



# STRATEGIC PLAN

**2013-2015**

## TABLE OF CONTENTS

Strategic Planning Process _____	2
Vision and Mission _____	3-4
Strategic Goals and Objectives _____	4
Strategic Goal 1 _____	4
Strategic Goal 2 _____	4
Strategic Goal 3 _____	5
Strategic Goal 4 _____	6
2013 Priorities _____	7
Committees _____	7-8

## OUR STRATEGIC PLANNING PROCESS

The process we used to create this strategic plan began by casting a wide net to all members to gather input about global directions in which organization development could play a key role, trends in the organization development field, and strengths and weaknesses of the Organization Development Network specifically. We called this the Vision-Strategy-Organization (VSO) project, highlighting our intention of having the vision for the Network lead us to our strategy and reorganization. We thank those in the VSO Leadership Group who had conversations with board members and the Executive Director during the early months of this process: Billie Alban, Judith Katz, Mila Baker, Carolyn Lukensmeyer, Charles Seashore, Dick Axelrod, Emily Axelrod, Sandra Janoff, and Marvin Weisbord. These conversations helped to clarify the history, possibilities and challenges before us.

Feedback came through a variety of mechanisms: surveys and focus groups in which all members could participate, specific focus groups with Organization Development Network Affiliate members and Organization Development students, contributions to the “flipchart wall” throughout the October 2011 conference, and a face-to-face session involving a representative cross-section of our membership conducted at the end of that conference. We appreciate the contributions of a diverse group of members and conference attendees who stayed to provide input last year. SmithBucklin, our association management firm, supported the collection of this data by facilitating many of these focus groups as well as analyzing the survey results to create a business value proposition – identifying those Network products and services members perceived as most and least valuable. CoVision, a pioneer in the field of group engagement technology consulting and long-time sponsor of the Network, also facilitated focus groups as well as the face-to-face session utilizing their technology to support data collection and synthesis. Lenny Lind and Laura Gramling from CoVision made important contributions to this process.

We had volumes of data to sort, and three volunteers offered to help us define themes. Dr. Dona Witten used qualitative data analysis software to code the data; Magdy Mansour and Yasmeen Oweiss Burns developed themes. These individuals volunteered an enormous amount of time, and we give our heartfelt thanks to them. With these codes and themes, we conducted a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis for the Organization Development Network, as well as a “competitor” analysis to identify differentiating factors between the Network and other Organization Development-related associations. Dr. Marisa Sanchez facilitated the strategic planning process as the Board defined strategic goals, objectives, measures, and initiatives. The resulting strategic plan represents the long-term vision and mission of the Network as well as specific strategies to support progress in identified areas over the next three years.

We have already started reaching out into the organization to solicit volunteers to help implement this strategic plan. At the end of this document is a list of committees being formed to carry out this work. We invite all Network members to get involved in areas of interest to them and be a part of the transformation and growth of our Network.

## VISION AND MISSION

### VISION FOR THE FIELD

Organization Development is a field central to creating effective and healthy human systems in an inclusive world community.

### VISION FOR THE NETWORK OF NETWORKS

The Organization Development Network, grounded in humanistic values, convenes and equips practitioners, leaders, and academicians to address critical corporate, governmental, and social justice priorities with leading edge practice and theory from multiple disciplines.

### MISSION FOR THE NETWORK OF NETWORKS

Lead advances in the practice and theory of Organization Development that result in healthy, effective organizations and a healthy planet.

- Advance the application of leading edge theory to address business and societal needs
- Support the creation of leading edge theory
- Provide access to and awareness of theory and practice to practitioners, leaders, and academicians
- Convene forums for practitioners, leaders, and academicians to address their priority needs
- Disseminate knowledge and leading edge practices
- Support the global practice and awareness of Organization Development
- Be a viable network of global practitioners, academicians, and leaders using Organization Development
- Set standards of competency for the field

The mission statement expresses our commitment to provide leadership in the field. This calls for leadership in sensing the direction and needs of organizations and societies by supporting practical, innovative organization development solutions and responses. It calls for leadership in helping to put the right ideas, people, and other resources together at the right times to create relevant solutions to issues and to build healthy and effective organizations. Healthy organizations and healthy societies are required to achieve a healthy planet, in the broadest sense. Practitioners, academicians and key organizational leaders have succeeded in placing Organization Development and organization development based activities into the mainstream of management and everyday life to the extent that many may identify organization development practices and techniques as good management, leadership, and people skills. Now our mission calls for us to build awareness of what Organization Development is while demonstrating it in places that need it where it is missing.

### IMPLICATIONS:

- Create a proactive and adaptive culture rather than a reactive, fixed one
- Generate initiatives and projects that include and go beyond conferences and stimulate positive impacts on organizations and society
- Link the effects of what occurs in the world back into the Network in terms of knowledge, learning, and awareness.
- Publicize the role of Organization Development and our members in various projects, rather than maintaining a low profile working on the agendas of others
- Through the Network, practitioners operate as leaders and advocates to achieve results

- Address organization effectiveness and social justice priorities by supporting both cross-fertilization across the Network and in-depth specialization.

With a mission to advance the practice and theory of Organization Development and a vision for the field to be central in creating healthy and effective human systems, a field of practitioners who have tended to work behind the scenes in organizations, are placing their work in center stage, addressing issues relevant now and in the future.

## STRATEGIC GOALS and OBJECTIVES

### **STRATEGIC GOAL 1:** *Support Network members in their work to build healthy human systems*

The work of the Organization Development Network's membership is to support the design and development of healthy human systems, where those systems may be individuals, teams, organizations, and communities. The Network supports its members in this work through training, networking, mentoring, employment opportunities, and exchange of ideas and best practices. We can segment members by level of experience, industry, and professional specialty, to best support the needs of each segment.

**Objective 1.1** Align the Network benefits and Organization Development practitioner needs at all levels of experience. Ensure that all segments of our membership receive value.

It is important that the Organization Development Network's programs serve the spectrum of its members to ensure value for the primary member groups. We will identify primary member groups and map the Network's existing inventory of offerings to create a baseline of how well the organization is serving each of the member groups. We will examine gaps in offerings and develop, communicate, and implement new offerings.

**Objective 1.2** Develop an Organization Development certificate program and institutional accreditation program.

Many of our members and the clients whom our members serve have communicated the need for Organization Development professional certification. Many other professions, such as HR and project management, have benefited from such certification to help clients identify qualified professionals and to support professionals in their career development. Individual certification and learning institution accreditation programs provide an infrastructure that supports quality performance of Organization Development practitioners. We will introduce an Organization Development certificate to support the Network's vision to be the premier organization promoting the advancement of Organization Development practice and theory. The Network will be seen as the body that defines excellence in Organization Development.

### **STRATEGIC GOAL 2.** *Transform our culture of inclusion through expansion of values and practices*

The culture of any organization is a key part of its ability to grow, change and fulfill its mission. In today's world, we are charged to be outward facing and business-oriented while we co-create products, programs, structures, practices, and processes that reflect the whole of who we are as an organization and achieve positive results for our members and stakeholders. A culture of inclusion values and creatively uses its diversity, inviting us all to participate in and lead this field and the work of the Network. The culture we are building in the Network helps to

create economic success for its members and stakeholders and helps to build new leaders in the work and the world.

**Objective 2.1** Ensure all Network programs and activities expand the culture of inclusion

The Network makes a commitment to assure that we are inclusive in our programs, suppliers, and partnerships in terms of race, gender, sexual orientation, economic class, education, and experience. We will expand our culture of inclusion to attract the major sectors of work that use Organization Development for effectiveness and change. A healthy system is attractive to new members and to groups of members, providing as much value and access to benefits as possible. We will create a best-in-class outreach program attracting internal and external practitioners; new and experienced practitioners; and leaders who use Organization Development from private, public, and nonprofit sectors, and assure that there are leadership opportunities for all. We will audit and monitor ourselves and report to the membership on our progress.

**Objective 2.2** Develop a strong business perspective as part of the Network's culture and the field of Organization Development

Through products and partnerships, publications of leading edge practice, governance structure, and communications with members and stakeholders, we will not only strengthen our business perspective as a Network, but also strengthen the Field. We will highlight areas to bring this strength to the Network as we make choices about structure, rewards, priorities, fund development, and the impact of what we do.

**Objective 2.3** Develop a Network culture and structure that are viable for global, local/regional, and entrepreneurial activities and partnerships

Creating a viable structure as a Network of networks requires experimentation and innovation in how we make decisions, deliver benefits and services, and demonstrate value to members and in the world. We will frame and conduct such experiments as part of co-creating a viable and successful culture.

**Objective 2.4** Develop the next generation of emerging leaders and practitioners for the field

Leaders create culture through their response to critical situations. Working with other committees and Network activities, we will foster the development of new leadership from different sectors that furthers the vision, mission, and strategic goals of the Network

**STRATEGIC GOAL 3.** *Leverage new operational and governance models to increase our impact*

Healthy organizations must find ways to leverage financial resources, board and staff commitment, and volunteer time to maximize results. This strategic goal supports development of an effective and efficient organizational infrastructure to support the work of the Organization Development Network. We will create an infrastructure that documents and uses best practices in governance, leadership succession planning, and defining clear roles and responsibilities.

**Objective 3.1** Manage ODN efficiently and effectively

We will identify and document board and staff processes, roles, and responsibilities to create a sustainable infrastructure. These processes will be supported by appropriate technology to facilitate back-office efficiencies as well as support member self-service.

### **Objective 3.2** Partner effectively with SmithBucklin

In 2010, the Network contracted with SmithBucklin, a professional association management firm, to manage network operations such as member registration, conference logistics, marketing support, and financial management. With this shift, the Network will continue to capitalize on best practices to partner effectively with SmithBucklin. Member experience will be solicited to help evaluate these practices.

### **Objective 3.3** Leverage volunteers to provide strong governance and support to ODN

Volunteer engagement in the governance of associations like Organization Development Network is critical to organizational growth and sustainability. While the Network has a long history of volunteers rising to the occasion to support specific initiatives like our annual conference, member offerings, and board service, it is important to institutionalize volunteer engagement to ensure sufficient resource pools, institutional memory, and succession planning as well as to encourage creativity and innovation. We will create mechanisms and a culture to promote volunteerism from a diverse cross section of our membership.

## **STRATEGIC GOAL 4. *Strengthen the Network's financial position***

The survival and growth of the Network depends on our ability to manage our operations in a way that provides financial reserves. Standard guidance for associations is that we should have six months to one year of operating expenses in reserve. This strategic goal has been set to initially achieve and sustain these reserve levels.

### **Objective 4.1** Develop income-generating products and services that provide high value to our members.

It is critical that as the Organization Development Network develops offerings that best meet our practitioner-members' needs, the Network also ensures that those offerings produce revenue for the Network. This objective is a companion objective to 1.1 to ensure that Network products and services provide high value as well as revenue. We will create financial models to facilitate cost and revenue determination by offering as well as across offerings.

### **Objective 4.2** Rapidly and aggressively increase membership.

The input to this strategic plan indicated several potential sources of membership that the Organization Development Network can target: the Network affiliates, students, organizational members, and members of OD social media.

- Members of Organization Development Network Affiliates are often not members of the Network. We will develop closer connections to Affiliates and provide supplemental value to Affiliate members.
- Students in Organization Development graduate schools and courses are an excellent pool of potential members as they represent individuals who desire careers in Organization Development, are making career shifts and are looking for new professional homes. We will develop relationships with Organization Development graduate programs to introduce student membership.
- The majority of Organization Development Network's members are individual members. We will market to organizations to increase organizational membership, allowing for discounts for group membership.
- We will reach out to and participate in Organization Development social media to promote the value of the Organization Development Network.

### **Objective 4.3** Continue to do fundraising and development

In 2010, the Network initiated its Steward's Circle as a mechanism to encourage members to donate funds to the Organization Development Network. We will continue those efforts while also targeting fund drives and other development mechanisms to support specific initiatives. Donors can contribute to favorite initiatives and track progress.

## 2013 PRIORITIES

Network members have articulated the need for greater benefits in exchange for membership fees. By enhancing member benefits, we can provide members with the value they seek as well as attract returning and new members. Priorities for 2013 include the following:

- (1) Enhance professional development member benefits to provide the greatest value added
- (2) Launch an awareness campaign of enhanced member benefits to primary member segments
  - a. Regionals
  - b. Students
  - c. Organizations
  - d. Prior ODN members
  - e. Current members
- (3) Continue to offer a valuable, revenue-generating conference
- (4) Continue to offer a high-quality Organization Development Practitioner publication
- (5) Increase sponsorships for all Network activities
- (6) Improve operational effectiveness, and Partner effectively with SmithBucklin

## COMMITTEES

The Organization Development Network can only be successful if it has strong volunteer committees to carry out the Network's priorities. The Network strongly encourages members to serve actively on committees. All of the Committees connect to the Vision and Mission and some have responsibilities to expand the business model and guide revenue generation in their areas. For example, the Professional Development & Education, Research and Publications, Fund Development, and Strategic Relationships committees all have a connection to expanding our business model.

**Membership:** Develop and recommend strategies for retention of existing and recruitment of new Organization Development Network members, including current and new categories of membership.

- o **Volunteer Subcommittee:** Solicit volunteers to support committee work and special projects as well as track interested volunteers.
- o **Awards Subcommittee:** Administer Organization Development Network Awards recognition programs for individuals and companies.

**Professional Development and Education:** Evaluate the professional development needs of the membership and recommend programs, speakers, and other resources to meet those needs. Deliver those products and programs in the most educationally effective and financially efficient manner to bring value to membership segments.

**Strategic Relationships:** Develop strategic relationships with organizations that will help advance the theory and practice of Organization Development. Includes guidelines for building relationships, projects, and products with corporations, universities, and entrepreneurs.

- **Regionals Subcommittee:** Promote relationships with regionals that want to align themselves with the Organization Development Network.

**Annual Conference Committee:** Plan and execute a profitable, valuable Organization Development Network Annual Conference that increases connection and community.

**Research and Publications:** To identify research and publications projects which will advance the practice and theory of Organization Development; oversee publications strategy to communicate leading edge practice to members

- *OD Practitioner* Editorial Review Board: Serve as editors and advisors for the ODN's quarterly professional journal.

**Fundraising Committee:** Oversee the development needs of the organization and organize programs and projects to fund our initiatives, such as Stewards Circle, developing grants, and substantial sponsorships.

**Culture, Diversity and Inclusion:** Transform the Network's culture of inclusion by expanding its values, business practices, and interpersonal practices

**Nominating and Governance Committee:** Nominate and recruit members to serve on the board; assist the Board Chair in nominating officers and committee chairs and to recommend changes in the governance structure and elections.

**Finance Committee:** Monitor Organization Development Network financial performance, communicate performance to Board of Trustees, and work in conjunction with staff to develop annual budget and oversee timely audits.

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