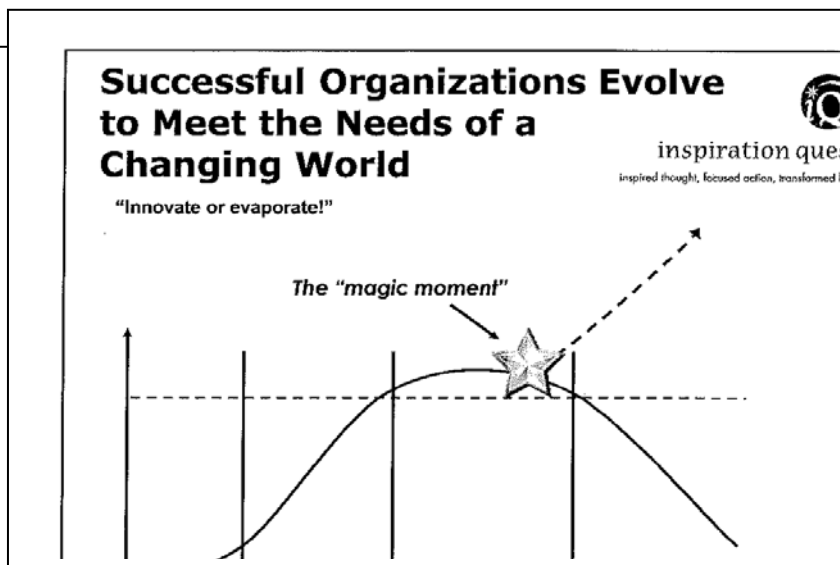
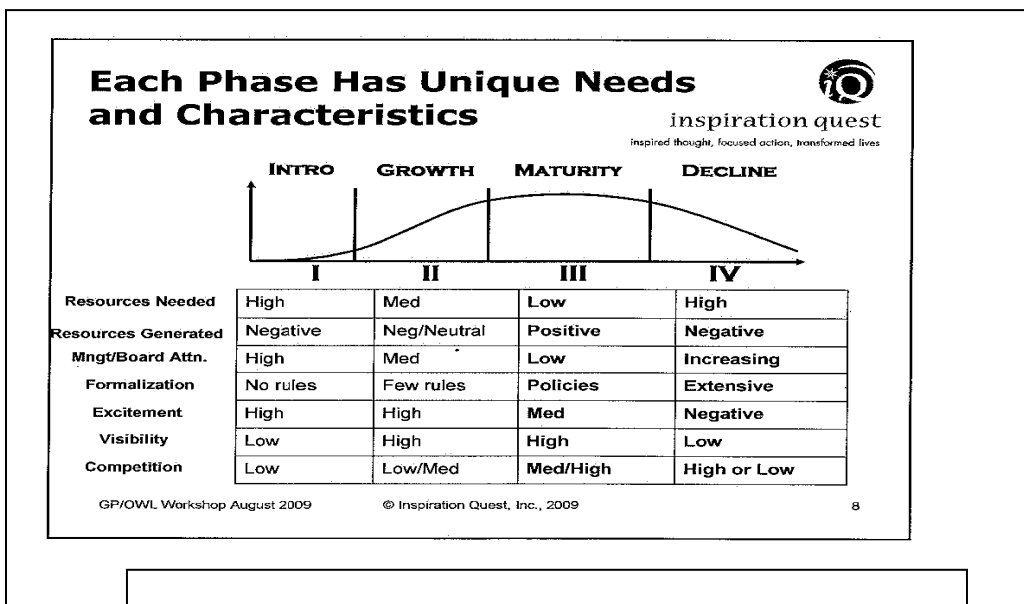


OWL/CA Annual Meeting, October 3, 2009
“Strategic Visioning and Action Planning for OWL”
Delivered by Claire Lachance, Inspiration Quest, Inc.

DISCUSSION NOTES

I. Context Setting

Retreat attendees were provided an overview of the four phases within the nonprofit lifecycle. It was the strong consensus of the group that OWL (in California) is currently in either the decline phase or the later portion of the maturity phase—presenting OWL with the opportunity to reinvent and innovate to ensure its long-term sustainability. The ensuing discussion focused on developing a shared vision for OWL, and conducting preliminary brainstorming and action planning on key strategic areas of opportunity.



II. Our Vision for OWL in California

- Overarching Theme of **Expansion (membership, visibility, advocacy, impact)**
 - Get New Members
 - Double membership each year!

- Baby Boomers
- Think more broadly...age 30+; not just women; etc.
- Increase diversity
- **Become the Go-To Advocacy Group**
 - Infiltration!
 - Be more visible
 - Address issues facing older women—but don't limit ourselves
 - OWL as “watch-dogs”
 - Assess community needs and issues
 - Promote women in politics
- **Address issues with OWL organizational structure**
 - Leadership development/succession planning...**need new leaders for the future!**
 - **OWL-California issue: role, purpose**
 - Chapters or no chapters?
 - Strengthen chapters
 - Maximize **online tools/website**
 - Should each chapter have its own unique website—how efficient is this?
 - Be flexible—adapt over time to meet evolving needs
 - Relation to OWL National
- **Become more intergenerational**
 - Membership
 - Programs
 - Presentations at high schools, etc.
 - Visit home-bound seniors
- **Raise more money!**
- **Make meetings more effective**
- Socialize—build on peer group model

III. Developing Two-Year Goals and Initial Action Plans

What are the gaps between where we are today and where we want to be tomorrow?

- **Membership**
- **Issue Relevance**
- **Visibility and Identify of OWL**
- **Financial Stability and Sustainability**
- **Organization Structure (local, regional, state, national)**
- **Leadership/Succession Planning**
- **Increased Involvement in Local Politics and Issues**
- **Educational Role**
- **Chapters Working Together and Communicating**

Small Group Break-out Discussions—Action Planning on Four Key Issues:

- **Membership Development**
 1. Get friends and colleagues involved
 2. Go to other groups
AAUW, League of Women Votes, etc.

3. Host conference calls; participate in conf. calls
4. OWL as one organizational entity—brochures, dues structure, website
5. Use technology—offer training

- **Succession Planning**

- Institute a policy whereby the Assistant President becomes the next President
- Institute a mentorship program
- Provide financial support for interested OWL members to travel to National (learning opportunity for potential future leaders)
- Offer training to potential leaders
- Improve diversity among membership and potential leaders
- Reinstate the Field Advocate position

- **Visibility and Increased Political Involvement**

- Attending/serving on boards and commissions
- Tabling
- Monitoring local policy-making bodies
- Building/working with other groups
- Writing letters to news media
- Sending letters/cards to elected officials
- Identifying ourselves as OWLs at every opportunity
- Speaking on OWL-related issues in schools, etc.
- Using web-based technology to educate and expand awareness of OWL
- Developing talking points regarding OWL

- **Fundraising**

- Encourage planned giving (wills, insurance beneficiary, etc.)
- Expand the OWL Endowment
- Have a collection bowl at every program or presentation
- Pursue grants, including government grants for relevant topics such as fall prevention and elder financial protection
- Offer travel opportunities in which a portion of the fee goes to OWL—learn what’s going on with older women in other countries
- Have an annual dinner
- Increase our overall knowledge about fundraising and generating revenue
- Think out of the box!

IV. Prioritization of Action Steps

Retreat attendees were asked to identify the top two actions needed to strengthen OWL this coming year. The following chart summarizes the top vote-getters:

Other actions receiving two or fewer votes included: increasing meeting attendance, opening new chapters, clarifying/strengthening identity, making personal commitments, using the internet/website, focusing on intergenerational opportunities, and addressing the OWL Statewide “issue.”