

Paralyzed Veterans of America

Strategic Plan

May 2022



Contents

Context for this plan

Overview

Goal 1

Goal 2

Goal 3

Goal 4

Indicators of success

Organizational and financial implications

Context

In September 2021, PVA embarked on a process to develop a five-year strategic plan

- PVA chose Wellspring Consulting to facilitate the planning process

These materials share the strategic plan that will be put forward to the PVA Board of Directors for a vote of approval on May 19th

The strategic plan provides a roadmap for PVA over the next five years, including:

- Strategic goals and the approach to achieve them
- Changes to PVA's organizational structure to support this work

Overview of conducted interviews, meetings, and data analysis



71 interviews with internal and external experts and stakeholders

- 56 interviews with PVA's Board and staff
- 15 interviews with PVA's peers and partners



Meetings with PVA's Board and staff

- 1 interim meeting with PVA's full Board
- 1 meeting with the Executive Committee
- 3 meetings with the Board Strategic Planning Committee
- 6 meetings with the PVA work team
- Ongoing conversations with PVA's leadership



Data collection and analysis

- Comprehensive review of PVA materials, including the recent member survey and program data
- External research on future-facing Veteran trends, VSOs, and key partners

PVA's strengths

PVA is well-respected for the quality of its work

Deep commitment to paralyzed Veterans

Committed staff with substantial expertise

High impact programs

Members committed to helping others

PVA is unique

The only VSO focused on Veterans with SCI/D

Distinctive relationship with the VA

Outsized influence on policy and research

PVA has profound impact on the people it serves

PVA offers community, affirmation, mutual support, and hope

PVA is a fierce and successful advocate for benefits and healthcare for its constituents

PVA faces internal and external challenges

Externally...

A changing Veterans landscape

- The Veterans' population is declining
- SCI/D Veterans are likely declining more quickly
- Younger Veterans have different needs; are less oriented toward traditional membership

Internally...

Limited engagement by members

- Less than ~15 percent of members are actively involved in PVA⁽¹⁾
- Some cohorts of members are less well served

Limited information on the needs and preferences of stakeholders

- PVA doesn't have established mechanisms for hearing from members, SCI/D Veterans, and others
- More information is needed to understand how to attract and engage members

Uneven program and operational quality

- Chapters vary in their resources and effectiveness
- Collaboration between the national office and chapters could be enhanced

(1) Estimate provided in "Member Engagement Plan", February 22, 2022

This strategic plan will enable PVA to:

- ✓ Better understand the needs of members, SCI/D Veterans, and their families
- ✓ Improve its communication with members, SCI/D Veterans, and associate members
- ✓ Strengthen the impact and reach of its programs
- ✓ Recruit new members and associate members
- ✓ Increase PVA's organizational effectiveness

Contents

Context for this plan

Overview

Goal 1

Goal 2

Goal 3

Goal 4

Indicators of success

Organizational and financial implications

Structure of this plan

1. **Goals** – *A goal is a high-level outcome that PVA will achieve*

A. Objective – *An objective is an undertaking that will lead to achievement of the goal*

i. Initiative – *An initiative outlines specific tasks to be completed that will lead to achievement of an objective and, thereby, a goal*

A later section of these materials focuses on the organizational and financial implications of the strategic plan

Strategic goals

1. Enhance systems to assess and strengthen programs and communications

2. Strengthen programs to better meet the needs of SCI/D Veterans, members, and allies

3. Attract new PVA members

4. Invest in organizational effectiveness

Contents

Context for this plan

Overview

Goal 1

Goal 2

Goal 3

Goal 4

Indicators of success

Organizational and financial implications

Strategic Goal 1

Goal 1	Objectives
Enhance systems to assess and strengthen programs and communications	<ul style="list-style-type: none">1A. Undertake research with SCI/D Veterans and families to inform program assessments and member outreach1B. Employ data to regularly review programming1C. Improve communications to members, associate members, and Veterans with SCI/D1D. Develop a robust network of external organizations who can provide support and resources to PVA members and SCI/D Veterans

Summary: Goal 1 will bolster PVA's ability to serve its core constituents and improve engagement in programming

Through these objectives...

- 1A. Undertake research with SCI/D Veterans and families to inform program assessments and member outreach
- 1B. Employ data to regularly review programming
- 1C. Improve communications to members, associate members, and Veterans with SCI/D
- 1D. Develop a robust network of external organizations who can provide support and resources to PVA members and SCI/D Veterans



PVA will...

- Better understand the needs and interests of all core constituents, and inform program assessments
- Ensure programs are meeting the needs of SCI/D Veterans and families and allocate resources accordingly
- Ensure PVA's core constituents are aware of programs and can participate
 - This, in turn, will enable PVA to increase member engagement
- Strengthen support for SCI/D Veterans, especially those with MS and ALS
- Attract new members who are referred to PVA through partners

Objective 1A: Undertake comprehensive research with SCI/D Veterans and families to inform program assessments and member outreach

- i. Engage a market research consultant to undertake comprehensive research with members, other SCI/D Veterans, and families and caregivers to understand:
 - Current and most important needs of PVA’s core constituents
 - Their awareness and satisfaction with PVA and its programs, and opportunities to strengthen the value proposition for membership, outreach, and recruitment
 - How members, their families, and caregivers are being served, and opportunities to strengthen program offerings
 - Opportunities to improve referrals to other organizations that can support PVA

- ii. Share research findings with national staff and chapters and employ findings to:
 - Refine National and chapter programming
 - Strengthen communications, including member outreach

Objective 1B: Employ data to regularly review programming

- i. Develop systems to collect data on program participation (e.g., total participation, unique participants, demographics of participants)
- ii. Conduct periodic research with constituents to understand satisfaction with programming and opportunities for improvements (augmenting and updating research described in Objective 1A)
- iii. Conduct structured annual assessment of programming
 - Gather all available data on programs, including:
 - Usage
 - Satisfaction / unmet needs of constituents
 - Costs
 - Identify opportunities to strengthen existing programs or add new ones
 - Assess programs (existing and proposed) against criteria (*see detail on the next slide*)
 - Refine specific programs and program portfolio to meet needs of constituents, including specific subsets including SCI, MS, ALS, women, at-large, younger, older, etc.
 - If necessary, conduct individualized outreach to subgroups of members to test new programming ideas

More detail on Objective 1B: Potential criteria to assess programs

Need

1. Will this program address an important need for PVA's main beneficiaries: SCI/D Veterans, families and caregivers?

Reach

2. Do we expect this program to attract a significant number of our beneficiaries, or of a subgroup with distinctive needs (e.g., Veterans with MS, Veterans with ALS, women Veterans, older Veterans, younger Veterans)?

Impact

3. Are the desired outcomes of this program clear and compelling, and is PVA likely to be effective in achieving these outcomes?

Fit

4. Is PVA better positioned to provide this program than other groups or partners? Does it fit with PVA's capabilities?

Cost effectiveness

5. Is the cost per participant appropriate given the level of benefit for the participant? Is it on par with comparable programs?

Financial support

6. Is there the potential to obtain durable incremental funding for this program? If not, does the value of this program exceed the value of other potential uses of funding?

Reputation

7. Will this program enhance the reputation of the PVA?

Objective 1C: Improve communications to members, associate members, and Veterans with SCI/D (1 of 2)

- i. Develop a robust communications strategy to collect and update high-quality contact information for each member
 - Assess issues with membership data and outreach
 - Develop a plan for both national and chapter staff to update all membership data in 2023, and maintain regular updates
 - Train national staff and chapters in how to collect membership information and manage updates
 - As part of Initiative 1Ciii below, revisit technology requirements to ensure data is accurately collected, synthesized, and reported

- ii. Set expectation that chapters will contact every member at least yearly

- iii. Assess PVA's information systems to improve communication with constituents about membership, programming and events
 - Engage technology consultant to audit PVA's information systems and develop specifications for what PVA technology should be able to accomplish
 - Based upon this work, develop and execute strategy to strengthen technology infrastructure, provide necessary training for staff, and add staff as necessary

Objective 1C: Improve communications to members, associate members, and Veterans with SCI/D (2 of 2)

- iv. Develop and execute a strategy to more effectively communicate about programming and events to members
 - Conduct survey of members and associate members to determine how they would like to receive information on programming and events
 - Develop a plan to improve communication to members on programming and events
 - Test new communications plan, including any new technology tools used, with small subset of chapters, and make refinements, as needed
 - Train national staff and chapters to utilize new tools, as needed

- v. Develop a shared brand identity across PVA
 - Build on the previously developed communications plan (“Communications Team Plan”, January 16, 2022), to align National and chapter communications
 - Enhance PVA’s resource library with website templates, and other external materials that chapters can use (*see Objective 4B for additional details*)
 - Train chapter staff and leadership, as needed, on the improved resources library

Objective 1D: Develop a robust network of external organizations that can provide support and resources to PVA members and SCI/D Veterans

- i. Employ research with constituents (conducted as part of Objective 1A) to understand the key needs of SCI/D Veterans that PVA cannot provide directly and for which referrals could be valuable
- ii. Audit and engage with existing or prospective partners to understand how they can strengthen PVA's work
 - Create a list of strategic partners that can either refer Veterans with SCI/D to PVA, and / or support PVA's programming; prioritize ALS and MS organizations
 - Conduct detailed assessment of key areas for collaboration
 - If relevant, build partnerships or create a referral database (*see Objective 1Diii below*)
- iii. Establish referral system, and relationships with aligned organizations
 - Prepare a document that contains all partner organizations with key details of each organization, including individuals in each organization responsible for liaison with PVA
 - Develop a plan to update referral list and regularly connect with partner organizations
- iv. Assign staff, as needed, to manage referrals and partnerships

More detail on Objective 1D: Types of partnerships PVA could cultivate

Category	Opportunities to strengthen or build new partnerships	Examples of partners
Field Services	<ul style="list-style-type: none"> • Develop stronger partnerships with the MS and ALS Centers, as well as the VA neurological department for member outreach and referrals • Identify other organizations that can provide wraparound services for collaborations or referrals 	<ul style="list-style-type: none"> • MS and ALS Centers • VA's Neurological Department • MS Society, ALS Association • Christopher Reeve Foundation
Medical Services	<ul style="list-style-type: none"> • Strengthen the collaboration with the MS and ALS Centers, as well as neurological department to ensure member needs are being met • Strengthen partnership with organizations that support individuals with SCI/D for member outreach 	<ul style="list-style-type: none"> • MS and ALS Centers • VA's Neurological Department • MS Society and ALS Association
Sports and Recreation	<ul style="list-style-type: none"> • Partner with other organizations that offer adaptive sports or recreational activities to increase program offerings to members and their families • Build a discount program for adaptive sports equipment with corporate partners 	<ul style="list-style-type: none"> • Move United • SCORE
Architecture	<ul style="list-style-type: none"> • Partner with organizations that can assist with the construction or installation of accessible homes, and interior features • Build a discount program with corporate partners 	<ul style="list-style-type: none"> • Adaptive Design Association • Michael Graves & Associates • Lowe's & Home Depot
Career Program	<ul style="list-style-type: none"> • Provide referrals to other organizations that can assist with mentorship, employment, and volunteer opportunities 	<ul style="list-style-type: none"> • MS Society and ALS Association
Other	<ul style="list-style-type: none"> • Build partnerships to offer additional direct benefits for members and families or caregivers, e.g., rehabilitation support, training and support to caregivers 	<ul style="list-style-type: none"> • Mike Utley Foundation

Contents

Context for this plan

Overview

Goal 1

Goal 2

Goal 3

Goal 4

Indicators of success

Organizational and financial implications

Strategic Goal 2

Goal 2	Objectives
Strengthen programs to better meet the needs of SCI/D Veterans, members, and allies	<ul style="list-style-type: none">2A. Strengthen existing programs2B. Expand support for Veterans with MS2C. Expand support for Veterans with ALS2D. Better serve members-at-large2E. Increase PVA's appeal to younger Veterans with SCI/D2F. Develop offerings for families and caregivers

Summary: Goal 2 will strengthen PVA's ability to serve *all* constituents

Through these objectives...

2A. Strengthen existing programs



PVA will...

- Use virtual programs to reach more members who cannot attend in-person due to health, distance, age, or other reasons
- Engage more members, particularly younger members, who are interested in having a positive impact on the lives of others
- Ensure there are enough NSOs and they are deployed where they are needed most
- Redouble its efforts to support SCI/D research and education

2B and C. Expand support for Veterans with MS and ALS

2D. Better serve members-at-large

2E. Increase PVA's appeal to younger Veterans with SCI/D

2F. Develop offerings for families and caregivers



- Increase the impact PVA has on groups that have not always been at the forefront of PVA's work
- Attract and engage more individuals within each subgroup

Objective 2A: Strengthen existing programs (1 of 2)

- i. Invest in substantive virtual programs
 - Develop a calendar of recurring virtual programming aimed at members and associate members
 - Inform choices by reviewing past participation data and research with members and associate members
 - As part of Objective 1C, expand and formalize the channels used to communicate virtual events to members
 - Potentially, investigate options to provide a subset of members with technology tools to access to virtual programming (e.g., tablets or computers)

- ii. Increase government relations efforts
 - Expand avenues for interested members to become involved in government relations
 - E.g., virtual Hill visits, in-person state and local meetings
 - Develop and codify expectations for chapters' engagement on government relations
 - Offer training and resources to chapter leadership and Government Relations Coordinators
 - Track and celebrate local and state government relations “wins”

Objective 2A: Strengthen existing programs (2 of 2)

- iii. Assess capacity and deployment of NSOs
 - Conduct an assessment to understand the level of NSO support that is needed by SCI/D Veterans and how it is distributed geographically
 - Based on the needs assessment, consider where NSOs should be placed
 - This could involve a reallocation and prioritization of unfilled NSO positions
 - Develop and distribute guidelines among PVA staff, chapters, and volunteers about the role of the NSO, including roles the NSO does not fill

- iv. Explore opportunities to expand and highlight PVA's investment in SCI/D research
 - Explore ways PVA could further strengthen its support SCI/D research
 - Consider ways to elevate SCI/D research in communications and development efforts

More detail on 2A: An overview of the NSO role

An overview of the NSO role

NSOs are responsible for:

- Helping Veterans and their surviving family members to secure benefits, particularly:
 - Disability compensation and ancillary benefits from the VBA
 - Health care benefits, supplies, equipment, and medications from the VHA
 - Dependency and Indemnity Compensation (for surviving spouses)
- Monitoring the quality of health care provided at VA Medical Centers

NSOs are not responsible for:

- Recruiting PVA members
- Identifying participants for PVA programs
- Gathering data on Veterans

Objective 2B: Expand support for Veterans with MS

- i. As part of the research conducted in Objective 1A, hear from Veterans with MS about how PVA could best serve their needs
- ii. Increase support to and advocacy for the VA's MS system of care
- iii. Expand partnerships with the MS Society and other MS organizations in order to:
 - Recruit new members with MS
 - Better connect Veterans with MS to external resources
- iv. Test the addition of expanded affinity groups and peer mentorship among members with MS
 - PVA's women's retreat and programming could serve as a model for this affinity group

Objective 2C: Expand support for Veterans with ALS

- i. As part of the research conducted in Objective 1A, hear from Veterans with ALS about how PVA could best serve their needs
- ii. Increase support to and advocacy for the VA's ALS system of care
- iii. Assess whether opportunities exist to improve NSO efforts to help Veterans with ALS rapidly access their benefits
- iv. Explore the potential for an ALS Committee, with ex officio representation on PVA's Board
 - This committee could be composed of family members and caregivers of members with ALS
- v. Expand partnerships with the ALS Association and other ALS organizations in order to:
 - Recruit new members with ALS
 - Better connect Veterans with ALS to external resources

Objective 2D: Better serve members-at-large

- i. As part of the research conducted in Objective 1A, hear from members-at-large how PVA could best serve their needs
 - Specifically seek to understand what appetite, if any, members-at-large have for participating in PVA’s governance structure
- ii. Create pathways for members-at-large to be involved in PVA’s governance; e.g.:
 - Set expectations that the Board President (or other designated representative) meets with interested members-at-large at least twice per year
 - Create a Board subcommittee composed of members-at-large
- iii. Develop strategy to communicate directly with members-at-large
 - Explore ways to facilitate chapter outreach to at-large members
- iv. Increase member-at-large access to PVA programming, including government relations
 - Members-at-large could be valuable representatives of PVA in states where PVA does not have a chapter, such as New York and New Mexico

Data on members-at-large

PVA has 1,401 at large members, ~1,300 of whom have shared an address with PVA

- Approximately 50% of members-at-large live in a state where a PVA chapter had existed but is now disbanded
 - 475 live in Connecticut, New Jersey, New York, or Pennsylvania – the states previously served by PVA’s Eastern chapter
 - 173 reside in New Mexico, which was previously served by the Zia chapter

Objective 2E: Increase PVA's appeal to younger Veterans with SCI/D

- i. As part of the research conducted in Objective 1A, hear from young Veterans how PVA could best serve their needs
- ii. Informed by this research, develop a set of designated program offerings for young Veterans; these could include:
 - “High-adrenaline” national sporting events
 - Opportunities to participate in local, state, and national advocacy and give back to the community
 - Programming and events—including potentially an affinity group—that accommodate young families
 - Programs and resources to support mental health and wellness
- iii. Explore options for increasing young member representation in PVA's governance, including potentially a Young Veteran Subcommittee

Note: For the purposes of this plan, we define younger Veterans as those under the age of 50

More detail on Objective 2E: How analogous VSOs are seeking to attract younger Veterans

Increase focus on families and caregivers

VSOs report young Veterans are interested in programs for families and caregivers

- One VSO reports 72% of Veterans who left military service have families

VSOs are increasing related offerings, e.g., by:

- Holding programs during hours when young Veterans have family support
- Creating family-friendly programming
- Providing retreats for families and caregivers

Increase community engagement

VSOs report young Veterans are interested in opportunities to “give back”

VSOs are seeking to attract younger Veterans through community engagement, e.g.:

- Advocacy and policy training, outreach, travel to D.C.
- Volunteer opportunities to directly help others

Expand mental health programs

A 2020 Wounded Warrior survey showed:

- 93% of members live with a severe mental health condition
- 30% of members reported having suicidal thoughts in the two weeks prior to the survey launch

VSOs are expanding mental health programming via help-lines, peer-mentoring programs, and access to mental health providers

Objective 2F: Develop offerings for families and caregivers

- i. As part of the research conducted in Objective 1A, hear from families and caregivers how PVA could best serve their needs
- ii. Informed by this research, develop a set of designated program offerings for families and caregivers; these could include:
 - Expand awareness of—and possibly funding for—scholarships to families of members
 - Launch a caregiver affinity group
 - PVA’s women’s retreat and programming could serve as a model for this affinity group
 - Develop a network of referrals for paid caregiving support
 - Create specific resources within the Career Program for families and caregivers
- iii. Across chapters, recruit families and caregivers to become associate members
- iv. Form an Associate Members Committee, on which families and caregivers could serve

Contents

Context for this plan

Overview

Goal 1

Goal 2

Goal 3

Goal 4

Indicators of success

Organizational and financial implications

Strategic Goal 3

Goal 3	Objectives
Attract new PVA members	<ul style="list-style-type: none">3A. Quantify and tell the story of PVA's impact on members and non-members3B. Strengthen and streamline member recruitment3C. Expand eligibility criteria to all honorably discharged Veterans with MS3D. Formalize and expand associate membership program

Summary: Goal 3 can help expand and engage PVA's member base

Through these objectives...

3A. Quantify and tell the story of PVA's impact on members and non-members



PVA will...

- Attract new members who may not have previously understood the value of membership
- Help existing members better understand how PVA can support them
- Raise PVA's profile with current and potential donors and partners

3B. Strengthen and streamline member recruitment



- Attract new members who have been deterred by the complexity of the application process
- Increase partnerships with organizations that can refer eligible Veterans to PVA

3C. Expand eligibility criteria to all honorably discharged Veterans with MS



- Clarify eligibility for Veterans with MS
- Position PVA to better advocate for and support Veterans with MS

3D. Formalize and expand associate membership program



- Extend a model that has been successfully employed by several chapters
- Enhance PVA's support to families, caregivers, and others who support PVA's members
- Increase the size of PVA's member base

Objective 3A: Quantify and tell the story of PVA's impact on members and non-members

- i. Undertake research with members and SCI/D Veterans to better understand the value proposition of membership
 - This could be done in conjunction with the research in Objective 1A
- ii. Rely on the research conducted above to develop a marketing and communications campaign to tell the story of PVA's impact
- iii. Prepare and distribute materials for current and prospective members on PVA's impact, history, benefits, and programming

More detail on Objective 3A: What we heard from members and non-members re: the value of joining PVA or other VSOs

During strategic planning, we've heard from members that they particularly value:

- The camaraderie and connection to others with shared life experiences
- The ability to help others
- The opportunity to learn and stay informed about issues impacting SCI/D Veterans

From speaking with other VSOs and conducting external research, we've heard that younger members are particularly interested in:

- The opportunity to make an impact, e.g., by participating in advocacy and governance, or volunteering
- Offering support and a sense of belonging to their families and caregivers

The research conducted as part of Goal 1A will help to further illuminate what members and non-members care about most, and allow PVA to quantify and tell the story of PVA's impact

Objective 3B: Strengthen and streamline member recruitment

- i. Strengthen outreach to identify eligible members through partnerships with hospitals and other organizations that serve eligible Veterans (see 1D)
- ii. Streamline the membership application process
 - Allow chapters to opt into automatic membership enrollment, aiming for 100% participation – *see subsequent slide for detail*
 - Establish the national membership team as single point of contact for eligible members and those moving through the process
- iii. Invest in a centralized database to track eligible member participation and recruitment

Objective 3A will also strongly support this objective: Quantify and tell the story of PVA's impact on members and non-members

More detail on Objective 3B: Opt-in automatic chapter admission

Background

Currently, PVA's chapters have no set process for admitting new PVA members into the chapter

- Some chapters automatically admit new members once approved by national
- Some require a Board vote or other process

Automatic admission for newly approved members will have several benefits

- Reduce chapter administrative burden and time spent processing new member applications
- Increase the speed with which applicants become members of PVA
- Simplify the member application process, which could:
 - Attract more members to PVA, generally
 - Encourage new members to join a chapter

Note: Automatic admission would not apply to member transfers

Objective 3C: Expand eligibility criteria to all honorably discharged Veterans with MS

In the Board meeting in May, Board members will introduce a resolution to expand member eligibility criteria to all honorably discharged Veterans with MS

- This change in PVA's eligibility criteria will likely not require a charter change

This expansion could have several positive benefits for the organization; it:

Simplifies and clarifies PVA's member eligibility criteria, which can appeal to potential members and grow PVA's member base

- Many Veterans with MS have been confused and / or put off by PVA's MS-related eligibility criteria
- PVA currently has low membership penetration among Veterans with MS

Positions PVA to expand its support to Veterans with MS and its relationships with partners that primarily serve individuals with MS

- A simple mandate to serve all Veterans with MS can make it easier for outside organizations to understand and align with PVA's work
- See Objective 2B for more detail

Broadens and diversifies the composition of PVA's members

- A high number of Veterans with MS are middle-aged and female, whereas PVA's current member base skews older and male
- A high number of Veterans have MS in connection with their military service, whereas members with SCIs are increasingly non-service-connected

More detail on Objective 3C: Resolution to expand to all honorably discharged Veterans with MS

WHEREAS, PVA has represented Veterans with Multiple Sclerosis since its inception in 1976;

WHEREAS, membership in PVA has been limited to Veterans with Multiple Sclerosis who only have lesions detectable on the spinal column, whereas those with lesions only visible within their brains are not eligible;

WHEREAS, the Deputy Director of the VA's MS Center of Excellence West stated that current research shows that a minimum of 82% of those diagnosed with MS detected in their brains also had lesions on their spinal column and;

WHEREAS the Deputy Director of the VA's MS Center of Excellence West stated her opinion that all those diagnosed with MS in their brains do have lesions on their spinal columns however, the Magnetic Resonance Imaging (MRI) technology is not able to fully detect lesions and;

WHEREAS, improvements in MRI technology continually provides better and more precise imaging resulting in the detection of previously undetected lesions and this has been observed in MRIs of Veterans with smaller lesions becoming detectable and;

WHEREAS, All PVA governing documents should be changed and updated to include membership eligibility for all Veterans Diagnosed with MS and;

THEREFORE, BE IT RESOLVED, the Paralyzed Veterans of America change its membership criteria to include all honorably discharged Veterans diagnosed with Multiple Sclerosis.

BE IT FURTHER RESOLVED, that the Resolution Committee make all necessary changes to the PVA governing documents.

Objective 3D: Formalize and expand associate membership program

- i. Develop guidelines for associate membership (e.g., who qualifies, how they participate, etc.)
 - *See the following slide for potential guidelines*

- ii. Work with chapters to formalize and standardize the associate membership program
 - Host a session at an upcoming convention about how to start an associate membership program
 - Offer draft bylaws and guidelines to chapters interested in instituting associate membership
 - Track associate membership by chapter

- iii. Develop a Board committee for associate members
 - *See 2.F.iv for more detail*

More detail on Objective 3D: Potential guidelines for associate membership programs

Who could be eligible to become an associate member:

- Families and caregivers of current or deceased PVA members
- Veterans with mobility impairments who do not qualify for PVA membership
- Current elected representatives
- Anyone willing to commit 20 hours volunteering for the chapter

What associate membership “gets” associate members:

- Access to all PVA programs and events
- The opportunity to connect with others who share your experience
- An opportunity to serve on the Associate Member Board Subcommittee
- At chapter leadership’s discretion, funds to support travel to national PVA events (e.g., Wheelchair Games, etc.)

What an associate membership program costs a chapter:

- Slight increase in administrative burden (e.g., to admit associate members, maintain contact information, etc.)
- Increased program and event costs (e.g., due to incremental cost to serve associate members)
- *Many chapters already have an associate membership program and will not incur increased costs*

More detail on Objective 3D: Examples of associate membership at PVA

Texas – Associate program

- 75-100 associate members
- Structure is relatively informal, with chapter Board overseeing program
- Open to three categories:
 - Families and caregivers
 - Veterans with paralysis who don't qualify to be a PVA member
 - Volunteers and legislative members

Mountain States – Auxiliary program

- 140 auxiliary members
- Operates as a separate 501c3 with its own Board
- Composed primarily of the families and caregivers of members

These chapters have greatly valued their associate membership programs

Contents

Context for this plan

Overview

Goal 1

Goal 2

Goal 3

Goal 4

Indicators of success

Organizational and financial implications

Strategic Goal 4

Goal 4	Objectives
Invest in organizational effectiveness	<ul style="list-style-type: none">4A. Refine the chapter grant process4B. Strengthen the national – chapter working relationship4C. Enhance training for Board and staff leadership4D. Expand chapter training and peer-to-peer learning

Summary: Goal 4 will enhance PVA's effectiveness in serving its constituents

Through these objectives...

4A. Refine the chapter grant process



PVA will...

- Return the grant program to its original purpose
- Increase chapters' efficiency and effectiveness in serving members

4B. Strengthen the national – chapter working relationship



- Enhance and maintain trust and collaboration between the national office and the chapters
- Ensure both the national office and chapters are aligned and pursuing the same aims

4C. Enhance training for Board and staff leadership



- Enhance Board members' expertise and preparation for national leadership
- Increase staff understanding of member needs and the chapter experience

4D. Expand chapter training and peer-to-peer learning



- Build stronger, more expert chapter leadership teams that are well-prepared to serve members
- Foster greater connections between chapters

Objective 4A: Refine the chapter grant process

- i. Engage an outside consultant to help PVA develop a revised chapter grant program
 - The process could be led by the Executive Committee
 - The past work of the Chapter Grants Subcommittee could be used as input
- ii. Once the Executive Committee is ready to move forward with a revised resolution, hold a Board vote to approve the refined chapter grant process

See the following slides for more context on the challenges of the current chapter grant process

More detail on Objective 4A: The chapter grant is not adequately fulfilling its main purpose (1 of 2)

History of the chapter grant

- There is no reference in the Charter regarding chapters receiving grants or financial support from National ⁽¹⁾
 - Grant money was originally provided by National for chapters to establish themselves and be able to serve members and Veterans with SCI/D across multiple regions
- The chapter grant evolved through the years, but its purpose remains the same: funding is provided to ensure that chapters can represent PVA's interests locally⁽²⁾

Current rules (adopted by PVA's Board)

- Chapters must request to participate in the grant program by September 15 of each year by writing a letter to PVA's Chief Financial Officer
- Funds must be used primarily for program operations (65%) that “will coincide with the philosophy and direction of PVA and must be spent on activity which will benefit PVA members”⁽³⁾
 - Chapters must submit annual budgets with their participation requests to reflect how the funds will be used for this purpose
- National can reduce the percentage of the grant allocated to the chapters if 65% or more is not spent on programs that benefit PVA's members⁽⁴⁾

(1) See the following two slides for footnotes and sources

More detail on Objective 4A: The chapter grant is not adequately fulfilling its main purpose (2 of 2)

Issues identified with the current grant process

- The funds provided by national act as a subsidy rather than a grant and there is a lack of compliance with current rules
 - Chapters receive funds annually, even when there isn't a clear need established
 - Some chapters fail to submit grant participation requests with budgets that clearly show how funds will support members
 - The annual funds are provided to chapters even when chapters fail to comply with the mandatory programs
- PVA national provides funds every year regardless of chapter performance, making it hard to hold chapters accountable for achieving the mandated requirements

Opportunity for change

- PVA could align the chapter grant with its main purpose and ensure that all chapters are using the funds to adequately serve members and Veterans with SCI/D at the local level

Reference: Footnotes and sources for previous two slides

- (1) PVA's Chapters are intended to represent PVA's mission at the local level; PVA Chapter Adm. Guide, Chapter Formation Guidelines
- (2) The grant money is currently designed to support chapters so that they, in turn, can support PVA's mission locally. Funds must be used for basic office and program operations that "will coincide with the philosophy and direction of PVA and must be spent on activity which will benefit PVA members" (PVA Chapter Administrative Guide, I.63.) What this means is that funds should only be allocated to chapters as long as they are in line with the direction set by PVA and the activities conducted by the chapters benefit PVA members
- (3) PVA Chapter Administrative Guide, I.63
- (4) Chapters must allocate at least 65% of the funds towards program operations and at most 35% on "basic" office operations. The application must include a "copy of the chapter budget for the coming year which will project a minimum of 65% program expenditure rate". Failure to demonstrate a good faith effort to achieve a minimum of 65% program expenditure rate may result in administrative action to include forfeiture of national funding" (PVA Chapter Administrative Guide, I.22) Also, if a chapter has a "program expense ratio that is less than an average of 65% of its required annual financial statements for two consecutive years, that chapter will have its chapter grant for the immediately following fiscal year reduced by a percentage determined by the difference between its program expense ratio and the recommended program expense ratio, e.g. a 40% program expense ratio would result in a chapter grant reduction of 25% (65-40)" (PVA Chapter Administrative Guide, I.64).

Sources: PVA By-Laws; PVA Chapter Administrative Guide (2021); PVA Administrative Guide (2021); Baseline interviews with PVA's Board and staff, Wellspring synthesis

Objective 4B: Strengthen the national – chapter working relationship

- i. Delineate clearly for chapters what support they can get from national, and how to get it
 - Alongside department leads, delineate the types of support each department can offer chapters
 - Also delineate potential requests that the departments cannot fulfill
 - Seek input from chapters on areas of support that are most valuable
 - Create clear protocols for chapter leaders and VP Liaisons to request support

- ii. Enhance current resource library for chapters to draw upon, including referrals to external supports
 - Organize and highlight the resources national has already created for chapters (*see also Objective 1.C.v*)
 - Develop additional trainings and resources, as needed (e.g., website development guides)
 - Get input from chapters on what they would find most useful
 - Designate external resources chapters can seek for tasks that fall outside of national's supports

- iii. Create channels for greater feedback and communication between national staff and chapters
 - Channels could include: an open Google survey, a quarterly call between PVA's national staff leadership team and chapter leadership, or a special session at each Board meeting

Objective 4C: Enhance training for Board and staff leadership

- i. Strengthen onboarding to National Directors, including travel to D.C. to meet with the staff leadership team and learn about PVA
 - Within onboarding, ensure National Directors understand all PVA programs, and the role of staff in running them

- ii. Introduce yearly board governance training for all Board members, engaging governance consultants as appropriate; topics could include:
 - Conflict of interest
 - The Board's fiduciary role
 - The types of decisions typically made by a Board (as opposed to staff)

- iii. Create avenues for national staff to regularly visit and interact with chapters

Objective 4D: Expand chapter training and peer-to-peer learning

- i. Identify topics of greatest interest for training and peer-to-peer learning among chapter Executive Directors and Board members; potential topics include:
 - Fundraising
 - Website development and maintenance
 - Associate membership programs
 - Regular member engagement

- ii. Develop and execute a schedule of trainings and peer-to-peer learning opportunities
 - Trainings could be conducted by national staff or outside experts
 - Peer-to-peer learning could be self-organized by chapter leadership

Contents

Context for this plan

Overview

Goal 1

Goal 2

Goal 3

Goal 4

Indicators of success

Organizational and financial implications

Recap: Strategic goals and objectives

1. Enhance systems to assess and strengthen programs and communications

- 1A. Undertake research with SCI/D Veterans and families to inform program assessments and member outreach
- 1B. Employ data to regularly review programming
- 1C. Improve communications to members, associate members, and Veterans with SCI/D
- 1D. Develop a robust network of external organizations that can provide support and resources to PVA members and SCI/D Veterans

2. Strengthen programs to better meet the needs of SCI/D Veterans, members, and allies

- 2A. Strengthen existing programs
- 2B. Expand support for Veterans with MS
- 2C. Expand support for Veterans with ALS
- 2D. Better serve members-at-large
- 2E. Increase PVA's appeal to younger Veterans with SCI/D
- 2F. Develop offerings for families and caregivers

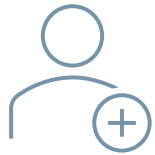
3. Attract new PVA members

- 3A. Quantify and tell the story of PVA's impact on members and non-members
- 3B. Strengthen and streamline member recruitment
- 3C. Expand eligibility criteria to all honorably discharged Veterans with MS
- 3D. Formalize and expand associate membership program

4. Invest in organizational effectiveness

- 4A. Refine the chapter grant process
- 4B. Strengthen the national – chapter working relationship
- 4C. Enhance training for Board and staff leadership
- 4D. Expand chapter training and peer-to-peer learning

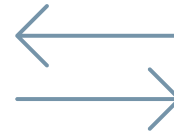
Indicators of success



PVA attracts higher rates of SCI/D Veterans & their families as members & associate members



Engagement by members, associate members, and other SCI/D Veterans increases



PVA program participants and members feel PVA's programs meet their needs



PVA supports the passage of targeted federal legislation



PVA grows research and education funding for the care and cure of SCI/D



PVA adds new partners, and its partnerships are effective



Effective trainings for the Board and chapters occur regularly



National and chapter leaders feel connected to and supported by each other

A high-level timeline of key activities

FY23	FY24	FY25 and beyond
<ul style="list-style-type: none"> • 1A: Conduct research on SCI/D Veterans and their families • 1C: Invest in communications <ul style="list-style-type: none"> – Gather member contact information – Begin a technology review • 2A: Expand virtual programming • 2B – F: Lay the groundwork for subgroup programming (e.g., for younger members, families, etc.) • 3B: Adopt opt-in automatic chapter admission • 3C: Revise admission criteria to include Veterans with MS • 3D: Develop associate membership program • 4A: Engage ext. consultant and begin chapter grant review • 4C – D: Conduct Board and chapter trainings 	<ul style="list-style-type: none"> • 1B: Conduct first annual program assessment • 1C: Strengthen communications <ul style="list-style-type: none"> – Implement new communications tools for programs and events – Develop a shared brand identity – Complete the technology review • 1D: Expand partnerships • 2A: Expand government rel. program • 2A: Expand research program • 2A: Assess NSO program • 2B – F: Launch subgroup programming • 3A: Using data from evaluation process, revamp communications on impact of membership • 3D: Expand assoc. membership prog. • 4A: Complete review and gain approval for newly revised chapter grant process • 4B: Enhance chapter resource library 	<ul style="list-style-type: none"> • 1B: Update and expand program assessment, as needed • 1C: Adopt new ways to communicate with members • 2B – F: Revise subgroup programs based on participant feedback • 4A: Implement new grant process • 4B: Deepen national-chapter collaboration

Contents

Context for this plan

Overview

Goal 1

Goal 2

Goal 3

Goal 4

Indicators of success

Organizational and financial implications

Organizational implications

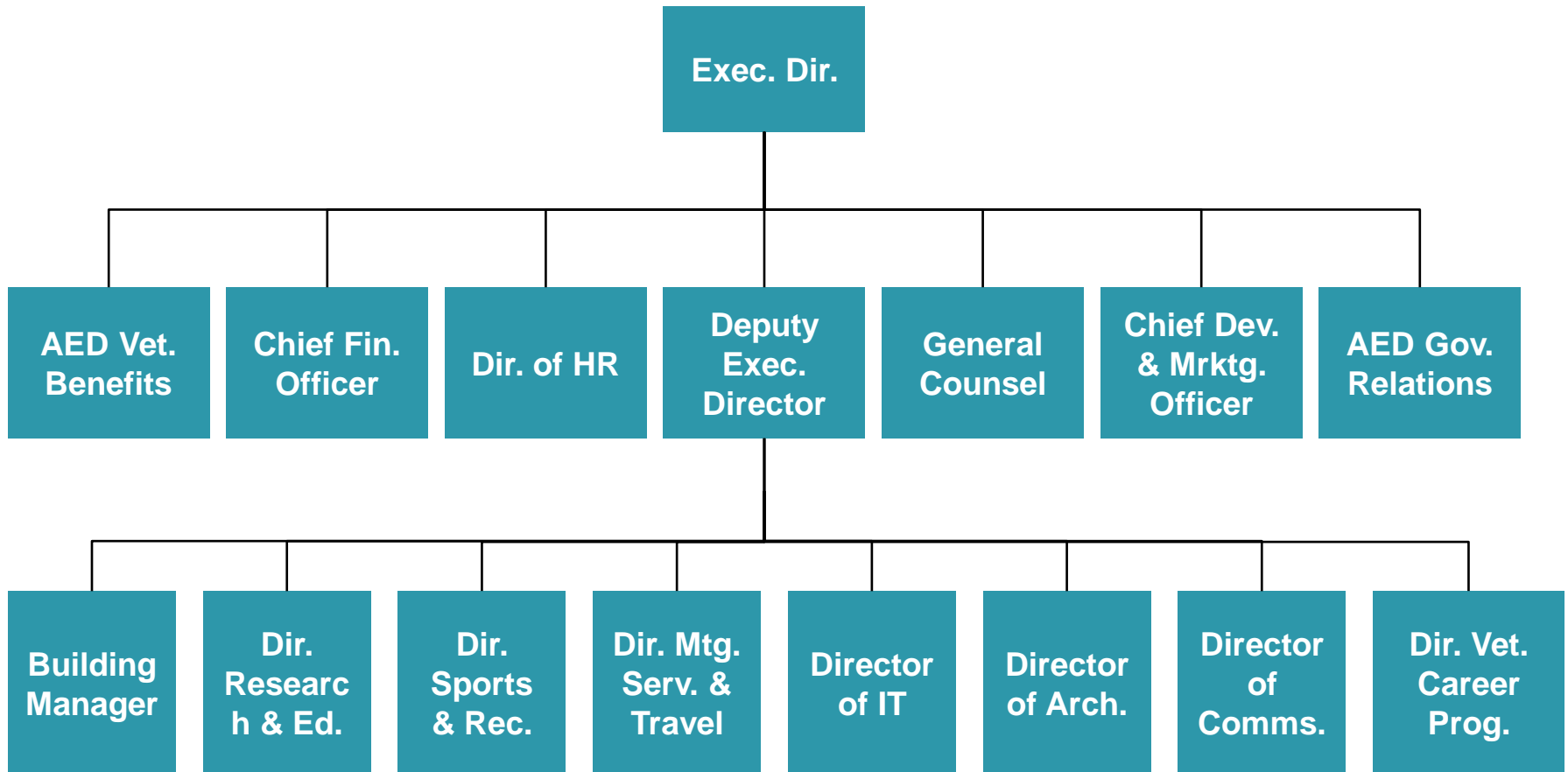
To support the successful execution of the strategic plan, PVA will refine its organizational structure:

- Reorganizing the leadership team
- Reclassifying two leadership positions
 - AED of Programs and Benefits (formerly AED of Veterans Benefits)
 - AED of Communications and Marketing (formerly Director of Communications)
- Potentially hiring one Director-level head of membership in FY23

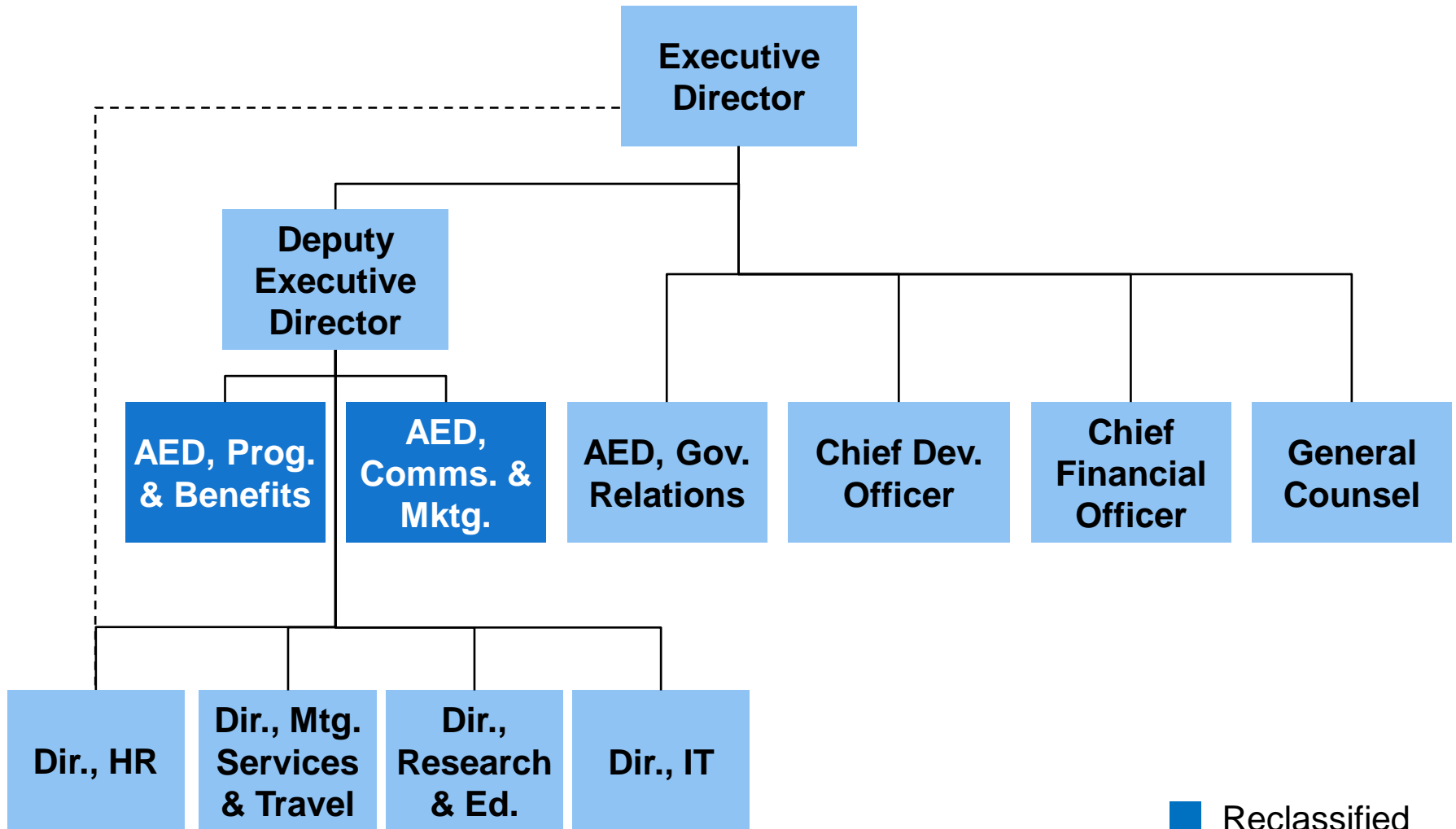
Additional changes or staffing additions may be required after FY23

- These will be built into annual operating plans and identified for the Board

Current PVA leadership organizational chart



Proposed reports to the Executive Director and Deputy Executive Director



■ Reclassified

Detail: Key areas of oversight for reclassified roles

AED, Programs and Benefits

Field Services

Medical Services

Sports and Recreation

Architecture

Veterans Career Program

Market research and Evaluation

AED, Communications and Marketing

Internal communications

External communications,
including DRTV and digital

Member recruitment⁽¹⁾

(1) We propose the member recruitment team will move under the AED of Communications and Marketing and add a Director-level position

Financial implications

There may be some marginal incremental costs associated with the strategic plan in FY23 that are not included in the budget

- The bulk of the first-year costs are accounted for either in the Executive Office budget or will be absorbed through the existing FY23 operating budget
- One exception is a potential new position in the Membership Program; this position is not included in the operating budget because it is uncertain whether this position will be implemented in FY23 or FY24

Starting in FY24, costs associated with implementation of the strategy will be built into PVA's operating budget and identified for the Board