



ST. LOUIS  
FORUM



# 2018-2021 Strategic Plan

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## Foreword by Board President

Founded in 1981, the St. Louis Forum brings together executive and professional women in the Greater St. Louis area who have distinguished themselves through significant achievements in their chosen fields. Members comprise a broad continuum of disciplines and variety of industries, with a balance of for-profit and not-for-profit organizations represented. Today, the St. Louis Forum has more than 265 members. Membership is by invitation only.

In 2017, the St. Louis Forum Board of Directors considered how we might move our organization to the next level of value for our members. We surveyed current and former members and conducted a series of focus groups to gather insights into members' perspectives on how the organization should transform itself to stay relevant in the evolving environment. In 2018, we held two Board retreats to reflect on our current position and to dream about St. Louis Forum's future. Finally, we charted our first strategic plan.

This St. Louis Forum strategic plan covers a three-year period from August 2018 through July 2021. It sets out a bold and ambitious vision for the members of St. Louis Forum. It will provide direction for adding value to our members in a changing context for membership organizations.

The Board of Directors would like to thank all stakeholders who were involved in shaping this strategic plan. I also commend all of St. Louis Forum's volunteers for their continued effort, dedication and commitment to advancing our organization.

We invite you to engage with us as we seek to realize the ambitions of our new strategic plan.

Lynn Barnes, President  
Board of Directors



## **Our Foundational Statements**

### ***Our Mission ... Why We Exist***

St. Louis Forum promotes  
the advancement of women  
through distinctive experiences  
that enable influential women leaders  
to connect and grow  
professionally and personally.

### ***Our Vision ... What We're Creating***

St. Louis Forum, the region's foremost  
organization for influential women leaders,  
creates an engaging environment  
that facilitates connections,  
learning and collaboration.

## Strategic Planning Method

The strategic planning process was initiated by the St. Louis Forum Board of Directors in 2017. In February 2017, St. Louis Forum engaged Collaborative Strategies, Inc. to proactively assess how well the organization is engaging its demographically diverse membership base. We surveyed current and former members and conducted three focus groups to gather insights into members' perspectives.

In our research, we sought to answer five main questions:

1. How can St. Louis Forum remain vital to our membership?
2. What do our current members value most about St. Louis Forum?
3. What could we do to increase member participation/engagement?
4. What could we do to increase attendance at regularly-scheduled meetings and special events?
5. How should the organization change to meet the needs of our membership?

A comprehensive Member Engagement Report was presented to the Board in May 2017. In August 2017, the research findings were shared at the annual meeting, and reactions and further insights were gathered through roundtable discussions.

All this member feedback was carefully reviewed in advance of Board strategic planning retreats in March 2018 and May 2018. During the retreats, the Board created new mission and vision statements and the strategic plan that follows.

## What We Heard

In our research, we found that members generally feel St. Louis Forum is meeting its mission and are pleased with the organization's programming. Members are supportive of:

- Friday luncheons
- Clayton location
- Speaker-driven programming

Members enjoy hearing speakers who have unique, behind-the-scenes information. Many are interested in spending time during luncheons to discuss what they heard and learned. Younger members are willing to travel to the speaker's location, if it would create an immersive learning experience.

The top reason members belong to St. Louis Forum is professional networking, and many members expressed an interest in the organization becoming more proactive in building member connections and relationships.

- In particular, many feel the open mingling time at luncheons could be improved to ensure all find value in this networking opportunity.

- Being more intentional about building relationships has the greatest potential to benefit newer members (<7 years) and younger members (Millennials and Gen X) who feel relatively less welcomed and enthusiastic about membership than other members. Similarly, the diverse membership demographics result in younger members not experiencing enough peer-interaction.

Although nearly all members want to receive e-mail communications from St. Louis Forum, members are interested in creating a private LinkedIn group to communicate and connect with each other. Many also expressed interest in updating Forum's use of technology (e.g., recording webinars).

Looking to the future, younger members would like to raise St. Louis Forum's profile in the community, highlighting the organization's exclusivity and providing a platform for community influence. Others would like Forum to remain focused on its current mission of expanding professional networks (not adopting any political bias or specific cause).

## Our Strategic Plan: 2018-2021

To achieve our vision, St. Louis Forum has identified four strategic goals we believe are required for continued success. These strategic goals will provide a clear direction for how St. Louis Forum invests time, talent and financial resources over the next three years.

**Goal #1: BRAND**

*Elevate St. Louis Forum’s **brand** with members and in the St. Louis region*

**Success Measures**

- Member satisfaction and retention
- Community awareness
- Inquiries and invitations

Strategic Initiatives	Responsibility	Aug 2018- July 2019	Aug 2019- July 2020	Aug 2020- July 2021
Develop a value proposition that differentiates St. Louis Forum from “competitors”	Strategic Planning Task Force	[by Aug]		
Define our brand voice, implementation guidelines and graphic standards	Communications	x		
Develop internal communication plan to create “buzz” and generate interest in being/staying involved and recruiting others	Communications	[by Aug]		
Develop external communication plan to raise Forum’s profile in the community and build stature of the brand	Communications		x	
Find an opportunity or project to “be known for”	Issue Exploration			x
Explore potential for “hosting sponsorships” to expand community of influence	Programs/Events	Ongoing	Ongoing	Ongoing

**Goal #2: MEMBERSHIP**

*Grow an increasingly-diverse, welcoming and engaged membership of influential women leaders*

**Success Measures**

- Diversity
- Satisfaction
- Attendance
- Volunteers
- Retention

<b>Strategic Initiatives</b>	<b>Responsibility</b>	<b>Aug 2018- July 2019</b>	<b>Aug 2019- July 2020</b>	<b>Aug 2020- July 2021</b>
Define target segments for growth and articulate value proposition for each segment	Membership	x		
Refine membership criteria and nomination / evaluation / selection processes	Membership	x		
Create a culture of welcome and invitation – during new member orientation and beyond – through member relationship management practices	Membership	x		
Develop a member engagement/retention strategy	Membership	x		

**Goal #3: EXPERIENCES**

*Create a comprehensive program structure for unique and memorable **experiences** – including opportunities for deeper dialogue and collaboration – that help members grow professionally and personally*

**Success Measures**

- Participation rates
- Program evaluations
- Retention
- Referrals

<b>Strategic Initiatives</b>	<b>Responsibility</b>	<b>Aug 2018- July 2019</b>	<b>Aug 2019- July 2020</b>	<b>Aug 2020- July 2021</b>
Use member survey and ongoing feedback to build and refine a comprehensive, three-year program structure, using pilots and phased implementation	Programs/ Events	Ongoing	Ongoing	Ongoing
Create processes and tools to facilitate personal interactions and relationship development during and after events	Programs/ Events + Membership + Communications	x		
Develop a system for monitoring participation and satisfaction by event type, topic, time, location and analyzing link to retention	Programs/ Events		x	

**Goal #4: INFRASTRUCTURE**

*Align committees and build a technology platform so **infrastructure** can be better leveraged to encourage connections, conversations and collaboration*

**Success Measures**

- Technology requirements and development plan
- Timely (realistic) deliverables
- Improved committee and Administrator efficiency
- Increased opportunities for member self-service

<b>Strategic Initiatives</b>	<b>Responsibility</b>	<b>Aug 2018- July 2019</b>	<b>Aug 2019- July 2020</b>	<b>Aug 2020- July 2021</b>
Align committees with strategic priorities and create charters	Strat Planning Task Force	[by Aug]		
Define business needs (existing processes and desired functionality)	Tech TF w/ input from all Cmtes	x		
Evaluate technology vendors and systems	Tech TF	x		
Develop technology plan and migrate to new platform	Tech Task Force/ Administrator		x	
Develop (or revise) committee SOPs to leverage new technology platform	All Committees		x	

## Monitoring our Performance

To ensure successful implementation of our strategic plan, St. Louis Forum is committed to the following management principles:

- Annual operational plans with targets will be completed in July/August of each plan year and approved by the Board of Directors during its August meeting.
- Committees will be empowered to implement key initiatives to the broadest extent possible to allow the Board to focus on strategic issues and decisions.
- Progress on key management indicators will be monitored monthly using a management dashboard.
- Progress on operational plans will be evaluated quarterly, and a deep dive on strategic plan progress will be conducted at the Board's annual retreat.
- Strategic initiatives will be adapted based on what we are learning and real-time feedback.

## Conclusion

St. Louis Forum's strategic plan positions the organization to be the region's foremost organization for influential women leaders. The plan also provides St. Louis Forum stakeholders with a sense of where St. Louis Forum is headed over the coming years and of the strategic goals and initiatives on which the Board of Directors and Committee Chairs will be focused.

We invite all who share our desire to promote the advancement of women and help influential women leaders in the St. Louis region to connect and grow to join us in activating this plan.