One Year Strategic Plan

Social Marketing Association of North America
SMANA

Strategic Planning Pro Bono Project

June 2017
M Powered Strategies

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Executive Summary

This strategic plan is the result of a pro bono project implemented by M Powered Strategies (MPS) for the Social Marketing Association of North America (SMANA). This plan stems from information gathered during an initial environmental scan, followed by a series of individual stakeholder interviews and a full board member survey. MPS presented in-progress findings at the SMANA April Board Meeting, then facilitated a working session during the May Board Meeting to collaboratively refine organizational identity elements, develop a prioritized list of strategic goals, and create action plans for initiatives in support of each goal. The process of defining this strategic plan was detailed, iterative, and involved high engagement from the SMANA board and executive director team.

This 2017-2018 Strategic Plan is meant as a management tool that will guide SMANA toward successful completion of the goals described within it over the next year. Throughout the three-month duration of this project, MPS consultants worked with SMANA to gain insight into the organization's current state and develop an approach to focus efforts in this next critical time for organizational maturation. Just past its one year birthday, SMANA has previously focused its efforts internally, developing initial organizational and administrative structures. SMANA is now at a key point where it can pursue many different organizational models as it continues to mature. For example, the board could pursue a major donor model where sponsor revenue is a primary funding source, or a programmatic revenue model where educational programs generate revenue for the organization. A healthy organization typically incorporates a combination of these and several other revenue sources. Likely, as SMANA makes progress toward the goals outlined in this one year plan, the specific balance that will best serve the organization will become clearer.

Analysis from the environmental scan allowed the joint SMANA and MPS team to assess and adjust the strategy of the organization in response to the available resources, and competing priorities, to position SMANA to become a healthy, sustainable organization. Most importantly, this strategic plan ensures that the organization remains focused on their mission and dedicated to their goals.

This strategic plan includes the refinement of SMANA's organizational identity elements, such as its mission and vision statements, and its core organizational values. The plan segments the strategic focus areas of internal, external, and coalitional. It also defines and prioritizes the top five strategic goals for this next year, with action plans for initiatives to support each goal.

Monitoring and iteration is the key element to this strategic plan's success. As the SMANA team executes the associated action plans, they must monitor these activities to adjust to changing needs, as objectives are achieved; repeat this process to define the next set of activities to support the strategic goals; and analyze outcomes to inform decisions on future strategic direction and organizational maturity. This documented plan and the associated tools are embedded for future use in support of SMANA's mission and organizational success.

Organizational Identity Elements

In order to ensure alignment of all strategic components and efforts, MPS worked with SMANA board members to solidify foundational strategic elements that comprise SMANA's organizational identity: Vision, Mission, and Core Values. These elements create a consistent baseline for changing strategic goals and initiative alignment. All efforts should support progress to the organizational vision. The approach for achieving this progress should align with the mission. The way this work is executed should be representative of the core values. Efforts that do not map to these organizational identity elements may be out of SMANA's strategic direction scope.

Vision

The vision statement represents the desired future state that the organization intends to achieve.

Note: this refined vision statement aligns to that of the International Social Marketing Association (iSMA).

We envision a world in which social marketing is a widely-used approach to improve individual and societal well-being.

Mission

The mission statement identifies the organization's permanent purpose and its approach to achieving its vision.

Our mission is to advance social marketing in North America to support social good by connecting behavior change agents and promoting social marketing.

Core Organizational Values

Core values represent principles that bind the organization together and set the foundation for how work is done.

Value	Meaning
Industry Connectors	▪ Share information, resources, best practices, opportunities
Social Marketing Advocates	▪ Build awareness of social marketing, promoting its value, advancement, use
Collaborative	▪ Work across multiple geographic, topical and functional areas (practitioners, academics, students) to create synergy
Empathetic	▪ Understand social marketing's broad user base and varied cause application (users/uses) and leverage this diverse expertise, experience/background
Rigorous	▪ Draw on social marketing and scientific training and expertise to better position social marketing as a viable intervention framework

Strategic Planning

Strategic Orientation

Strategic orientations are the main, high-level business segments that form the basis for the organization's business model. They represent the category areas in which SMANA must excel in order to deliver high value to their members and successfully achieve its mission. Each orientation will have associated goals to ensure that the strategic plan includes a blend of internal, external, and coalition focused efforts. While many organizations differ in the how they distribute resources across these areas, successful organizations need to purposefully address all three orientations to achieve organizational health and sustainability.

Below, the orientations are presented in bold and their description is presented in italics. Some initiatives may have dual orientations and/or significant dependencies in other orientations. The segmentation below indicates the primary orientation in order to create balance between organizational efforts and resource allocation.

- **Internal:**
    - *Internal oriented goals focus on the health of SMANA's organization that allow it to achieve its external functions, including: strengthening finances, board structure, succession planning, the functional infrastructure to recruit and retain members, etc.*
- **External:**
    - *External oriented goals support the public face of SMANA's mission, which include: building awareness and appreciation of Social Marketing, the public-facing programs that encourage*

retention and recruitment of membership, programmatic efforts, advertising and awareness campaigns, resolving brand confusion, etc.

- **Coalitional:**
    - *Coalition oriented goals build relationships between partner organizations, whose work will support SMANA. These include founding and structuring the interface with local chapters and adjacent associations such as the Pacific Northwest Social Marketing Association (PNSMA) and iSMA.*

Goals: 2017 – 2018 Prioritization & Action Planning

The following **five strategic goals** were compiled through a series of individual stakeholder interviews, full board member surveys, and MPS association industry expertise and analysis. Together, SMANA and MPS prioritized the most imperative goals for the next year, ensuring this strategic plan included more than one strategic orientation. Each prioritized strategic goal represents a bundle of progressive activities that break the SMANA strategy into smaller actionable initiatives.

In order for SMANA to make incremental progress towards achieving these strategic goals, each actionable initiative will be treated as a separate mini project. The action plans for each project initiative will document:

- Project Description & Objectives
- Action Owner
- Target Due Dates & Schedules
- Project Dependencies
- Specific Risks

Below is a list of the prioritized strategic goals. As the action plans are completed, the board may identify further initiatives needed to support the over-arching strategic goal.

1. SMANA Board Governance Refinement (Internal)

- **Define Roles & Responsibilities**
  Document SMANA board member roles and responsibilities to ensure shared understanding, compliance, and leverage critical board resources.

- **Develop Succession Planning**
  Create a process for identifying new board members to ensure seamless transitions for board positions and reduce gaps in positions, especially executive positions (President, Vice President, Treasurer, and Secretary).

- **Distribute Work Efforts**
  Improve work share distribution across SMANA board members and leverage team expertise, networks, and availability.

2. Funding (Internal)

- **Generation**
  Increase the opportunities for funding sources that are aligned with existing activities, and build a pipeline of aligned funding sources based on optimal portfolio size and mix of programmatic activities.

- **Diversification**
  Diversify funding sources by identifying new opportunities for organizations to support SMANA, and build a pipeline of aligned funders based on optimal portfolio size and mix of programmatic activities.

3. Programs (External)

- **Unique Member Benefits**
  Develop benefits that only SMANA members have access to, fostering an increase in membership value proposition without diminishing exposure to new audiences.

4. Membership Retention & Engagement (External)

- **Retention**
  Maintain current membership base by extending current first year members, with a specific emphasis on outreach mechanisms, renewal reminders, and low-friction renewal methods.

- **Engagement**
  Develop pathways to actively involve SMANA's membership base actively in its programs and community, in support of membership retention and value proposition.

5. Membership Pipeline (External)

- **Recruiting New Members**
  Increase membership by identifying new members.

- **Volunteer Pipeline**
  Develop members that are interested in volunteering time or in kind donations to support SMANA's goals and initiatives.

Action Plan Tracking Tool

MPS has provided an action plan tool that identifies the five priority strategic goals and supporting initiatives that the SMANA board identified during the May Board Meeting. The tool documents action plans for each initiative, as well as ideas for future development that the board agreed were not as urgent. The board can use this tool to verify that board task assignment, board recruitment and succession planning, and volunteer task assignments are aligned with SMANA's goals. Additionally, SMANA can use the action plan tracker as an accountability mechanism, to capture progress in advancing each initiative, as action owners begin to execute the activities.

Future Considerations

Given the one year time frame and resource limitations, the team needed to reduce and limit the 2017-2018 strategic goals based on what could feasibly be accomplished with the constrained resources available to SMANA. The two goals below will be important to include in future action planning, as achieving results in both will have positive impact on SMANA's organizational health and ability to achieve its mission. The SMANA team will have the strategic documentation and tools in this strategic plan and associated deliverables, in order to effectively reach consensus for future goal and action planning.

6: Related Organization Interface Structure (Coalition)

- **Define Local Chapter Structure**
  Document the structure and interaction with local chapters, including membership dues, brand elements, intellectual property and/or shared benefits.

- **Define International Association Structure**
  Document the structure and interaction with iSMA, including membership dues, brand elements, intellectual property and/or shared benefits.

7: Build Awareness for SMANA & Social Marketing (External)

- **Define Brand**
  Create brand elements that communicate SMANA's mission and vision.

- **Promote SMANA & Social Marketing**
  Using brand elements, increase public awareness of SMANA and social marketing, with a specific focus on building awareness among the agencies who commission social/behavior change work.

Additional Findings

Additionally, our team's analysis included the findings below that may be helpful benchmarks for future action planning efforts.

- **Member Retention Rates:** 1st-year retention is a major hurdle for all associations. Even very healthy and mature organizations lose 30-40% of their first-year members at the first renewal cycle.

- **SMANA's Volunteer Engagement is excellent:** Volunteer engagement is less than 5% of the membership in typical organizations, while SMANA's is greater than 20%.

- **Volunteer contributions are above average:** Several board members indicated 5 hours or more per week dedicated to SMANA. This is a testament to their enthusiasm and dedication, but creates risk of burnout and complicates succession planning.

Conceptual Frameworks

Conceptual frameworks that could assist future planning and goal/initiative prioritization are:

Market Access Model:

This model supports increased understanding of what currently drives SMANA market engagement, and which segments SMANA seeks to increase engagement in the future. There are 4 "circles" of engagement to consider, and 3 intersection points between the circles that can inform how to increase engagement with the ultimate goal of creating a new member.

- **Circle 1: Members:** What do members want, what do they think about SMANA, and think about the profession?

- **Circle 2: Engaged Non-members**: (Listserv subscribers, website visitors, nonmember event attendees, etc.). What nonmembers who know SMANA want, think about NIGP, think about the profession?

- **Circle 1 & Circle 2 Intersection**: What can SMANA do to entice engaged nonmembers to join? Consider the Membership Value Model to evaluate insights at this intersection

- **Circle 3: Non-engaged Professionals**: (Social marketers who aren't involved. They could be and should be, but aren't). What pros who don't know SMANA want and think about the profession

- **Circle 2 & Circle 3 Intersection**: What can SMANA do to reach and engage with untapped parts of the market? Consider the Engagement Barrier Model to evaluate insights at this intersection

- **Circle 4: Adjacent Professions**:(People who work with social marketers)

- **Circle 3 & Circle 4 Intersection**: How can SMANA entice others to engage, participate, and appreciate? Consider the Engagement Barrier Model to evaluate insights at this intersection, especially the "doesn't know" and "doesn't care" barriers.

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Membership Value Model

This model segments the type of motivation for someone to get involved with SMANA, join as a member, and continue their involvement, by aspirational, beneficial, or financial. Most people have many reasons: so SMANA should prioritize which motivation is most important for SMANA's mission and the majority of the membership, without ignoring the others, and develop what activities can support that motivation.

- **Aspirational:** "I support this because it this is a worthy cause that needs my contribution"
  - SMANA board members indicated this as the 2nd-most important motivator.
  - Emphasize aspirational motivation by building a large Circle 1 and Circle 2 population, and consistently broadcast accomplishments and encourage additional engagement.

- **Beneficial**: "I get practical and useful professional benefits from this that I couldn't get elsewhere"
  - SMANA board members indicated this as the most important motivator.
  - Emphasize beneficial motivation by creating more innovative and unique benefits to members such as educational content, collaboration tools, and networking opportunities.

- **Financial**: "I get my money's worth though discounts and exclusive materials"
  - SMANA board members indicated this as the least important motivator.
  - Since it is the least important, emphasize financial motivation only through low-effort activities such as small discounts to events and occasional promotions of members-only activities.

Engagement Barrier Model:

This model examines the barriers prevent someone from increasing their engagement with SMANA, such as a Circle 3 becoming more engaged as a Circle 2. Most reasons can be isolated in three categories: Doesn't know, doesn't care, or can't.

Below are descriptions of each reason as well as a mitigation SMANA can take to identify and remove those barriers.

- **Barrier - Doesn't Care:**
  - No interest in social marketing generally, or no interest in what SMANA offers specifically.
  - Mitigation: Entice by identifying what doesn't appeal to them and adjusting programs and messaging.

- **Barrier - Doesn't Know:**
  - Has not heard of SMANA, does not know about programs, or does not recognize when programs could meet their needs
  - Mitigation: Inform by expanding communication distribution networks

- **Barrier - Can't:**
  - Cannot get approval, cannot afford, does not have time, or does not have access.
  - Mitigation: Facilitate by providing more affordable, accessible, and convenient activities

MPS & MPS Pro Bono Assists Program

M Powered Strategies (MPS) is a change management consulting firm serving organizations that perform public service. Our Vision is to foster a culture of innovation in public service by empowering agents of change. Our Mission is to empower clients through innovative change management services and build an exceptional firm motived by public service.

MPS Pro Bono Assists Program aims to empower nonprofit organizations to achieve their goals and manage fundamental organizational needs by:

- Design meaningful projects aligned with our expertise
- Provide experienced consultants to execute customized projects

- Help nonprofit clients transform their operations and maximize social impact

The MPS team for the SMANA Strategic Planning Support project includes a Non-Profit and Association Subject Matter Expert, and a Senior Facilitator/Strategic Planner. Davin Hattaway, CAE is a senior consultant with 15 years of professional experience in management of 43 domestic and international nonprofit organizations. Hannah Hammer is a senior facilitator with over 11 years of experience facilitating in the public and private sector, focused on strategic planning, executive leadership support, organizational change, complex stakeholder management, strategic communications, program management, and business process design.

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