



Tennessee Returned Peace Corps Volunteers

Strategic Planning Retreat - Recap of Session

September 29, 2018
9:00 a.m. – 12:00 p.m.
Nashville Public Television

The board of directors for the Tennessee Returned Peace Corps Volunteers organization invited all members to participate in a retreat to discuss priorities and next phases of activity. In an effort to set forth strategic objectives for the next 3-5 years, a member survey was sent prior to the retreat to provide insight into how well the group was meeting its mission and what members would like to improve in the future. A facilitator was secured from the Center for Nonprofit Management in order to provide a neutral convener and ensure meeting objectives were met.

Board members Amanda Frick Keiser and Dave Keiser kicked off the retreat, and expressed appreciation to members of the group who provided space for the meeting and refreshments. The group introduced themselves individually and stated their location of service in the Peace Corps and stated various reasons “why” they came on this day and future support of the organization.

INTENTIONALITY WHY?
CONTRIBUTION "I SERVED..."
I'M BRAND NEW
INSIGHT INTO AGENCY
LISTEN
DIFFERENT VOICES
PROVIDE GUIDANCE
SHAPING THE NEW - NEXT 10 YRS
I BELIEVE IN US
THIS ORG MEANS A LOT TO US
GREAT IDEAS NEXT 3-5 YRS
WE'VE BEEN TOGETHER SINCE INCEPTION

Board members Dave Keiser and Amanda Frick Keiser provided slide presentations for the board to begin the discussion. The history of the organization since inception (2008) was illustrated through images, timelines and reports of impact on partners from TNRPCV. Aggregated results were shared from the August/September 2018 member survey.

Beth Morrow was introduced as the facilitator for the meeting to allow for discussion of all in the room on three main objectives for the day:

- 1) Decide on fundraising and giving goals
- 2) Review and focus on type of activities and frequency
- 3) Discuss membership engagement

The group reviewed and ratified the mission statement for TNRPCV, which states:

Tennessee Returned Peace Corps Volunteers (TNRPCV) is a statewide non-profit uniting and empowering the Tennessee Peace Corps community through service and support.

Members participated in a “SOAR” Analysis of the organization, using Ingrid Bens SOAR process, an adaptation of SWOT. The group was asked to individually acknowledge the below questions and allow quiet reflection in a gallery walk, then begin to note their responses on the sheets provided.

Strengths:

What are our greatest assets internally and externally?

What are we most proud of accomplishing thus far in our existence?

What makes us unique?

Opportunities:

What is the mission asking us to do?

What synergies already exist with other groups? What other synergies can we create?

What do we know or understand already about outside threats, challenges or limitations to our current work?

What are the top opportunities on which we should focus our efforts?

Aspirations:

What are we deeply passionate about?

Who should we become? What will we aspire to be?

How does our collective ‘why’ compel us toward the future?

Results:

What do we want to be known for?

What goals could be set to achieve results toward this?

How will we know if we’ve achieved results?

The group was able to debrief and discuss, synthesize and distill thoughts to some main components of each SOAR category.

STRENGTH OF ORG
MISSION / GOALS / FINANCES
TECHNOLOGY
SHARED VALUES
PEOPLE INVOLVED

WHAT'S LIMITING =
TIME
MONEY
CAPACITY
Geography

• INCLUSIVITY
RESULTS WE'RE AFTER: DIVERSITY: RACE +
+ GENDER
GRANTS / EVENTS MEASUREMENT? • CAREER •
• BACKGROUND
PEOPLE, CONNECTIONS + FUN ... MEASURED

ASPIRE TO BE
RESOURCE TO EACH OTHER • LIFE IN THE
STATES
OPPORTUNITIES ARE: - RECRUITMENT FOR PEACE CORPS
- MENTORING OTHERS
- COMMUNICATING OUR STORIES
- AWARENESS OF THIS ORG. (SPORTS AS A TOOL)

QUESTIONS

PROFESSIONAL
SOCIAL SUPPORT

- DO WE PUT MENTORSHIP INTO STATEWIDE GOALS?
- WHAT IS THE PROCESS FOR BOARD DEVELOPMENT? COULD WE WORK ON IT?
- HOW DO WE BETTER MARKET OURSELVES OUTSIDE OUR PCV COMMUNITY?
THE AVERAGE PERSON.
- HOW WILL WE INCORPORATE THIS SESSION INTO BOARD WORK?

Q-

- ARE WE MISSING PEOPLE OF COLOR IN PCV COMMUNITY HERE?
- ARE WE MISSING THE YOUNG RECENTLY RETURNED?
- ARE WE MISSING OTHER PROF BACKGROUNDS - MORE VARIED
- DO WE WANT TO BE MORE INVOLVED IN PC CONNECT?

Smaller groups discussed the categories of attention for planning purposes, in light of strengths and opportunities identified. Groups had time with each of the two main categories and built upon previous members' thoughts to provide a conclusive set of ideas in the time allowed for both Fundraising Events/Funds Distribution and Activities: Type/Frequency.

The facilitator distributed color dots for each member to indicate priority ideas for 'green-light' efforts and 'yellow-light' efforts as secondary but important items. The ranking criteria was to ask: which of these items are most immediately related to strategic movement forward? Secondly?

TOP GREEN-DOT PRIORITY for Fundraising Events and Funds Distribution: Intentionally plan for service disbursement funds

FUNDRAISING

~~AVERAGE~~ → EXPAND MEMBERSHIP ON FUNDRAISING CMTE

- LARGER events - LESS FREQUENT PER YEAR
- SMALLER events - MORE FREQUENT
- TECH - SAAMY events

GIVING

THE MONEY WE'VE RECEIVED + Gen DONATIONS

- INTENTIONALLY PLAN FOR SERVICE DISPERSEMENT FUNDS

AVG GIFT 5K
5-10 GIFTS PER YEAR

% of donations → ^{TNRPC} ORG → ENDOWMENT (NEW PROCESS)

- SUPPORT INITIATIVE FOR RECENTLY RETURNED PCV

TOP GREEN-DOT PRIORITY Activities for TNRPCV – Type and Frequency: Professional Networking

ACTIVITIES

TYPES

• DECIDE ON TIME SPENT ON PARTNERSHIP ACTIVITIES

- FAMILY FRIENDLY
- LOCATIONS OTHER THAN H-Hall
- INTERNAL MENTORING (RECENTLY RETURNED)
- PROFESSIONAL NETWORKING
- EXPAND MEMBERSHIP ON ACTIVITIES CMTE
- SMALLER more intimate - TOPICAL DISCUSSION
- OUTREACH FOR PC AS ACTIVITY

FREQUENCY

- LOW COST OPTIONS
- STANDING MONTHLY
- RSVP Requirement

Regroup Reflection + Discussion on Vision, Aspirations, Strengths & Opportunities + Potential Action

Members returned to subgroups to develop action plans for emerging priorities as a final step and to consider what is needed to begin. First thoughts on these actions and needs were listed as:

- Update TNRPCV LinkedIn page (**need** password and outreach to community that it exists)
- Communication to TNRPCV that networking/mentoring is future focus / gather input (**need** to expand the activities committee; **need** to identify “need” for help, i.e. social media, communications, planning)
- Tie funds to service activity/program (**need** funds)
- Partner with 1-2 organizations with similar goals / refugee-immigrant (**need** to identify relevant projects)
- Plan 2019 fundraising goals and activities (**need** to expand fundraising committee)

The facilitator captured adjacent needs / wishes of the group that support the strategic goals via engagement of various audiences. The following continued to emerge in discussion and conversation as important:

- Annual reporting
- Telling our stories through social media (to average people; to ourselves)
- Recently returned PCVs
- PC Connect
- Communicating what we offer (mentoring, networking, social, and service)

Close Out

The group adjourned with a renewed focus on ways to organize itself for 2019 activity and beyond. Consensus-building group work and open discussion regarding top-line items provided clarification on what board members need to consider in the planning for future work and fund distribution.