



American Association of University Women  
Lake/Sumter (FL) Branch

2022-23 Strategic Plan Progress

**GOAL 1: Differentiate us by developing and providing dynamic learning opportunities targeted to college-educated women.**

One of four specified objectives was exceeded.

**Objective 1.4:** *Covid-permitting, resurrect Day Trips. By the end of 2022-23 program year, the Day Trips Committee will plan and offer at least one trip to a destination of interest.*

The Day Trips Committee planned and offered three day trips:

- Sanford --- German Restaurant
- Mt. Dora – Dora canal eco tour
- Crystal River – boat trip and lunch at Plantation

Although not included in action steps this year, the Branch has made some progress toward engaging members in the educational process as presenters and/or organizers. Toward that end, for the January Tech Trek program, member Liz Schweers organized the campers and their families to present at the meeting. And for Women's History Month in March, two members – Jan Barone and Espi Walmsley – served as panel members for the program.

Evaluating programs at General Meetings was not a goal for this year, but it was included in this year's implementation notes. At the April 2023 General Meeting, the co-Directors of Programs conducted an evaluation of the programs offered for this year.

Because the Branch had neither a Programs Committee nor a Fundraising Committee, other objectives under this goal were not addressed.

**GOAL 2: Organize robust efforts to Recruit, Engage, and Retain Members, especially targeting new eligible women moving into Sumter (and eventually Lake) County.**

Two of five specified objectives showed progress.

**Objective 2.1:** *The Communications Committee will create a roster of groups in The Villages to which we will send announcements of our open-to-the-public events.*

The Communications Director was in process of compiling such a list for the Membership Drive Open House, when the event was postponed. The list can be completed and used for future publicity.

**Objective 2.5:** *During the 2022-23 program year, conduct at least one Membership Recruitment Drive targeted at college-educated women moving into areas South of 44. Support the Membership Drive through press relations, advertisement, and on social media. In subsequent years, the branch will host at least one drive per year.*

A Membership Drive was scheduled and planned, and registrations via our website were solicited. Of note is the amount of advertising that was done to raise awareness of our Branch. Ultimately, we needed to postpone the drive due to low registrations. But the advertising drew visitors to General Meetings in January through April; during that time period, members have also brought friends to General Meetings. At least six visitors became members in that period.

The advertising, the open invitation to a meeting, the efforts of members to bring friends to General Meetings, and the excellent General Meeting programs combined to attract new members. And the number we've drawn so far is approaching the number targeted as an

outcome of the Membership Drive. So, we didn't hold a Membership Drive, but we have made progress toward the expected outcome.

The Branch may want to consider NOT holding a drive annually but to put resources into advertising and scheduling engaging programs and encouraging members to continue bringing a friend to a meeting.

As part of the preparation for the Membership Drive, a committee developed a new tri-fold color brochures and multi-fold color business cards as well as other recruitment materials. Developing these materials was targeted for inclusion in future years, so we are substantially ahead of schedule in having professional-looking publicity.

The Membership Drive Committee also developed a narrated PowerPoint loop and a looped slide show for the Open House. Both products can be used in future events to promote branding and recognition of our Branch.

**GOAL 3: Enhance and create opportunities to support young women beginning their journeys in STEM fields.**

No objectives were written for this goal for 2022-23. However, our branch maintained our philanthropy, sending nine girls to Tech Trek in the summer of 2022, and funding one new and five continuing college scholarships for the 2022-23 academic year.

Hopefully, in the coming year, work can begin to follow up with Tech Trek campers and continue to follow up with scholarship recipients as that kind of outcome information will help us in soliciting donations in the future.

**GOAL 4: Reorganize branch committee structure to create a framework that enhances branch governance.**

One objective was specified and met.

**Objective 4.1:** *By September 2022, the Co-Presidents will compile a Board Handbook to include, at a minimum, job descriptions of Board positions and expectations of Board members.*

The Board Handbook was completed on time and posted on the Branch website in the Members' Pages.

At the end of this Program Year, the current Board should be surveyed regarding the usefulness to them of the Handbook. The incoming Board should also be directed to the Handbook.

Although it was not specified as an objective until next year, the Branch applied for and was awarded 501(c)(3) tax status by the IRS and the State of Florida during this Program Year. We are now a charitable organization under federal and state laws.

Moving forward, the Branch should develop and implement a plan for soliciting donations internally and externally to capitalize on our new tax status.

Also not included in this year's objectives was reinstating the Diversity, Equity, and Inclusion (DEI) Committee. The re-established committee began meeting in the fall and gained four new members. That Committee created the February Black History Month General Meeting program and followed through in March and April. And, as included in future implementation suggestions, the committee used National's DEI Plug n Plays and other DEI Toolkit resources and other ideas learned from DEI chairs around the country to develop the February program and its follow up.

Finally, even in the absence of a Fundraising Committee, Branch members stepped up to hold small fundraisers. For example, Judy Reinhardt organized a Pampered Chef Party at her home, Beth Hicks coordinated a Farewell-to-the-Old-Card Mah Jongg event, and Joan Krick donated a quilt for a drawing. In addition, Espi Walmsley was involved in

obtaining a donation from The Villages Voices chorus. These efforts helped increase the funds available to fulfill our philanthropic obligations.

## **Challenges**

The Branch achieved quite a bit in this year, yet it is reasonable to ask why so few of the specified objectives were addressed. There are two primary reasons: The expectations embodied in the plan may have been too ambitious, and efforts suffered from a lack of womanpower.

The final strategic plan was substantially scaled back from earlier versions. But we may not have scaled it back enough, particularly considering our womanpower issues. During the year, we lost several people from leadership positions due to unexpected health challenges. This meant that there were fewer people to re-organize the branch infrastructure while also maintaining branch governance and activities. In addition, although some members stepped up to fill in the gaps, we never had available the volunteer workers needed to accomplish the specified objectives.

New objectives need to be specified for 2023-24 to benefit from the strategic plan as a living working document...not just words on paper.