



**LEADERSHIP** *Los Alamos*

An educational organization dedicated to the future of Los Alamos

## **2013 Strategic Plan**

## **Leadership Los Alamos Strategic Plan**

### **Vision Statement**

The vision statement describes the desired future that we want to create.

#### Leadership Los Alamos Vision Statement

Leadership Los Alamos identifies, enlightens, and encourages leaders of diverse backgrounds, occupations, and cultures for the purpose of broadening the understanding of our community and enhancing the quality of leadership.

### **Strategic Focus Areas –**

Strategic Focus Areas are items of extreme importance and affect in determining the nature and quality of Leadership Los Alamos' future. The Strategic Focus Areas define where resources – both time and money – should be spent to reach the fulfillment of the vision by answering the most critical question – “what really is the most important?” These areas are not prioritized due to their equal importance to, and effect on, Leadership Los Alamos' future.

#### Leadership Los Alamos Strategic Focus Areas

- Recruiting
- Class
  - Board
  - Financial partners
- Curriculum development
- Marketing
- Admin support
- Alumni Development
- Board rules and responsibilities
- Partnership strategy
- Sustainability
  - Financial
  - Programs
  - People
- Data Repository
  - Metrics
  - Records
  - Documents
  - Financials

### **Goal statements**

The Goal Statements reflect leadership priorities and direction that define the basis for policy-setting, revenue and resource generation and allocation, the creation of specific objectives (performance results) that must be achieved toward implementing the vision and goals. The Board must determine the appropriate planning horizon for the goals necessary to budget for

investments and programs essential for the future of Leadership Los Alamos. The following Goal Statements were developed for each of the Strategic Focus Areas.

## Leadership Los Alamos Goal Statements

### Marketing

- Establish LLA as a viable and respected program within the County, which is supported by other organizations and well –connected to its alumni.
  - Make funders (County, LANB) aware of accomplishments (grads program).
  - Social events at location of funders (e.g. LANB).
  - Make organizations that send people aware of LLA.
    - Benefits
    - End product
  - Develop alumni information.
  - Publicity for sessions, strategic planning (e.g., LA daily post).
  - Market upcoming sessions. Advertise in paper, etc.
  - Diversify major sponsors (beyond County, LANB).
  - Establish and implement strategy to expose LLA to Los Alamos organizations and non-profits.
  - Timely/frequent press releases promoting LLA program (schools, events, success stories).
  - Establish quarterly newsletter - digital
  - Establish mailing list.
  - Promote sponsors through class materials, advertising, and press releases.
  - Connect program to graduates.
  - Social media plan.

### Sustainability

- Financial
  - Establish financial strategy that is diverse and stable while keeping tuition costs and expenses reasonable.
    - Establish cyclic budgets.
    - Diversify and expand sponsorship\_(alumni, class s session sponsors).
    - Fundraising
- Recruitment
  - LLA will implement a strategy and will sustain and perpetuate successful, cyclic recruitment of new classes.
    - Establish cycle.
    - Develop recruiting strategy.
    - Ensure affordable program.
    - Develop marketing strategy.

- Workload
  - LLA will ensure that it maintains an appropriate number of LLA members with reasonable workloads to recruit, manage records, facilitate classes, engage alumni, and manage administrative requirements.
  - Pair mentor/protégé for each class.
  - Establish requirements for graduates for following years.
  - Board duties.

### Recruiting

- For Financial Partners
  - Develop comprehensive recruiting plan for financial partners.
  - Identify what we need.
    - Goods, location, just cash?
    - Budget
    - Develop donation levels and benefits.
  - Develop target markets.
    - Alumni, County, LANB, business community.
  - Develop sponsor feedback/appreciation plan.
- For Board
  - Recruiting materials that define job.
  - Recruiting schedule: when we start.
  - LLA alumni only? Board criteria needed.
  - Identify Board Member recruiting opportunities
    - Alumni events, current class.
- For Classes- students
  - Develop comprehensive recruiting plan to include a variety of mediums.
    - Personal, press releases (print, radio), social media.
  - Identify target markets.
    - Non-profits (Family Strengths Network, Family Council), business community, speakers, UNM-LA, SBIC, LANL, alumni.
  - Review application content – is it conducive to diversity, and does it set appropriate expectations?
  - Set recruiting plan: schedule
  - Build diversification into review board – how we review student AP's.

### Alumni Development

- Develop communication plan with alumni.
- Increase alumni involvement/participation/enrichment.
- Define areas of involvement.
  - Social/networking
  - Financial sponsorship
  - Support of LLA program

- Recruiting
  - CD
  - Curriculum development
  - Enrichment events
- Encourage community service opportunities.
- Promote alumni as a community resource.

### Admin Support

- Operate LLA more smoothly and provide opportunity for program expansion.
  - Review prior committee's report.
  - Determine staffing/no staffing
    - Centralized and distributed.
  - Develop operations manual for different LLA activities/job description.

### Curriculum Development

LLA will have an informative sustainable curriculum program that educates and encourages engagement and building of community connections.

- Current
- Relevant
- Leadership training
- Education on community issues
- Context
- Build community organization involvement
- Encourage continued involvement
  - Also need alumni metrics one to three years and how content was useful.
- Feedback loop
- Review/evaluate topics covered (social needs/non-profits). (Current and relevant goes with this).
- Calendar/checklist
- Balance of information vs. hands-on/breakouts (class format), lecture vs. question, and answer time vs. breakouts.
- No follow-on to breakouts (class format).
- Do goal below.
  - Develop connections and network within LLA in current class and speakers.
- Speaker needs: to speaker/to class.
  - Speaker information – who is in class so speaker knows audience.
  - Speaker's resume and abstract to class prior to session.
  - Speakers bring volunteer opportunities.
- Evaluations – collect and how to use session timing.
- Sustainable – organizers and speakers.
- Current year class – partner to plan next year's class.
- Logistics

- Food
- Room reservations
- Transportation
- Customer experience
- Scheduling
- Timing for sessions – longer, every two months?
- Curriculum community – role, structure, meeting times.
- Master planning session with all board.
- Alumni development (who develops, how)
- Enforcement of ground rules for students and board members.

### Board Roles and Responsibilities

LLA will establish clear expectations of board members in order to conduct the affairs of LLA. Define and implement the LLA program (class alumni marketing, admin support...)

- Functions (in bylaws vs. doing) bylaw changes?
- Annual checklists (state form re: boards, IRS...).
- Review of requirement (legal, financial, P.O. Box).
- Each board member transition list.
- Expectations of board members (attendance at meetings, class sessions, strategic planning sessions, chair session?).
- Hold each other accountable.
- Monitor class attendance?
- Board functions – succession/mentor.
- Program committee co-chairs.
- Past boards members – advisory role?
- Reartime action – get someone from last year’s class.

### Data Repository

Establish a centralized data management program to support operational and promotional activities on a cyclic basis to understand success of the program, validate purpose, and perpetuate the organization.

- Finances managed by Board Treasurer
  - Needs secondary backup
  - Will have more responsibilities (fund raising)
  - Needs better rules/procedures
- Metrics
  - Need to define what they are
  - Establish baseline
  - Link to marketing
  - How to distribute/collect/cycle
  - Products
    - For customers (funders/sponsors)
    - For participants

- For marketing
- (Need data call – what do we need, who has what, what condition data is in).
- Metrics
  - Success stories (define success)
  - Graduate tracking
  - Organization connections (how much, how long)
  - Surveys

### Partnership Strategy

Establish and implement a partnership strategy so that LLA can contribute to and learn from other partners for the following purposes:

- Recruit
- Financial stability
- Programming
- Diversity participants
- Achieve mutual goals
- Positive association and endorsement
- Network with other programs
  - Leadership NM
  - LAYL
  - Learn from these organizations.
  - Leadership Santa Fe, San Juan, Albuquerque
- Why Needed
  - Learn from
  - Recruiting
  - Financial support
  - Program support
  - Achieve diversity
  - Achieve mutual goals
  - Imaging

### **Stakeholder Analysis**

The key to success for any nonprofit organization is satisfying important stakeholders according to their criteria for satisfaction. Mission and vision should therefore be thought about in relation to those stakeholders. A stakeholder is any person, group, or organization that can place a claim on Leadership Los Alamos' resources, attention, or output or is affected by its output. A stakeholder analysis is the means for identifying who the organization's internal and external stakeholders are, how they evaluate the organization, how they influence the organization, what the organization needs from them, and how important they are.

#### Leadership Los Alamos Stakeholders

- Class members
- Sponsoring organizations – sponsors of students
- Donors
- Los Alamos citizens
- Entire community
- County
- Alumni
- Local organizations
- Board
- Speakers
- Region
- State
- Future citizens
- Youth leadership programs
- IRS
- The world

#### Alumni

- Connection lost since graduation from Leadership Los Alamos.
- Great learning experience.
- What can we do to measure their attendance? They should evaluate how well we did.
- What are they doing now?
- What do we want this program to feel like? Bonding?
- Do more with alumni?
- Missing a component to our program – don't engage.
  
- What do we need from alumni?
  - Input into programming.
  - Untapped opportunity and resource.
  - Ask them where they think we should go?
  - Groom people to give of themselves – we need to replenish that.
  - What did they get out of it?
  - Networking.



- Engage them in what they want to do.

#### Class Members – what do they say?

- Doing an excellent job.
- Would like more discussion.
- Pack too much into a short session.
- Too much information.
- Like the orientation/grad sessions.
- Getting exposure and connection they never would.
- Like venue.
- Engagement with community/regional leaders.
- Getting to know other class members.
- Want to follow-up with presenters.
- Not enough time.
- Want smaller groups.
- Allow more time for Q&A.
- What do we need from class members?
  - Need to pay attention, participate, and be engaged.
  - Make sure of full attendance and full engagement
  - Need feedback.
  - Become/continue engagement as alumni (in community and in Leadership Los Alamos).
  - Really want to learn what's in this community.
  - Open minded.
  - Can use evaluations for future planning.

#### Donors

- Doing well.
- County/LANB all in – happy with what we do.
- Appreciation for donors – send annual report (year-end brief) – **Initiate immediately.**
- Do we really know?
- Need from donors:
  - Feedback, engagement.
  - Money.
  - Less money for sustainability.
  - What are the donors getting out of this expectation?

#### Non-Profit Organizations

- Under represented in our program as part of the program – presenters.
- Opt for them to get engaged.
- Need to invest in them.
- Won't know (most) how well program is doing.

- What do we need from Non-Profit Organizations?
  - Participants need to invest.
  - Participation in programming.
  - Understanding of their needs.
  - Need to know who/what they are.
  - Project ideas.
  - Need to invest in them.

### Sponsoring Organizations

- County
- Lab
- Bank
- Hospital
- Bandelier
- YMCA
- LA Monitor
- UNM-LA
- LACDC
- Private businesses
- Don't have direct feedback.
  
- What do we need from sponsoring organizations:
  - Need to know what they think.
  - How are their employees benefiting?
  - How can we improve?
  - Tap into LASO.
  - Why are they sending staff to the program?
  - More diversity.

### **Stakeholder Interviews**

The board members divided up the stakeholder list and conducted interviews to gauge their satisfaction with the overall Leadership Los Alamos program. Following is a list of what the Board learned from these interviews

- Opportunity for marketing.
- Leadership skills – grow employees.
- Leader who helps managers manage.
- Good program, more could benefit.
- Wanted leadership and ethics.
- Who has been through LLA (at LANL).
- Programming – speaker experience.
- Leaders are management title/ position.
  - All inclusive concept of leadership.
- Potential in growth in optimizing message.
- Unique of Los Alamos area – creativity of sessions and learning.
- Work together with LLA NM.

- Targeting top leaders might not be the way to go. Look at people who have potential. Grow leaders.
- Class structure post-graduation (class project?).
- Criteria for LLA applicants (supervisor input).
- Ability to network after class (alumni interact with classes).
- Structure alumni engagement with current class.
- Celebrate the success of every alumni graduating (get name out there).
- Great value in supporters being recognized.
- Don't want to be received as owned by anybody.
- Get word out to sponsors of LLA.
- Set up scholarship for tuition.
- Engage sponsors/managers in graduation.
- We could be a roundtable for non-profits
- LLA students facilitate dialogue in community (facilitation training).
- Building pride in the program – identify with being a member.
- Let people do more with less or work with other organizations.
- Good reputation.
- Really likes having staff do it.
- Facilitate better collaboration between organizations.
- Have class do interviews and visits with leaders of the community.
- Define changes that need to occur in community.
- Parent/teacher organization - teachers can't come to meetings during week.
- Alumni should be sponsors of the program.
- Sponsor leadership community award?
- Better branding.
- Provide targeted leadership training.
- Comprehensive list of organizations in community and their contacts.
- Consolidated on-line of relevant documents, studies.
- Get people from more groups.
- Work with Elks, American Legion, Rotary Club.
- Set up program where it has a diversity of discipline.
- Idea of what if we sponsor one person from the high school..
- San I, SFNF, BMW, Elks, Rotary, schools. Religious organizations, university involved.
- Same organizations/speakers (e.g., la family council).
- Class helps community perspective employees (YMCA).
- Class length good.
- Scholarship - keep , expand (YMCA).
- Get more youth involved.
- Nobody knows LLA unless company participates.
- Alumni – newsletter – where they are in community.
- LLA – involvement after class (not understood to be in community).
- Could improve expectations of how we put program together.
- Session objectives not clearly articulated up front.

- Speakers not free to talk - control on speakers. Create environment for speakers to freely and express their views.
- LLA chair and perspective to their organization (Torpy, Police Department).
- Small group discussions in class.
- Bring in emerging issues.

### **Assessing the Environment to Identify Strengths, Weaknesses, Opportunities and Challenges**

In this step the internal strengths and weaknesses of Leadership Los Alamos were identified, along with external opportunities and challenges (or threats). Known as a SWOC, this exercise is very useful in clarifying the conditions or situations within which the organization operates. Whereas the stakeholder analysis (Appendix A) provides useful information about the politics impinging on the organization, the SWOC analysis supplies an overall systems view of the organization and the factors affecting it. A SWOC analysis brings to the surface clues about the probable contours of effective strategies, because every successful strategy builds on strengths and takes advantage of opportunities while it also overcomes or minimizes the effects of weaknesses and challenges.

#### Leadership Los Alamos SWOC Exercise

For the purpose of this exercise board members were split into two teams. Team one developed internal strengths and weaknesses and team two developed external opportunities and challenges.

#### **Internal Strengths**

Internal strengths are resources or capabilities that help Leadership Los Alamos accomplish its mission and create value for the Los Alamos community.

- Core of involved board members.
- Dedicated session chairs.
- A strong program in terms of breadth and education.
- Great speakers.
- Recent class leadership component.
- Program has consistent and committed donors.
- Highlight local resources.
  - Food and locations of sessions.
- Talent pool of alumni.
- Hard-working program committee.
- Fill classes.
- Graduates are successful leaders.
- Networking opportunities.
- Introduction session: opportunity for interaction and self-discovery.
- End session: opportunity to interact and self-discovery.
- Diversity of backgrounds.

#### **Internal Weaknesses**

Internal weaknesses are deficiencies in resources or capabilities that hinder Leadership Los Alamos's ability to fulfill its mission and create value for the Los Alamos community.

- Not enough interaction during sessions.
- Planning process for program chairs is inconsistent/frustrating.
- Program sustainability is a problem.

- Financial sustainability.
- Lack of structure to distribute workload.
- No succession planning.
  - Key positions of organization.
  - Into community.
- No administrative support.
- Lack of resources/mentoring to program participants on how to engage on issues presented.
- Record-keeping/archiving system?
- Criteria for applicants missing.
- Lack of recruitment plan/targeted recruitment.
- Don't celebrate successes.
- Roles/responsibilities of Board members ill-defined.
- Too much passive learning.
- Disconnect between style of first session, subsequent sessions, and end session.
- Diversity in ethnicity/socioeconomic.

### **External Opportunities**

External opportunities are outside factors or situations that Leadership Los Alamos can take advantage of to better fulfill its mission or create value for the Los Alamos community.

- Success stories.
- Alumni spot light – who's who?
- Grads should promote program.
  - Identify self as LLA graduate.
- Update website as promotional.
  - Social media sites (Facebook/Twitter).
- Partnership with other leadership programs.
  - LLA Santa Fe
  - Leadership New Mexico
  - Link to youth leadership.
- Partner with other organizations - do programs - break down larger organizations.
  - Kiwanas
  - Rotary
  - Service organizations
  - Elks
  - ROTC
  - PEEC
- How do we look at donors?
- Tapping into the younger generation.
- Alumni engagement.
- Formalize process for cyclic external feedback.
- Large pool of educated, experienced individuals.
  - For students/speakers.
- Multi-year program

## External Challenges

External challenges are outside factors or situations that can affect Leadership Los Alamos in a negative way – making it harder to fulfill the mission or create value for the Los Alamos community.

- Funding
  - Limited sponsors.
  - Not a lot of funds.
- Developing next generation of leaders.
- Already achieved majority of top tier.
- Vision is limiting.
- Not sure what external opinion of LLA is.
  - Need feedback program/process.
- Meeting space.
  - Local vs. outside.
  - Good space.
  - Engaging site.
- Small group of support organizations.
- How to take advantage of knowledge pool.
- How do we get potential students interested in program?
  - Will program help?
- Do not track success in program stories.
- Size of the community limited.
  - For sponsorship.
  - Aging population.