defined by January 2019.
	2. Tools are identified and implemented by April 2019.
2. Collaborate with partner groups to spread the word about our events and upcoming meetings. This includes groups like AARP, department of blind and visually impaired, school systems., eye doctors, prevention of blindness groups, etc.
	1. Receiving additional and more diverse members and inquiries. Proportion of membership that is new to the federation has increased.
3. Identify and use social media more effectively. weekly posts. Sending request to everyone on our list serve to like our page and get updates/create event invites on Facebook. YouTube promo video for chapter.
	1. Number of likes and shares increases. Seeing spike in new membership. Number of comments and dialogue.
4. Create a meet-up group to engage blind, non-blind people, and potential members.
	1. Holding 3 meet-ups a year.
5. Develop a chapter mentorship program.
	1. More active members who show up. More people interested in board positions and leadership positions.
6. Conduct an annual membership survey to assess how we are doing and to identify other ways we can do better.
	1. Conducting a survey by April 2019.
	2. Creating an action plan based on survey results.
7. Create event delivery teams to work on event hosting events, promotion, and logistics.
	1. We have assigned members to work on various repetitive tasks.
	2. Our big events have assigned hosting teams to spread the work throughout the chapter.

## Community Engagement and Education—Renee and Wanda

### Current Strategies

* Plan activities that increase out exposure and visibility in the community which includes our neighborhoods and places of interest
* Building relationship with our civic leaders
* Cultivating community partnerships and businesses

### Brainstorm on actions we Could take

* Plan a White Cane Safety event-publicizing this event throughout various channels and outlets
* Awareness in schools (A speaker’s bureau) and at senior citizens homes in addition to churches wit concentration in the month of October
* Making ourselves aware on the City of Alexandria website
* Competence/Sensitivity training

### Action Plan—Community Engagement and Education

**Goal: The community will know who we are and what we are about and the community will be more comfortable and their knowledge-base; experience will be more enhanced**

1. Plan a White Cane Safety event-publicizing this event throughout various channels and outlets
	1. Before and after survey demonstrates more awareness.
	2. general head count of who is reached with the event
2. Host a “speakers Bureau to Raise Awareness in schools, senior citizen homes, and churches with concentration in the month of October
	1. We can set a goal of how many places we visit and speak at and measure against that goal; identify target presentation location; handing out literature
3. Tap into the Alexandria City Website and other avenues to raise the community’s awareness that we exist
	1. Understand the process and complete necessary paperwork
	2. Identify and pursue other mechanisms
4. Competence/Sensitivity training
	1. A pre and post survey for the individuals who are completing the training shows improvement
	2. Evaluation process
5. Identify and secure topical liaisons that directly engage within Alexandria, including being active in various city committees and other avenues.
	1. NFBV of Alexandria is recognized as an active player advancing safety for people who walk.
	2. Our members are staffing at least four city advisory committees by August 2019.

## Fundraising—Susie and Andre

### Current strategies

* Strategies are vague… NO real clear strategies.
* Evelyn and Susie developed a fund-raising flyer which was distributed to the chapter for review and comment. The flyer has been finalized, the plan presented to the chapter, some tracking tools developed, but no progress as yet.

### Actions brainstormed that we could do

* Identify fund raising committee chair.
* Identify goals for what to do with our money.
* Working toward something. Identify efforts that are inclusive so people can make large and small contributions.
* Make sure we have seed money to fund efforts.
* Identify efforts that get us out into the community – table selling stuff, maybe tied to white cane day.
* Build relationships with local businesses - Chamber of commerce.
* Research what is working with other organizations that are successful.
* Participating in community fund raising efforts, but raises our profile.
* Establish self-propelled fund-raising efforts – Amazon Smile, scrip program, so on.

### Action plan--Fundraising

**Goal: Ensure chapter reaches financial stability to be able to fund chapter activities and responsibilities. Develop comprehensive fundraising plan, and eventually be able to make long-term investments.**

1. Identify a fund-raising chair and develop the tools to track and manage fund-raising efforts.
	1. identify person within three months;
	2. Develop spreadsheet tracking tool;
	3. After chapter account is created, establish ability to donate electronically to the chapter bank account, either through transfers, Square, or online click to donate links; and
	4. Verify non-profit tax-exempt status through tax ID #, and be able to provide receipts for donors for tax purposes.
2. Establish fund-raising targets, and specific purposes for money raised.
	1. Set specific targets for fund raising - $1,000 by end of one year;
	2. Identify at least two specific purposes for the money, and project what it would cost to fund those items;
	3. Identify long range investment growth goals;
	4. Earmark a set amount of money raised for investment in long-range interest-bearing funds, such as a CD, money-market fund, or equity index fund;
3. Research fund-raising efforts by other organizations that have proven successful.
	1. Earmark a set amount of money raised for investment in long-range interest-bearing funds, such as a CD, money-market fund, or equity index fund;
	2. Establish committee to research options;
	3. Identify within six months three ideas, one short term, one medium term, one long term;
	4. Committee reports out to chapter within six months its proposals/suggestions/research results;
	5. Identify at least one self-propelled fund-raising option that the chapter can embrace within six months of reporting.
4. Conduct fund-raising efforts, including those in the community that raise our profile, and are inclusive so that all can participate whenever possible.
	1. Execute two successful fund-raising efforts in a year;
	2. Meet with chamber of commerce executive director to identify specific mechanisms for working together in the community;
	3. Have net more money in the bank at the end of one year after initiatives began;
	4. Be able to meet all chapter fiscal responsibilities, including contributions to the state affiliate, and national funds such as Sunshine, White Cane, Jernigan, and tenBroek.

## 4. Building Our Internal Capacity

### Action plan-Building Internal Capacity

1. Jeremy-Building tracking tools and working with the other teams to ensure we have the tools to meet their needs
	1. Hold data needs gathering meeting by November 2018
	2. Draft plan for technology and data tracking by the January chapter meeting with some stuff already implemented
	3. Training on tools and technology we are using delivered by January 2019 with optional attendance by members of chapter
	4. Ideas being considered and will be decided during the scoping meeting in November include, but aren’t limited to:
		1. Build out a skills matrix where people can tell us what they’re good at
		2. Dropbox, google, filing system in general (for the board)
		3. Online donation button
		4. Central file tracking membership
		5. Ways to track fundraising
		6. Membership survey: how often should we meet
		7. Tracking hot button community issues
		8. Anything else that the teams need
2. Jeremy-Succession planning
	1. Draft succession plan by November
	2. Final succession plan in place by January meeting and reported to chapter
3. Brian and Jeremy-Hosting the monthly meeting: Define a list of rotating common activities for which people can volunteer
	1. Brian gets checklist of volunteer activities to Jeremy by October 22
	2. Jeremy will collect volunteers to help with tasks at the end of October’s meeting