Leadership Southern Maryland
Regional Collaboration for Today’s Leaders and Tomorrow’s Vision

Strategic Plan
2016 – 2019

Prepared by
Brad and Linda Gottfried
October, 2016
Introduction

Strategic planning has become a common tool for organizations as a way of helping to better achieve their missions. Climbing to a “30,000 foot level,” boards of directors and senior officers are better able to evaluate their organizations and the environments in which they operate. With this information, leadership can better envision clear strategies to help achieve their missions. While clear strategic directions are critical to an organization, they must be accompanied by tactical approaches that help achieve the goals of the organization.

As the Leadership Board of Directors and senior management decided to engage in a strategic planning process, they requested the services of Brad and Linda Gottfried, who donated their services to the organization through the St. Mary’s Nonprofit Institute at the College of Southern Maryland.

The process began with each board and staff member providing his or her input on a SWOT analysis (Strengths-Weaknesses-Opportunities-Threats) with regard to the organization. The outcome was summarized and the results are included in Appendix 3.

The strategic planning retreat was conducted on Saturday, August 20, 2016 at College of Southern Maryland’s Leonardtown Campus with the Gottfrieds acting as facilitators. The first item of business was a review of Leadership Southern Maryland’s mission statement. It was determined that the mission statement required further review and minor revisions. The result of the SWOT analysis was discussed and the most important items were agreed upon. The group then brainstormed goals and action items it would take to help achieve those goals. The Gottfrieds then put the plan together with input from Helen Wernecke and John Felicita.

The goals presented in this document are aspirational; the plan will help Leadership Southern Maryland get closer to achieving them.
Leadership Southern Maryland’s Top Four SWOT List

**Strengths**
- Board (diversity, commitment)
- Brand/Reputation
- Unique product, program and curriculum
- Staff

**Weaknesses**
- Inactive Alumni
- Lack of a value proposition
- Insufficient infrastructure (e.g., too much reliance on board; use of personal computers; retention and succession)
- Financial stability

**Opportunities**
- Establish greater relevancy
- Increase Diversity (geographic, people, ages)
- Increase Alumni engagement
- Create reliable funding streams

**Threats**
- Competition for donor dollars
- Value proposition
- Lack of Alumni engagement
- Saturation of eligible candidates
GOAL I: Program: Leadership Southern Maryland provides exemplary educational programs and services attracting and inspiring leaders from Southern Maryland

Objective 1: Strengthen LSM’s mission and recruitment activities

1.1.1- Review and refresh LSM’s mission statement and vision, goals and strategies ensuring they are all in alignment and measureable
   - Responsible party: Theresa Johnson on behalf of the Board of Directors
   - Reporting out/completion date: Q4 2016
   - Measurement of success: Recommendations reported to Board

1.1.2- Review and revise how participants are recruited and encouraged to apply
   - Responsible party: Barry Friedman
   - Reporting out/completion date: Q1 2017
   - Measurement of success: Report to Board using best practices

1.1.3- Develop strategies to build the applicant pool
   - Responsible party Barry Friedman (Adult Leadership; John Felicitas (Teen Leadership))
   - Reporting out/completion date: Q4 2016
   - Measurement of success: Report to Board using best practices

1.1.4- Target companies for recruitment of new participants
   - Responsible party: Development Committee
   - Reporting out/completion date: Q4 2016
   - Measurement of success: Report to Board using best practices

Objective 2: Ensure the relevance and quality of existing programs

1.2.1- Evaluate the executive curriculum for relevancy
   - Responsible party: Program Coordinator
   - Reporting out/completion date: Q2 2017
   - Measurement of success: Report submitted to Board

1.2.2- Hardwire retention/stewardship and recruitment of educational partnerships for Education Day
   - Responsible party: Lead Advocate for Education Day
   - Reporting out/completion date: Q2 2017
   - Measurement of success: Report submitted to Board

1.2.3- Create an effectiveness program advocate recruitment process
   - Responsible party: Program Coordinator
   - Reporting out/completion date: Q3 2017
   - Measurement of success: Report to Board using best practices
1.2.4- Identify a litmus test that includes diversity and relevancy across the board
   - Responsible party: Program Coordinator
   - Reporting out/completion date: Q4 2017
   - Measurement of success: Report to Board using best practices

1.2.5- Evaluate the Nonprofit Program
   - Responsible party: Program Coordinator
   - Reporting out/completion date: Q3 2017
   - Measurement of success: Report submitted to Board

**Objective 3: Develop new programs that will enhance the mission of LSM**

1.3.1- Create a robust Alumni engagement plan
   - Responsible party: Alumni Chair
   - Reporting out/completion date: Q1 2017
   - Measurement of success: Report to Board using best practices

1.3.2- Consider an alumni of the year award
   - Responsible party: Alumni Chair
   - Reporting out/completion date: Q2 2017
   - Measurement of success: Recommendation submitted to Board

1.3.3- Explore additional program options (Participant subsets: Young professionals, Age groups, TLA, Retirees)
   - Responsible party: Board Governance Committee
   - Reporting out/completion date: Q4 2017
   - Measurement of success: Report to Board using best practices

1.3.4- Develop programs that attract donors/sponsors/Solicit for additional programs: leadership conference, town halls, speakers bureau etc.
   - Responsible party: Executive Director/Programs Committee
   - Reporting out/completion date: Q1 2018
   - Measurement of success: Report with recommendations to Board

**GOAL II: Visibility and Reputation:** Leadership Southern Maryland is well-known, relevant, respected as it promotes a clear understanding of its mission and value

**Objective 1: Ensure that LSM’s message is effectively being communicated**

2.1.1- Undertake a communications audit
   - Responsible party: Communications Chair
   - Reporting out/completion date: Q1 2017
   - Measurement of success: Audit completed and recommendations reported to Board
2.1.2- Update/create a strategic marketing/communications plan  
  - Responsible party: Communications Chair  
  - Reporting out/completion date: Q1 2017  
  - Measurement of success: Report of updated plans to Board for its review/approval

2.1.3- Identify ways to celebrate achievements of alumni (monthly)  
  - Responsible party: Communications Chair  
  - Reporting out/completion date: Q2 2017  
  - Measurement of success: Report to Board using best practices

2.1.4- Find better ways of using media technology (social media)  
  - Responsible party: Communications Chair and Tyler Willis  
  - Reporting out/completion date: Q1 2017  
  - Measurement of success: Report to Board using best practices

2.1.5- Create a strong visual identity and branding  
  - Responsible party: Communications Chair  
  - Reporting out/completion date: Q4 2017  
  - Measurement of success: Recommendations submitted to Board for its approval

2.1.6- Determine benchmarks for achieving visibility/enhancing reputation  
  - Responsible party: Lee C  
  - Reporting out/completion date: Q4 2017  
  - Measurement of success: List of benchmarks developed and field tested

Objective 2: Review new initiatives to enhance image

2.2.1- Develop a plan to celebrate the 10 years of LSM’s existence (October 16, 2018)  
  - Responsible party: Executive Director and Alumni Chair  
  - Reporting out/completion date: Q4 2017  
  - Measurement of success: Plan submitted to Board for its approval

2.2.2- Help nonprofits that LSM is assisting become more visibleuccessful (communicate)  
  - Responsible party: Communications Chair  
  - Reporting out/completion date: Q2 2017  
  - Measurement of success: Series of recommendations submitted to Board after conferring with nonprofit community and using best practices

GOAL III: Resources: Leadership Southern Maryland has the resources (e.g., funds, personnel, facilities) it needs to effectively achieve its mission

Objective 1: Enhance Fundraising

3.1.1- Update fundraising plan  
  - Responsible party: Development Chair  
  - Reporting out/completion date: Q1 2017  
  - Measurement of success: Fundraising plan updated and submitted to Board
3.1.2- Explore grant funding
   - Responsible party: Development Chair
   - Reporting out/completion date: Q4 2016
   - Measurement of success: Recommendations presented to Board

3.1.3- Explore partnerships with other organizations (help take them to the next level) that may lead to additional cash for LSM
   - Responsible party: Development Chair
   - Reporting out/completion date: Q2 2018
   - Measurement of success: Report submitted to Board with recommendations

3.1.4- Explore ways of increasing the number of alumni who are dues-paying members (alumni association)—revisit “what’s in it for me” for those alumni who have “disappeared”
   - Responsible party: Alumni Chair
   - Reporting out/completion date: Q3 2017
   - Measurement of success: Report submitted to Board with series of recommendations

3.1.5- Convert advocates into donors
   - Responsible party: Development Chair
   - Reporting out/completion date: Q1 2018
   - Measurement of success: Discussion of recommendations formulated using best practices

3.1.6- Establish niche fundraising opportunities (fun and innovative)
   - Responsible party: Development Chair
   - Reporting out/completion date: Q1 2018
   - Measurement of success: Recommendations submitted to board for its action

1.1.7- Explore establishing a bequests program
   - Responsible party: Development Chair
   - Reporting out/completion date: Q2 2018
   - Measurement of success: Ideas submitted to the Board for its action

Objective 2: Enhance LSM’s Physical Space/Access to Technology

3.2.1- Address the need for additional office space
   - Responsible party: Executive Director
   - Reporting out/completion date: Q4 2016
   - Measurement of success: Possible options presented to the Board for its actions

3.2.2- Effectively address IT issues
   - Responsible party: Executive Director
   - Reporting out/completion date: Q4 2016
   - Measurement of success: Recommendation submitted to the Board that addresses the issue

3.2.3- Consider investing in donor software
   - Responsible party: Finance Committee
- Reporting out/completion date: Q1 2017
- Measurement of success: Recommendation submitted to Board for its action

3.2.4. Identify ways of automating processes (such as application process)
- Responsible party: Communications Chair
- Reporting out/completion date: Q2 2017
- Measurement of success: Recommendations submitted to Board

Objective 3: Ensure the wise use of budgets/use of resources

3.3.1. Review budget/revenue options and develop a strategy that depends less heavily on alumni giving.
- Responsible party: Finance Committee and Development Committee
- Reporting out/completion date: Q2 2017
- Measurement of success: Completion of review and submission of recommendations to Board

3.3.2. Develop a multi-year budget process
- Responsible party: Finance Committee
- Reporting out/completion date: Q2 2017
- Measurement of success: Ideas for implementation shared with Board

Objective 4: Ensure Adequate Staffing

3.4.1. Consider establishing a student intern program
- Responsible party: Executive Director
- Reporting out/completion date: Q4 2016
- Measurement of success: Review conducted and recommendations submitted to the Board

3.4.2. Consider a volunteer program, including recruitment and use of resource
- Responsible party: Executive Director
- Reporting out/completion date: Q2-2018
- Measurement of success: Review conducted and recommendations shared with Board

3.4.3. Identify ways to hire additional staff to take some of the pressure off the Board
- Responsible party: Executive Committee
- Reporting out/completion date: Q3 2017
- Measurement of success: Review conducted and recommendations shared with Board

3.4.4. Create Administrative Operations Plan (Continuity of Operations)
- Responsible party: Administrative Manager
- Reporting out/completion date: Q2 2017
- Measurement of success: Plan created and approved by Board

3.4.5. Create a succession plan
- Responsible party: Executive Director
- Reporting out/completion date: Q3 2018
- Measurement of success: Plan created and approved by Board
GOAL IV: Talent Management: Leadership Southern Maryland deploys effective management and leadership approaches as a way of maximizing its resources and assuring quality programming

Objective 1: Ensure an effective Board of Directors

4.1.1. Review the roles and responsibilities of Board members
   - Responsible party: Governance Committee
   - Reporting out/completion date: Q1 2018
   - Measurement of success: Using best practices, create a fresh review of the Board’s structure that is discussed and possibly implemented

Objective 2: Enhance services provided to program participants

4.2.1. Explore a mentor program for new LSM participants/students
   - Responsible party: TLA Chair/Program Chair
   - Reporting out/completion date: Q3 2017

Objective 3: Better utilize/engage past participants (alumns)

4.3.1. Build a Board member pipeline program that engages alumni (survey of interests)
   - Responsible party: Governance Committee and Alumni Committee
   - Reporting out/completion date: Q1 2017
   - Measurement of success: List of recommendations submitted to Board using best practices

4.3.2. Review and codify all available talent as current and past LSM participants
   - Responsible party: Governance Committee and Alumni Committee
   - Reporting out/completion date: Q1 2017
   - Measurement of success: List completed and disseminated where appropriate
Appendix 1: Action Items by Responsible Committee/Person

Administrative Manager

3.4.4. - Create Administrative Operations Plan (Continuity of Operations)

Alumni Chair

2.1.1. - Develop a plan to celebrate the 10 years of LSM’s existence (October 16, 2018)—With Executive Director
3.1.4. - Explore ways of increasing the number of alumni who are dues-paying members (alumni association)—revisit “what’s in it for me” for those alumni who have “disappeared”
4.3.1. - Build a Board member pipeline program that engages alumni (survey of interests)—With Governance Committee
4.3.2. - Review and codify all available talent as current and past LSM participants—Governance Committee

Theresa Johnson - Alumni Committee

1.1.1. - Review and refresh LSM’s mission statement and vision, goals and strategies ensuring they are all in alignment and measurable
1.3.1. - Create a robust Alumni engagement plan
1.3.2. - Consider an alumni of the year award

Barry Friedman

1.1.2. - Review and revise how participants are recruited and encouraged to apply
1.1.3. - Develop strategies to build the applicant pool

Board Governance Committee

1.3.3. - Explore additional program options (Participant subsets: Young professionals? Age groups? TLA? Retirees?)

John Felicitas

1.1.3. - Develop strategies to build the applicant pool

Communications Chair

2.1.1. - Undertake a communications audit
2.1.2. - Update/create a strategic marketing/communications plan
2.1.3. - Identify ways to celebrate achievements of alumni (monthly)
2.1.4. - Find better ways of using media technology (social media) with Tyler Willis
2.1.5. - Create a strong visual identity and branding
2.2.2. - Help nonprofits that LSM is assisting become more visible/successful (communicate)
3.2.4. - Identify ways of automating processes (such as application process)

Development Committee

1.1.4. - Target companies for recruitment of new participants
3.1.1. - Update fundraising plan
3.1.2. - Explore grant funding
3.1.3. - Explore partnerships with other organizations (help take them to the next level) that may lead to additional cash for LSM
3.1.5.- Convert advocates into donors
3.1.6.- Establish niche fundraising opportunities (fun and innovative)
3.1.7.- Explore establishing a bequests program
3.3.1.- Review budget/revenue options and develop a strategy that depends less heavily on alumni giving - With Finance Committee

Executive Committee
3.4.3.- Identify ways to hire additional staff to take some of the pressure off the Board

Executive Director
1.3.4.- Develop programs that attract donors/sponsors/Solicit for additional programs: leadership conference, town halls, speakers bureau etc. (with Executive Director)
2.2.1.- Develop a plan to celebrate the 10 years of LSM's existence (October 16, 2018) - With Alumni Chair
3.2.1.- Address the need for additional office space
3.2.2.- Effectively address IT issues
3.4.1.- Consider establishing a student intern program
3.4.2.- Consider a volunteer program (recruits and uses)
3.4.5.- Create a succession plan

Finance Committee
3.2.3.- Consider investing in donor software
3.3.1.- Review budget/revenue options and develop a strategy that depends less heavily on alumni giving - With Development Committee
3.3.2.- Develop a multi-year budget process

Governance Committee
4.1.1.- Review the roles and responsibilities of Board members (look at best practices of other boards)
4.3.1.- Build a Board member pipeline program that engages alumni (survey of interests) - With Alumni Committee
4.3.2.- Review and codify all available talent as current and past LSM participants - With Alumni Committee

Lead Advocate for Education Day
1.2.2.- Hardwire retention/stewardship and recruitment of educational partnerships for Education Day

Lee C.
2.1.6.- Determine benchmarks for achieving visibility/enhancing reputation

Programs Committee
1.3.4.- Develop programs that attract donors/sponsors/Solicit for additional programs: leadership conference, town halls, speakers bureau etc. (with Programs Committee)

Program Coordinator
1.2.1.- Evaluate the executive curriculum for relevancy
1.2.3.- Create an effectiveness program advocate recruitment process
1.2.4.- Identify a litmus test that includes diversity and relevancy across the board
1.2.5.- Evaluate the Nonprofit Program
4.2.1.- Responsible party: Explore a mentor program for new LSM participants/students - With TLA Chair
TLA Chair
4.2.1.- Responsible party: Explore a mentor program for new LSM participants/students- With Program Committee

Tyler Willis
2.1.4- Find better ways of using media technology (social media) with Communications Chair
Appendix 2: Action Item Timelines

Q4 2016
1.1.1. Review and refresh LSM’s mission statement and vision, goals and strategies ensuring they are all in alignment and measurable
1.1.3. Develop strategies to build the applicant pool
1.1.4. Target companies for recruitment of new participants
3.1.2. Explore grant funding
3.2.1. Address the need for additional office space
3.2.2. Effectively address IT issues
3.4.1. Consider establishing a student intern program

Q1 2017
1.1.2. Review and revise how participants are recruited and encouraged to apply
1.3.1. Create a robust Alumni engagement plan
2.1.1. Undertake a communications audit
2.1.2. Update/create a strategic marketing/communications plan
2.1.4. Find better ways of using media technology (social media)
3.1.1. Update fundraising plan
3.2.3. Consider investing in donor software
4.3.1. Build a Board member pipeline program that engages alumni (survey of interests)
4.3.2. Review and codify all available talent as current and past LSM participants

Q2 2017
1.2.1. Evaluate the executive curriculum for relevancy
1.2.2. Hardwire retention/stewardship and recruitment of educational partnerships for Education Day
1.3.2. Consider an alumni of the year award
2.1.3. Identify ways to celebrate achievements of alumni (monthly)
2.2.2. Help nonprofits that LSM is assisting become more visible/successful (communicate)
3.2.4. Identify ways of automating processes (such as application process)
3.3.1. Review budget/revenue options and develop a strategy that depends less heavily on alumni giving.
3.3.2. Develop a multi-year budget process
3.4.4. Create Administrative Operations Plan (Continuity of Operations)

Q3 2017
1.2.3. Create an effectiveness program advocate recruitment process
1.2.5. Evaluate the Nonprofit Program
3.1.4. Explore ways of increasing the number of alumni who are dues-paying members (alumni association)—revisit “what’s in it for me” for those alumni who have “disappeared”
3.4.3. Identify ways to hire additional staff to take some of the pressure off the Board
4.2.1. Explore a mentor program for new LSM participants/students
Q4 2017
1.2.4. Identify a litmus test that includes diversity and relevancy across the board
1.3.3. Explore additional program options (Participant subsets: Young professionals? Age groups? TLA? Retirees?)
2.1.5. Create a strong visual identity and branding
2.1.6. Determine benchmarks for achieving visibility/enhancing reputation
2.2.1. Develop a plan to celebrate the 10 years of LSM’s existence (October 16, 2018)

Q1 2018
1.3.4. Develop programs that attract donors/sponsors/Solicit for additional programs: leadership conference, town halls, speakers bureau etc.
3.1.5. Convert advocates into donors
3.1.6. Establish niche fundraising opportunities (fun and innovative)
4.1.1. Review the roles and responsibilities of Board members

Q2 2018
3.1.3. Explore partnerships with other organizations (help take them to the next level) that may lead to additional cash for LSM
3.1.7. Explore establishing a bequests program
3.4.2. Consider a volunteer program, including recruitment and use of resource

Q3 2018
3.4.5. Create a succession plan
Appendix 3: SWOT Results

1. What are LSM's four greatest strengths?

- Our Alumni-9
- Dedicate, visionary Board of Directors- 6
- Brand and reputation- 4
- Program adaptability and variety – 4
- Our executive staff- 4
- Community Support- 3
- Communication and development efforts are growing and having positive results- 2
- Networking – Connections within classes and membership-2
- LSM's mission/stays focused on it
- Altruistic membership interested in common goal
- New staffing in front office that understands ROI, Revenue/Expenses
- Transparency with new leadership
- Organization attracts educated, confident leaders.
- Offers a unique one of the kind service in the region
- Focused and diverse program
- Viewed as reputable program
- Collective Influence in community
- Commitment by class members to do a significant project while they're in the class

2. What are the four most important internal weaknesses that LSM will need to address in the future?

- People need to feel that their contribution matters
- Financial stability continues to be an issue 9
- “Life Beyond Eliot and Helen”- succession planning - 4
- Size of staff; worked too hard- 3
- Working board—too engaged? Will future boards be as committed?- 2
- Complacency/not enough planning for future- 2
- alumni are not broadly engaged- 2
- Becoming static
- Limited pool of potential applicants
- Reliance on defense community for many applicants diversity across counties (i.e., being seen as St Marys program)
- Lack of direct services for grant funders
- Brand consistency
- Trying to accomplish too much with too little
- Recruitment of new leaders into program
- Lack of donor database
- Too many redundancies in back office operations
- Curriculum design and programs dependent on volunteers
- Institutional knowledge bleed – as longer term and often more dedicated people come off the board
- Playing it safe and not tackling the “tough” questions in each of the program components
- Balancing the “work” of the organization – staff or volunteers
- Striving for a “Diverse” alumni
- Inactive / Disinterested alumni – While we are blessed with alumni who are contributing in diverse ways in the community, we struggle with alumni support to LSM.
- Infrastructure – Office space; staffing; technology. As the Program grows, can our infrastructure keep pace?
- Personal Conflicts of interest/Cronyism
- fundraising continues to be less than we’d like to be able to plan on
- computing environment and cloud storage and internet security
- finding a continual new base of class members and corporate sponsors
- Number of participating companies that annually enroll employees is relatively small
- Infrastructure (Helen & Rebecca are using their own laptops-Helen working this issue now)
- So much rests on volunteers who work full time jobs and have families that sometimes the deadlines do not get met and the organization is at risk (I do my best to back up the deadlines to mitigate the risk!)

3. What are four important opportunities that LSM might be able to take advantage of?

- Expand/increase use of alumni- 5
- Grow partnerships/local businesses- 2
- Potential to address community wide issues (perhaps in partnership with local governments; regionalization)- 2
- We are nearing our 10th Anniversary – Can we plan a celebration and include alumni, Regional friends/leaders/ supporters?- 2
- TLA seems to have gone well and fill a need that is there in the community; we may be able to leverage it/increase youth-oriented programs- 2
- Increase Development initiatives/grants- 2
- This is a wealthy community
- Better ties to Sotterley
- Can we get funding from the tri-counties?
- New and diverse trainings
- Senior level program or program for prior participants at least 5 years out with different focus
- More online opportunities
- Mini loaned executive program like feds do where a leader would work one on one with some department or focus with nonprofit or small business owner like a mentor
- Diversity
- Value proposition
- Best practices from other similar leadership groups in surrounding area
- Networking opportunities
- Potential to link alumni to local issues on an individual basis, such as joining local nonprofit boards
- Network of other community leadership organizations across the country provide innovative ideas and models for implementation
- Maintaining/re-establishing LSM as an “elite” organization that only professionals who have reached a certain career or success level can join
- Partnering with a third party entity to promote brand and increase value proposition
- Better use of Non-Profit Institute
- Use of Alumni to mentor TLA Ambassadors
- Continued Regional Economic growth – engaging LSM alumni in the smart planning and execution of our Southern MD region.
- LSM benefitted from the Chick-Fil-A grant this year. What other grant opportunities can be pursued?
- Through our connections and focused effort, quantifying and publicizing LSM’s value to the region. This will draw participants, draw opportunities for growth and emphasize needs that LSM is well situated to effect positively.
- More Technology
- More media
- Need to build more alumni in Calvert and Charles counties.
- Take advantage of partnering opportunities with young professionals group, with Farming 4 Hunger, or other agencies we're just getting to know
- Funding through grants if we can get organized to apply for them
- Potential partnering with other agencies on TLA (maybe in Charles or Calvert counties)
- Recruit new participants beyond current companies
- Increase communication and marketing efforts to expand visibility, grow future class sizes and assist in development efforts.

4. What are four important external threats that LSM is experiencing, or may experience, in the future?

- Competition for donor dollars/seeking help too often to the same sponsors- 6
- Static economy or slow one- 4
- Saturation with membership/Turnover in the area - 4
- Program seen as St. Mary’s centric (though we have more Charles County representation than any previous year for Class of 2017)- 3
- Possible growing apathy to be involved, particularly alumni- 3
- Impact of changing demographics on program- 3
- Inadequate finances/cash flow/expensive programs- 3
- Defense cuts/economic downturn- 2
- Remaining of value to alumni- 2
- Lack of time for members or new recruits to engage in activities (due to work, long commute, competing boards, etc.)
- Calvert County’s business community continues to be underrepresented due to nature of local economy and prevalence of commuters.
- Perception that there is not enough “value add” or “value proposition”
- Transparency
- Relevancy
- Will CSM continue to be a “friend” of LSM when/if Dr. Gottfried departs (Heaven forbid!)?
- Image - LSM is viewed by some as a program for DoD and/or as simply a networking opportunity for “elitists”. If LSM does not find a way to expand upon and/or quantify the positive effect on individuals and the community as a whole, that image, however small, will not go away. This may be controlled internally but it becomes an external issue.
- Competition - other organizations may be able to implement components of LSM’s programming without the cost associated or understanding the strength in the network that exists with LSM
- Participating companies could pull out and not enroll employees.
- Competition could loom.
# Appendix 4: Action Item Grid

**GOAL I: Program:** Leadership Southern Maryland provides exemplary educational programs and services attracting and inspiring leaders from Southern Maryland

**Objective 1: Review LSM’s mission and recruitment activities**

<table>
<thead>
<tr>
<th>Responsibility</th>
<th>Report Out By:</th>
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<tr>
<td>Theresa Johnson on behalf of the Board of Directors</td>
<td>Q4 2016</td>
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1.1.2 - Review and refresh LSM’s mission statement and vision, goals and strategies ensuring they are all in alignment and measureable

| Barry Friedman | Q1 2017 |

1.1.2 - Review and revise how participants are recruited and encouraged to apply

| Barry Friedman (Adult Leadership) | Q4 2016 |
| John Felicitas (Teen Leadership) | Q4 2016 |

1.1.3 - Develop strategies to build the applicant pool

| Steve Kooms Development Committee | Q4 2016 |

1.1.4 - Target companies for recruitment of new participants

**Objective 2: Ensure the relevance and quality of existing programs**

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<td>Anna Fagan Program Coordinator</td>
<td>Q2 2017</td>
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1.2.1 - Evaluate the executive curriculum for relevancy

| Mary Ann Bowman, Lead Advocate for Education Day | Q2 2017 |

1.2.2 - Hardwire retention/stewardship and recruitment of educational partnerships for Education Day

| Anna Fagan Program Coordinator | Q3 2017 |

1.2.3 - Create an effectiveness program advocate recruitment process

| Anna Fagan Program Coordinator | Q4 2017 |

1.2.4 - Identify a litmus test that includes diversity and relevancy across the board

| Anna Fagan Program Coordinator | Q3 2017 |

1.2.5 - Evaluate the Nonprofit Program
Objective 3: Develop new programs that will enhance the mission of LSM

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<tr>
<td>1.3.4- Develop programs that attract donors/sponsors</td>
<td>Helen Wernecke Executive Director and Programs Committee Q1 2018</td>
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</tbody>
</table>

GOAL II: Visibility and Reputation: Leadership Southern Maryland is well-known, relevant, respected as it promotes a clear understanding of its mission and value

Objective 1: Ensure that LSM’s message is effectively being communicated

<table>
<thead>
<tr>
<th>Responsibility</th>
<th>Report Out By:</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1.1- Undertake a communications audit</td>
<td>Lee C Communications Chair Q1 2017</td>
</tr>
<tr>
<td>2.1.2- Update/create a strategic marketing/communications plan</td>
<td>Lee C Communications Chair Q1 2017</td>
</tr>
<tr>
<td>2.1.3- Identify ways to celebrate achievements of alumni (monthly)</td>
<td>Lee C Communications Chair Q2 2017</td>
</tr>
<tr>
<td>2.1.4- Find better ways of using media technology (social media)</td>
<td>Lee C Communications Chair and Tyler Willis Q1 2017</td>
</tr>
<tr>
<td>2.1.5- Create a strong visual identity and branding</td>
<td>Lee C Communications Chair Q4 2017</td>
</tr>
<tr>
<td>2.1.6- Determine benchmarks for achieving visibility/enhancing reputation</td>
<td>Lee C Communications Chair Q4 2017</td>
</tr>
</tbody>
</table>
### Objective 2: Review new initiatives to enhance image

<table>
<thead>
<tr>
<th>Objective</th>
<th>Description</th>
<th>Responsibility</th>
<th>Report Out By</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.2.1</td>
<td>Develop a plan to celebrate the 10 years of LSM’s existence (October 16, 2018)</td>
<td>Helen Wernecke Executive Director and Teresa Johnson Alumni Chair</td>
<td>Q4 2017</td>
</tr>
<tr>
<td>2.2.2</td>
<td>Help nonprofits that LSM is assisting become more visible/successful (communicate)</td>
<td>Lee C Communications Chair</td>
<td>Q2 2017</td>
</tr>
</tbody>
</table>

### GOAL III: Resources: Leadership Southern Maryland has the resources (e.g., funds, personnel, facilities) it needs to effectively achieve its mission

### Objective 2: Enhance Fundraising

<table>
<thead>
<tr>
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<th>Description</th>
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<th>Report Out By</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1.7</td>
<td>Update fundraising plan</td>
<td>Steve Kooms Development Chair</td>
<td>Q1 2017</td>
</tr>
<tr>
<td>3.1.8</td>
<td>Explore grant funding</td>
<td>Steve Kooms Development Chair</td>
<td>Q4 2016</td>
</tr>
<tr>
<td>3.1.9</td>
<td>Explore partnerships with other organizations (help take them to the next level) that leads to additional cash</td>
<td>Steve Kooms Development Chair</td>
<td>Q2 2018</td>
</tr>
<tr>
<td>3.1.10</td>
<td>Explore ways of increasing the number of alumni who are dues-paying members (alumni association)—revisit “what’s in it for me” for those alumni who have “disappeared”</td>
<td>Teresa Johnson Alumni Chair</td>
<td>Q3 2017</td>
</tr>
<tr>
<td>3.1.11</td>
<td>Convert advocates into donors</td>
<td>Steve Kooms Development Chair</td>
<td>Q1 2018</td>
</tr>
<tr>
<td>3.1.12</td>
<td>Establish niche fundraising opportunities (fun and innovative)</td>
<td>Steve Kooms Development Committee</td>
<td>Q1 2018</td>
</tr>
<tr>
<td>3.1.13</td>
<td>Explore establishing a bequests program</td>
<td>Steve Kooms Development Committee</td>
<td>Q2 2018</td>
</tr>
</tbody>
</table>
### Objective 2: Enhance LSM’s Physical Space/Access to Technology

<table>
<thead>
<tr>
<th>Responsibility</th>
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</thead>
<tbody>
<tr>
<td>3.2.5- Address the need for additional office space</td>
<td>Helen Wernecke Executive Director</td>
</tr>
<tr>
<td>3.2.6- Effectively address IT issues</td>
<td>Helen Wernecke Executive Director</td>
</tr>
<tr>
<td>3.2.7- Consider investing in donor software</td>
<td>Finance Committee</td>
</tr>
<tr>
<td>3.2.8- Identify ways of automating processes (such as application process)</td>
<td>Lee C Communications Chair</td>
</tr>
</tbody>
</table>

### Objective 3: Ensure the wise use of budgets/use of resources

<table>
<thead>
<tr>
<th>Responsibility</th>
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</tr>
</thead>
<tbody>
<tr>
<td>3.3.1- Review budget/revenue options and develop a strategy that depends less heavily on alumni giving.</td>
<td>Finance Committee and Development Committee</td>
</tr>
<tr>
<td>3.3.2- Develop a multi-year budget process</td>
<td>Finance Committee</td>
</tr>
</tbody>
</table>

### Objective 4: Ensure Adequate Staffing

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>3.4.1- Consider establishing a student intern program</td>
<td>Helen Wernecke Executive Director</td>
</tr>
<tr>
<td>3.4.2- Consider a volunteer program (recruits and uses)</td>
<td>Governance Committee</td>
</tr>
<tr>
<td>3.4.3- Identify ways to hire additional staff to take some of the pressure off the Board</td>
<td>Executive Committee</td>
</tr>
<tr>
<td>3.4.4- Create Administrative Operations Plan (Continuity of Operations)</td>
<td>Administrative Manager</td>
</tr>
</tbody>
</table>
### GOAL IV: Talent Management

Leadership Southern Maryland deploys effective management and leadership approaches as a way of maximizing its resources and assuring quality programming.

#### Objective 1: Ensure an effective Board of Directors

<table>
<thead>
<tr>
<th>Responsibility</th>
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</tr>
</thead>
<tbody>
<tr>
<td>4.1.1- Review the roles and responsibilities of Board members (look at best practices of other boards)</td>
<td>Governance Committee</td>
</tr>
</tbody>
</table>

#### Objective 2: Enhance services provided to program participants

<table>
<thead>
<tr>
<th>Responsibility</th>
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</tr>
</thead>
<tbody>
<tr>
<td>4.2.1- Explore a mentor program for new LSM participants/students</td>
<td>TLA Chair Program Chair</td>
</tr>
</tbody>
</table>

#### Objective 3: Better utilize/engage past participants (alumns)

<table>
<thead>
<tr>
<th>Responsibility</th>
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</tr>
</thead>
<tbody>
<tr>
<td>4.3.1- Build a Board member pipeline program that engages alumni (survey of interests)</td>
<td>Governance Committee and Alumni Committee</td>
</tr>
<tr>
<td>4.3.2- Review and codify all available talent as current and past LSM participants</td>
<td>Governance Committee and Alumni Committee</td>
</tr>
</tbody>
</table>