



## Strategic Plan

Adopted September 17, 2014

Amended September 2, 2015

Amended September 21, 2016

Tatman Consulting  
P.O Box 82531  
Baton Rouge, LA 70887

Ph: (225) 767-7640  
Fax: (225) 767-7648

## Introduction and Purpose of Plan

The Executive Leadership of the Louisiana Funeral Directors Association met in Jonesville, Louisiana September 3-5, 2014 to conduct a Strategic Planning Retreat. During this time, the leadership of the organization reviewed and analyzed LFDA in order to develop a road map with the purpose of establishing a vision and aligning the resources of the organization with that vision.

The Executive Leadership of the Louisiana Funeral Directors Association met again in Jonesville, Louisiana September 1-3, 2015 to conduct a Strategic Planning Retreat Review. In addition to reviewing the 2014 Strategic Plan, the leadership participated in a Parliamentary Procedure training and reviewed the organizations structure.

The Executive Leadership of the Louisiana Funeral Directors Association met again in Jonesville, Louisiana September 19-21, 2016 to conduct a Strategic Planning Retreat Review. In addition to reviewing the 2014 Amended Strategic Plan, the leadership participated in a Board Orientation and reviewed the organizations structure.

## Process

The LFDA Strategic Planning process consisted of gathering of internal and external data prior to the Strategic Planning Retreat. The data included a membership survey, leadership survey, a historical review of the organization and other association data. The information was compiled and presented to participants as each major area was discussed. The retreat began with a discussion of the strategic planning process and agreement on that process. We began the discussion with a historical overview of the organization and conversation and recollections of the group. We moved to the SWOT analysis. From the SWOT analysis we reviewed LFDA's mission statement and identified goals and objectives. We further developed the goals and objectives through group discussion and exercises. Staff developed tactics based on the information gathered during the retreat process. The following is a draft of the LFDA Strategic Plan for consideration by the LFDA Board of Directors and membership.

## SWOT Analysis

The Louisiana Funeral Directors Association executive leadership utilized the SWOT (Strengths, Weaknesses, Opportunities and Threats) method to facilitate discussion during the Strategic Planning Retreat.

The Strengths and Weaknesses identified were issues that the executive leadership felt affected the organization internally.

The Opportunities and Threats identified were issues that the executive leadership felt affected the organization externally.

SWOT data was developed from input from LFDA Leadership, Staff, and Membership Survey. During the retreat the data was discussed and outlined to help develop Strategic Objectives for the organization.

### SWOT Analysis Cont.

	<i>Helpful</i>	<i>Harmful</i>
<i>Internal (to group)</i>	<p><b>STRENGTHS</b></p> <ul style="list-style-type: none"> <li>• Membership</li> <li>• Active past presidents</li> <li>• Established association</li> <li>• Laws &amp; Legislative Committee &amp; program</li> <li>• Lobbyist</li> <li>• Attorney &amp; Legal Guidance</li> <li>• Website &amp; Online Presence (i.e social media)</li> <li>• Experience</li> <li>• Knowledge</li> <li>• Financially stable</li> <li>• Disciplined</li> <li>• Networking opportunities</li> <li>• Relationships</li> <li>• Executive Board/Leadership</li> <li>• Executive Director/Staff</li> <li>• Continuing education</li> <li>• Student involvement</li> <li>• Association Management Company</li> <li>• Governance Structure</li> <li>• Enthusiastic &amp; passionate leaders</li> </ul>	<p><b>WEAKNESSES</b></p> <ul style="list-style-type: none"> <li>• Executive Board</li> <li>• Membership growth</li> <li>• Membership participating</li> <li>• Upcoming leaders</li> <li>• Leadership structure/duties/training; Governance</li> <li>• District level accountability (leadership)</li> <li>• Inactive past presidents</li> <li>• Voting process</li> <li>• Tangible benefits for members</li> <li>• Pricing structure for events</li> <li>• Vendor value</li> <li>• Legislative Grass Roots</li> <li>• Resistance to change</li> </ul>
<i>External (to group)</i>	<p><b>OPPORTUNITIES</b></p> <ul style="list-style-type: none"> <li>• Partnership with Embalmers Association</li> <li>• Partnership with MFDA</li> <li>• Funeral Home community involvement</li> <li>• Consumer education (i.e. clergy, etc.)</li> <li>• Have the Talk of a Lifetime</li> <li>• Membership recovery</li> <li>• Hospice</li> <li>• Professional/Political Development</li> <li>• Legislative Relationships/Engagements</li> <li>• Positive Change/modern evolvement</li> <li>• Faith based organizations</li> </ul>	<p><b>THREATS</b></p> <ul style="list-style-type: none"> <li>• Legislation (cemetery)</li> <li>• Cremation (cremating indigents)</li> <li>• Consumer apathy</li> <li>• Lack of consumer education</li> <li>• Pre-need (educating, funding)</li> <li>• 3<sup>rd</sup> party sellers (i.e. caskets)</li> <li>• National legislation (other states)</li> <li>• Laws and Regulations</li> <li>• Hospice</li> <li>• CE at state board meetings</li> <li>• Mortuary Schools (i.e. Delgado)</li> <li>• Lawsuits</li> <li>• Staff</li> <li>• Legislative/Regulatory/Legal</li> <li>• Industry change</li> <li>• Apathy</li> <li>• Faith Based organizations</li> <li>• Organizations (i.e. Kiwanis)</li> <li>• Social media</li> </ul>

## Goals & Objectives

The following objectives were developed by retreat participants through the strategic planning process. Each area was identified in the SWOT analysis and further developed through the process. The following are the top four areas of focus.

1. **Membership:** Improve recruitment and retention efforts to provide more valuable benefits for members.
2. **Communications:** Develop and improve LFDA's communications with members, consumers, and legislators.
3. **Governance:** Establish policies and procedures that hold leaders accountable for their duties and responsibilities.
4. **Programs and Events:** Create a branding strategy that promotes meaningful and valuable LFDA events (Establish LFDA events as the "Disney World" of the funeral industry).

### Goal #1: Membership

**Improve recruitment and retention efforts to provide more valuable benefits for members.**

#### **Objectives:**

- I. Enhance LFDA's recruitment and retention plan.

#### **Tactics:**

- a. Contact firms to find out why they are not interested in joining LFDA.
  - i. Survey non-members
  - ii. Survey non-renewals
- b. Update membership recruitment packet.
  - i. Develop a student recruitment packet
- c. Refine member benefits and educate non-members about LFDA's membership benefits.
- d. Create a student database so that staff can distribute information directly to them regularly.
- e. Share a list of LFDA firm members with students who are interested in working in Louisiana
- f. Encourage district governors to promote local state events.
- g. Include mortuary school contacts and students on member communications.
- h. Contact mortuary schools to see if LFDA can provide literature about the association to them to give to their students.
  - i. Communicate with student leaders the benefits of LFDA and resources available to them
  - ii. Schedule leadership to conduct LFDA presentations at mortuary schools for students

- iii. Research advertising opportunities at mortuary schools
      - iv. Explore social media opportunities with schools
    - i. Research promoting LFDA to individuals that participate in online learning (i.e. Commonwealth)
    - j. Maintain communication with past scholarship recipients
      - i. Contact recent recipients (Scholarship Committee Members/After graduation)
        - 1. Personal call from member of the Scholarship Committee or Executive Committee
        - 2. Send Congratulations card from LFDA after graduation
      - ii. Create presentation for current scholarship recipients to recognize them during the Annual Convention at the Luncheon
      - iii. Include testimonials on the website from past scholarship recipients
    - k. Create membership videos campaign
      - i. Highlight member firms and membership benefits (Similar to the NFDA campaign, "I am NFDA")
      - ii. Share videos through social media channels such as YouTube and Facebook
    - l. Improve LFDA database
      - i. Verify email address for each firm employee
- II. Increase participation and involvement on the state level.
- Tactics:**
- a. Create more distinct member and non-member registration fees for all LFDA events.
- III. Increase participation and involvement on the district level.
- Tactics:**
- a. Identify community events in each district for members to participate in.
  - b. Provide information to district governors before each district event to incorporate into their meetings that includes but is not limited to:
    - i. A state officer(s) attending the meeting
    - ii. Information on State events and activities ("State of the Union")
    - iii. Legislative Update ("cliff notes")
    - iv. Contact District Governors prior to each of their district meetings to discuss state updates and legislative activities that can be discussed and shared with the district membership
    - v. Provide a written report if a member of the Executive Committee or Staff is not able to attend
  - c. Encourage members utilize community events as an opportunity to engage and educate their local consumers about the funeral industry and the importance of memorialization.
  - d. Develop a key prospect recruitment plan.

- i. Identify three (3) key prospects in each district.
- ii. Work with the district governors to identify volunteers to engage the prospect(s) and carry out the recruitment plan.
- iii. Schedule personal visits with the volunteers and prospects.
- e. Research getting a traveling trophy or artifact that can serve as the official “Outstanding District Award” that can be presented to the winning District Governor at the Convention and kept until the next Convention

## Goal #2: Communications

### Develop and improve LFDA’s communications with members, consumers, and legislators.

#### **Objectives:**

- I. Create a marketing plan for the “Have the Talk of Lifetime” campaign.

#### **Tactics:**

- a. Identify experts in Louisiana to become trainers on the “Have the Talk of a Lifetime” campaign.
    - i. Research “train the trainer” opportunities that NFDA can offer.
    - ii. Identify key people that can become trainers in the state.
  - b. Establish a Continuing Education program on “Have the Talk of a Lifetime.”
  - c. Present Continuing Education program at District Meetings.
  - d. Expand on current “Have the Talk of a Lifetime” communications.
    - i. Include more information on the website.
    - ii. Develop pages on LFDA’s Facebook page that promote the campaign.
    - iii. Include articles in the newsletter.
  - e. Contact NFDA for resources on “Have the Talk of a Lifetime” to share with members.
  - f. Identify any legal issues associated with “Have the Talk of a Lifetime” and educate members on them.
  - g. Research the effectiveness of the campaign
    - i. Research how other states are utilizing the campaign and their effectiveness
    - ii. Identify complimentary organizations that can help promote the campaign
- II. Improve legislative Grass Roots efforts.

#### **Tactics:**

- a. Educate members on a district level.
  - i. Conduct mock discussions at district meetings to train members on how to communicate to their legislators.
  - ii. Identify legislators in each district and members that know their local legislators.
  - iii. Identify legislators that members in the area are not engaging with and coordinate meetings.
- b. Provide “cliff notes” on important issues.

- c. Attend the Elephant Stomp and Donkey Romp annually.
  - i. Research registration fees for the LFDA President and Laws & Legislative Committee chair to attend the event.
  - ii. Discuss incorporating an Annual Budget item for the President and Laws & Legislative Committee chair's registration for the event with the Treasurer and Executive Committee.
- d. Encourage district governors to invite legislators to their district events to speak.
- e. Research language that creates a new licensure for non-licensed funeral directors.

### **Goal #3: Governance**

#### **Establish policies and procedures that hold leaders accountable for their duties and responsibilities.**

#### ***Objectives:***

- I. Create an accountability structure for officers.

#### ***Tactics:***

- a. Define duties and responsibilities for each office.
    - i. Research 2 year term for officers
    - ii. Schedule an in-person "Annual Planning Meeting" with all officers immediately following the Annual Convention
  - b. Create a mentoring structure that educates and molds incoming officers.
  - c. Develop and conduct an officer training program annually.
  - d. Establish a process for the Executive Director to communicate with officers about their duties and responsibilities.
  - e. Direct the bylaws committee to address leadership issues in the bylaws.
  - f. Research the need for a Allied Member Committee
  - g. Encourage Past President participation
    - i. Continue hosting a Past President's luncheon at the Fall Meeting & Seminar
    - ii. Continue hosting a Past President's breakfast at the Annual Convention
    - iii. Encourage Past Presidents to attend Executive Committee Meetings regularly
  - h. Review LFDA insurance policies
    - i. Ensure that General Liability Insurance covers Districts
    - ii. Request quote for Directors & Officers Insurance
- II. Define a nominations process for incoming officers.

#### ***Tactics:***

- a. Create qualifications for nominees.
- b. Identify duties and time commitment.
- c. Confirm firm support of nominees.
- d. Review potential bylaw changes that incorporate the nominations process.

- III. Research the relationship between the State Organization and Districts.

- a. Determine the liability and legal implications that may exist between the entities.
- b. Review governing documents established by the districts. Help develop governing documents with district leadership if they are not in place.
- c. Research structural organization of districts
  - i. Research other State Funeral Director Associations' district structure
  - ii. Schedule meeting with CPA to discuss district tax requirements
  - iii. Gather historical and current district documentation to organize into a reference manual for each district governor and maintained by LFDA staff
    1. Bylaws
    2. Articles of Incorporation/Charter
    3. Tax Return
    4. Bank Information
    5. Agenda & Minutes
    6. Board Composition
    7. Etc.
  - iv. Research ability for LFDA to provide monetary assistance to districts

#### Goals # 4: Programs and Events

**Create a branding strategy that promotes meaningful and valuable LFDA events (Establish LFDA events as the "Disney World" of the funeral industry).**

#### ***Objectives***

- I. Maintain hosting events at destination type venues.
 

***Tactics:***

  - a. Research kid friendly host locations.
  - b. Incorporate a kid program into the Annual Convention.
  - c. Research locations north of I-10.
  - d. Research non-gender specific extracurricular activities that can be incorporated into events.
  - e. Research restructuring agendas at events to include more social events.
  - f. Incorporate a non-funeral related speaker into continuing education (i.e. comedian).
  - g. Research cost and logistics associated with having funeral directors volunteer to help staff at LFDA events.
    - i. Coordinate with MFDA on volunteer allotment at the Joint Annual Convention
- II. Increase perceived vendor value at events.
 

***Tactics:***

  - a. Create better venue access.
  - b. Research the necessity of a tradeshow floor at the Annual Convention.
  - c. Research opportunities for the vendors that are sponsors to address attendees during their designated event(s).



- d. Incorporate sponsorship video advertising opportunities at the Annual Convention
- III. Research opportunities to educate related industries.
- Tactics:**
- a. Research how LFDA can use Hospice Analytics to survey the state.
    - i. Contact Dr. Cordt Kassner
  - b. Research the ability for religious organizations, AARP, Hospice, etc. to promote the Have the Talk of a Lifetime campaign.
  - c. Research the guidelines and qualifications needed for LFDA to become an approved provider for hospice continuing education.
  - d. Encourage members to build and nurture relationships with clergy and hospice in their area. Research available resources from NFDA regarding guidelines for interacting with clergy and/or hospice.
  - e. Engage the governing body of hospice and schedule meeting for the LFDA leadership to sit down with them and develop a plan to work together on issues.

### Mission Statement

During the 2016 Strategic Planning Retreat Review, the Executive Leadership of the Louisiana Funeral Directors Association reviewed the LFDA Mission Statement and agreed that it still represented the mission of the association and decided to not make any changes to it at that time.

***“To promote integrity in the funeral service industry through education, legislation, networking and communications.”***

### Conclusion

The Louisiana Funeral Directors Association is a professional and trade association that has been in existence since 1918. Our membership is made up of funeral service professionals from across the state of Louisiana. The strategic planning process is an effort to chart a course for the future of LFDA while respecting the history and tradition of the association. These recommendations are offered to align the organization’s resources and vision. This drafted document is offered for consideration as a road map for the future of the association. We especially thank those individuals who have offered themselves as leaders of the LFDA over its long and storied history. We also thank those leaders who will take over the leadership of the organization in the years ahead. This document is an effort to create a connection between where we have been and where we are going.