



MOVING FORWARD

THREE-YEAR STRATEGIC PLAN (2014 – 2016)

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LEBANON VALLEY CHAMBER OF COMMERCE

THREE-YEAR STRATEGIC PLAN (2014 – 2016)

Background

In late 2012, the Lebanon Valley Chamber of Commerce's Board of Directors approved a multi-step process for developing a new three-year Strategic Plan for the organization. The proposed new plan, which would cover the years 2014 – 2016, was intended to follow and build upon the Chamber's last Strategic Plan, which spanned the 2009 – 2011 period.

The Chamber's last Strategic Plan helped to redirect the Chamber's attention and resources into a broader overall Program of Action that incorporated greater involvement in advocacy and business and community issues, along with continued attention to member services and programs and events. It was decided that the Chamber's new Strategic Planning process should examine the Chamber's current status and role in the community, ways in which it could better serve its members and the Lebanon Valley and its organizational and financial strengths and needs. The intent was to have the new plan build upon its predecessor and identify even more strategic roles and direction for the Chamber for the coming three years.

The Chamber's Strategic Planning Process

The Chamber's Strategic Planning process was begun in early 2013 with the identification and recruitment of the Plan Steering Committee Chair, Vice Chair, four task force chairs and a professional facilitator, who would be asked to lead a Chamber Board planning retreat later in the planning process. The four task forces to be utilized in preparing the new Strategic Plan were to be focused on the areas of Organizational Excellence, the Chamber's Leadership Role In the Community, Membership Value & ROI and Finances & Membership.

In May, 2013, the Plan Steering Committee met to establish a timeline for implementing and completing the planning process, and by the following month, rosters of Chamber member volunteers were finalized for the four task forces that would be utilized to conduct the planning process. An online membership survey was also undertaken, with a mid-July response deadline, to obtain members' input regarding the Chamber's current programs, efforts and direction as well as recommendations on future organizational priorities and areas for improvement.

The four task forces began meeting individually in July, with the goal of having their draft reports and recommendations completed by August 31. Provided to each of the task forces as background information for their discussions and planning efforts were the results of the Chamber's online membership survey, along with various statistical breakdowns of the Chamber's current membership prepared by Chamber staff and a comparative analysis of the Lebanon Valley Chamber's finances and performance versus other chambers of commerce of similar size across the United States.

About this same time, the Chamber Board reaffirmed the organization's Vision and Mission, as originally established by the Board during the Strategic Planning process in 2008.

All four planning task forces, which were each comprised of a strong and diverse mix of Chamber member volunteers, completed their draft reports by the early part of September. The reports were compiled into one draft document that was submitted to the Chamber's Board of Directors for discussion and modification at a half-day Board planning retreat held at Gretna Glen Camp & Retreat Center in late September.

The Board's input obtained at the planning retreat was incorporated into the next draft of the proposed Strategic Plan. This next draft of the Plan, coupled with a consolidated list of the top strategic priorities for 2014, the first year covered by the new Plan, was submitted to and approved by the Chamber Board at its meeting on October 28, 2013.

This latest Strategic Planning process has been an intensive one and has provided the Chamber with substantial input on our members' and the community's needs and their views on ways in which this organization can further enhance its impact on our members and the Lebanon Valley. Equally important and exciting were the task force volunteers' and other members' strong recommendations on the expanded leadership role they want and expect the Chamber to play in our community.



VISION

The Lebanon Valley Chamber of Commerce will excel as the premier business leadership organization and catalyst for change, growth and prosperity in the Lebanon Valley.

MISSION

The Lebanon Valley Chamber of Commerce is a visible, proactive advocate and resource for its member employers and the Lebanon Valley. It is committed to advancing our region's economic vitality and quality of life through the provision of strong leadership and through the formation of dynamic organizational and community partnerships.

ORGANIZATIONAL EXCELLENCE TASK FORCE

Vision: To effectively populate and align our Board, staff and volunteers toward excellent execution of our Mission and Strategic Plan

Strategic Objectives:

- A. Populate and align our Board of Directors and Executive Committee for proactive leadership in advancing the economic vitality and quality of life in the Lebanon Valley. (Ongoing)

Strategies:

- 1) Reinforce a strong understanding of the role of the Executive Committee in strengthening the Board for decision-making and succession. (2014 & ongoing)
- B. Ensure the provision of visionary leadership by the Chamber CEO and the alignment of all Chamber staff to execute the Strategic Plan. (2014 & ongoing)

Strategies:

- 1) Ensure leadership succession for the CEO role that ensures continuity of mission and implementation of the Strategic Plan. (2014)
 - 2) Utilize the US Chamber accreditation as a ‘best practices’ check list and guide to review Chamber procedures, leading to future Accreditation of the Lebanon Valley Chamber. (2014 & ongoing)
- C. Recruit and align the volunteers so that the Chamber remains the premier business organization for volunteer leadership, resources and accomplishment in the Lebanon Valley. (Ongoing)

Strategies:

- 1) Identify a process to attract, develop, and retain a strong core of volunteers. (2015)
 - 2) Develop innovative communication approaches to engage volunteers. (Ongoing)

CHAMBER'S LEADERSHIP ROLE IN THE COMMUNITY TASK FORCE

Vision: To play a leadership role in ensuring that all parts of the Lebanon Valley and all of its business and community resources and amenities achieve their full potential.

Strategic Objectives:

- A. Marketing the Lebanon Valley – Identify, develop and use all available resources for marketing Lebanon City, County and Valley as the place of choice for businesses, individuals, families and visitors. (2015, 2016)

Strategies:

- 1) Develop, in conjunction with other partner business organizations and public officials in our community, a marketing image or theme for the Lebanon Valley to foster a positive, focused identity for this community. (2014)
 - 2) Identify and promote the Lebanon Valley's regional advantages and resources and its many positive attributes – its quality of life, convenient location, skilled workforce and moderate cost of living. (2014, 2015, 2016)
 - 3) Fully utilize technology in all forms – websites, social media, mobile apps, etc. in this marketing effort. (2014, 2015, 2016)
 - 4) Promote community-wide acceptance of the need for planned, controlled growth that ensures ongoing economic and cultural prosperity for the Lebanon Valley. (2014, 2015, 2016)
- B. Building the Lebanon Valley's Economy – Play a lead role as a conduit for all other private and public sector partner organizations and individuals to ensure a comprehensive and effective economic and business development program for the Lebanon Valley. (2014 & ongoing)

Strategies:

- 1) Foster coordination and cooperation to ensure the development and implementation of a comprehensive, coordinated economic development program for all of the Lebanon Valley that will address and correct any gaps that currently exist in our community's overall business and economic development effort. (2014)
- C. Advocacy – Assertively and effectively advocate for legislation, policies and actions to foster and maintain a positive business climate and quality of life in the Lebanon Valley, Pennsylvania and our nation. (2014, 2015, 2016)

Strategies:

- 1) Identify, advocate, and promote consistent policies that contribute to economic and cultural growth. (2014, 2015, 2016)

- 2) Encourage an expanded and active advocacy role by other business organizations in the Lebanon Valley. (2015, 2016)
 - 3) Build strong working relationships with all current and future elected officials and their staffs representing all portions of our community. (2014, 2015, 2016)
- C. Education and Workforce Development – Actively lead, advocate and partner on key education, workforce development and leadership development issues and initiatives. (2015, 2016)

Strategies:

- 1) Facilitate interaction with employers, education leaders and institutions in Lebanon County to create an ongoing forum to identify and meet area employers' future labor force needs. (2015, 2016)

MEMBERSHIP VALUE & ROI TASK FORCE

Vision: To have the Lebanon Valley Chamber provide an array of services, programs, benefits, events, communication options and initiatives that offer an unparalleled level of value and ROI to current and prospective members that makes membership in the Chamber a “must-do” for any business located in or doing business in this community.

Strategic Objectives

- A. Develop a strategy and process for evaluating and enhancing communications and marketing to members and to the Lebanon Valley community. (2014)

Strategies:

- 1) Enhance and broaden the Chamber’s marketing & communications initiatives by:
 - a. Assisting in the preparation of an overall Chamber marketing and communications plan including a community-wide branding and marketing initiative. (2014)
 - 2) Explore new methods of marketing and communicating to members that includes target marketing initiatives, streamlining communications and segmenting of members for marketing purposes (2014), and through the use of on-line webinars, streaming media, taped events and other technology. (2015)
- B. Ensure that the mix of Chamber activities, services, programs, events and initiatives provide an appropriate balance of high value to members and ROI on Chamber resources. (2014, 2015, 2016)

Strategies:

- 1) Develop a benchmark and review process for all services, programs and events to ensure a strong and viable mix and variety of offerings by measuring the level of satisfaction and profitability; combining offerings or discontinuing those determined to be no longer essential, effective, beneficial, sufficiently profitable or heavily resource dependent. (2015, 2016)
- 2) Explore and implement new activities, services, programs, events and initiatives that will fit into the Chamber’s current mix of offerings and that provide a high level of value and/or ROI to the Chamber members. (2014, 2015, 2016)
- 3) Explore the feasibility of developing and marketing a “buy local”-type of program focused on the use of Lebanon Valley Chamber members first. (2014)
- 4) Explore new and enhance existing programs or initiatives that focus on the professional development of young entrepreneurs and professionals and that will support and engage them in participating in the Chamber. (2015, 2016)

- a) Educate and communicate with area employers the value of Leadership Lebanon Valley, the Lebanon Valley Young Professionals, other professional development initiatives and the value of continuing their employees' involvement in Chamber-related activities. (2014, 2015, 2016)
- C. Develop a dynamic data management approach that would provide for segmenting of the Chamber's membership, data collection and target marketing to the membership via email, social media and other means. (2014, 2015)

FINANCES & MEMBERSHIP TASK FORCE

Vision: To be the organization in the Lebanon Valley most able to attract and retain all businesses and organizations as members and that is equally successful in generating significant non-dues revenues for the Chamber to provide sustainable positive impacts on its members and the community.

Strategic Objectives:

- A. **Overall Financial & Fiscal Policies** – As the leading organization representing the Lebanon Valley’s business community, expect to end each year with as much net income as possible to ensure the Chamber’s continued viability and to expand the Chamber’s reserve funds. (2014, 2015, 2016)

Strategies:

- 1) Establish profit for the Chamber as a culture within the Board of Directors, all committees and task forces and staff, with committee chairs reporting benefits of events to the Chamber. (2014, 2015, 2016)
- 2) Aggressively grow both membership investment income and non-dues revenues, while striving to maintain an approximate 50 – 50 percent split in total Chamber revenues from these two sources. (2014, 2015, 2016)
- 3) Establish annual year-end net income goals for the Chamber, with these funds to be added to the Chamber’s reserves. (2014, 2015, 2016)

- B. **Growing the Chamber’s Membership** – Ensure consistent growth of the Chamber’s total membership and membership resources each year through comprehensive and aggressive membership recruitment and retention efforts. (2014, 2015, 2016)

Strategies:

- 1) Increase the Chamber’s membership retention rate to 91 percent for 2014 and establish that level as a minimum retention rate for 2015 and 2016. (2014)
- 2) Establish and achieve, at a minimum, these annual year-end total membership goals: (2014, 2015, 2016)
 - a) 2014 – 855
 - b) 2015 – 915
 - c) 2016 – 930
- 3) Establish and pursue a comprehensive and aggressive membership recruitment and retention effort that includes:
 - a) Promoting those factors, services and programs that have contributed to the Chamber’s retention of its long-standing members. (2015, 2016)
 - b) Continuing to attract additional volunteers to the Ambassadors Committee to expand that group’s ability to perform its crucial outreach and communication role with the Chamber’s members. (2014, 2015, 2016)

c) Developing a continually expanded range of opportunities and approaches for fostering the involvement of current Chamber members in membership recruitment efforts. (2014, 2015, 2016)

4) Explore and implement optional approaches for making it as easy as possible for businesses and organizations to become and remain members of the Chamber (i.e. tiered membership investment schedule, electronic funds transfer for dues payments). (2014)

C. Growing the Chamber's Non-Dues Income – Ensure the maximum growth possible each year in non-dues revenues for the Chamber to help expand the Chamber's ability to serve its members and our community, strengthen its financial foundation and offset the needs for larger increases in annual membership investments. (2014, 2015, 2016)

Strategies:

- 1) Examine the number, schedule, impact and profitability of current Chamber programs and events and determine the potential for reducing the number of such programs and events while making them more profitable and more heavily attended. (2014)
- 2) Examine each program, event and benefit program offered now and in the future by the Chamber in terms of their profitability and/or the value they provide to the Chamber and its members. (2015)

D. Maximizing Efficient Use of Our External Resources – Develop strategic and tactical approaches for ensuring the efficient use of external resources available to the Chamber. (2014, 2015, 2016)

Strategies:

- 1) Explore strategic alliances that may be available to efficiently utilize Chamber and allied business organizations' resources to meet the needs of the organizations and our area's business community. (2014)
- 2) Explore opportunities for the possible sharing of services between the Chamber and allied business organizations to conserve and efficiently utilize staff, financial and volunteer resources. (2015)

LEBANON VALLEY CHAMBER OF COMMERCE

2013 Strategic Planning Process

Steering Committee

Chair

Thomas Buzby
(Retired, Weaber. Inc.)

Vice Chair

David Kerr
(AT & T – Pennsylvania)

Planning Retreat Facilitator

Roger S. North
(North Group Consultants)

ORGANIZATIONAL EXCELLENCE TASK FORCE

Chair – Roger North (*North Group Consultants*)

Edward Coyle (*Buzgon Davis Law Offices*)

Edward Kercher (*Kercher Industries, Inc.*)

Warren Lewis (*Klick-Lewis, Inc.*)

CHAMBER'S LEADERSHIP ROLE IN THE COMMUNITY TASK FORCE

Chair – John Whitmoyer (*Henry & Beaver, LLP, Attorneys*)

Doug Aldinger (*Quandel Construction Group, Inc.*)

Karen Baxter (*Met-Ed*)

Mayor Sherry Capello (*City of Lebanon*)

Dan Chirico (*Bell & Evans/Farmers Pride*)

Randy Ebersole (*Ebersole Honda – Buick – GMC*)

Jamie Hanford (*Ladd-Hanford Dodge Chrysler Jeep Mazda Suzuki KIA*)

Dr. Steven Houser (*Annville Cleona School District*)

Jeffrey Steckbeck (*Steckbeck Engineering & Surveying, Inc.*)

Dr. Lewis Thayne (*Lebanon Valley College*)

MEMBERSHIP VALUE/ROI TASK FORCE

Chair – Margie Yohn (*BeYohnd Mail & Marketing*)

Jack Cantwell (*SkyLimit Marketing*)

Carrie Ehrgood (*Jonestown Bank & Trust Co.*)

Karen Groh (*IA Design*)

Barbara Kauffman (*Kauffman Creative Services, Inc.*)

Tim Kish (*Sherwin Williams Northeast Region*)

Lori Kostow (*Lebanon Catholic School*)

Tony Lucci (*Murry's, Inc.*)

Jason Trout (*Good Samaritan Health System*)

David Tyndall (*Metro Bank*)

FINANCES & MEMBERSHIP TASK FORCE

Chair – Rodney Seidel (First National Bank of Fredericksburg)

Michael Battistelli (*Stifel*)

Christopher Gebhard (*Hoaster Gebhard & Co.*)

Glenn Rambler (*Members 1st Federal Credit Union*)

Mickey Santora (*WLBR/WQIC Radio*)