



Strategic Planning:

Lessons from the Massachusetts Pain Initiative Experience

The Massachusetts Pain Initiative (MassPI) has been active at different levels since the mid-1980's. We were revitalized in 2000 as a partner existing within the American Cancer Society, New England Division. Since revitalization, we have consistently been a very active volunteer group. Starting in 2000, we had the luxury of a full-time ACS staff person. Our non-profit status (501-C3), primary funding, and staff support came from our partnership with ACS. In March, 2007, our full-time ACS staff person left her ACS position and the position was not filled.

This change was an eye-opener for MassPI volunteers and a sharp reminder to those of us in leadership positions that we did not have an understanding of our financial situation. In spite of receiving grants for activities in the past, and raising money as the State Initiative hosting the Alliance of State Pain Initiatives National Meeting in Boston, we were told by ACS that we did not have any funds remaining! We were also advised that we did not have a designated line item in the ACS budget. We found ourselves essentially without funds or staff support. Although ACS continues to provide some funding on an annual basis, and telephone and conference call services to us, MassPI realized we needed to better understand our current structure and plan for a structure and funds to assure our continued existence. Strategic planning was essential.

Negotiating a home for your Initiative? Some questions to ask and answers to have in a writing Memorandum of Understanding:

1. If we agree to partner with you, what do you see as the responsibilities and expectations for each of us?
2. What will you provide? What will you get from us?
3. What will we provide? What will we get from you?
4. Who will pay for the services/activities provided?
5. Who will decide what activities the Initiative participates in?
6. What will happen with funds we raise?
7. Will we pay an administrative fee for funds under your management?
8. How will we access our funds?
9. Does anyone else have access to the funds?
10. Will our contact information have your logo and ours or just ours?
11. Who owns the work product from our Initiative?

Key points:

1. Be sure you have full access and control over any funds raised by your initiative and to your logo and work product
2. Be sure you have a governing or leadership group of Initiative members to direct the work of the Initiative

Strategic Planning

MassPI has had a written strategic plan since our revitalization in 2000. However, the plan was not always used to direct the work of the Initiative. Our structure includes a Steering Council and three working Councils – Public Awareness, Professional Education and Legislative Councils.

Current challenges include:

1. Raising funds through grants and other sources to support our work
2. Because of our current partnership with ACS, any funds we raise must go to ACS and we must request them back as needed. The process is time consuming, slow, and sometimes frustrating. Members have had to charge large amounts of money to their personal credit cards to fund meetings etc. and wait for reimbursement, in spite of MassPI having received grants to cover the expenses. The process is not working.
3. MassPI is now an all-volunteer organization. Communication among leaders is essential for our long term existence. No single person can hold MassPI information not shared by at least one other person.
4. We need new members and new leaders

Common questions about strategic planning**What is a strategic plan?**

A strategic plan is a written flexible plan or roadmap that sets direction for an organization's work. It should be reviewed and revised as needed and at least annually.

How should we begin?

Ask the following questions:

1. "Who are we" and "Why do we exist". Look at your mission and vision for your organization.
2. What do we see for our organization in the future?
3. What services do we provide now?
4. Where should we provide in the future?
5. Where should we concentrate our resources and energy?
6. How will we know if we are making progress?

Who should develop the plan?

While leaders have a key role in developing the strategic plan, involving others will make the plan more workable and successful for the organization. For example, in addition to people in key leadership positions, choose a person who has been a member for a long time; someone who is a new member; someone who hasn't joined, but could; a student; someone who is no longer a member. You may want to involve key people in the communities you serve, representatives from other key organizations and others who have a vested interest in the work of your Initiative.

How should we start?

Gather information about your organization (internal needs assessment) and your community (external needs assessment). Identify trends in your community, regionally and nationally that will have an impact on your work. Look at the things you are currently doing and the things that you dream about doing. Start from where you are now and dream of the possibilities!

Next:

1. Let your mission statement of your Initiative guide the content of your strategic plan. If you don't have a mission statement, develop one. Ask, "who are we?", "why are we here?", "What do we want to accomplish". Etc.
 - a. The MassPI mission is: "MassPI is a statewide, non-profit, volunteer organization dedicated to ending needless pain and suffering from persistent and acute pain and to improving the quality of life for all people with pain."
2. Develop several key goals. Be sure the goals are consistent with your mission.
3. Develop a financial plan to meet each goal – what will you need in funds, volunteers, and other resources to achieve each goal?
4. Develop a written action plan for each goal that outlines the steps to be taken to achieve the goal. Be specific with:
 - a. Objectives for each goal
 - b. Specific actions that need to be taken
 - c. Measurable outcomes – how you will know if you achieve each step
 - d. Budget for each goal
 - e. Timeframes
 - f. Designate person responsible for each step
5. Share the plan with members
6. Put the approved plan in action!

Use the plan to guide decision making – for new projects, indicate how the project will meet the strategic goals. If a project does not meet the strategic goals, discuss whether or not the goal is still appropriate. If it is, decline to take on a project that does not meet strategic planning goals. If the goal is outdated, revise the plan.

Designate a time to evaluate and revise the plan – at least annually. Let the plan guide your work!

The MassPI Experience:

When MassPI lost its full-time staff person, we realized that we had not fully planned for our future. We did not understand that our finances were not a discrete line item in the ACS budget and that we essentially were without funds. We had relied on ACS staff as the central “holder” of information and products for the Initiative, did not have access to an electronically useful version of our membership list and needed to raise funds immediately to move forward with our work. Other important issues were developing strategies to recruit and retain volunteers for MassPI and identifying the best way for MassPI to move ahead as an organization. Our Steering Council met and determined that we needed to meet to plan our future. At the same time, we had an opportunity to apply to the Alliance of State Pain Initiatives for a grant to fund strategic planning, which we fortunately received.

How to plan an initial strategic planning meeting:

- Convene a small group of members to organize the process
 - We designated two key leaders – MassPI Steering Council co-chair and consulting chair
- Seek recommendations for a facilitator for the strategic planning process.
 - We asked members to inquire at their work-place to find recommendations for facilitators their employers had used in the past.
- Once potential facilitators are identified, request brief proposals from each candidate and view their websites if they have one.
 - When we had recommendations for possible facilitators, we called several, explained what we wanted to do and asked for a brief written proposal from each.
 - We reviewed their websites
- Conducted telephone interviews with each candidate via conference call, asking similar questions for each interview.
 - Compile a list of questions for the interview and ask similar questions for each interview.
- Once selected, identify in writing, the role of the facilitator, hourly rate or other agreed upon method of payment , specific responsibilities of the facilitator and responsibilities of the Initiative.

- Designate several Initiative leaders to work with the facilitator ahead of time to develop the strategic planning process and meeting agenda.
 - Our process included:
 - A pre-meeting survey sent to MassPI leaders and other key stakeholders to identify key issues and strengths for MassPI now and in the future.
 - Responses were grouped by the following topics:
 - Structural
 - Operational
 - Program
 - Other issues
 - These topics helped form the issues for discussion at the meeting
 - Continuing work with the co-chairs of MassPI and the facilitator to be sure the facilitator understood our situation and our goals and to develop the agenda for the meeting.
 - Convened an all-day Strategic Planning Session for leaders of the Initiative and other key stakeholders – for MassPI, our Steering Council and Working Council Chairpersons. Our agenda included:
 - Introductions and plan for the day
 - Review of MassPI's mission
 - Review of MassPI's strengths (from the survey)
 - Review of MassPI's current issues (from the survey and categorized as follows:
 - Structural
 - Operational
 - Program
 - Other issues
 - Opportunities for MassPI
 - Status of Pain Initiatives in other states
 - Small groups I – Dream for the future
 - Capturing common elements

- Creating a vision for MassPI
- Developing an action plan – one step at a time
- Making agreements

At the end of this meeting, participants agreed to:

1. Continue our structure within ACS for 1 year
2. Look at other options for MassPI – for example: linking with other organizations or establishing ourselves as a 501C3
3. Re-evaluate our options and decision in one year.
4. Meet with ACS to develop a process to access funds we have raised
 - a. This is an ongoing issue for MassPI.
 - i. Our treasurer now has a cash card for \$500 to cover small expenses and we set up direct billing to our account at ACS whenever possible for larger expenses. The process still needs refining
 - ii. Our treasurer keeps track of all income and expenditures for the Imitative and periodically reconciles her spreadsheets with ACS to assure accuracy of our account at ACS.
5. Reconfigure the Steering Council to include the following volunteer positions:
 - a. The Chairs of the Public Awareness, Professional Education and Legislative Councils
 - b. Two co-chairs
 - c. Past chair-person (1 year term and responsible for nominating officers)
 - d. Secretary
 - e. Treasurer
 - f. Council member responsible for marketing and membership
 - g. ACS liaison
 - h. 2 members at large
 - i. Advisor to the MassPI
6. Assign a clear work responsibility to each Steering Council member
7. Expand our work to include marketing and fundraising

8. Include a programming sub-committee to the Professional Education Council
9. Change co-chair leadership in April 2008 to give current co-chairs an opportunity to do other meaningful work for MassPI.
10. Seek funds to hire an independent contracted administrative assistant who would work from home approximately 5 hours/week. Responsibilities would include assuming responsibility for checking phones and the email, communicating with the membership under the direction of the Steering Council and other appropriate duties.
 - a. Appointed a "hiring committee" to screen, interview and recommend a candidate to the Steering Council
 - b. Position to start as soon as possible
11. Hold Steering Council conference calls monthly through the Spring.

A second strategic planning meeting was held in April to review our progress with our plan developed at our first meeting, to assist with the planned transfer of leadership and to evaluate progress to date.

Our Strategic Plan is in the process of being revised, reviewed and presented to the membership shortly.

What should a strategic plan include?

There are many templates for strategic plans. Your plan should be simple and easy to read and it should include your mission statement. Remember, the plan must remain flexible to change with the times and adapt to new issues as needed. List each objective and under that objective, list specific activities planned to meet the objective. Include a timeframe for completion of each activity and the person who is accountable for leading each activity. Also include the resources (people and money) necessary to complete the activity. See below for additional help.

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Additional resources:

<http://www.sla.org/pdfs/sphand.pdf> (Special Libraries Association document)

http://www.ourcommunity.com.au/boards/boards_article.jsp?articleId=1306 (with click-on additional information.

http://www.wildrosefoundation.ca/bdp/bulletins/Strategic_Planning_Governance.pdf