



2022 – 2027
STRATEGIC PLAN
REPORT

League of Women Voters of Wake County
North Carolina

lwvwake.org

July 2022

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ACKNOWLEDGMENTS

The 2022 Strategic Planning Team was comprised of LWV-Wake Board members, committee chairs, and other League leaders. Their commitment to this project is a testament to their dedication to LWV-Wake and its future success. We acknowledge and thank the following League members who contributed significant time and effort to the development of this strategic plan.

Candace Blackley (*Board Member*)
Brittany Bryan (*Board Member*)
Dale Cousins (*Board Member*)
Heather Dennis
Shannon Halbur
Robin Hammond
Dana Jennings
Jenny Kotora-Lynch (*Board Member*)
Mary Lelik
Marian Lewin (*Board Member*)
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Elaine Okal (*Board Member*)
Rebecca Poling
Terri Ring
Retta Riordan (*Board Member*)
Cheryl Tung (*Board President*)
Laurel Voelker (*Board Member*)
Dianna Wynn (*Facilitator*)



We also thank the 168 LWV-Wake members who responded to an online survey as part of this project. Their feedback was invaluable in assessing the organization and establishing future priorities.

FACILITATOR – DIANNA WYNN



Dianna Wynn is a consultant with over 25 years of experience delivering communication skills training and meeting facilitation services to businesses, government agencies, nonprofit organizations, and adult learners. She is a former college professor and the co-author of several college textbooks including *Working in Groups*, *Think Communication*, *The Challenge of Communicating*, and *Thinking Critically*. *Working in Groups* has been a market leader among group communication texts for over 25 years with translated editions selling internationally.

Dianna serves on the LWVUS Board of Directors and is a past president of the League of Women Voters of Wake County where she chaired numerous committees. Prior to becoming active in the League of Women Voters, Dianna was president of the ACLU of North Carolina.

Dianna has an M.S. in Communication and Public Address from the University of North Texas and a B.A. in Speech Communication from California State University Fullerton. She is a lifetime member of the National Communication Association.

She provided her services for this project *pro bono* including facilitation of the process and preparation of this report.

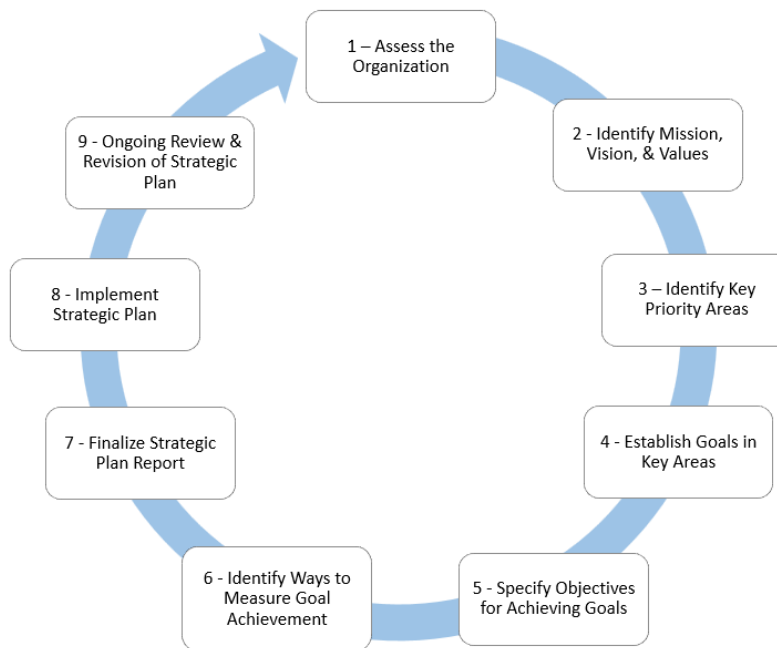
EXECUTIVE SUMMARY

As the 2017-2022 strategic plan was due to end, the LWV-Wake Board of Directors approved moving forward with the development of a new five-year strategic plan. This report summarizes the process, assessments of the organization, and the final strategic plan which includes nineteen goals in seven strategic priority areas, objectives for each goal, and suggested metrics for each objective. The final plan is ambitious and encourages the organization to stretch beyond its past practices to further promote the organization's success. At the same time, the Strategic Planning Team believes that the plan is realistic, and achievement of the goals is possible.

The membership and leadership of an all-volunteer organization such as LWV-Wake is ever changing. This report errs on the side of retaining ideas and information that may be helpful to future League leaders. As LWV-Wake leadership works to implement the plan over the next five years, they are encouraged to regularly review progress toward goals and objectives, develop new approaches for determining metrics for measuring goal achievement, and draw insight from the data contained in the appendix.

Process Overview

In January 2022, an eighteen-member Strategic Planning Team was established comprised of Board members, committee chairs, and other LWV-Wake leaders. Work on the project began in January and was completed in June 2022. The following chart is an overview of the process.



An online survey seeking feedback from members and nonmembers was launched in January 2022. The Strategic Planning Team had its first orientation meeting in February (held virtually due to the ongoing COVID-19 pandemic). Subsequent day-long in-person sessions were conducted monthly in March, April, and May. In June a smaller team, with input from the Board, worked to identify possible metrics for objectives. The final report was completed in July 2022.

Summary of Five-Year Goals

Strategic Area 1: Communications

- Improve the effectiveness of the communications team.
- Improve LWV-Wake’s external communications.
- Improve the website user experience.

Strategic Area 2: Empowerment

- Improve LWV-Wake’s advocacy efforts.
- Provide civics education for the public.

Strategic Area 3: Events

- Improve LWV-Wake event planning.
- Increase attendance at LWV-Wake events.
- Expand the diversity of the audience attending LWV-Wake events.

Strategic Area 4: Finances

- Increase revenue.
- Improve financial management.

Strategic Area 5: Governance

- Establish effective leadership succession processes.
- Improve the effectiveness of LWV-Wake’s board.
- Improve the effectiveness of LWV-Wake’s committees.
- Develop stronger partnerships with other organizations.

Strategic Area 6: Membership

- Increase membership in LWV-Wake.
- Improve the diversity of LWV-Wake’s membership.
- Increase the number of members volunteering for LWV-Wake.

Strategic Area 7: Voter Services

- Improve the coordination of work within the Voter Services Committee.
- Increase voter turnout in Wake County.

ASSESSING THE ORGANIZATION – KEY FINDINGS

Before embarking on a process for re-envisioning the future of LWV-Wake, the team needed to understand its past and assess its present status. Three methods of organizational assessment were used including (1) an online survey of members and nonmembers, (2) a SWOT analysis, and (3) group reports on key aspects of the organization. What follows are key findings from the survey results, SWOT analysis, and group reports. (More complete data is included in the appendix.)

Survey Summary

An online survey of both members and nonmembers was conducted. Survey results provided insight into member demographics and perceptions of the League. (Complete survey data is included in the appendix.) The following are key findings.

- **Member Diversity** – Not surprisingly, 96% of LWV-Wake’s membership are women. (This is not necessarily a problem given LWVUS’s emphasis on the value of women to influence change.) The organization lacks racial diversity with 95% of members identifying as white. The overwhelming majority of members are 65 years of age or older and are retired. The membership is highly educated with approximately 93% of members having at least a bachelor's degree. An impressive 69% possess a master's and/or doctoral degree.
- **League Reputation and Influence** – LWV-Wake is perceived as a successful organization. On a scale of 1 to 10, both members and nonmembers rate the organization’s efforts toward accomplishing its mission on average as an 8. The majority of members indicate that they joined the League because of its mission. League members as well as nonmembers overwhelmingly approve of the organization’s nonpartisan approach. The League possesses an extraordinarily high level of credibility among both members and nonmembers with 94% of all respondents indicating that they are more likely to support legislation if the League endorses it.
- **Issues for Advocacy** – Respondents overwhelmingly reported that LWV-Wake should place a priority on elections and voting-related issues. Responses also suggest significant support for the League to address civil rights issues. Nonmember responses suggest that LWV-Wake could have a greater voice on women’s rights issues.
- **Communications** – League members prefer learning about the organization’s activities via email, the newsletter, and the website. The social media platforms on which members and nonmembers are most active is consistent with national surveys – (1) Facebook, (2) Twitter, (3) Instagram, and (4) LinkedIn (listed in order of preference).
- **Volunteerism** – A desire for meaningful volunteer opportunities was cited by over half the members as one of the reasons they joined the League. Forty-seven percent of members also indicate that they joined because they wanted to be more politically active. Approximately half of member respondents report having volunteered for LWV-Wake within the past year. Another 23% indicate that they have volunteered for the League in the past but not within the last year.

SWOT Analysis Summary

A SWOT analysis is a method of identifying an organization's internal strengths, internal weaknesses, external opportunities, and external threats. Members of the Strategic Planning Team were asked to consider the following questions:

- Strengths (S) – What are LWV-Wake's strengths as an organization? What do we do well? What do we do better than others? What are our assets?
- Weaknesses (W) – What are LWV-Wake's weaknesses as an organization? What can we improve? What do others do better? What are our limitations?
- Opportunities (O) – What are the opportunities external to the organization that we could be capitalizing upon? What are the social, political, economic, technological, demographic, or other trends or conditions that could help us achieve our goals?
- Threats (T) – What are the challenges external to the organization that could make it more difficult to achieve our goals? What are the social, political, economic, technological, demographic, or other trends or conditions that might interfere with our objectives?

The following are the dominant strengths, weaknesses, opportunities, and threats that were identified by the Strategic Planning Team. (More complete SWOT feedback is included in the appendix.)

Internal Strengths

- Members' Dedication and Expertise – LWV-Wake has an extraordinarily dedicated membership base.
- Respected Brand – The League has a long history and trusted reputation.
- Nonpartisanship – The League's nonpartisanship contributes to its credibility.
- Rational Approaches – LWV-Wake's actions and positions on issues are characterized by careful research and analysis.

Internal Weaknesses

- Lack of Diversity – LWV-Wake lacks diversity in its membership.
- Reliance on Volunteers – LWV-Wake's complete reliance on volunteers can limit its effectiveness.
- Governance Limitations – LWV-Wake suffers from some internal governance issues impacting committee effectiveness.
- Lack of Member Engagement – A significant portion of the LWV-Wake membership is not engaged in LWV-Wake activities.
- Inadequate Communications – LWV-Wake lacks sufficient commitment to effective internal and external communications processes.

External Opportunities

- Partnerships – The numerous nonpartisan organizations within Wake County presents LWV-Wake with partnership opportunities.

- Political Climate – In a divisive political climate more Wake County residents may be favorably inclined to support LWV-Wake.
- Colleges, Universities, and High Schools – The numerous high schools, colleges, and universities, including HBCUs, in Wake County presents LWV-Wake with opportunities for partnerships and member recruitment.

External Threats

- Political Climate – The political climate in North Carolina makes progress on issues LWV-Wake supports difficult.
- Perception of Partisanship – A hyper-partisan political climate threatens LWV-Wake’s reputation as a nonpartisan organization.

Summary of Assessment Reports

Strategic Planning Team members were divided into smaller research groups to address the following questions about the organization:

- What is LWV-Wake’s history?
- How is LWV-Wake managed?
- What is LWV-Wake’s financial status?
- Who are LWV-Wake’s members and how are they engaged with the organization?
- What events does LWV-Wake offer to members and the public?

Each team developed a written report. Additionally, the Board completed a self-evaluation in 2021 that was reviewed as part of the process. (Full reports appear in the appendix.) The following are key findings from the reports.

LWV-Wake History

- LWV-Wake was established in 1920 and was active into the 1930s when LWV-Wake, along with all Leagues in North Carolina ceased functioning. LWV-Wake was re-established in 1948 and has been active since then.
- The Wake League has been active in voting-related efforts as well as advocacy on various policy issues at the local, county, and state level throughout its history.
- It has achieved many successes, as well as confronted challenges, and has been publicly recognized for its work in the community. LWV-Wake remains a vibrant organization.

Organizational Governance

- LWV-Wake is 501(c)3(h) nonprofit organization and is governed by a Board of Directors. It is an all-volunteer organization, and there is no paid staff.
- The organization has a robust committee structure comprised of member volunteers. There are approximately 19 committees that address issues for advocacy, help operate the organization, and promote membership engagement.
- The organization is guided by bylaws as well as policies which can be found on the website.

Finances

- The organization has steadily increased revenue from membership dues over the past five years. There was a decrease in dues revenue in 2021 likely due to the pandemic.
- Revenue from donations and grants has dramatically increased in the past two years.
- A Women's Equality Day reception is the major fundraising event each year. Revenue from this fundraiser has steadily increased over the last five years. There was a decrease in revenue from this event in 2021 due to the pandemic.

Membership & Engagement

- The Membership Committee employs a number of strategies for both recruitment of new members as well as retention of existing members.
- Membership levels reached an all-time high in 2021 with 468 members. However, membership declined to 358 members in 2021, possibly due to the pandemic among other factors. Nevertheless, membership levels are strong.
- The percentage of members volunteering with LWV-Wake remains relatively healthy, though there appeared to be a decline in volunteerism and engagement due to the pandemic.

Communications

- A Communications Committee coordinates most communications-related tasks across the organization.
- LWV-Wake's website was recently upgraded, and numerous other technologies are used to promote communications throughout the organization.
- The Wake League has a presence on major social media platforms including Facebook, Twitter, Instagram, YouTube, and LinkedIn.

Events

- LWV-Wake offers numerous events each year for both members and nonmembers. Many events reflect the League's mission of advocating for voting rights and fair elections. Some events educate members and/or nonmembers on important public policy issues. Other events provide members an opportunity to socialize and build connections within the organization.
- The types of events offered throughout the year typically include the following: Timely Topics, candidate forums, DEI roundtable discussions, League Lit book discussions, webinars on special topics, training events, social events, field trips, and fundraisers.
- There is no central committee coordinating event planning. Individual committees are responsible for their own event planning.

2021 Board Self-Evaluation

- Overall, the Board's self-evaluation was favorable. However, there were areas for improvement that emerged from the results.
- Responses suggest that the primary areas for improvements relate to (1) clarification of Board roles and responsibilities, (2) onboarding of new Board members, and (3) the Board's oversight of programs.

MISSION, VISION, & VALUES

The Strategic Planning Team explored the organization’s mission, vision, and values in the early stages of the process. The mission, vision, and values provide a “touchstone” for guiding an organization’s decisions and activities.

- Mission – A statement that conveys an organization’s purpose for being
- Vision – An aspirational statement that expresses what an organization wishes to become or to achieve
- Values – Identifies the core principles that guide an organization

The team adopted the same vision statement as LWVUS for consistency across the organization. A new LWV-Wake vision statement was developed, and core values were identified. The mission, vision, and values of LWV-Wake are as follows:

Mission

Empowering Voters. Defending Democracy.

Vision

We envision a community in which the League of Women Voters of Wake County is a trusted source of information empowering everyone to participate fully in our democracy.

Values

- *Civic Engagement* – We believe that civic engagement is necessary to effect positive change at all levels of government.
- *Nonpartisanship* – We value a nonpartisan approach to understanding and advocating on issues.

2022-2027 FIVE-YEAR STRATEGIC PLAN

The strategic plan is comprised of goals within strategic priority areas, objectives for each goal, and suggested metrics for measuring efforts toward or achievement of the goals. Below is a description of each component of the plan.

- *Strategic Area* – A broad area of activity that supports the mission of the organization
- *Goal* – A primary outcome within the priority area (What do we want to accomplish?)
- *Objective* – An approach to achieve a goal (How might we work to achieve the goal?)
- *Metric* – A method of measuring our activities and achievement. (How can we measure progress?)

The goals and objectives in this document were agreed upon by the entire Strategic Planning Team and are the most important elements of the plan. The metrics are suggested methods of measuring progress. League leaders may discover new and/or better ways of measuring activity or achievement as they begin work on each objective. Goals, objectives, and metrics are organized within seven strategic priority areas:

1. Communications
2. Empowerment
3. Events
4. Finances
5. Governance
6. Membership
7. Voter Services

The following pages contain the LWV-Wake 2022-2027 five-year strategic plan.

STRATEGIC AREA 1: COMMUNICATIONS

| STRATEGIC AREA 1: COMMUNICATIONS | | | |
|----------------------------------|---|--|---|
| Goals | | Objectives | Metrics |
| 1.1 | Improve the effectiveness of the communications team. | a) Develop a strategic communications plan. | Completion of communications plan submitted to Board; League Leader survey results |
| | | b) Expand the capacity of the communications team. | Number of volunteers contributing to communications; Communications team self-assessment |
| 1.2 | Improve LWV-Wake's external communications. | a) Build stronger relationships with the media. | Number of press releases submitted per year; Increase in earned media per year; Number of events with media present |
| | | b) Increase LWV-Wake's social media reach. | Increase in followers on each social media platform per year; Increase in audience reach on each platform per year |
| 1.3 | Improve the website user experience. | a) Improve the website. | Increase in website traffic per year including member-specific data; Member satisfaction survey results |
| | | b) Provide more training on using the website. | Number of volunteers completing website training |

STRATEGIC AREA 2: EMPOWERMENT

| STRATEGIC AREA 2: EMPOWERMENT | | | |
|-------------------------------|--|--|---|
| Goals | | Objectives | Metrics |
| 2.1 | Improve LWV-Wake's advocacy efforts. | a) Develop a comprehensive plan for advocacy. | Completion of advocacy plan submitted to Board |
| | | b) Provide on-going advocacy training. | Number of advocacy training opportunities offered per year; Number of members participating in advocacy training per year; Member satisfaction survey results |
| | | c) Increase the number of League members attending public government meetings. | Number of members attending public government meetings per year; Number of government meetings attended by members per year |
| | | d) Utilize better technologies as advocacy tools. | Number of members utilizing technology in advocacy per year |
| | | e) Expand local advocacy efforts on local issues. | Survey of committees to identify local issues in which LWV-Wake is active; Increase in number of advocacy efforts on local issues |
| 2.2 | Provide civics education for the public. | a) Develop a basic civics education curriculum. | Completion of a curriculum plan submitted to Board |
| | | b) Implement a civics education program for the public. | Number of members participating in civics education program; Number of nonmembers participating in civics education program; Number of YouTube views of civics education videos |

Strategic Area 3: Events

| STRATEGIC AREA 3: EVENTS | | | |
|--------------------------|---|---|--|
| Goals | | Objectives | Metrics |
| 3.1 | Improve LWV-Wake event planning. | a) Develop league-wide procedures and best practices for planning events. | Completion of procedures and best practices document submitted to Board and all committees; League leader survey |
| | | b) Ensure that a wide variety of events and speakers are offered. | Matrix analyzing variety in event offerings; Member satisfaction survey results |
| 3.2 | Increase attendance at LWV-Wake events. | a) Improve promotion of public League events to both members and nonmembers. | Increase in audience size per year; Audience post-event evaluation results |
| | | b) Increase promotion of public League events in the media. | Number of press releases submitted promoting events; Number of media mentions of LWV events; Increased engagement and conversion rates for online LWV event-related promotions |
| 3.3 | Expand the diversity of the audience attending LWV-Wake events. | a) Improve the scheduling of events to meet varying audience needs. | Matrix analyzing scheduling of events; Audience post-event evaluation results |
| | | b) Vary the location of events (including virtual) to better attract a more diverse audience. | Matrix analyzing variety in event locations; Audience post-event evaluation results |
| | | c) Offer events addressing topics that appeal to a more diverse audience. | Matrix analyzing topics at events; Audience post-event evaluation results; Member satisfaction survey results |

STRATEGIC AREA 4: FINANCES

| STRATEGIC AREA 4: FINANCES | | | |
|----------------------------|-------------------------------|---|---|
| Goals | | Objectives | Metrics |
| 4.1 | Increase revenue. | a) Establish fund development processes and goals.* | Completion of processes and goals submitted to Board |
| | | b) Develop new sources of funding. | Increase in revenue per year |
| | | c) Expand grant writing efforts. | Number of grant applications submitted per year; Increase in grant funding per year |
| 4.2 | Improve financial management. | a) Establish a standing finance committee. | Regular meetings of Finance Committee established |
| | | b) Strengthen fiscal controls to mitigate risk. | Report of efforts to Board |
| | | c) Improve communication about LWV-Wake finances. | Member satisfaction survey results |

* The broad term “fund development” is used here to refer to the ongoing strategic process of sustaining and growing the organization’s resources including, but not limited to, identifying potential donors, seeking grants, cultivating relationships with donors and grantors, pursuing endowments, fundraising events, etc.

STRATEGIC AREA 5: GOVERNANCE

| STRATEGIC AREA 5: GOVERNANCE | | | |
|------------------------------|--|---|---|
| Goals | | Objectives | Metrics |
| 5.1 | Establish effective leadership succession processes. | a) Create an effective leadership succession plan. | Completion of succession plan submitted to Board and committees; Percentage of new leaders per year; Member satisfaction survey results |
| | | b) Implement a leadership training program. | Number of members participating in leadership training |
| 5.2 | Improve the effectiveness of LWV-Wake's board. | a) Develop board governance processes that promote greater effectiveness. | Leadership evaluation results |
| | | b) Clarify and better communicate the role of the LWV-Wake board. | Leadership evaluation results; Member satisfaction survey results |
| 5.3 | Improve the effectiveness of LWV-Wake's committees. | a) Ensure that committee objectives clearly align with LWV-Wake's mission and vision. | Survey of committees to identify alignment with mission and vision |
| | | b) Develop and communicate more effective committee processes. | Leadership evaluation results; Member satisfaction survey results |
| | | c) Improve communication and collaboration between LWV-Wake committees. | Leadership evaluation results; Member satisfaction survey results |
| | | d) Encourage committees to apply a DEI lens to their approach to issues.* | Survey of committees to identify DEI perspective on issues; Review of Advocacy Request forms which require a DEI approach |

* DEI refers to diversity, equity, and inclusion.

(Strategic Area 5: Governance is continued on the next page.)

| | | | |
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| 5.4 | Develop stronger partnerships with other organizations. | a) Identify potential partnerships with other organizations. | List of potential partners developed by committees and submitted to Board |
| | | b) Improve and expand LWV-Wake's collaboration with other organizations. | Number of organizations actively working with on issues |

STRATEGIC AREA 6: MEMBERSHIP

| STRATEGIC AREA 6: MEMBERSHIP | | | |
|------------------------------|---|--|---|
| Goals | | Objectives | Metrics |
| 6.1 | Increase membership in LWV-Wake. | a) Develop more effective membership recruitment strategies. | Increase in membership per year |
| | | b) Develop more effective membership retention strategies. | Percent of retained members per year; Member satisfaction survey results |
| 6.2 | Improve the diversity of LWV-Wake's membership. | a) Improve outreach to BIPOC communities.* | Analysis of outreach efforts |
| | | b) Establish a youth engagement program. | Increase in student members per year; Number of members participating in youth engagement program |
| 6.3 | Increase the number of members volunteering for LWV-Wake. | a) Develop a volunteer engagement program. | Number of members volunteering for LWV per year; Member satisfaction survey results |
| | | b) Improve the communication of volunteer opportunities. | Number of members volunteering for LWV per year; Member satisfaction survey results |
| | | c) Better meet the volunteer needs of members. | Number of members volunteering for LWV per year; Member satisfaction survey results |

* BIPOC is an acronym that refers to "Black, Indigenous, and people of color" and is pronounced "bye-pock".

STRATEGIC AREA 7: VOTER SERVICES

| STRATEGIC AREA 7: VOTER SERVICES | | | |
|----------------------------------|---|--|---|
| Goals | | Objectives | Metrics |
| 7.1 | Improve the coordination of work within the Voter Services Committee. | a) Evaluate the structure of and communication within the Voter Services Committee and implement changes as appropriate. | Results of Voter Services evaluation submitted to Board |
| | | b) Improve voter services volunteer training. | Number of members volunteering for voter services; Number of members participating in voter services training; Member satisfaction survey results |
| 7.2 | Increase voter turnout in Wake County. | a) Improve the effectiveness of vote411.org in Wake County. | Increase in Wake County traffic to vote411.org per election |
| | | b) Expand voter registration efforts. | Number of voter registration activities; Number of voters registered |
| | | c) Increase get-out-the-vote (GOTV) efforts. | Number of GOTV activities per year; Number of people reached via GOTV activities; Number of members participating in GOTV activities per year |
| | | d) Increase the number of candidate forums offered. | Number of candidate forums offered per year; Number of people reached with candidate forums each year |

The appendix is a separate document and may be requested from the LWV-Wake Board. It contains reports and brainstormed ideas that may be useful to LWV-Wake Board members, committee chairs, and project leaders in their work to support the League and further its mission.