

Led by LASA President Gil Joseph and Executive Director Milagros Pereyra, and facilitated by Alejandro Pinedo and Sakis Kotsantonis of KKS Consulting, the strategic planning process yielded a set of initiatives that will guide LASA's activities and resources for the next three to five years. These initiatives focus on: (1) managing growth and enhancing LASA's infrastructure; (2) new constituencies, primarily graduate students and Latin Americans; (3) revisiting what LASA is and stands for (LASA's identity); and (4) enhancing communications.

LASA could not have completed this project without the wisdom and work of an exceptional Strategic Planning Committee:

John Coatsworth, Past President (Columbia University) Claudia Ferman, Film Festival Director (University of Richmond) Merilee Grindle, Past President, Past Program Chair, and Past Treasurer (Harvard University) Gilbert Joseph, President (Yale University) Marysa Navarro, Past President and Past Program Co-Chair (Harvard University) Philip Oxhorn, LARR Editor in Chief (McGill University) Aníbal Pérez-Liñán, Incoming LARR Editor in Chief (University of Pittsburgh) Timothy Power, Treasurer, Past Program Co-Chair (University of Oxford) Catalina Romero, Past Executive Council Member (Pontificia Universidad Católica del Perú). Lars Schoultz, Past President (University of North Carolina, Chapel Hill) Kimberly Theidon, Past Executive Council Member (Tufts University)

Likewise, several members participated in interviews during LASA2015 in Puerto Rico, and more than 4,500 responded to the strategic planning survey.

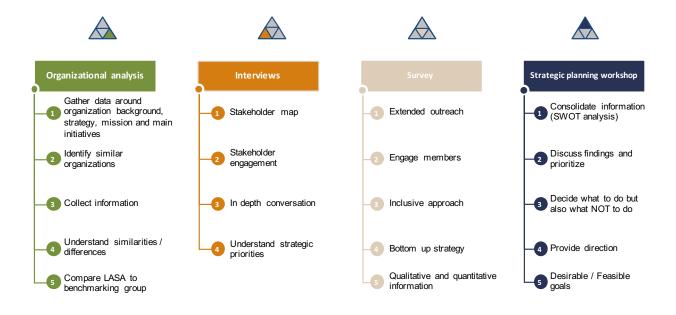
The following pages present a summary of the strategic planning process as well as the initiatives, steps for implementation, and a timeline.

LASA Strategic Plan

1 Summary

As part of creating a five-year strategic plan for LASA the following steps were performed:

- 1. **Organizational analysis:** Data was collected around LASA's organizational background, strategy, mission, and main initiatives. At the same time, data was collected from organizations similar to LASA to identify where LASA stands in comparison to peer organizations.
- 2. **Interviews:** A stakeholder map was created to identify key constituent groups. Interviewees were selected from each stakeholder group ensuring disciplinary, gender, and regional balance. Interviews were analyzed and codified by the consultants. The interviews provided a thorough understanding of strategic priorities for different stakeholder groups.
- 3. **Survey:** A survey was constructed using the responses and strategic priorities obtained during the interviews. The survey, offered in English and Spanish, was done in order to ensure involvement and engagement from the entire membership. This survey collected qualitative and quantitative data.
- 4. **Strategic planning workshop:** A strategic planning workshop took place to discuss findings, explore additional strategic goals, and prioritize initiatives.



1.1 Organizational Analysis

As a first step in organizational analysis, data was gathered around the current strategy, objectives, main initiatives, and mission of LASA. For this purpose, the LASA staff was engaged to provide the necessary information. Relevant documents such as LASA financial reports and statements, the 2003 LASA strategic plan, and the LASA orientation manual were reviewed to obtain a clear understanding of the organization.

Upon completion of the review of internal documents, in order to understand how LASA compares to similar organizations (and to explore emerging best practices), several organizations were identified from which public data was available. Data was gathered across six categories:

- Basic information about the organization
- Journal
- Membership information
- Governance
- Technology
- Engagement

The total sample consisted of 42 organizations. These included regional studies associations and subjectbased associations. Given the nature of the collected data, direct comparison using a quantitative system was not always possible.

Key Findings

- > LASA is one of the largest organizations in terms of its membership base.
- LASA is underutilizing technology channels (e.g., social media) to engage with its membership base.
- LASA's website seems outdated compared to websites from the other organizations of similar size.
- > The impact factor of the Latin American Research Review (LARR) is lower than the mean.

1.2 Interviews

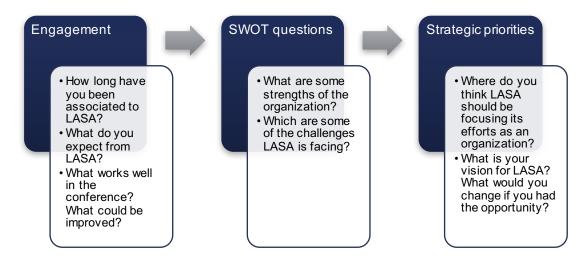
The second step of the strategic planning process consisted of interviews with individuals representing key stakeholder groups (Table 1). The interviewees were carefully selected to fairly represent LASA's membership ensuring disciplinary, gender, and regional balance. Interviews took place during the 2015 congress in Puerto Rico. Interviewees were asked a series of questions regarding their interest in LASA, their engagement with the organization, what they believe are some of its key strengths, and their opinion on LASA's strategic priorities for the next five years.

Table	1:	Stakeho	lder	Map
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Stakeholder Map				
Executive Council				
Ways and Means Committee				
Sections				
Donors				
Life Members				
Student Members				
Other Members				
Staff				

In order to get into more detail regarding LASA's strategic priorities, interviewees were asked about what LASA's strategic goals should be in the next five years and why they believe these are important for the organization, and also to provide ideas on how these goals can be achieved. A total of 44 individuals were invited and 26 interviews took place (Table 2).

Sample Interview Questions¹



¹ SWOT: Strengths, Weaknesses, Opportunities, and Threats.

Table 2: Stakeholders Interview Count

Stakeholder Interviews

Discipline	Invite	d	Interviewed	
Political Science	10	23%	10	38%
Anthropology	7	16%	4	15%
Sociology	5	11%	3	12%
Literature	11	25%	3	12%
History	<u>11</u>	25%	<u>6</u>	23%
	44		26	
Discipline Category				
Social Science	22	50%	17	65%
Humanities	22	50%	<u>9</u>	35%
	44		26	
Gender				
Male	22	50%	14	54%
Female	<u>22</u>	50%	<u>12</u>	46%
	44		26	
Region				
US / Canada	24	55%	18	69%
Latin America	11	25%	4	15%
Europe	5	11%	2	8%
Other Countries	4	9%	2	8%
	44		26	

Key Findings

<u>Strengths</u> Multidisciplinarity Networking opportunities Diversity Reach Size (visibility, recognition, resources)

<u>Challenges</u> Budget limitations Travel grants Low attendance by Latin Americans Limited use of technology Governance structure

<u>Strategic Priorities</u> Online/open access More attention to graduate students Improve communications between LASA and membership Further engage Latin Americans Improve transparency

1.3 Survey²

Creating a strategic plan should be a collaborative and engaging process of research, debate, and discussion that draws from multiple perspectives to determine the best plan for the future. Although the interviewees provided a very detailed and fair representation of the views from various stakeholder groups within LASA, we thought that the overall strategic planning process would be greatly enhanced if the broader membership base could be included. For that reason, a survey was prepared and sent out to LASA's members.

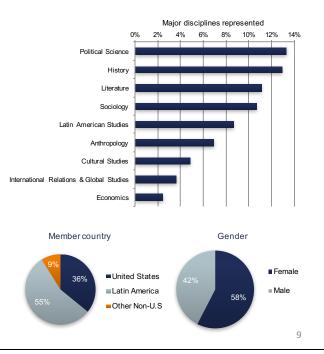
The findings from the organizational analysis and interviews helped in the creation of the survey questions. Questions were divided into categories containing both multiple choice questions and open-ended questions where more detailed views and opinions could be expressed.

Survey Categories

- > Values/engagement: Questions regarding engagement with LASA
- Congress: Questions about what works well during the congress and what kinds of changes people would like to see
- LARR: Questions on what people think about LARR
- Strategic priorities: Questions aiming to get the membership's views on strategic priorities and the future relevance of area studies
- > Communications: Questions regarding preferred communication channels with LASA

Survey Demographics





² Responses from new members or members with only one year of membership were removed from the dataset.

Key Findings/Highlights

Values/engagement: Questions regarding engagement with LASA

73%	Are familiar with LASA's objectives
63%	Regularly read the LASA Forum
59%	Receive the benefits they expect as a member of LASA
57%	Feel personally engaged with LASA
48%	Believe there is clear communication about LASA's achievements

Congress: Questions about what works well during the congress and what kinds of changes people would like to see

76%	Indicate that the congress is the primary reason to become a member of LASA
61%	Believe there are sufficient opportunities to network with Latin
	American scholars
43%	Attend presentations outside their own academic discipline
40%	Understand the difference between sections and congress program
	tracks
29%	Have institutional support to travel to LASA congresses

▶ <u>LARR</u>: Questions on what people think about LARR

59%	Believe that publications in LARR count toward their academic
	rank promotion and tenure
47%	Read one or more LARR articles in detail when published
40%	Believe that LARR has a strong reputation in their institution
33%	Believe that LARR's impact factor is satisfactory
7%	Indicate that LARR is their first choice of journal to submit a paper
	for publication

Strategic Priorities: Questions aiming to get the membership's views on strategic priorities and the future relevance of area studies

69%	Believe that LASA should be more active outside the annual
	congress
68%	Believe that LASA is open to all academic disciplines
56%	Believe that LASA makes good use of technology to communicate
	with its members
32%	Believe that LASA engages well with graduate students
27%	Believe that LASA generates sufficient opportunities to connect
	with colleagues from Latin America outside the congresses
24%	Believe that LASA has a strong presence outside its annual
	congress
85%	Believe their own research is interdisciplinary in nature
70%	Believe that scholars in their academic discipline are supportive of
	interdisciplinary/area studies
34%	Believe that, in their professional life, they feel pressured to focus
	on disciplinary activities rather than on area studies

> <u>Communications</u>: Questions regarding preferred communication channels with LASA

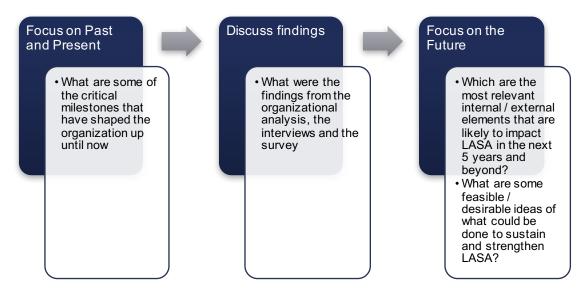
53%	Believe that the frequency of communications with LASA is satisfactory
45%	Frequently visit the LASA website to check for news and updates
45%	Prefer communication via email
26%	Prefer communication with website
18%	Prefer communication via Facebook

1.4 Strategic Planning Workshop

The strategic planning workshop took place in New York on November 7, 2015. The workshop had 11 participants and lasted a full day. During the workshop the findings from the interviews and the survey were presented and the group developed and prioritized a list of strategic issues that now form the basis of the strategic plan. These steps took place during the workshop:

- 1. **Identification of initiatives for LASA:** Findings from the interviews and survey were grouped under specific high-level initiatives that LASA and its resources should be focusing on over the next five years. The group's brainstorming session resulted in an extended list of initiatives that would create the highest impact for LASA and its members.
- 2. **Prioritization:** The group then prioritized these initiatives. The prioritization criteria were: (1) the significance of each initiative; (2) the expected impact from taking action; and (3) the availability of resources.
- 3. **Planning:** The prioritized initiatives were discussed in greater depth in terms of the strategic direction for each initiative, what success would look like, example activities that could be undertaken, etc.

Workshop Approach



Strategic Planning Overview and Budget

By combining key findings (from the organizational analysis, interviews, and survey) with LASA's vision, the strategic planning workshop participants determined four initiatives that capture LASA's strategic direction for the next five years.

Key Findings	Vision	Initiatives	Annual Budget
The Secretariat is perceived as doing a good job with increasing demands and limited resources. Given the growth of the organization, its governance and Secretariat structure needs to be revised.	Asses the governance/Secretariat structure of the organization and adapt it to be aligned with membership growth. Create new roles as appropriate.	Managing Growth Ensure that LASA has the structure to support its recent and future growth.	Evaluation*: \$42,000 Additional salaries: TBD
Graduate students now represent a significant part of the membership. Initiatives around how to better engage the graduate student community need to be explored.	Engage graduate students.	<u>New Constituencies</u> Explore options to better engage with graduate students and Latin Americans.	Students/career portal: \$18,000 Other: TBD
Cost is the major obstacle to attending the congress. Options need to be explored to expand travel grants.	Expand travel grants for Latin Americans.		TBD
LASA is viewed as the go-to place for Latin American studies. LASA's main strengths are diversity, multidisciplinarity, and opportunity for networking.	Make sure that LASA remains relevant during and between / beyond congresses.	Identity Maintain LASA's relevance and achieve its mission in new ways.	Evaluation*: \$55,000 Implementation: TBD
Several perceptions exist that do not represent the reality. Improving communications with LASA's membership base could address this issue.	Develop a communications strategy and modernize LASA's communications channels.	<u>Communications</u> Improve communications to address perceptions and better reflect progress and achievements.	Additional salaries and benefits: \$70,000 New digital portal: \$20,000 Other: \$30,000

*Year 1 (2016)

Strategic Planning Timeline (High Level)

Overall High-level strategic plan 2017 2018 2019 2016 2020 Review Secretariat's Implement changes / Operating Model recruitment Enhance EC's Ensure appropriate oversight of the strategic plan Managing Growth functional role Review of membership Implement membership policies policy changes Brand strategy definition Review and define LASA's Identity verbal / visual identity and Engagement and dissemination imagery Analysis of communication, opportunities and channels Intro new channels, social media, Forum Communications Develop new digital portal Improve communications during and beyond the congresses Operationalize inclusion of graduates Create careers portal New constituencies Explore ideas on how LASA can be active outside congresses Further assist Latin Americans / Expand travel grants

2 Initiatives Detail

2.1 Initiative: Managing Growth

LASA has experienced a very significant growth in its membership base over the last few years. The critical question the organization needs to answer is how to best support its recent growth and develop the capabilities needed for future growth. The issues identified in terms of supporting and managing growth were around the structure of the Secretariat, the Executive Council (EC), and membership policies.

Secretariat: The association's governance structure is seen as solid, respected, and efficient. At the same time, the Secretariat has been found to be overwhelmed with work and most probably understaffed. As the organization is growing, the Secretariat needs to also match this growth. Therefore, a very important activity that was identified was to review and evaluate the structure and resources of the Secretariat team and develop appropriate recommendations. This review was suggested to be carried out by a third party with expertise in organizational design and operating models.

EC: The current format of the EC presents several challenges: the tenure of the current members and the meeting frequency does not allow for full utilization of the EC members' skills. The changes in EC's leadership present difficulties in ensuring the continuity of initiatives that have been decided by past committees. At the same time, the strategic plan activities span a five-year period, highlighting the necessity for continuity. In order to address such challenges, different activities were suggested such as the creation of a "standing committee" with longer tenure than the EC, composed of EC and non-EC members.

Membership policies: The current growth of the membership base presents an opportunity to review the appropriateness of the membership policies.

Table 3 summarizes the activities that will be included in the Managing Growth initiative.

Activities description	Steps for implementation	Responsible party	Timeline
Review Secretariat's operating model and implement changes This initiative involves a full review of the operating model* of the Secretariat. Items such as current roles and responsibilities, internal processes, and software tools will be reviewed to identify what the strengths are and where the gaps lie. This review will also include exploring opportunities to develop new roles as appropriate (e.g., communications officer), and also understand the connection with the University of Pittsburgh and the impact the organization's growth has in this relationship. The review will lead to the development of a target operating model, which will enable the Secretariat to manage LASA's future growth.	 Document and analyze current operating model. Identify gaps and develop target operating model. Present results and recommendations to the EC. Implement changes in processes/roles and responsibilities/technology. Run recruitment process for new roles. Fill new roles. 	External third party Secretariat	February 2016 to December 2016
Enhance EC's functional role Two main initiatives were identified that can address the challenges associated with the current EC format. The first one would be to review the regularity of the EC meetings. This review should not only explore the addition of another face-to-face meeting but also the possibility of a virtual meeting with specific agenda items (e.g., reviewing the progress against the plan). The second initiative, which would aim mostly to ensure the continuity of initiatives and the realization of the strategic plan action items, is the establishment of a committee or committees responsible for certain tasks (e.g., oversight of the strategic plan, fund-raising, etc.) with longer tenure than the EC.	 Review regularity of EC meetings. Propose format of new meeting (if necessary). Implement changes in EC's operations. Committees submit updates/proposals to EC, relevant to their tasks. 	Secretariat in collaboration with EC	February 2016 to December 2017
Ensure appropriate oversight of strategic plan This activity aims to ensure the continuity of the initiatives and the realization of the action items of the strategic plan. For this purpose, the establishment of a committee (oversight committee) responsible for certain tasks (e.g., oversight of the strategic plan, fundraising, etc.) was suggested.	 Develop proposal for the creation of oversight committee. Define committee's role and responsibilities (agree on and document working assumptions). Committee submits quarterly reports/review of the Strategic Plan to the EC. 	Secretariat with two newly appointed ex officio members	2016-2020
Review of membership policies This initiative aims to streamline membership policies with the purpose of simplifying them, while at the same time reviewing the costs as a function of the benefits provided to the members	 Perform landscape analysis of other organizations' membership costs and benefits. Utilize survey data to identify opportunities for cost changes to specific groups. Develop recommendations based on findings and present to EC for approval. Identify opportunities for streamlining membership policies and implement changes. 	Secretariat in collaboration with an appropriate committee	January 2017 to December 2017

Table 3: Managing Growth Activities

* An operating model is the way people, technology, and processes work together to deliver a common objective.

2.2 Initiative: New Constituencies

The possibility for LASA to engage with new constituencies was discussed during the strategic planning workshop. The survey results showed that the membership base would prioritize professional disciplines first, followed by natural sciences and formal sciences. Nevertheless, it was decided that LASA should ensure that priority would be given first to the new constituencies coming from within LASA, e.g., graduate students. The number of graduate students joining LASA has been growing, and now they are almost 25 percent of the membership. LASA decided that further engagement and opportunities must be given to this very important stakeholder group.

Together with graduate students, it was also determined that more effort needs to be put into Latin American scholars and students in terms of helping them attend the conference either by providing more funding opportunities or by utilizing technology.

Table 4 describes the activities that will be included in the New Constituencies initiative:

Activities description	Steps for implementation	Responsible party	Timeline
Operationalize inclusion of graduates This initiative aims to make the relationship with the graduate student community more formal. As a first step a student representative would be elected to be part of the EC. The way this process will work needs to be examined due to the fact that students will remain under the student status for a limited number of years. Once this process is established, the student representative will serve as a concrete mechanism for the student voice within LASA and its governance.	 Create process around graduate representation in the EC. Present plan for further engagement with graduates at LASA50. Establish meeting with graduates at the conference. Set agenda (aim is that graduates are prepared for this meeting). Collect concerns, issues raised, minutes. Elect graduate representative to the EC, attend first meeting, collect feedback on participation, review feedback and decide next steps. Explore ways to ensure continuity and set expectations by appropriate communications. 	Secretariat with EC	May 2016 and ongoing
Initiatives outside the congress: Career development LASA can be a platform where members may and should receive multiple benefits outside the congress. This initiative is targeted for graduate students, for whom finding a job is a major concern. LASA could assist students by providing advice on career development and how many of the skills acquired during a doctorate degree are transferable outside academia. LASA can leverage the industry's constant search for	 Explore ideas on how LASA can be active outside the congress. Assign oversight committee with the task of developing and presenting ideas for LASA's activities outside the congress. Develop, design, and implement plan for graduate and professional career services. Approach sponsors. Encourage companies/organizations to partner with LASA 	Secretariat with appropriate committee Secretariat with dedicated communications professional	January 2017 to December 2017
new talent and collaborate with major corporations in developing such programs. Further assist Latin Americans Cost is one of the major reasons Latin Americans find it difficult to attend the LASA Congress. For this reason, it is recommended that LASA puts more effort into finding ways to expand the travel grants program. At the same time, LASA will also advertise more systematically what has already been achieved in terms of providing help, promote transparency, and show the success to the membership at large.	 on professional development activities. Collect and review feedback. Design metrics that communicate LASA's efforts towards the inclusion of Latin Americans (e.g., percentage of Latin Americans attending the annual congress, number of travel grants). Establish goals for expanding the number of travel grants. Explore further funding opportunities (engage development committee). Aggressively seek capital that will enable the institution to support the new established goals. 	Secretariat with dedicated communications professional Appropriate committee(s)	May 2016 and ongoing

Table 4: New Constituencies Activities

2.3 Initiative: Identity

Determined as a strategic priority, this initiative is about reviewing, updating, and redefining what LASA is and stands for, making sure that it remains relevant to all of its stakeholders. It consists of a full review of LASA's brand identity, ensuring that key messages are clearly conveyed to all audiences and reflect the full spectrum of the association's activities.

Some of the objectives and expected results are:

- Clarify and better reflect what the association is today, reinforcing its five-year strategy.
- Review and update the messages and terminology being used by LASA, making sure they remain relevant to all members and constituents.
- Help build and strengthen LASA's identity outside of the congresses.
- Prompt and facilitate multidisciplinary integration and communication during, within, and beyond congress activities.
- Improve open access and open dialogue (becoming more diverse and plural).
- Guide and improve LASA's communication level.

This initiative will be addressed through a specific brand identity project to be implemented by a specialized thirdparty firm. A detailed project proposal has been requested for this purpose.

Table 5 summarizes the activities that will be included in the brand identity project:

Table 5: Identity Initiatives

Activities description	Steps for implementation	Responsible party	Timeline
Review LASA's identity (brand strategy) LASA's brand identity will be reviewed to reflect and maximize the business strategy. Activities will analyze the why and what, defining the association's mission, principles, target audiences, and value drivers, and articulating a brand positioning that clearly conveys what LASA is and does.	 Develop the <i>brand platform</i>, including mission, principles, and definition of target audiences, demand drivers, and brand positioning. This <i>platform</i> is the basis from which the verbal and visual identity will be developed. 	Secretariat with third-party brand consultancy firm	Project runs from March through December 2016
Review and define LASA's verbal identity, messages and terminology This initiative focuses on reviewing all verbal expressions of the brand to update terminologies, define key messages, and find the <i>tone of voice</i> that authentically reflects LASA's brand personality. It includes the creation of guidelines to ensure consistent application throughout all communication channels.	 Review current verbal identity to understand what is missing or could be updated and improved. Define key messages and the association's tone of voice. Review and define updated and consistent terminology Create verbal application guidelines to ensure brand consistency. 	Secretariat with third-party brand consultancy firm	Project runs from March through December 2016
Review and update LASA's visual identity and imagery This activity focuses on reviewing all visual expressions, such as its logo, fonts, icons, and other elements, making sure they are aligned with LASA's strategy. It includes an analysis of the website and LARR from the visual identity aspect, pointing to eventual opportunities to update their layout. It also includes the creation of visual guidelines to ensure consistent application in all communication channels.	 Review main visual contact points such as the logo, fonts, icons, and other visual elements to make sure they are updated and aligned with current strategy. Review website and LARR layout. Create visual application guidelines to ensure brand consistency. 	Secretariat with third-party brand consultancy firm	Project runs from March through December 2016
Engagement and dissemination This activity seeks to explain and communicate LASA's identity and strategy to key stakeholders, making sure everyone is aware, supportive, and on board. It will be implemented throughout the U.S. and Latin America, using printed/electronic presentations and/or in-person meetings when possible. Additionally, a platform should be provided for LASA's identity to be discussed.	 Create comprehensive presentation(s) targeted at key stakeholders to present and explain LASA's strategic goals and newly revised/created brand identity. Hold remote meetings and presentations in the U.S. and Latin America (where available) to communicate LASA's strategic goals and brand identity to key regional stakeholders. Collaborate with communications team to include blogs in the new LASA portal. Review and redesign the LASA Forum. 	Secretariat with third-party brand consultancy firm	Project runs from March through December 2016

2.4 Initiative: Enhancing Communications

This strategic initiative is about how LASA communicates and will review the ways in which LASA communicates, aiming to improve the clarity and effectiveness of its messages to all key audiences.

It will specifically consider opportunities to improve communication at congresses and *beyond* congresses, as well as on existing channels, such as the website/portal, LASA Forum, LARR, email messages, and newsletters. New, interactive opportunities to communicate and engage taking advantage of social networks and other digital infrastructures will also be considered by this strategic initiative.

Table 6 describes the activities that will be included in this initiative.

Activities description	Steps for implementation	Responsible party	Timeline
Analysis of communication activities, opportunities and channels Conduct a thorough analysis of what is done today, the results, and management's satisfaction level. From this analysis, other activities will be defined to identify opportunities and additional channels that can be used by LASA to improve its mode of communication.	 Analyze and assess effectiveness of current communication activities and channels. Develop short-term (two-year) communication plan and budget, for immediate implementation. 	Secretariat with dedicated communication professional	ASAP 2016
Develop new digital portal (website) Review and update LASA's website seeking more agility and interactivity with target audiences. Consider specific moderated areas for members, graduate students, and job section targeted at Latin American audiences.	 Hold internal discussions to gather requirements (description, briefing, etc.) for new digital portal. Outsource the creation and design of the portal to a web development team. Create role of moderator for digital portal content. 	Secretariat with dedicated communication professional	June 2016 to April 2017 (ready prior to 2017 congress)
Improve communication during the congress Activities will include improving and expanding access to content from the congress, such as webcasting and posting congress sessions on digital channels (e.g., YouTube), introducing interdisciplinary panels, and special networking areas for graduate students.	 Webcasting: define which sessions could/should have webcasting and what budget and technology are needed. Open new digital channels; curate and populate content for distribution. Plan and deliver interdisciplinary panels; communicate their novelty. Create specific sessions and networking opportunities for graduate students/members. 	Congress organization team	Start ASAP and ongoing for next congresses
Improve communication beyond congresses This activity will look into evolving the LASA Forum and the association's presence and dialogue in social media (for example, groups at LinkedIn and other relevant forums).	 Review LASA Forum format and effectiveness; redesign seeking updated format. Define social media presence, content, and maintenance plan linked to new portal and channels. Define additional activities and channels derived from communication plan. 	Secretariat with dedicated communication professional	ASAP 2016

Table 6: Enhancing Communication Activities