This provides the Western Area Strategic Planning Committee's 2015-2017 Biennial Report, which summarizes the Committee's role, goals, key accomplishments and recommendations for continuity.

ROLE OF COMMITTEE/OFFICE: STRATEGIC ALIGNMENT

- Align the strategic goals and plans of the Western Area with the National Priorities of The Links, Incorporated.
- Facilitate the development, implementation and performance tracking of Western Area Work Plans.
- Train and guide Western Area Chapters in Strategic Planning, including goal-setting, action plan development, and measurement tracking.

SMART GOALS:

- **Goal 1:** Increase Western Area Board proficiency in Strategic Planning as evidenced by 100% completion of Work Plans in alignment with the Western Area and National Strategic Plan.
- **Goal 2:** Increase Western Area Chapters' proficiency in Strategic Planning as evidenced by 100% of all chapters with developed Strategic Plans by 2016.
- **Goal 3:** Increase Western Area Chapters'/members' awareness of National Strategic Planning best practices as evidenced by an increase in Western Area Chapters participation in National/Area Strategic Planning Webinars/Workshops by 2017.

COMMITTEE ACCOMPLISHMENTS/SUMMATION

**Goal 1: Background:** The Western Area Leadership Team had its Orientation Session in Houston in September 2015. One key component of the meeting was a Strategic Roadmap Session to begin planning the work over the Biennium for the new leadership team.

- Worked closely with the Western Area Director to create the framework, process and deliverables for the Strategic Roadmap Session to foster the development of a comprehensive and robust Leadership Team built Western Area Work Plan:
  a) Assisted the Western Area Director in developing each Team or Committee's Role, and SMART Goals consistent with the Six National Priorities.
  b) Aided in the facilitation of the Strategic Roadmap Session in which six Teams collaborated to develop, align and refine their respective Work Plans.
  c) Designed the Session's Team Break-Out discussions, which afforded each Team the opportunity to share, align and build a Work Plan to achieve the 2015-2017 Western Area Goals and Charges.
  d) The Session's Report-Out enabled each Committee or Team to share its planned delivery on the Western Area Strategic Outcome Statement:

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<table>
<thead>
<tr>
<th>Western Area Strategic Outcome Statement</th>
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<td>The Western Area will develop and implement programing and membership initiatives and enact operational policies and procedures that inform and engage its Chapters and members so that they personify &quot;A Mind for Business and a Heart for Service.&quot;</td>
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COMMITTEE ACCOMPLISHMENTS/SUMMATION (CONT.)

Goal 1: (Cont.)

e) Collaborated with the Western Area Director to devise the Western Area Leadership Team Work Plan Update Session, one-year into the Work Plan implementation, as a gauge of intermediate indicators of progress against key actions to be accomplished by the end of the 2015-2017 Biennium.

f) Worked with the Western Area Director to develop the National Submissions of the 2015-2017 Western Area Work Plans.

- **Outcomes:**
  - 100% of Western Area Officers'/Team Leads' and Committees Chairs' Work Plans completed by October 2015
  - 100% of Western Area Officers'/Team Leads' and Committees Chairs' Work Plan Updates completed by September 2016
  - National submissions of Western Area Work Plans in October 2015 and September 2016
  - All 2015-2017 Western Area Work Plans **aligned** within the Western Area and with the National Strategic Plan

Goal 2:

- Outreach and advocacy with Western Area Chapter Strategic Planning Chairs and Chapter Presidents achieved 100% of Western Area Chapters with a developed proficiency in Strategic Planning, as evidenced by 100% of all chapters within the Western Area with Strategic Plans developed by 2nd Quarter 2016, given data from the ProofPoint National Strategic Tracking Tool:
  a) Created and implemented a **Chapter Liaison Outreach** structure, process and plan to provide each Western Area Strategic Planning Chair and Chapter with a personal advocate and dedicated resource to foster awareness, understanding and proficiency with The Links, Incorporated Strategic Planning best practices & processes.
  b) Western Area Strategic Planning Committee members, one assigned to each chapter, conducted both **proactive** outreach and **troubleshooting** in response to chapters’ queries, questions and challenges.

- **Outcomes:**
  - 100% of Western Area Chapters were pro-actively contacted via email and/or phone calls to provide instructional Strategic Planning updates, tutorials or advocacy during the Biennium
  - The Western Area is the **only Area** with 100% of its chapters with Strategic Plans input into the ProofPoint National Tracking System as of 2nd Quarter 2017

- Launched what's believed to be the first Area **Chapter Strategic Planning Online Survey** in March 2017 to provide a comprehensive profile of Western Area Chapters' strategic planning structure, processes, attitudes and perceptions:
  a) Designed survey methodology and questions to better understand chapters' strategic planning needs, challenges and best practices.
  b) Implemented one-on-one **Communications Outreach Plan** to contact each chapter to introduce survey, address questions and resolve any technical issues.
  c) Findings will influence the content of Western Area Strategic Planning workshops, webinars and tools, so that they are relevant and responsive to chapters’ requirements, and to further foster Strategic Planning success.

- **Outcomes:**
  - As compared to industry benchmarks for online survey responses of 30% - 70%, the Western Area **Chapter Strategic Planning Online Survey** achieved a 100% response rate with all 59 Western Area Chapters completing the online survey
  - Topline Survey Findings to be released in 2nd Quarter 2017 and incorporated within the Strategic Planning Workshop at the 43rd Western Area Conference
COMMITTEE ACCOMPLISHMENTS/SUMMATION (CONT.)

Goal 3:

• Increased Western Area Chapters'/members' awareness of National Strategic Planning best practices via the use and development of educational tools, train-the-trainer presentations, Webinars and workshops designed to provide practical tips and tools to enhance Strategic Planning expertise:
  a) Served as a presenter in two of the three National Strategic Planning Committee Webinars in 2015, the Refresher Webinar and the Tracking Tool Webinar both in September 2015.
  b) Served as a panelist presenter at the National Strategic Planning Committee Workshop at the 40th National Assembly in Las Vegas, Nevada in July 2016; conducted the live online demonstration of ProofPoint to foster adeptness with the tool.

• Developed Western Area Webinar and Tutorials to augment National Strategic Planning Committee resources and further enhance the Strategic Planning skills of Western Area Chapters/members, and the Western Area’s responsiveness to their needs:
  a) Created the ProofPoint Administrator Tutorial in May 2017 for use by the National Strategic Planning Committee's Area Chairs to increase efficiency and more timely responses to chapters' ProofPoint technical questions.
  b) Developed and implemented the Webinar: Refresher for ProofPoint April 2017 Update designed to aid in navigating the ProofPoint National Tracking System, primarily for those who are doing the actual ProofPoint updates to address FAQs.
  c) Created educational/training documents aimed at Western Area Presidents and Strategic Planning Chairs, and designed to optimize use of the ProofPoint National Strategic Planning Tracking System:
     – April 30 Update PowerPoint (March 2016 & March 2017) and the Updating & Editing Chapter Goals PowerPoint (April 2016 & March 2017)
     – October 31 Update PowerPoint (October 2016) and the Updating & Editing Chapter Goals PowerPoint (October 2016)
  d) Presented Strategic Planning Committee updates or provided information during Western Area President's calls:
     – March 2016 - ProofPoint April 30, 2016 Update
     – October 2016 - ProofPoint October 31, 2016 Update
     – March 2017 - Online Survey, March Webinar, Conference Workshop Updates
     – April 2017 - Reminder ProofPoint April 30, 2017 Update deadline
     – May 2017 - Online Survey Update and 5-Easy Steps To A Smooth Transition In Strategic Planning

• Developed interactive Strategic Planning workshop for 43rd Western Area Conference (In Search of Hidden Treasure) to engage members with Strategic Planning best practices; the workshop incorporates:
  a) Highlights of actionable tools, tips and templates for both jumpstarting and advancing chapter Strategic Planning practices
  b) Interactive environment for practice-sharing to leverage lessons-learned
  c) Resources from National Strategic Planning handbook, and findings from the Western Area Chapter Strategic Planning Online Survey

  • Outcomes:
    – 77% of Western Area Chapters participated in at least one National Strategic Planning Webinar during 2015-2017
    – 100% of Western Area Chapters were provided with Western Area train-the-trainer tutorials on the ProofPoint National Tracking Tool during 2015-2017
RECOMMENDATIONS FOR CONTINUITY

• The Western Area Strategic Planning Chair should continue strong involvement with the National Strategic Planning Committee to keep abreast of National direction and ensure alignment and compliance with National Strategic Planning goals and direction.
• Continue proactive chapter outreach and communication to serve as advocates for Strategic Planning throughout the Western Area and foster a greater awareness and understanding of the requirements and benefits derived by the chapters.
• Examine ways to showcase and reinforce best practices and embed a value proposition for planning within training/workshop tools.
• Fully utilize the Western Area Strategic Planning Committee to enhance the service, proficiency and engagement of Western Area Chapters with strategic planning and manage the deliverables and outcomes of the Strategic Planning Committee Work Plan.

2015-2017 STRATEGIC PLANNING COMMITTEE MEMBERS

Link Veronica Spencer-Austin, Chair
Mid-Cities (TX) Chapter
Link Karla Fuller, Co-Chair
Mid-Cities (TX) Chapter
Link Ida S. Daniel
Denver (CO) Chapter
Link Maxine Jackson
Orange County (CA) Chapter
Link Jamien Jordan
Town Lake (TX) Chapter
Link Kimberly Powell
Mid-Cities (TX) Chapter
Link Lisa Wills-Rogers
Lone Star (TX) Chapter