

SECTION 1

CHAPTER STRATEGIC PLAN

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Your local chapter is just like your business in that for the business or chapter to accomplish growth and be successful, it must have goals, a clear-cut plan to perform activities which lead to those goals, and a method of tracking progress toward those goals.

To help your chapter set goals and track its progress, each chapter is encouraged to complete a Chapter Strategic Plan (CSP). This planning document will help you set goals and plan activities for the year. As you complete the activities, fill in the completion date. The CSP addendum includes samples that will be helpful during the planning session. Make copies of these documents for your Chapter's Planning Session.

Chapter Planning Session

During the summer, the chapter board of directors should conduct a planning session to complete the CSP for the upcoming year and outline the activities for that time. This session should be at a time when the full board can attend and spend time evaluating the chapter and setting attainable goals and strategies for the upcoming years.

Decide what your chapter's priorities are for the year, and how you would like to see it develop in the next three years.

Sample Agenda

- I. Welcome and introductions.
- II. Networking/team building activity.
- III. Assess the chapter's current strengths and weaknesses.
- IV. Identify the chapter's goals and strategies.
- V. Complete the Chapter Strategic Plan.
- VI. Review chapter officer roles and responsibilities. Determine date and time when board will hold meetings each month.
- VII. Assign core committee chairs and responsibilities. Also, complete the chapter calendar for the year, including scheduled events and meetings (with suggested meeting topic ideas and speakers).

IMPLEMENTING THE CHAPTER STRATEGIC PLAN

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Chapter leaders are encouraged to:

- Involve as many members as possible in chapter activities by delegating various responsibilities. This reduces the burden of responsibility on any one chapter leader, while it also serves to identify and develop future chapter leaders.
- Take time at the start of the year to get organized and to plan chapter activities. Involve all chapter leaders in the development of an annual plan.

Purpose of CSP

- Provide a planning and management tool to involve chapter leaders.
- Provide continuity year-to-year within the chapter.
- Account for the chapter's activities.
- Improve efficiency, effectiveness, and teamwork.
- Create a shared vision and direction by the leadership, by generating ownership among those involved.
- Help dissolve personal agendas.
- Build leadership skills.
- Identify potential activities.
- Give the chapter the strong foundation needed to allow the chapter to excel.

Instructions

One person should be identified as "CSP Coordinator." The CSP coordinator will be responsible for maintaining this document and recording goals and accomplishments.

Different leaders and chapter members should be assigned the responsibility for various activities through committee assignments. At local board of directors' meetings, the CSP coordinator should report the status of CSP activities regularly.

The plan is divided into five sections:

1. Mission Statement.
2. Category.

3. Goal.
4. Strategy.
5. Action Steps.

Each category has an entire page dedicated to it. The suggested categories are Membership, Government Affairs, Leadership Development, Communications/Public Relations, Education, Chapter Management, and Fundraising. To keep board members focused upon the mission of the association, each page begins with the TRA mission statement.

Under each category, the board should set one or more goals. Goals are desired results for the chapter stated in broad terms. Under each goal, there are one or more strategies to help attain those goals. The strategies clearly define the desired outcome(s) in a measurable and achievable statement. The action steps are the specific methods that will be used to achieve the strategies. Each action step contains a due date, person(s) assigned to the task, start date, and completion date.

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