



CLAN CARMICHAEL | USA

# STRATEGIC PLAN 2025 - 2028



# CLAN CARMICHAEL USA STRATEGIC PLAN

## BACKGROUND AND CONTEXT

The board members of Clan Carmichael USA met in October 2023 in Stone Mountain, Georgia to envision the direction, challenges, and needs of this organization. Members completed a SWOT analysis, suggested goals, sorted and prioritized those goals, and whittled down a long list of targets to three primary objectives.

These objectives serve to ultimately strengthen CCUSA and continue its role in preserving Clan Carmichael heritage for future generations.

## HOW TO USE A STRATEGPIC PLAN

Strategic Planning is a process where organizations define a bold vision and create a plan with objectives and goals to reach that future. A great strategic plan defines where your organization is going, how you'll win, who must do what, and how you'll review and adapt your strategy development.

To use a strategic plan, organizations should be intimately familiar with its goals and steps, refer to it frequently, and include the plan in any decision making or leadership process.

For Clan Carmichael USA, this means publishing the plan where all members can access it, making sure all current board members have read and familiarized themselves with the strategic plan, and incorporating its steps and goals into the meetings of the board of directors.

A strategic plan, however, is not set in stone, and can be fluid--dates in particular may need to push back, move forward, or fluctuate as real-world events and conditions affect organizational priorities.



# CLAN CARMICHAEL USA

## STRATEGIC GOALS AND OBJECTIVES

### MEMBERSHIP

#### GOAL 1. GROW CCUSA BY DOUBLING MEMBERSHIPS

- The CCUSA board of directors will create a membership committee consisting of directors and non-directors to oversee membership goals
  - deadline: winter 2024/2025
- Identify new member prospects (by general characteristics, demographics, or location)
  - deadline: first meeting of membership committee
- Define benefits
  - *CCUSA lacks a meaningful story to motivate potential members to join. The membership committee will define what the benefits of joining CCUSA are, and how to market them.*
  - deadline: summer 2025
- Develop a member recognition habit
  - *CCUSA is good at acknowledging members who have passed away, but not who are still with us. CCUSA will develop a plan to regularly recognize members, donors, and their families to promote retention.*
    - *example: a “Welcome New Members” page in the Eagle Gate*
  - deadline: summer 2025
- Launch a membership campaign
  - deadline: 2025

**Target: active memberships doubled (125 to 250)**



# CLAN CARMICHAEL USA

## STRATEGIC GOALS AND OBJECTIVES

### REVENUE

#### GOAL 2. BUILD FINANCIAL STABILITY BY INCREASING DONATIONS AND REVENUE

- The CCUSA board of directors will create a fundraising committee consisting of directors and non-directors to oversee membership goals
  - deadline: winter 2024/2025
- Increase recognition of and thanks for donors
  - *plan should include annual tax receipts for donors*
  - deadline: summer 2025
- Provide annual financial report
  - *CCUSA seeks to improve fiscal transparency to donors and members; an annual financial report shall be produced each year and published in the Eagle Gate newsletter*
  - deadline: winter 2024
- Streamline donation process
  - *Current system is clunky, and many older members still wish to donate by check. Pursue options to give on a recurring basis. Move toward automation.*
  - deadline: summer 2025
- Fundraising goal: \$4000 in 2024 (\$1500 committed at strategic planning session; \$2500 remaining)
  - deadline: January 2025

**Target: 1/2 of operating expenses covered by donations alone each year**



# CLAN CARMICHAEL USA

## STRATEGIC GOALS AND OBJECTIVES

### EVENTS

#### GOAL 3. GROW CCUSA CONNECTEDNESS

- Identify an event organizer
  - deadline: spring 2025
- Host two (non-Highland Games) events in 2024
  - deadline: December 2024
- Quarterly events in 2025 and beyond
  - *this excludes Highland Games, but can include virtual events. CCUSA should diversify events geographically and by age, if possible.*
  - deadline: end of year 2025, ongoing

**Target: quarterly events every year, in multiple North American locations**



# CLAN CARMICHAEL USA - STRATEGIC PLAN



## SWOT ANALYSIS

### STRENGTHS

- Scholarships
- Continuity
- Enthusiasm
- Experience (40+)
- Organized
- Connection with CCI
- Personnel/Gifts
- Dedication
- Media
- Mini-book as entry

### WEAKNESSES

- Lack of recognition
- Membership (numbers)
- Membership (function)
- Communication
- Benefits of joining
- Burnout
- Need volunteers
- Aging volunteers
- Roles for new volunteers
- Member retention
- Leadership entrapment
- Board size

- Interest (Social Media)
- Cultural movements/Outlander
- New social channels
- Historical/ Clan grants
- Google/SEO
- DNA tests
- Highland Games
- Andy (meet and greet)

### OPPORTUNITIES

- Non-related groups
- Media hackers/ bots
- Digital illiteracy
- Generational shift
- Economy
- Family finances
- Geography
- Distribution of members
- Fracturing of connections

### THREATS

# CLAN CARMICHAEL USA STRATEGIC PLAN DRAFT

## PLAN CREATION

The first draft of the plan was by members of the Clan Carmichael USA board of directors and regular volunteers in October 2023.

After initial ideas, brainstorming, and calendar planning were incorporated, a formal draft of the plan was put together by newsletter editor volunteer Leah Carmical Hargrove. This current version has yet to be finalized and approved by the CCUSA board of directors (as of December 2024).

## ACKNOWLEDGEMENTS

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Art Carmichael  
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### CCUSA Volunteers

Leah Carmical Hargrove  
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