



Strategic Planning Process **OVERVIEW**

March 11, 2015

Sabatier Consulting

***Your strategic plan can
provide an invaluable blueprint
for growth and revitalization.***



Sabatier Consulting

Sabatier Consulting – Facilitator

- Media and communications practice founded in 1992
- Consultants have real-world executive and management experience and have dealt with real-world problems
- Research, experience and careful analysis informs recommendations for action



Sabatier Consulting – Facilitator

- Worked with many companies, organizations, associations and government in strategic planning
- We run the process, but don't try to “push the river”
- Previous work with NARFE – 2012 reposition and redesign of magazine and member/prospect research



Sabatier Consulting – Facilitator

- Lou Sabatier and Ed Fitzelle are assisting NARFE on this project, reporting to President Dick Thissen
- Our role:
 - Craft a best-practice strategic planning process
 - Build a communication plan for all stakeholders
 - Facilitate appropriate meetings and events
 - Set process milestones and hit them
 - Foster interaction that leads to results



The Keys to Successful Strategic Planning

- Define a clear and comprehensive grasp of the opportunities and challenges
- Prepare a realistic and detailed assessment of the organization's strengths and limitations
- An inclusive approach to all stakeholders
- An empowered planning committee



The Keys to Successful Strategic Planning

- Regular involvement of senior leadership
- Sharing of responsibility between board and staff members
- Learning from best practices
- Establishing clear priorities and an implementation plan
- Patience
- A commitment to change



NARFE Communication Goals

- To provide information to all stakeholders on how planning works (best practices) and our rationale
- To provide accurate, concise and timely updates to all stakeholders throughout the process with multiple communication tools and formats
- To emphasize objectivity, transparency and the opportunities available



NARFE Strategic Planning

- Sabatier Consulting outlined a planning process with steps that actually began in September 2013 and will continue until July 2016.
- A planning diagram has been created to communicate this process with stakeholders (officers, leaders, members and staff) ...

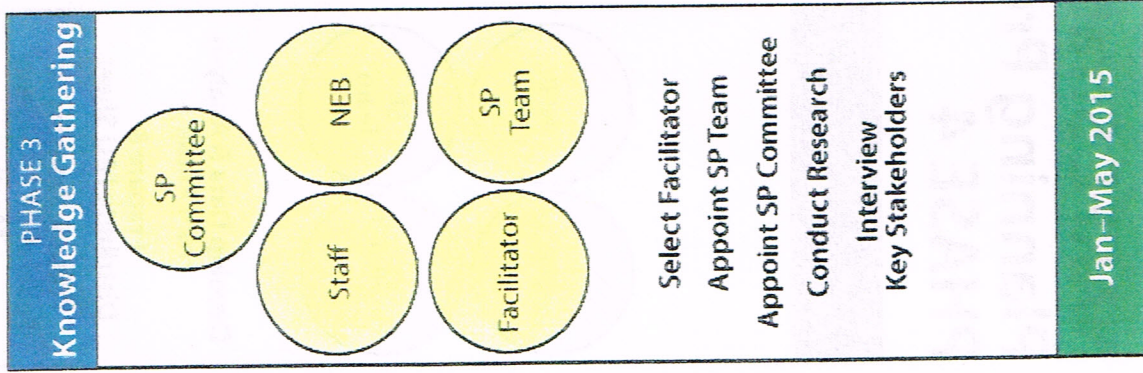


NARFE Strategic Planning Process

PHASE 1 Future of NARFE	PHASE 2 Passed Resolutions	PHASE 3 Knowledge Gathering	PHASE 4 Consensus Building	PHASE 5 Prepare Plan	PHASE 6 Communication
<p>COMPLETED</p> <p>Future of NARFE Committee</p>	<p>COMPLETED</p> <p>Delegates</p>	<p>SP Committee</p> <p>Staff</p> <p>Facilitator</p> <p>NEB</p> <p>SP Team</p>	<p>SP Committee</p> <p>Facilitator</p> <p>NEB</p> <p>SP Team</p>	<p>SP Committee</p> <p>Facilitator</p> <p>NEB</p> <p>SP Team</p>	<p>SP Team</p> <p>Facilitator</p> <p>NEB</p>
<p>Appoint Committee</p> <p>Committee Info Gather</p> <p>Committee Meetings</p> <p>Identify Critical Issues</p> <p>Cast Vision For Change</p>	<p>Convention Resolutions: Develop the Strategic Plan for Future NARFE</p> <p>Establish a Standing Strategic Planning Committee by February 15, 2015</p> <p>Reduce National Officers to Two</p>	<p>Select Facilitator</p> <p>Appoint SP Team</p> <p>Appoint SP Committee</p> <p>Conduct Research Interview Key Stakeholders</p>	<p>Develop Data & Analysis From Phase 3</p> <p>Prepare & Distribute FAQ Sheet</p> <p>Present Progress at Federation Presidents' Meeting</p>	<p>Review & Consider Input from Phase 3 & 4</p> <p>Write Strategic Plan</p>	<p>Distribute Strategical Plan Organizationally</p> <p>Develop Bylaws Agenda</p> <p>Facilitate Communication</p>
Two-Way Communication with Membership Throughout					
Sept 2013–April 2014	Aug 24-28 2014	Jan–May 2015	June–Aug 2015	Sept 2015–Jan 2016	Feb–July 2016



NARFE Strategic Planning Process: PHASE 3

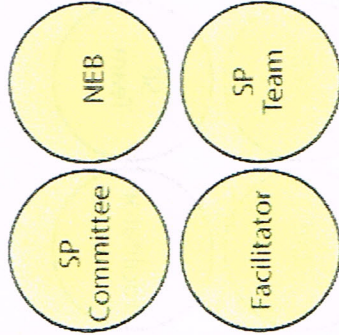


- ✓ Facilitator selected
- ✓ SP Team chosen
 - Prioritize FON proposals
 - Identify other pertinent issues
 - Assemble other relevant information
- ✓ SP Committee chosen
 - Review information provided by SP Team
- ✓ Research in progress
 - Sabatier Consulting to interview key stakeholders



NARFE Strategic Planning Process: PHASE 4

PHASE 4 Consensus Building



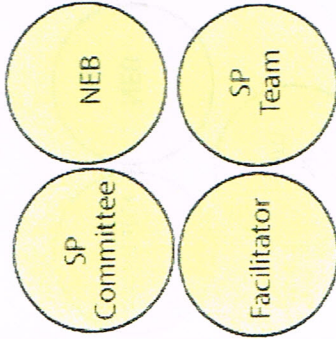
Develop Data & Analysis
From Phase 3
Prepare &
Distribute FAQ Sheet
Present Progress at
Federation Presidents'
Meeting

- SP Committee
 - prepare outline for strategic plan
 - prepare detailed memo for SP Team with *analysis and key points* from the research, data and information presented to the committee
- SP Team review and prepare fact sheet to be presented at Federation President's meeting



NARFE Strategic Planning Process: PHASE 5

PHASE 5 Prepare Plan



Review & Consider
Input from Phase 3 & 4

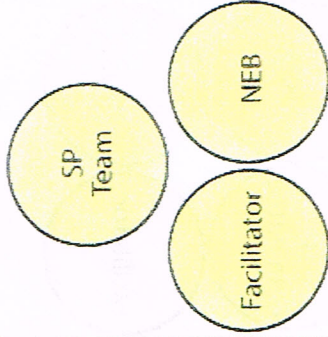
Write
Strategic Plan

- SP Team to write strategic plan
and share it with NEB



NARFE Strategic Planning Process: PHASE 6

PHASE 6 Communication



Distribute
Strategic Plan
Organizationally
Develop Bylaws
Agenda
Facilitate
Communication

- Distribute a strategic plan summary to all stakeholders
- SP Team to develop bylaws agenda and distribute it to all stakeholders



Feb-July 2016

Sabatier Consulting

NARFE Strategic Plan Fact Sheet

- Sabatier Consulting has created a Fact Sheet to accompany the planning process diagram
 - Highlights key points of planning process
 - Stresses the commitment needed for success in this process
 - Shared with members of planning team and committee
 - Intended to inform all stakeholders and emphasize inclusiveness and transparency



Next Steps

- Team shares short, mid and long-term guidance on **Future of NARFE** recommendations with Committee
- Committee convenes for work session
- Sabatier Consulting to interview key stakeholders for additional feedback
- NARFE research continues online
- Wrap up Phase 3 and move to Phase 4

