



2024-27 STRATEGIC PLAN

FORUM225

RED STICK YOUNG PROFESSIONALS

2024-25 Board of Directors

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Background

Founded in 1993, Forum 225 is the largest young professionals' organization in the greater Baton Rouge area. Forum 225 exists to provide young professionals with opportunities to grow philanthropically, professionally, and civically. Originally Forum 35, the organization underwent a rebrand and name change in 2020 to redefine Forum 225's purpose and identity – but the mission remains the same. Forum 225's members are committed to leading, improving, and shaping the greater Baton Rouge community.

Recognizing the significantly changed landscape in which the organization now operates relative to its inception, Forum 225 leadership saw a need to work toward shared priorities and goals as well as identify action items that reflect the organization's most pressing needs and opportunities. To achieve this, the organization initiated a strategic planning process in 2023. This document serves as the product of this effort, a three-year strategic plan that the Forum 225 Board of Directors adopted on April 23, 2024. This plan represents the results and takeaways from both a public and board member survey, as well as a roundtable discussion with Forum 225's stakeholders, including the advisory council and strategic planning session with the board of directors, all spanning a five-month period.

From this process, Forum 225 adopted a set of four core strategic priorities, supporting goals, and board-related internal action items. After adoption, the publicly available strategic plan will be regularly referenced by organizational leadership to ensure continued implementation.

While Forum 225 has been active for three decades, the organization's role in the community has evolved as new opportunities and challenges have risen. In the last five years, Baton Rouge has been impacted by national events, including the COVID-19 pandemic, which significantly impacted Forum 225 as an events-based organization. In response, Forum 225 shifted to a virtual landscape amid the global pandemic, modifying where it could in order to provide opportunities for dialogue and connection. Now, in the spring of 2024, as Louisiana has recently welcomed a new administration and we look ahead to an upcoming mayoral election, the space in which the organization operates continues to shift. Conversely, the organization stands to benefit from a new campaign to attract and retain young talent in the region by the Baton Rouge Area Chamber, a trusted source on economic development and quality of life in the capital region.

Following shifts and events of recent years, Forum 225 is committed to positioning itself as a leading voice in the community, representing a core demographic as we continue to see the region grow and evolve in a post-pandemic world where retaining young talent is of the utmost importance. This plan outlines the priorities and goals that will guide the organization over the next three years.

This planning process involved comprehensive internal and external input to develop strategic priorities and goals that are reflective of the organization's members, leadership, and stakeholders, including the greater Baton Rouge community. To facilitate this process, Forum 225 partnered with one of their corporate partners, Emergent Method, a Baton Rouge-based management and strategy consulting firm that supported the effort through an in-kind agreement.

As Forum 225 leadership implements the initiatives laid out in this plan, annually updated performance metrics and internal action items will allow the organization to monitor progress and communicate progress with members and stakeholders who share ownership of this plan and its success.

For more information on Forum 225's three-year strategic plan, visit forum225.org/strategicplan.

Executive Summary

Current Mission Statement and Pillars

Forum 225 has tied initiatives and programming to its mission statement and four respective pillars over the last several years. However, references to these pillars have waned over the years, leading to a lack of clarity on how to incorporate them into the organization's efforts and necessitating a refreshed framework for strategic plan alignment moving forward.

CURRENT MISSION STATEMENT

Our mission is to create opportunities for Baton Rouge young professionals to grow philanthropically, professionally, and civically. We're enhancing the vitality of the Baton Rouge community through civic-minded and service-oriented young professionals.

PILLARS

Leadership	Arts & Culture
Diversity	Service

Engagement Process

The process to develop this strategic plan was supported by internal and external engagement efforts with the intention of defining areas of opportunities and challenges as Forum 225 looks to enhance its role in the community over the coming years.

The process included input from a public survey, which was open to members, corporate partners, and community members; a board survey open to both the 2023-24 board of directors as well as the 2024-25 board of directors; and a roundtable discussion with the key stakeholders, including the 2023-24 advisory council – Morgan Almeida, Eric Dexter, Michael DiResto, Chelsea Gonzales, Brian Melancon, Chris Simoneaux, and Luke Williamson. The team also reviewed historic files and documents to better understand where the organization has been to inform where it should go.

Public Engagement

Forum 225 launched a public survey on December 4, 2023, and the survey was open until January 12, 2024. This anonymous survey consisted of 17 questions aimed to determine Forum 225's perceived role in the community, alignment to the organization's mission, and areas of strength, one's needing improvement, and potential priority. As the organization looks to enhance both member and community value, responses were critical to provide insight into the areas that the greater Baton Rouge community – members and stakeholders alike – believe the organization should prioritize.

The organization distributed the anonymous survey through its public website, a press release, email channels, and social media. Several reminders were sent out throughout the duration of the survey and

in total, 87 full responses were collected. Responses were then gathered and analyzed by Emergent Method for Forum 225's review and consideration in the planning process.

Trends and Takeaways

- Fifty-five percent of respondents were Forum 225 members, with almost half of the responses coming from community members and corporate partners.
- The majority of respondents were between the ages of 24 – 34.
- In general, respondents find that Forum 225 is somewhat aligned with its current mission and believe Forum 225 is somewhat effective and relevant in the community.
- Respondents indicated that connection and leadership development are what set Forum 225 apart as an organization, while communication was noted as the primary challenge to success.
- Coinciding with what sets the organization apart, respondents indicated that connection and leadership development are both what they are most interested in as well as what they believe Forum 225 should focus on moving forward.
- Suggested priorities for Forum 225 over the next three years include service initiatives, connection opportunities, and expanded recruitment.

For the full results of the public survey, visit Appendix A.

Board Engagement

Aligning with its public survey, Forum 225 launched a board survey on January 2, 2024, which was open January 19, 2024. The anonymous survey was open to the 2023-2024 Board of Directors and the 2024-2025 Board of Directors, which, at the time, were the current and incoming boards, respectively. The survey consisted of 17 questions that aimed to understand the internal perception of the organization from its leaders, how the board functions, and mission alignment. Feedback and response from Forum 225's current and incoming leaders provide a different benefit for the public and stakeholders, as the board has nuanced involvement and greater insight into the innerworkings of the organization and its processes.

The survey was distributed via email and the board's dedicated group communication channel with reminders distributed leading up to the deadline. In total, 16 responses were collected. Responses were then gathered and analyzed by Emergent Method for Forum 225's review and consideration in the planning process.

Trends and Takeaways

- In general, the board found that Forum 225 is somewhat aligned with its current mission.
- When posed with various stakeholder groups – including members, corporate partners, community partners, and the general public – the board responded that the perceived perception of Forum 225 by these respective groups is somewhat effective and relevant.
- While the board is generally passionate about the organization's mission, they do not agree that the mission is currently used to drive decision-making.
- Aligning with the public survey responses, suggested areas of focus by the board include connection for young professionals to their community and leadership development opportunities.
- Suggested priorities for Forum 225 noted by the board include communication, member value, and corporate partners.

For the full results of the public survey, visit Appendix B.

Stakeholder Engagement

Forum 225 held a stakeholder roundtable discussion to engage in dialogue on the direction of the organization prior to drafting this plan. The group provided insight that the Forum 225 board was able to incorporate into the discussions around priorities and goals for the next three years.

Strengths that were mentioned include Forum 225's history, its brand, and what this brand has represented for so long. Further, while the organization looks to increase engagement, the group noted that those who are actively engaged do so passionately.

Stakeholders identified communication as a threat to the organization's success, including how we communicate benefits to potential members, programming opportunities, and impact on the broader community. They also suggested that consolidating programming opportunities could be beneficial, as the organization may be trying to oversee too many functions in recent years as we see a lack in programming consistency. Finally, a potential threat to future success as posed by key stakeholders is the existing one-year board terms.

The group suggested that an opportunity for the organization is to restore the position Forum 225 has historically had as a representative voice for the young professional community. Additionally, aligning with BRAC's talent retention campaign that is underway as talent retention among the young professional demographic is clearly of the utmost importance to area businesses. Talent retention provides an opportunity for Forum 225 to expand its reach, grow its value, and be part of the solution. Other opportunities include more alignment with other professional or nonprofit organizations and expanding mentorship opportunities.

In conclusion, stakeholders emphasized that Forum 225 is more than just a professional networking organization – it is a resource and networking opportunity that helps young professionals plant roots in their community both personally and professionally.

Mission, Vision, and Values

As part of Forum 225's adoption of this three-year strategic plan, the organization is also adopting a revised mission statement (what the organization does), a new vision statement (what the organization aspires to be), and a set of core values (how the organization makes decisions). Each of these components will shape and drive internal operations, program offerings, and how the organization interacts with its members, stakeholders, and the community.

MISSION STATEMENT

Our mission is to create opportunities for Baton Rouge young professionals to connect with their community and grow philanthropically, professionally, and civically.

VISION STATEMENT

Forum 225 will empower Baton Rouge's young professionals to thrive as emerging leaders in the community, with an intention to drive success and make positive impact for our residents and region.

Core Values

Forum 225's core values will guide decision making and drive the organization's culture. The core values serve as the thread connecting stakeholders, intentions, and initiatives – guiding behavior and empower action.

Stewardship: We are committed to responsibly managing resources and providing opportunities for development and connection for the region's young professionals. As stewards, we will prioritize accountability, strategic thinking, and intentional planning, recognizing the importance of leaving a lasting, positive legacy for future members of the organization.

Collaboration: Serving as the cornerstone for the organization, collaboration will allow for diverse talents, skills, and perspectives to come together and make change. Through both internal collaboration among board members and stakeholders, as well as external collaboration with local organizations or community partners, we will promote open communication and strategic partnerships to foster an environment where collaborative efforts amplify our impact in the region.

Strategic Growth: Recognizing that sustainable growth requires intentional decision-making, we will prioritize thoughtful planning and adaptability for purposeful development. Strategic growth as a core value encourages us to identify opportunities that align with our mission and vision, ensuring that our organization evolves strategically to meet the evolving needs of Baton Rouge's young professionals and the community.

Inclusivity and Diversity: Our members and stakeholders recognize the importance of creating an environment where individuals of all backgrounds, identities, and experiences feel valued and respected. We actively seek to foster a culture that celebrates differences, amplifies voices, and embraces the richness that diversity brings. This core value reinforces our commitment to building a community where everyone has an equal opportunity to thrive and contribute.

Priorities and Goals

Through this strategic planning process, Forum 225 assessed its internal operations, community impact, and benefits to members and stakeholders to identify new ways for how we as the premier young professionals' organization for greater Baton Rouge can better serve our community.

Four key strategic priorities were identified that focus on Forum 225's purpose of providing meaningful and impactful experience to young professionals and the community at-large. These priorities should serve as the basis upon which all major decisions are made over the next three years. Further, as the primary drivers for new initiatives and aligning efforts, the priorities should take the place of the existing, but often not referenced or utilized, pillars.

Priorities

Connection

Community Involvement

Leadership Development

Operational Excellence

Beneath each priority description below are several linked goals that will guide the organization's efforts working toward each of the respective priorities.

Priority: Connection

Forum 225 understands the value of providing opportunities to connect, network, and collaborate for members. In working toward this priority, we will implement initiatives that strengthen the ties among young professionals with one another, area leaders, and the greater Baton Rouge community at large. By emphasizing interpersonal relationships, the organization aims to create a cohesive community that supports each member personally and professionally.

Goals

- Provide networking and relationship building opportunities for members through programming and events
- Increase awareness around opportunities within Forum 225 for members to engage
- Develop effective communications and marketing strategy for the organization
- Enhance membership value or existing and new members
- Serve as a dedicated and intentional steward of existing and new corporate partners

Priority: Community Involvement

Through the lens of community involvement, Forum 225 aims to enhance our impact beyond just its members. We will prioritize establishing partnerships with other local organizations and implementing service projects to be active participants in and contributors of the Baton Rouge community. In doing so, we will position young professionals to serve as a positive force for change – fostering a sense of responsibility and demonstrating a commitment to meaningful impact.

Goals

- Support general welfare of Baton Rouge residents through service opportunities, such as the existing community pantry
- Provide engaging and sustainable service and philanthropic opportunities for area young professionals
- Enhance the collective voice of young professionals in the community
- Build and maintain relationships with other community nonprofit groups in the region

Priority: Leadership Development

Forum 225 appreciates the critical role of leadership development for the long-term success of the organization and its members. By investing in the personal and professional growth of area young professionals, the organization ensures a pipeline of capable leaders who can contribute not only within the organization but also in their broader professional and community roles.

Goals

- Provide effective programming and mentor opportunities through the Barton Leadership Program
- Create diverse leadership development programming and resources for members
- Establish new networking opportunities with industry and community leaders to foster sense of responsibility and leadership among Baton Rouge young professionals

Priority: Operational Excellence

Operational excellence is fundamental for the efficient and effective functioning of the organization. This priority focuses on optimizing internal processes and operating procedures, assessing current recruitment efforts, improving internal and external communication, and streamlining board operations. By ensuring sound financial management, transparent communication, and well-defined roles and responsibilities, the organization establishes a solid foundation for sustainable growth and impactful initiatives over the three-year strategic period.

Goals

- Effectively manage internal documentation, standard operating procedures, and board processes
- Uphold fiduciary responsibilities
- Refine onboarding process for members and corporate partners
- Foster board togetherness
- Implement strategic and consistent communication to members and stakeholders

Conclusion

This three-year strategic plan represents extensive planning, research, and discussion over several months in 2023-2024 – all of which led to the development of the herein described strategic priorities and associating goals, as well as the redefining of the organization’s mission statement and development of the vision statement and core values. The contents of this plan will guide how Forum 225 impacts the community and serves as a voice for area young professionals in the coming years.

Through the leadership of the Forum 225 Board of Directors, the four new strategic priorities will provide guidance and direction to inform decisions related to recruitment, programs, initiatives, and opportunities, while providing members and community residents with transparency for how the organization is evolving. Forum 225 aims to be an effective and credible organization representing an invaluable demographic – the region’s next generation of leaders. As such, the board will regularly review the priorities, goals, and internal action items to assess progress and performance and ensure ongoing alignment.

It is important to note that this is a multi-year plan, the intention is not for goals to be achieved in one year. While the current board has identified what goals and actions to prioritize for the coming year, reviewing the plan will be an annual exercise by the incoming board of directors to not only assess progress for the concluding year but also outline key areas of focus for the following year.

Forum 225 thanks its members, corporate partners, community members, and advisory council participants for their contribution to the development of this strategic plan. Forum 225 is committed to working toward priorities defined throughout this process by our stakeholders and upholding the organization’s newly established vision – to empower Baton Rouge's young professionals to thrive as emerging leaders in the community, with an intention to drive success and make positive impact for our residents and region.

Appendix A – Public Survey Response Narrative

Public Survey

The public survey was open from December 4, 2023, until January 12, 2024. This anonymous survey consisted of 17 questions aimed to determine Forum 225's perceived role in the community, alignment to the organization's mission, and areas of strength, needed improvement, and potential priority.

The organization distributed the anonymous survey through its public website, a press release, email channels, and social media. Several reminders were sent out throughout the duration of the survey and in total, 87 full responses were collected. Responses were then gathered and analyzed by Emergent Method for Forum 225's review and consideration in the planning process.

Demographics

Of the 87 responses, 55.2 percent (48 respondents) were Forum 225 members, 39.1 percent (34 respondents) were Baton Rouge area residents (non-members), and 5.7 percent were corporate partners (5 respondents). The majority of respondents were between the ages of 24-34 (58.6 percent, 51 respondents), followed by those between the ages of 35-44 (21.8 percent, 19 respondents). Of the respondents who were members of Forum 225, 17.2 percent (15 respondents) have been a member for less than one year, 19.5 percent (17 respondents) have been a member for 1 – 2 years, 8 percent (7 respondents) have been a member for 3 – 5 years, and 10.3 percent (9 respondents) have been a member for 6+ years.

When asked that industry respondents worked in, the top five industries include nonprofit and voluntary work (17.2 percent, 15 responses); business, consultancy, or management (13.8 percent 12 responses); public service or administration (9.2 percent, 8 responses); other (9.2 percent, 8 responses); education (8 percent, 7 responses); and engineering or manufacturing (8 percent, 7 responses).

Response Narrative

In general, respondents find that Forum 225 is somewhat aligned with its current mission. On a scale of 1 to 5, respondents were asked to indicate how well Forum 225 aligns with its current mission, with 5 being extremely aligned, 4 as somewhat aligned, 3 as neither aligned or unaligned, 2 as somewhat unaligned, and 1 as extremely unaligned. 45 respondents selected "somewhat aligned," with 27 respondents selecting "extremely aligned," 9 respondents selecting "neither aligned nor unaligned," 5 respondents selecting "somewhat unaligned," and 0 respondents selecting "extremely unaligned." This averages to a 4.1 out of 5.

When respondents were asked about their perception of Forum 225's role in the community, 47 respondents indicated that Forum 225 is "somewhat effective and relevant," followed by 16 respondents who responded as "very effective and relevant," and 13 respondents who perceive Forum 225 as "ineffective or irrelevant." Seven respondents answered "unsure," and 4 respondents answered, "not familiar." This averages 2.1 out of 3.

In an open-response question around what sets Forum 225 apart and what Forum 225 does well, the top response theme was connection (9 responses) followed by leadership development (7 responses), and a three-way tie between programming, socials, and impact (6 responses).

The primary challenge indicated by respondents were communication-related (8 responses), followed by programming and diversity, both with 5 responses, and recruitment and identity, both with 4 responses.

When presented with Forum 225's areas of focus and asked to rank their benefit to the Baton Rouge community, "connection for young professionals to their greater community" was ranked number 1; "leadership development opportunities" was ranked number 2; "social events/networking" ranked 3; "volunteering/service opportunities" ranked 4; and "civic education opportunities" was ranked last, at 5.

Similarly, respondents were asked about which areas of focus they in particular were most interested (with no answer limit) in and most respondents answered, "connection for young professionals to their greater community" (31 responses); followed by "leadership development opportunities" (29 responses); "social events/networking" (25 responses); "volunteering/service opportunities" (20 responses); and lastly "civic education opportunities" (18 responses).

Nearly 27 percent of people (23 respondents) feel that Forum 225 adequately communicates upcoming events and opportunities to the community and members, while over 18 percent (16 respondents) feel that the organization does not. Further, 10.3 percent (9 respondents) said they are unsure, and 2.3 percent (2 respondents) said they were not familiar.

When asked in an open-response question to name the top three priorities Forum 225 should focus on and build upon in the coming years, service was the primary theme with 11 responses, followed by connection with 10 responses, recruitment with 9 responses, and leadership development and programming, both with 8 responses.

Respondents were asked about the biggest threats to Forum 225's future success in an open-response question, and the top category of responses was irrelevancy (7 responses), followed by low participation (4 responses), and communication (3 responses).

In an open-response question, 9 respondents categorized different types of events as the most prominent initiative that would make them want to be more engaged with Forum 225, with 7 respondents answering improved communication. Primary challenges or barriers that were indicated in an open-response question include timing of programs and events (5 responses), bandwidth (4 responses), and communication (3 responses).

Finally, respondents were asked what Forum 225 should consider during the strategic planning process and top responses included member value (3 responses) and recruitment (2 responses).

Appendix B – Board Survey Response Narrative

Board Survey

The board survey was open from January 2, 2024, to January 19, 2024. The anonymous survey was open to the 2023-2024 Board of Directors and the 2024-2025 Board of Directors, which at the time, were the current and incoming boards, respectively. The survey consisted of 17 questions that aimed to understand the internal perception of the organization from its leaders, how the board functions, and mission alignment.

The survey was distributed via email and the board's dedicated group communication channel with reminders distributed leading up to the deadline. In total, 16 responses were collected. Responses were then gathered and analyzed by Emergent Method for Forum 225's review and consideration in the planning process.

Demographics

Of the 16 responses, 62.5 percent (10 respondents) were from current Forum 225 board members while 37.5 percent (6 respondents) were from incoming Forum 225 board members.

Response Narrative

In general, board members find that Forum 225 is somewhat aligned with its current mission. On a scale of 1 – 5, respondents were asked to indicate how well Forum 225 aligns with its current mission, with 5 being extremely aligned, 4 as somewhat aligned, 3 as neither aligned or unaligned, 2 as somewhat unaligned, and 1 as extremely unaligned. Seven respondents selected "somewhat aligned," with 5 respondents selecting "extremely aligned," 3 respondents selected "somewhat unaligned," 1 respondent selecting neither aligned nor unaligned, and 0 respondents selecting "extremely unaligned." This averages to a 3.9 out of 5.

Board members were presented with various key stakeholder groups of Forum 225 and asked what they think each respective group's perception is of Forum 225. The question included a four-point scale, with 4 being very effective and relevant, 3 being somewhat effective and relevant, 2 being ineffective or irrelevant, and 1 being unsure. When asked about the believed perception of Forum 225 by its **members**, 13 respondents selected "somewhat effective and relevant," 3 respondents selected "very effective and relevant," and 0 respondents selected "ineffective or irrelevant" and "unsure," respectively. When asked about the believed perception of Forum 225 by **community partners and other organizations**, 7 respondents selected "somewhat effective and relevant," 4 respondents selected "very effective and relevant," 3 respondents selected "ineffective or irrelevant," and 2 respondents selected "unsure." For the believed perception of **Forum 225's corporate partners**, 5 board members selected "somewhat effective and relevant," 4 board members selected "ineffective or irrelevant," 4 board members selected "unsure," and 3 board members selected "very effective and relevant. Finally, when asked what they believe the perception of Forum 225 is by the **general public**, 7 respondents selected "unsure," 6 respondents selected "ineffective or irrelevant," 3 respondents selected "somewhat effective and relevant," and 0 respondents selected "very effective and relevant."

When asked in an open-ended question what board members believe sets Forum 225 apart and what this organization does well, the top answered discussed Forum's legacy (3 responses), followed by number of offerings for members, diversity of members, and accessibility to the community and involvement (all with 2 responses).

When asked in an open-ended question what Forum 225's biggest challenges are – both internal and external – for where the organization should look to improve, the top category was membership value (4 responses), followed by board support and promotion of the organization (both with 2 responses).

On a scale of 1 – 5, board was asked a series of questions regarding the structure of the board and understanding of responsibilities and processes, with 5 being strongly agree, 4 being agree, 3 being neither agree nor disagree, 2 being disagree, and 1 being strongly disagree. Respondents also had the option to select “not familiar,” which was not factored into the response averages. When asked whether participants agree or disagree that the board has a full understanding of its roles, responsibilities, and accountability to its stakeholders, 3 respondents selected “disagree,” 1 respondent selected “agree,” “neither agree nor disagree,” and “strongly disagree,” respectively (average of 2.3). When asked if the board's size is adequate for the organization's purpose, 4 respondents selected “agree,” and 1 respondent selected “strongly agree,” “neither agree nor disagree,” and “disagree,” respectively (average of 3.7). When asked if there is an adequate number of well-functioned board committees and working groups, 3 respondents selected “disagree,” and 1 respondent selected “strongly agree,” “agree,” and “strongly disagree,” respectively (average of 2.7).

When asked about board meeting duration and time held, 3 respondents selected “agree,” and 1 respondent selected “neither agree nor disagree,” and “disagree,” respectively; 0 respondents selected “strongly agree” and “strongly disagree” (average of 3.4). Regarding board diversity, with necessary stakeholder groups represented, 5 respondents selected “agree,” 1 respondent selected “strongly agree” and “neither agree nor disagree,” respectively, and 0 respondents selected “disagree” or “strongly disagree” (average of 4.0). When asked if the board has a clear, effective process for recruitment, 3 respondents selected “neither agree nor disagree” and “disagree,” respectively, 1 respondent selected “strongly disagree,” with 0 respondents selecting “strongly agree” or “agree” (average of 2.3).

For the statement around effective onboarding processes, 4 respondents selected “disagree,” 2 respondents selected “agree” and neither agree nor disagree,” respectively, with 0 respondents selecting “strongly agree” and “strongly disagree” (average of 2.9). When asked about if the board regularly assesses itself, 4 respondents selected “disagree,” 1 respondent selected “strongly agree,” “agree,” and “strongly disagree,” respectively, and 0 respondents selected “neither agree nor disagree” (average of 2.6).

For the statement around the board conducting business in a positive, professional, and team-oriented manner, 3 respondents selected “disagree,” 2 respondents selected “strongly agree,” and “neither agree nor disagree,” respectively, and 0 respondents selected “agree” or “strongly disagree” (average of 3.1). When asked about whether the board culture encourages and welcomes open discussion, even amid disagreements, 3 respondents selected “disagree,” 2 respondents selected “strongly agree,” 1 respondent selected “neither agree nor disagree” and “strongly disagree,” respectively, and 0 respondents selected “disagree” (average of 2.9). When asked about whether the board encourages innovation, 3 respondents said “agree,” 2 respondents said “strongly agree,” 1 respondent said “strongly agree” and “strongly disagree,” respectively, and 0 respondents selected “neither agree nor disagree” (average of 2.6).

When asked to respond to the statement about whether the board is passionate about the organization's mission, 3 respondents said “agree,” 2 respondents selected “strongly agree,” 1 respondent selected “neither agree nor disagree” and “disagree,” and 0 respondents said “strongly disagree” (average of 3.9). For the statement around whether board members understand mission, vision, and programs, 3 respondents said “neither agree nor disagree,” 2 respondents said “disagree,”

and 1 board member said “strongly agree” and “agree, respectively; 0 respondents said “strongly disagree” (average of 3.1).

Whether the board uses the mission and vision of Forum 225 to inform decision-making resulted in 3 respondents selecting “disagree,” 2 respondents selecting “strongly agree” and “agree,” and 0 respondents selected “neither agree nor disagree” and “strongly disagree,” respectively (average of 3.4).

When asked to respond to the statement about whether board members actively participate in strategic planning and ongoing thinking, 4 respondents selected “disagree,” 1 respondent selected “strongly agree,” “agree,” and “neither agree nor disagree,” respectively, and 0 respondents selected “strongly disagree” (average of 2.9). For the statement around the board attending to policy-related decisions, guiding operational activities, 3 respondents said “neither agree nor disagree,” two respondents said “disagree,” and 1 respondent selected “strongly agree,” and “agree,” respectively; 0 respondents said “strongly disagree” (average of 3.1).

When asked whether they agree or disagree that the board receives and understands regular reports on finances/budgets, service/program performance and other important matters, 5 respondents selected “agree,” 1 respondent selected “strongly agree” and “neither agree nor disagree,” respectively, and 0 respondents selected “disagree” or “strongly disagree” (average of 4.0). When asked if the board ensures the annual budget reflects the organization's priorities, 3 respondents selected “neither agree nor disagree,” 2 respondents selected “strongly disagree,” 1 respondent selected both “strongly agree” and “disagree,” and 0 respondents selected “agree” (average of 2.6).

For the statement about whether the board regularly evaluates and develops yearly goals, 5 respondents selected “disagree,” 1 respondent selected “strongly agree” and “agree,” respectively, and 0 respondents selected “neither agree nor disagree” and “strongly disagree” (average of 2.7). For the statement saying that the board effectively represents the organization to the community, 4 respondents selected “neither agree nor disagree,” 2 respondents selected “agree,” 1 respondent selected “strongly agree,” with 0 respondents selecting “disagree” or “strongly disagree” (average of 3.6).

When prompted with the statement, “I fully understand my roles and responsibilities as a board member,” 6 respondents selected “agree,” 2 respondents said “neither agree nor disagree,” and 1 respondent said “strongly agree,” with 0 respondents selecting “disagree” or “strongly disagree” (average of 3.9). When shown the statement, “I am knowledgeable about the organization’s programs and services,” 4 respondents said “agree” and “neither agree nor disagree,” respectively, 1 respondent said “strongly agree,” and 0 respondents selected “disagree” and “strongly disagree” (average of 3.7).

When asked to agree or disagree with the statement, “I completely fulfill my duties as a board member,” 2 respondents selected “strongly agree,” “agree,” “neither agree nor disagree,” and “disagree,” respectively, with 0 respondents selecting “strongly disagree” (average of 3.5). When given the statement, “I am providing adequate fundraising support for the organization,” 3 respondents selected “agree” and “disagree,” respectively, 1 respondent selected “strongly agree” and “strongly disagree,” respectively, with 0 respondents selecting “neither agree nor disagree” (average of 3.0).

When prompted with the statement, “I am an advocate for the organization in the community,” 5 respondents selected “agree,” 4 respondents selected “strongly agree,” and 0 respondents selected “neither agree nor disagree,” “disagree,” and “strongly disagree,” respectively (average of 4.4). Finally, board members were given the statement, “I find serving on this board to be a satisfying and rewarding experience,” and 4 respondents said “agree,” 2 respondents said “strongly agree,” 1 respondent said

“neither agree nor disagree” and “disagree,” respectively, and 0 respondents selected “strongly disagree” (average of 3.9).

When presented with Forum 225 areas of focus and asked to rank their benefit to the Baton Rouge community, “connection for young professionals to their greater community” was ranked number 1; “leadership development opportunities” was ranked number 2; “volunteering/service opportunities” was ranked number 3; “social events/networking” ranked 5; and “civic education opportunities” was ranked last, at 5.

When asked if the respondents feel that Forum 225 adequately communicates upcoming events and opportunities to the community and its members, 55.6 percent (5 respondents) said “no,” while 44.4 percent (4 respondents) said “yes.”

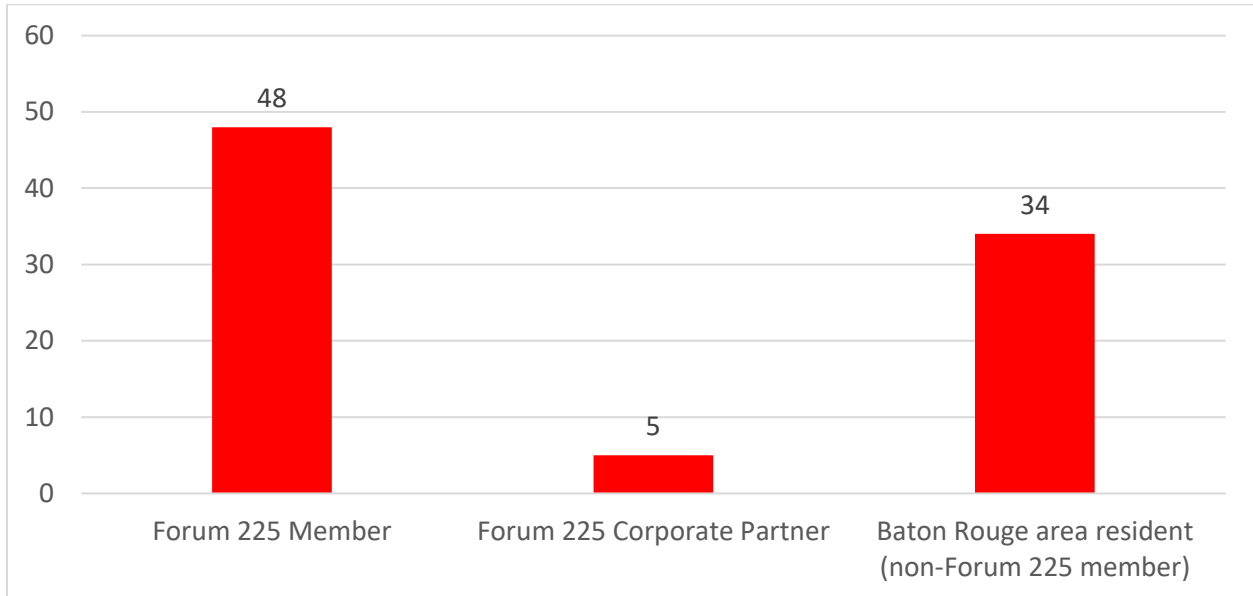
When provided an open-ended question asking what the top priorities Forum 225 are should consider and build upon over the next three years, majority of responses were categorized as communication (5 responses), followed by member value (4 responses), and corporate partners (3 responses). Community, service, development, and recruitment all followed with 2 responses.

When asked about what priorities or initiatives Forum 225 is currently focused on that it should stop investing in moving forward, there were few answers; they included Forum After Hours followed by small service events.

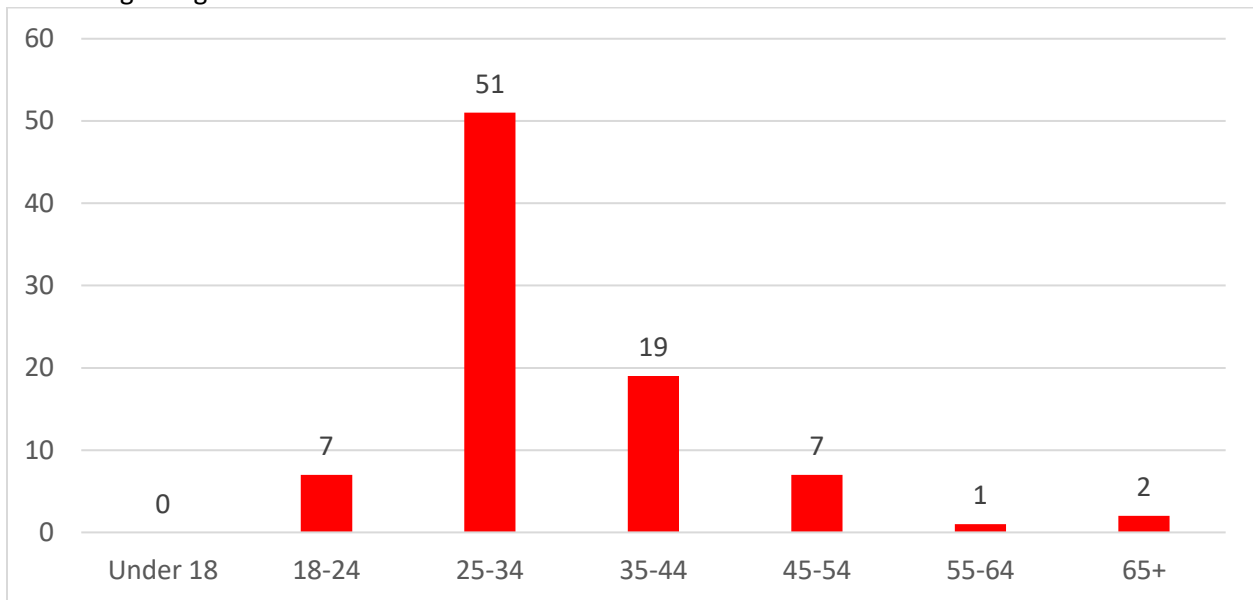
Finally, board members were asked in an open-ended question to note Forum 225’s biggest threats to success, and the top categories were rigidity – as it relates to exploring new opportunities, lack of funding, and identity (all with 2 responses). For what would make board members want to be more engaged, the top categories included better event planning and promotion of events and the organization (both with 2 responses).

Appendix C – Public Survey Results

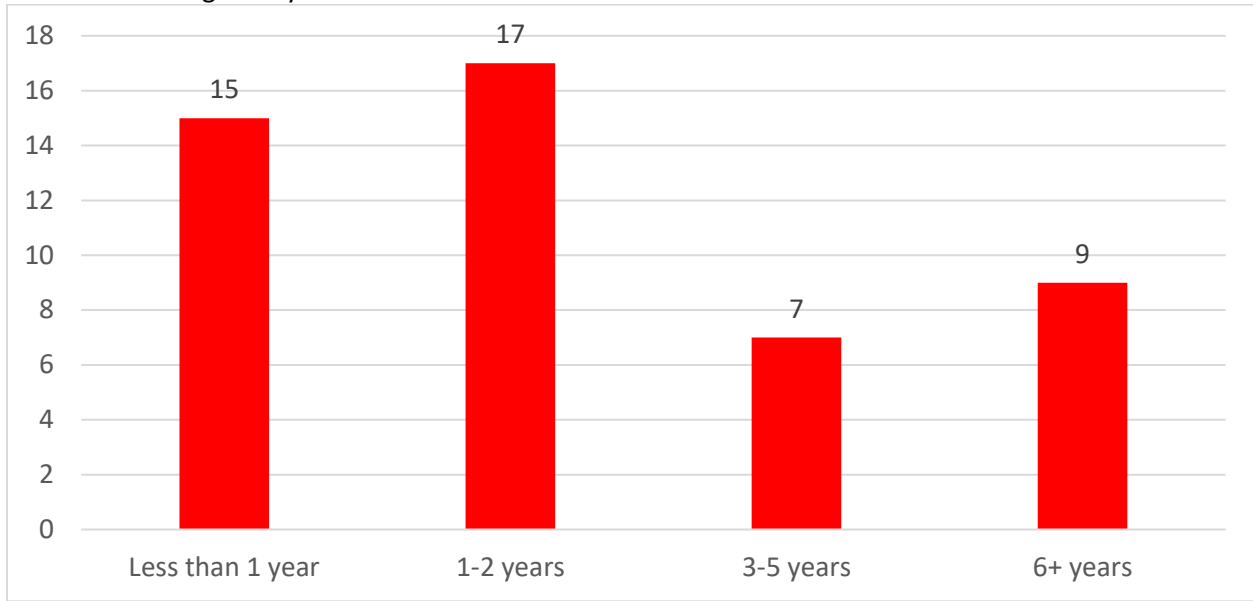
1. I am a:



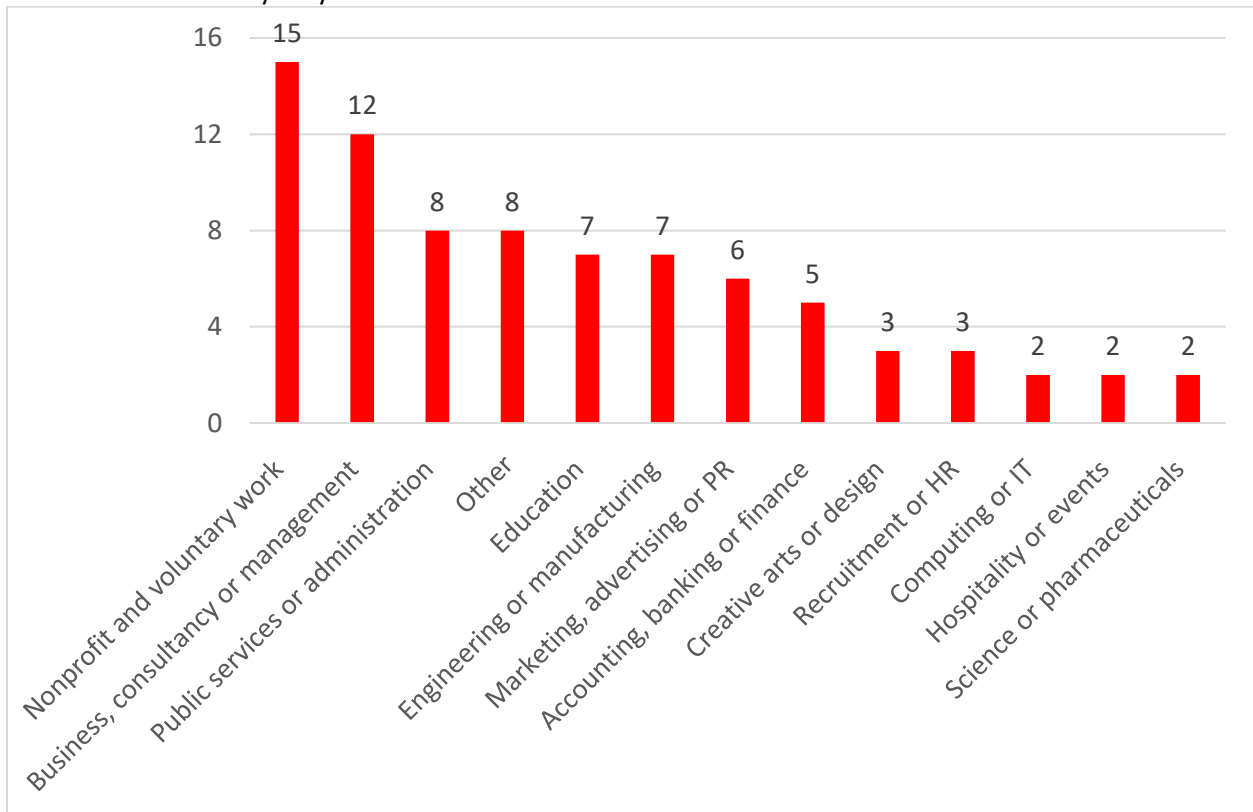
2. Age range:



3. How long have you been a member of Forum 225?

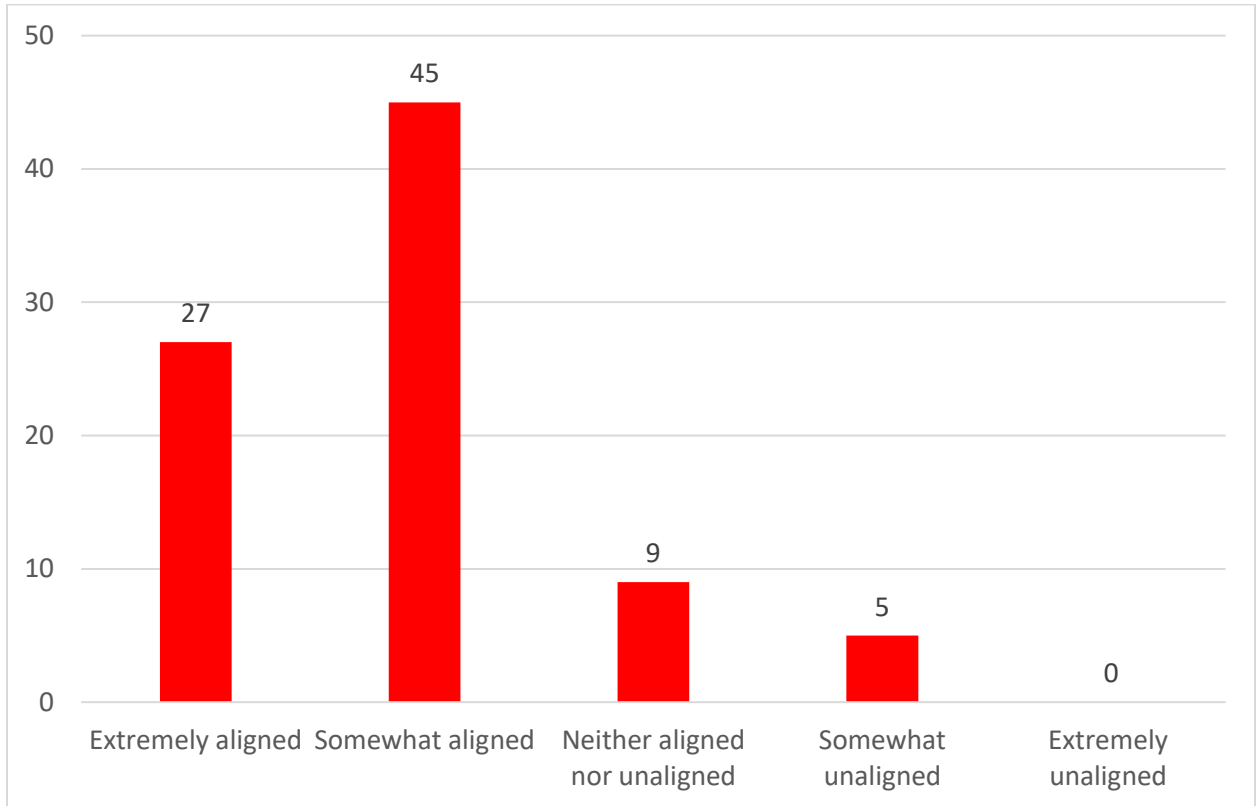


4. What industry do you work in?

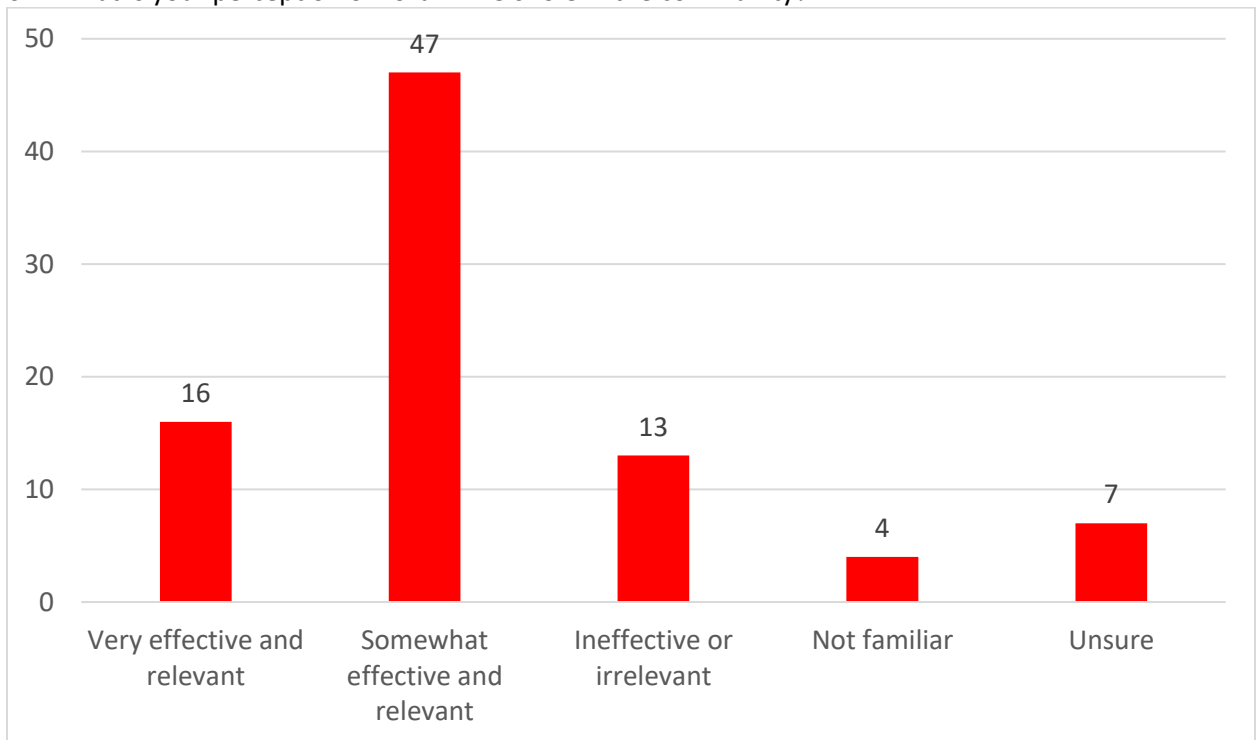


Industry	Count	Percent of total responses
Nonprofit and voluntary work	15	17%
Business, consultancy or management	12	14%
Public services or administration	8	9%
Other	8	9%
Education	7	8%
Engineering or manufacturing	7	8%
Marketing, advertising or PR	6	7%
Accounting, banking or finance	5	6%
Creative arts or design	3	3%
Recruitment or HR	3	3%
Computing or IT	2	2%
Hospitality or events	2	2%
Science or pharmaceuticals	2	2%
Environment or agriculture	1	1%
Healthcare	1	1%
Law	1	1%
Property or construction	1	1%
Sales	1	1%
Social care	1	1%
Student	1	1%
Energy and utilities	0	0%
Law enforcement and security	0	0%
Leisure, sport or tourism	0	0%
Retail	0	0%
Transport or logistics	0	0%
Unemployed	0	0%

5. Please indicate how well-aligned you believe Forum 225’s initiatives, programs, and communications are with its mission.



6. What is your perception of Forum 225’s role in the community?



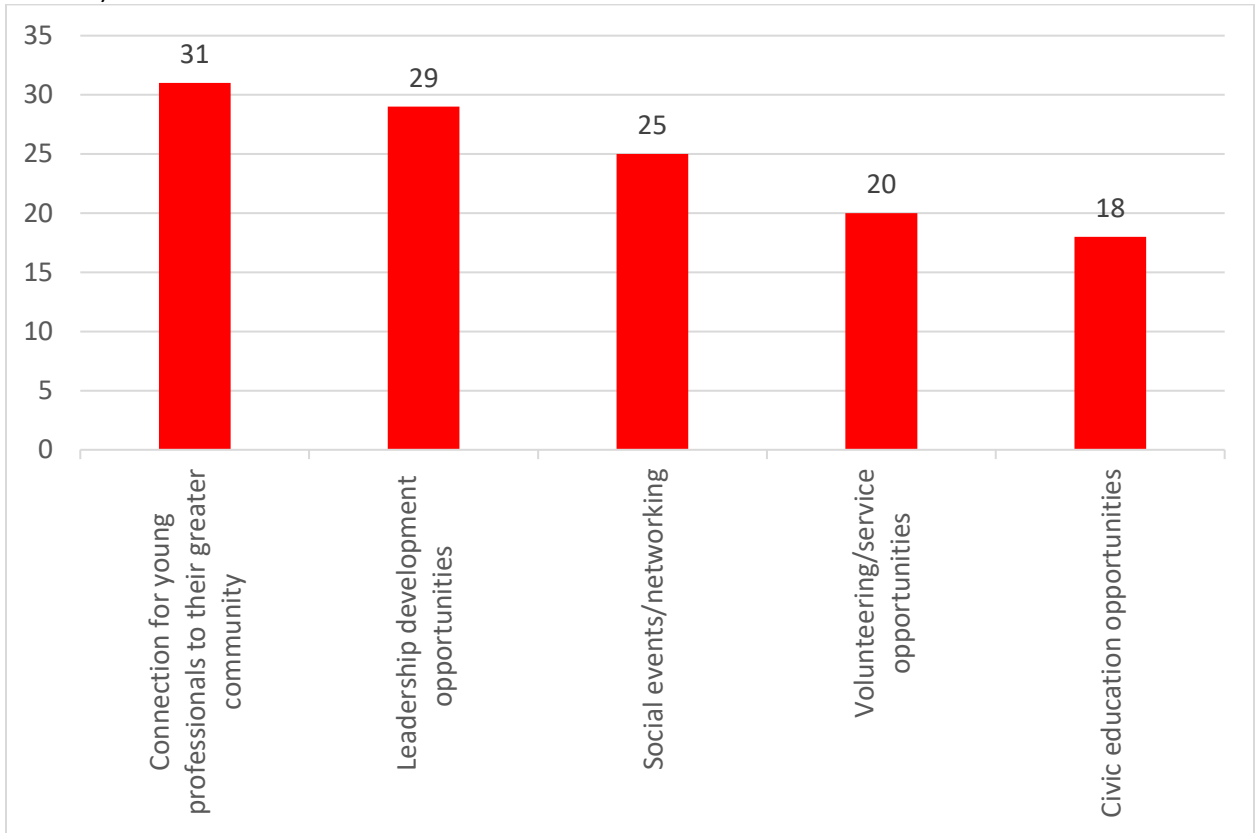
7. What sets Forum 225 apart? What does the organization do well?
 - Connection to young professionals (9 responses)
 - Leadership development opportunities (7 responses)
 - Interesting and meaningful programming (6 responses)
 - Fun social events (6 responses)
 - Impact on the Baton Rouge community (6 responses)

8. What are Forum 225’s biggest challenges as an organization? Where should it look to improve the most? Please consider both internal and external weaknesses.
 - Infrequent or low-quality communication (8 responses)
 - Quality or types of programming provided (5 responses)
 - Diversity of membership (5 responses)
 - Recruitment of new members (4 responses)
 - Having a deliberate and noticeable identity (4 responses)

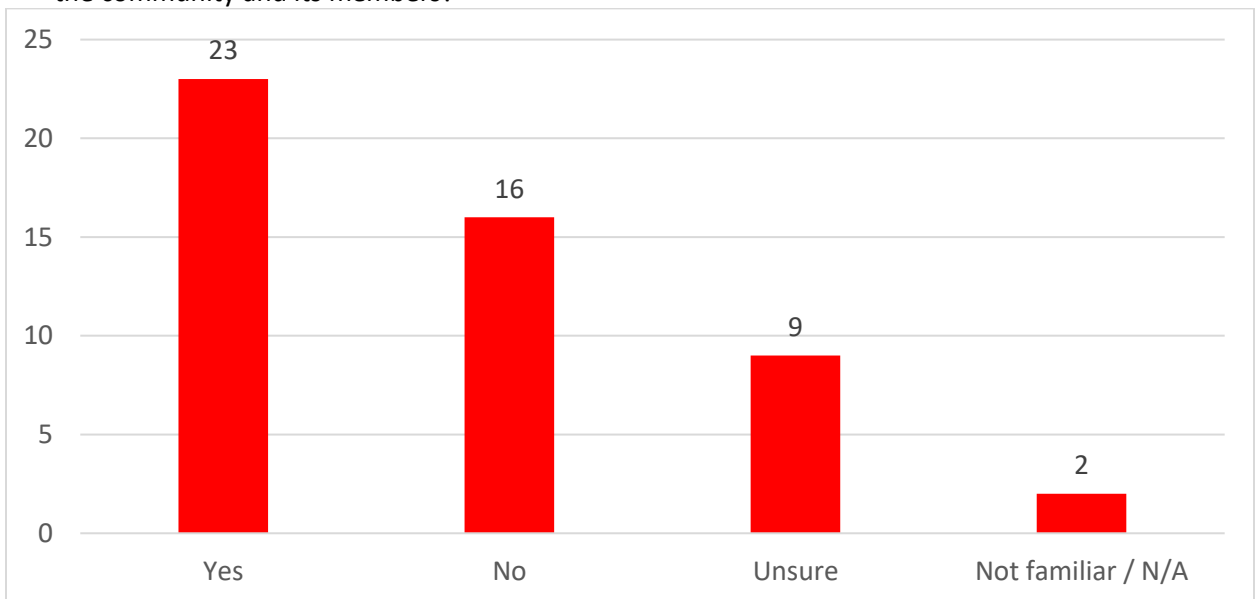
9. Rank the following areas of focus by their benefit to the Baton Rouge community (1 being the most beneficial and 5 being the least beneficial)

Focus area	Avg. Rank
Connection for young professionals to their greater community	2.5
Leadership development opportunities	2.6
Volunteering/service opportunities	3.2
Social events/networking	3.3
Civic education opportunities	3.4

10. Which of the following areas of focus are you most interested in? (You may select more than one)



11. Do you feel that Forum 225 adequately communicates upcoming events and opportunities to the community and its members?



12. What are the top three priorities that Forum 225 should consider and build upon over the next three years?
 - Service opportunities (11 responses)
 - Increased connections with professionals and the community (10 responses)
 - Recruitment of new members (9 responses)
 - Further leadership development of members (8 responses)
 - Higher-quality or increased programming (8 responses)

13. Are there priorities or initiatives that Forum 225 is currently focused on that it should stop investing in moving forward?
 - Specific recurring programming (2 responses)
 - Civic issues (1 response)
 - Low-attendance service projects (1 response)
 - Strictly social focus of events (1 response)

14. What are the biggest threats to Forum 225's future success?
 - Irrelevancy to young professionals and the capital region (7 responses)
 - Low participation at events (4 responses)
 - Poor or infrequent communication (3 responses)
 - Decreasing membership size (2 responses)

15. What would make you want to be more engaged with Forum 225?
 - Different types of events and programming (9 responses)
 - Improved communication (7 responses)
 - More focus on community improvement (2 responses)
 - More focus on connection with young professionals (2 responses)
 - Increased participation from members (2 responses)

16. Are there any specific challenges or barriers that prevent you from being more involved in activities?
 - Timing of events and programming (5 responses)
 - Lack of bandwidth outside work or personal life (4 responses)
 - Poor communication (3 responses)
 - Feeling aged out of the organization (2 responses)
 - Cost of events (2 responses)
 - Inconsistency of activities (2 responses)

17. Please provide any additional comments or feedback that you feel would be helpful to share as part of this strategic planning process.
 - Focus on member value (3 responses)
 - Focus on recruitment of new members (2 responses)
 - General approval of the organization (2 responses)

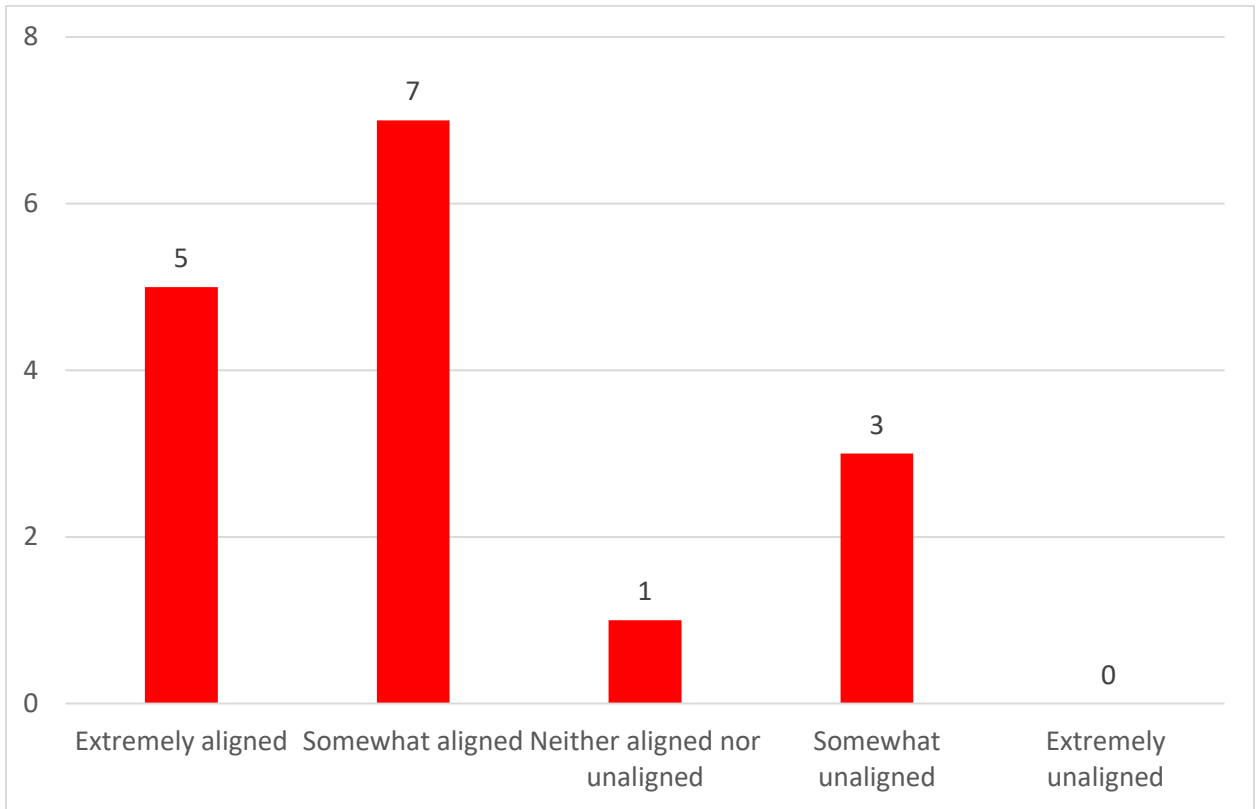
Appendix D- Board Survey Results

1. I am a:

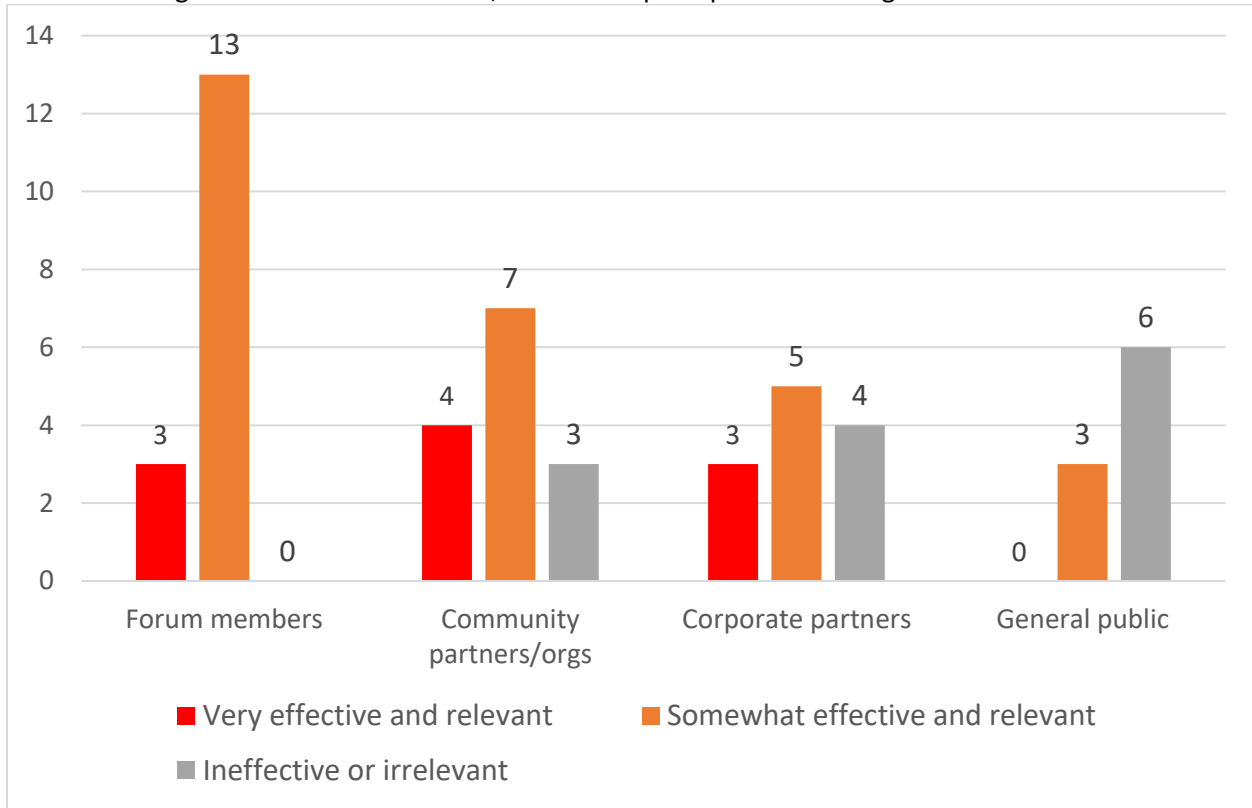


2. Forum 225's mission is to create opportunities for Baton Rouge young professionals to grow philanthropically, professionally, and civically. We're enhancing the vitality of the Baton Rouge community through civic-minded and service-oriented young professionals.

Please indicate how well-aligned you believe our initiatives, programs, and communications are with our mission.



3. Forum 225 has various stakeholder groups. In your opinion, what do these groups think about the organization? In other words, what is the perception of the organization?



Stakeholder Group	Average	Very effective and relevant	Somewhat effective and relevant	Ineffective or irrelevant	Unsure
Forum members	2.2	3	13	0	0
Community partners/orgs	2.1	4	7	3	2
Corporate partners	1.9	3	5	4	4
General public	1.3	0	3	6	7

4. What sets Forum 225 apart? What does the organization do well?

- Legacy in the capital area (3 responses)
- Breadth of offerings to members (2 responses)
- Diversity of membership (2 responses)
- Accessibility of the organization and further involvement (2 responses)

5. What are Forum 225's biggest challenges as an organization? Where should it look to improve the most? Please consider both internal and external weaknesses.

- Increasing member value (4 responses)
- Board support and structure (2 responses)
- Promotion of the organization (2 responses)

6. Please indicate your level of agreement with the following statements:

Statement	Average	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not familiar/NA
The board has a full understanding of its roles, responsibilities, and accountability to stakeholders. This includes board attendance and fundraising responsibilities.	2.3	0	1	1	3	1	3
The board's size is adequate for the organization's purposes.	3.7	1	4	1	1	0	2
There are an adequate number of well-functioning board committees and other work groups.	2.7	1	1	0	3	1	3
Board meetings are adequate in length and held at the right time of the day.	3.4	0	3	1	1	0	4
The board is appropriately diverse, with necessary stakeholder groups represented.	4.0	1	5	1	0	0	2
The board has a clear, effective process for recruiting new members.	2.3	0	0	3	3	1	2
The board utilizes an effective orientation process for new members.	2.9	0	2	2	3	0	2
The board regularly assesses itself.	2.6	1	1	0	4	1	2

The board conducts business in a positive, professional, and team-oriented manner.	3.1	2	0	2	3	0	2
The board culture encourages and welcomes open discussion, even when members disagree.	2.9	2	0	1	3	1	2
The board culture encourages innovation.	2.6	1	0	2	3	1	2
The board members are passionate about the organization's mission.	3.9	2	3	1	1	0	2

7. Please indicate your level of agreement with the following statements:

Statement	Average	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not familiar/NA
Board members understand the organization's mission, vision, and services/programs.	3.1	1	1	3	2	0	2
The board uses the mission and vision to inform decision-making.	3.4	2	2	0	3	0	2
Board members actively participate in strategic planning and ongoing strategic thinking.	2.9	1	1	1	4	0	2
The board attends to policy-related decisions, which effectively guide operational activities.	3.1	1	1	3	2	0	2

The board receives and understands regular reports on finances/budgets, service/program performance and other important matters.	4.0	1	5	1	0	0	2
The board ensures the annual budget reflects the organization's priorities.	2.6	1	0	3	1	2	2
The board regularly evaluates and develops yearly goals.	2.7	1	1	0	5	0	2
The board effectively represents the organization to the community.	3.6	1	2	4	0	0	2

8. Please indicate your level of agreement with the following statements:

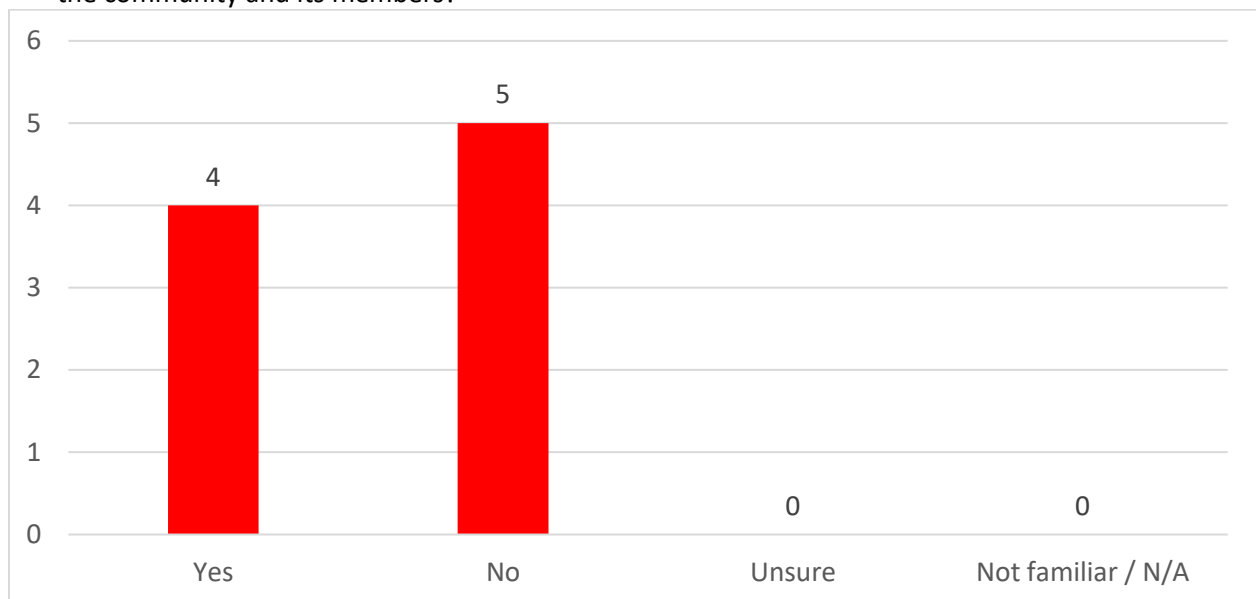
Statement	Average	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not familiar/NA
I fully understand my roles and responsibilities as a board member.	3.9	1	6	2	0	0	0
I am knowledgeable about the organization's programs and services.	3.7	1	4	4	0	0	0
I completely fulfill my duties as a board member.	3.5	2	2	2	2	0	1
I am providing adequate fundraising support for the organization.	3.0	1	3	0	3	1	1
I am an advocate for the organization in the community.	4.4	4	5	0	0	0	0

I find serving on this board to be a satisfying and rewarding experience.	3.9	2	4	1	1	0	1
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9. Rank the following areas of focus by their benefit to the Baton Rouge community (1 being the most beneficial and 5 being the least beneficial):

Focus area	Avg. Rank
Connection for young professionals to their greater community	1.8
Social events/networking	2.6
Leadership development opportunities	3.1
Volunteering/service opportunities	3.2
Civic education opportunities	4.3

10. Do you feel that Forum 225 adequately communicates upcoming events and opportunities to the community and its members?



11. What are the top three priorities that Forum 225 should consider and build upon over the next three years?

- Better communication to members (5 responses)
- Improving member value (4 responses)
- Enhancing or restructuring corporate partnerships (3 responses)
- Further connection to the community (2 responses)
- More service opportunities (2 responses)
- Leadership development for members (2 responses)
- New member recruitment (2 responses)

12. Are there priorities or initiatives that Forum 225 is currently focused on that it should stop investing in moving forward?
 - Stale events (2 responses)

13. What are the biggest threats to Forum 225's future success?
 - Being too rigid to pursue new opportunities (2 responses)
 - Decreased funding (2 responses)
 - Losing Forum 225's identity (2 responses)

14. What would make you want to be more engaged with Forum 225?
 - Better event planning (2 responses)
 - More event and engagement promotion (2 responses)

15. Are there any specific challenges or barriers that prevent you from being more involved in activities?
 - Work conflicts (1 response)
 - Board support (1 response)
 - Scheduling (1 response)
 - Lack of clarity around opportunities (1 response)

16. Please provide any additional comments or feedback that you feel would be helpful to share as part of this strategic planning process.
 - Need for board engagement (1 response)
 - Need for board cohesion (1 response)