



Michigan Veterans Trust Fund

Strategic Plan

Version: 12/8/2020



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MICHIGAN VETERANS TRUST FUND

Strategic Plan

Executive Summary

This strategic plan for the Michigan Veterans Trust Fund (MVTF) is a combined effort of the Board of Trustees, the MVTF Director, Lindell Holm, and his administrative staff. This document contains the strategic planning elements (mission, values, goals, objectives, tasks, and measures). It also highlights the alignment to the Michigan Department of Military and Veterans Affairs (DMVA) and housed within it, the Michigan Veterans Affairs Agency (MVAA). Finally, the document also contains suggestions of next steps to be taken by the Board and an appendix.

The impetus to do a strategic plan for the Michigan Veterans Trust Fund is tied to the celebration of their 75th anniversary in 2021. By doing a strategic plan, the MVTF seeks to safeguard the corpus body and offer additional programs to better meet the needs of Michigan veterans and their dependents. The MVTF Board of Trustees work continuously to identify what path(s) to take in the future to serve the veteran population in Michigan.

The plan itself looks forward over the next 5 years, and to that end, they have outlined four major goals (or targets) to meet:

- Develop and invest in veterans to become community leaders and promote veteran issues
- Invest in programs benefitting and supporting Michigan's veteran community
- Ensure the long term-term fiscal stability of the corpus to support the priorities of the Board and
- Modernize the MVTF Operations

Each identified goal has definite outcomes that the Board wishes to achieve. They have also identified tasks and measurements to meet those goals. As with all planning, it will take time, effort, and resources of the Board, MVTF director, administrative staff and working with others to be successful.

In addition, to the plan itself, this document also contains an Appendix, which discusses further information on the planning efforts. On page 17 is a one-page summary outlining the Strategic planning elements. There are also additional documents that accompanied this plan. They are the Design document, the Strategy chart, and a Timeline. The Design document outlines in detail the work done in each phase by the Board and serves as a reference document in further planning. The Strategy Chart is a graphic summary of the plan and the Timeline identifies when critical elements are projected to be completed.

As with all strategic plans, this plan is a living document, or beginning step, as the Board and Director will need to meet, review and revise it yearly to consider changes and whether they have met the goals identified.

Mission and Values

Following are some of the basic elements of the plan, the mission, validation, and values statements, along with reference to the to DMVA/MVAA's statements.

MICHIGAN VETERANS TRUST FUND MISSION STATEMENT

To spearhead the Michigan Veteran community's efforts to help themselves.

This aligns to the MVAA's vision as the central coordinating agency for the state, providing support, care, advocacy and service to veterans and their families.

To do this successfully, the Board of Trustees has defined goals to succeed:

MICHIGAN VETERANS TRUST FUND GOALS

- Develop and invest in community leaders that promote veteran's issues
- Invest in programs benefitting and supporting Michigan's veteran's community
- Ensure long-term stability of the corpus to support the Board of Trustees
- Modernize MVTF operations

MICHIGAN VETERANS TRUST FUND VALIDATION STATEMENT

The MVTF seeks to support veterans and their dependents (aligning with MVAA) by:

- Championing their needs
- Promote the general welfare of veterans and their dependents to reach financial responsibility and reach and maintain fiscal responsibility
- Provide necessary assistance for current and future generations of Michigan veterans.
- Empowering veterans to lead high quality lives with respect and dignity.

In addition to the mission and the value statement, the MVTF has identified core values, or beliefs the MVTF holds. They reflect the expected behaviors of staff and reflect the values of the MDVA and MVAA.

MVAA and the MICHIGAN VETERANS TRUST FUND VALUES

- **Respect**-Treat everyone the way you want to be treated
- **Integrity**-Always do the right thing with honesty and openness
- **Service**-Exceed expectations with innovative and collaborative solutions
- **Excellence**-Strive for the highest quality and continuous improvement

Introduction

About the Michigan Veterans Trust Fund

Michigan Veterans Trust Fund has been helping veterans and their families for over 75 years by dealing with financial needs due to unforeseen expenses. The MVTF structure is composed of Board of Trustees, county and regional committees and administered by a Director and staff, all housed within the MVAA. The major program, called the Emergency Grant Program (EGP), is intended to aid veterans to overcome a temporary or short term financial emergency or hardship that a grant will resolve and the applicant can demonstrate the ability to meet future expenses.

Organizational Identity-MVTF's History and Authorities

In 1946, the Michigan Legislature signed into law, Public Act 9 of 1946. This created the MVTF to help World War II veterans. The law defined eligibility for assistance, disbursement of funds and the creation of governing bodies and administration of the fund. The MVTF is governed by a Board of Trustees and the law provided for the establishment of county/district committees and explained the powers and duties of both.

In 1966, the Michigan state constitution was amended to create the Michigan Veterans Trust Fund and the Board of Trustees to administer the Trust Fund. The constitution gives sole fiscal authority to expend Trust Fund assets to the Board of Trustees "for the benefit of veterans or their spouses or dependents."

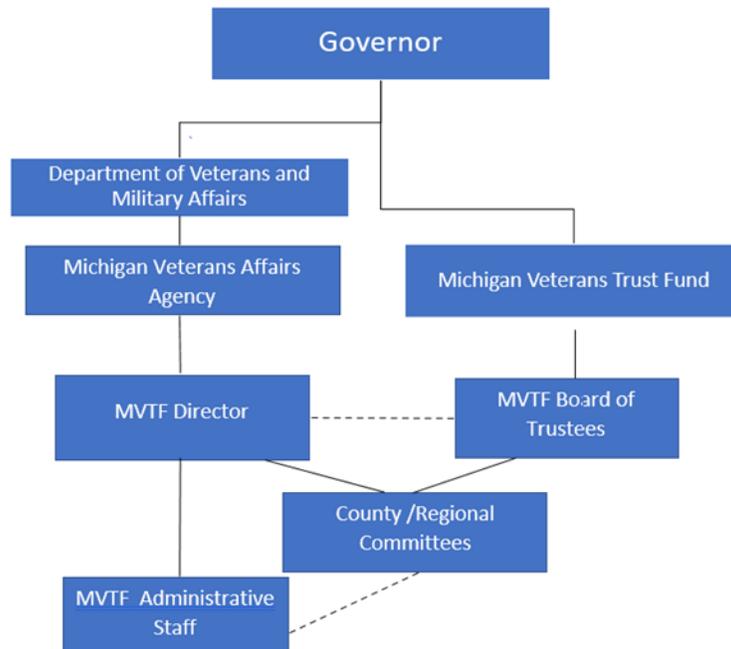
Organization and the Emergency Grant Program

The MVTF is governed by a Board of Trustees appointed by the Governor. The seven-member board has legal authority over all expenditures of the fund, the Emergency Grant Program and its policies that include Board reviews of certain applications and appeals of disapproved applications. The sole intent of the EGP is to help veterans and their dependents to overcome short term financial emergencies. To be approved, applicants must demonstrate that they have an unexpected short-term financial emergency and possess the ability to maintain their future living expenses if a grant were provided. Individual requests for emergency grants are initiated at the local level and considered by County/Regional committees appointed by the Board to review and approve or deny, or recommend approval of the applicant's request to the Board of Trustees if necessary.

As stated above, the director and administrative staff are located in DMVA/MVAA to oversee the EGP. They prepare cases for Board reviews and appeals, payment of grants and other expenses, and the maintenance of applicant records through a Customer Relations Management (CRM) system called Salesforce. They are located within the MVAA which serves as the central coordinating agency for the state, that provides support, care, advocacy and service to veterans and their families. The Board has worked those ideals into their planning efforts.

MVTF Organizational Structure and Alignment

This chart shows the alignment of MVTF to the Governor's Office and to the DMVA.



Strategic Plan Framework

The strategic plan finalized by the Board looks forward over the next 5 years, and to that end, they have outlined four major goals (or targets) to meet, along with objectives, tasks, and performance measures. This document summarizes these efforts and contains:

- Purpose
- Introduction- Organizational Structure
- The Plan Elements
 - Mission
 - Goals with strategies and outcomes
 - Objectives
 - Primary Players
 - Key Tasks and
 - Performance Measures
- Next Steps
- Appendix

Purpose

As the MVTF approaches its 75th year, the Board has decided to embark on a strategic planning process to better assess and meet the needs of veterans in a world that has changed immeasurably since 1946. The Board has witnessed an overall change in Michigan's veteran population and their families. First, there has been an overall decline of the numbers of veterans in Michigan and second, a change in demographics (age, gender etc.) of veterans along with other issues, necessitated a review of the efforts of the Fund. To that end, the Board realized a growing need for redefining the MVTF's duties. The Director, along with the Board of Trustees want to add public value by expanding in other areas, along with ensuring the financial stability of the fund in the 21st century.

Early in its history the MVTF has been used to support education programs for veterans and their children as well as vocational training and an orphanage. However, for the past seventy-four years, the MVTF has been most known for providing emergency grants to eligible veterans and their dependent family members experiencing financial hardships. Under this program, the MVTF has covered unexpected emergent needs ranging from utility bills, home repairs, mortgage assistance, and, most recently, damage to veteran's homes caused by the Sanford Lake Dam failure. While the EGP has done much to provide immediate temporary assistance to veterans facing adverse circumstances, the MVTF has done little to address the comprehensive health and vitality of the Michigan veteran community. For the above reasons, the Director, Lindell Holm, began to engage the Board in strategic discussions about changing veteran demographics and how this would impact current and future generations of veterans. In those conversations, it became clear that there was a need to conduct a more formal assessment and to determine the role the MVTF would play in helping to craft a better future for Michigan veterans. Therefore, they embarked on a strategic plan to outline their future.

Process

The overall strategic planning effort for the Board was facilitated by the Department of Management of Technology, Management and Budget (DTMB) Engagement and Performance Division (EPD) of the Office of Continuing Improvement (OCI). The planning efforts took a year of meetings with the Board, the director, and staff. The plan, took in 4 phases, including planning, current state, future state, and execution. Four main goals were identified along with a list of objectives and tasks. Those all aligned with MVAA's strategic planning efforts. (See the enclosed chart on page 7).

Each identified goal has definite outcomes (or consequences) that the Board wishes to achieve. The outcomes correspond directly to the goals stated above. They will take time, effort, and resources of both the Board and the administrative staff to be successful.

The outcomes are:

- Veteran leaders will become actively engaged and influential in their communities
- A healthy, vibrant, and visible veteran community in Michigan
- A viable stream of capital to fund the necessary programs
- Efficient and user-friendly products and services for veterans

The Board of Trustees seeks to work with and align to the Michigan Veterans Affairs Agency (MVAA's) initiatives. This offers support, care, advocacy and service to the veterans and their families. The Board along with the MVAA is identifying strategic opportunities that will enhance the efforts of the MVAA. In 2021 and beyond, the MVTF seeks to redefine itself as more than just an emergency grant program. In addition to giving out funds, the Board seeks to make veterans more visible, create leaders and advance issues unique to veterans in the community and statewide.

Alignment to DMVA Strategic Plan

The MVTF's strategic plan reflects back to a critical piece of MVAA's "Member for Life" concept, which garners recognition for its programs through preparation and the ability to utilize opportunities and maximize their effectiveness. They aim to be in the top one-third of all states for services, benefits and resources provided to veterans. Becoming a top one-third state for connection of benefits will lead to national recognition and improve the availability for grants, pilot programs and special studies. To that end, the MVTF's Board of Trustees has identified specific steps to take in the future to meet those goals.

The MVTF strategic plan seeks to complement and enhance the DMVA's vision of excellence to become the premier state for serving veterans and their families. It does so by maintaining the commitment to assist veterans and their families in times of crisis through the EGP but also seeks to expand upon the Board of Trustees' constitutional mandate by addressing the future needs of the veteran community through programs intended to nurture the growth of veteran leaders and the vitality of the veteran community.

This graph below highlights the goals of the DMVA, MVAA across the top and along the left side, the MVTF's goals. It shows graphically how they interconnect and enhance each other.

Goal Alignment Chart- DMVA/MVAA and MVTF

Michigan Veterans Trust Fund Goals	Department of Military and Veterans Affairs Goals		Military and Veterans Affairs Agency Goals			
	<i>1: Achieve Performance Excellence</i>	<i>2: Improve and Expand Veteran Services</i>	<i>1: Provide Excellent Care and Service</i>	<i>2: Enhance Opportunities</i>	<i>3: Invest in Our People</i>	<i>4: Optimize Operations</i>
1: Develop and Invest in community leaders to promote veterans' issues	●	●	●	●	●	
2: Invest in programs benefitting and supporting Michigan's veteran community		●	●			●
3: Ensure the long-term fiscal stability of the corpus to support the priority of the Board of Trustees	●		●			
4: Modernize MVTF operations	●	●	●	●		●

Strategic Plan

Goals, Objectives, Key Players, Tasks and Measures

The following section outlines the plan itself. It contains four goals along with outcomes, Objectives, and Key Tasks and Measures chosen by the Board to meet their mission of helping veterans through purposeful support.

Goal #1. Develop and invest in community leaders that promote veterans' issues

Description: The desired outcome of this goal is enhanced community engagement by Michigan veterans. Like the MVAA efforts to strengthen and develop new partnerships with agencies, Veteran Service Organizations (VSOs) and other organizations, the Board plans to work with many groups. In this goal, the Board seeks to create veteran leaders and have them actively engaged in the political process and/or become influential in their communities. The Board is looking to create a one-to-two-year fellowships in the policy field to develop leaders. This follows the MVAA's ideal of "Member for Life" by identifying leadership programs and opportunities. It will also assist the DMVA/MVAA to attain statewide/national recognition, act as a model for other states, improving the quality of life for veterans and their families. The strategic objectives are outlined along with key tasks and measurements. ¹

Objective 1.1 By September 1, 2021, identify existing leadership program options to emulate (Primary: MVTF Director, Chairperson of the Board of Trustees, Strategic Program Committee, others)

Key Tasks:

- 1.1.1 Seek to connect veterans with current and past veterans who are leaders (legislators, military, and business)
- 1.1.2 Collaborate with veteran service organizations (VSOs) to leverage their clout and structure for mutual benefits
- 1.1.3 Research the various opportunities available in the State of Michigan, through universities and other programs
- 1.1.4 Other operational tasks to TBD

Performance Measures

- Time spent per hours per month devoted to research
- Staff/Board members hours per month meeting with existing programs
- Surveys

¹ Note: Many of the operational tasks and measures will be determined later by the Strategic Program Committee, Board and Administrative staff as needed.

Objective 1.2: By Q2 FY2022, evaluate leadership programs

(Primary: Strategic Program Committee, MVTF Director, Board of Trustees)

Key Tasks:

- 1.2.1 Create a list of available programs
- 1.2.2 Present the findings to the Board for selection
- 1.2.3 Select mentors for the fellowship
- 1.2.4 Other tasks TBD

Performance Measures

- Completed list for Board discussion/approval
- Board/Committee time spent per month

Objective 1.3 By September 30, 2023, implement a leadership development program

(Primary: Program Committee, MTVF Director, staff)

Key Tasks

- 1.3.1 Leverage a fellowship graduate pool to place interns in the policy field
- 1.3.2 Work with mentors to set up meetings and
- 1.3.3 Collaborate with VSOs and DMVA/MVAA to advertise and communicate the program
- 1.3.4 Other tasks TBD

Goal 2: Invest in programs benefitting and supporting Michigan's veteran community

Description: The desired outcome of this goal is to create a healthy, vibrant veteran community in Michigan. This corresponds to the DMVA's goal of improving and expanding services, along with the MVAA's goal to provide excellent care and service. The Board will be collaborating with various entities (local/state/federal) to support the Board's priorities. They are also looking to invest in existing programs. These may be entrepreneur programs such as business/social/economic projects at the local or state level.

In addition, the Board is looking at the possibility of instituting a communications hub and tracking the outcomes for the training pilot program. They will work with the department and others. These both align with MVAA's goal to optimize operations.

Objective 2.1. By April 1, 2021, and then by July 1 of each year, create a prioritized list of possible veterans' programs to recommend to the Board for support

(Primary: Committee, MVTF Director, and staff)

Key Tasks

- 2.1.1 Complete the list of possible programs for veterans, prioritized
- 2.1.2 Align **strategically** the criteria developed for recommending support
- 2.1.3 Other tasks TBD

Performance Measures

- Board committee hours per month devoted to creating a list
- Alignment with existing veterans' programs through DMVA/MVAA, colleges and business

Objective 2.2: By February 2022, pilot a veteran-entrepreneur to support investment(s)
(Primary: Strategic Program Committee, Board, MVTF Director and others)

Key Tasks:

- 2.2.1 Meet with staff from MEDC, DMVA/MVAA, colleges, business, and local and federal agencies to endorse and invest in their programs
- 2.2.2 Other operational tasks TBD
- 2.2.3 Set up contracts with participating agencies

Performance Measures

- Staff hours per month spent on the program elements
- Copies of the contracts/budgets/receipts of invested programs

Objective 2.3: By February 2021, research the possibility of a one-stop communication hub

(Primary: Board, MVTF Director and others)

Key Tasks:

- 2.3.1 Research with communication possibilities for veterans and their families
- 2.3.2 Obtain 3 quotes from contractors and web developers
- 2.3.3 Meet with DMVA staff that been researching a similar initiatives
- 2.3.4. Leverage budget possibilities

Performance Measures

- ____ hours per pay month devoted to research
- Lists of contracts and quotations

Objective 2.4 Throughout FY 21 continue to maintain and develop relationships with current potential partners that enhance the impact of the Emergency Grant Program

(Primary: DMVA/MVAA staff, Board, MVTF staff)

Key Tasks

- 2.4.1 Meet with DMVA/MVAA and DHHS about the EGP and future initiatives
- 2.4.2 Other operational tasks TBD

Performance Measures

- Track the impact that these partnerships have on veterans and the EGP for use in determining whether to maintain or adjust the partnerships-Surveys
- Glean data and measurements that can be used to guide future programming efforts
- The MVTF will track long-term outcomes for veterans participating the financial training pilot program (Oct 1, 2021). *MVTF will establish the process the long-term outcomes within six months of finalization of the MVAA plan.*

Outcomes will be tracked for two years.

Goal #3. Ensure the long-term fiscal stability of the corpus to support the priorities of the Board of Trustees

Description: The Board desires to create a viable stream of capital to fund necessary programs and for future endeavors. This aligns with both DMVA and MVAA’s goals to achieve excellence and providing care and service. To be successful, the Board will need to collaborate with the DMVA/MVAA Legislative liaisons, the Governor’s, and the Legislature’s staffers to ensure statutory protection and financial endowment. They will also work closely with Department of Treasury to ensure proper investiture for fiscal stability and growth.

Objective 3.1. By Q2FY21, complete a needs forecast that incorporates anticipated funding for the EGP and well as initiatives as approved by the Board of Trustees.

(Primary-Board, Director, and staff)

Key Tasks

- 3.1.1. Conduct a needs forecast
- 3.1.2 Meet with staff from legislative staff to promote MVTF funding and initiatives
- 3.1.3 Collaborate with VSOs legislative liaisons to lobby the Legislature
- 3.1.4 Meet with staff from Treasury, as needed, about projected fiscal growth of the corpus
- 3.1.5. Explore fund-raising options

Performance Measures

- Staff hours per pay month devoted to a needs forecast
- Hours per month in meetings for EGP projected funding and other initiatives
- Financial forecasts created by Department of Treasury

Objective 3.2. By January 15, 2021, establish a “Strategic Programs Committee” to research potential support and make recommendations to the Board on future initiatives

(Primary-Strategic Committee members designated, MVTF Director)

Key Tasks

(Primary: Board and Strategic Program Committee when created)

- 3.2.1 Appoint Board members to the Strategic Programs Committee
- 3.2.2. Identify, list, and prioritize the tasks of the Committee

Performance Measures

- List of Board Members of the Committee
- List of prioritized tasks of the Committee

Objective 3.3 By April 1 each year, work with MVAA/DMVA policy liaisons to ensure MVTF initiatives/ programs/ priorities are reflected in the budget/legislative agenda

(Primary: Board, MVTF Director and liaisons from DMVA/MVAA)

Key Tasks

- 3.3.1 Meet with MVAA/DMVA liaisons on the budget and legislative agenda

Performance Measures

- List of budget and statutory issues developed

Goal #4. Modernize MVTF operations.

Description: The Board desires to create as an outcome, an efficient and more user-friendly products for veterans and their families. These align to all goals within the DMVA and the MVAA's strategic planning efforts of optimizing operations. They will accomplish this by making the EGP easier to use and streamlining operations of current systems. Other steps included in the goal are to have a complete set of bylaws for the Fund and the hiring of an additional employee to help with the administering the future initiatives and the EGP.

Objective 4.1: By January 15, 2021, approve MVTF's bylaws
(Primary-Board of Trustees and Director)

Key Tasks

- 4.1. MVTF Director will develop bylaws for the Fund
- 4.2 Board Members will approve the bylaws submitted by the MVTF Director

Measure

- Approved set of MVTF Bylaws

Objective 4.2: By March 15, 2021, coordinate with DMVA to catalog programs and services
(Primary-Committee members, DMVA staff and others)

Key Tasks

- 4.2.1. The Strategic Committee will develop a catalog and services to submit
- 4.2.2. Coordinate with DMVA/MVAA about programs/services/initiatives of the Board and existing programs for veterans and their families

Performance Measures

- Committee's time devoted to the program, services, and processes
- Copies of brochures outlining the program and services
- Outline of the processes used
- Executive director's and staff hours per pay month devoted to the program, services, and processes

Objective 4.3: By December 15, 2020, determine staffing requirements
(Primary-Board and MVTF Director)

Key Tasks

- 4.3.1. The Director will initiate hiring steps to acquire another staffer
- 4.3.2. Director will work with the MVAA Director to acquire permission for hiring
- 4.4.3 Submit needed paperwork and following procedures
- 4.4.4 If approved, initialize hiring process

Performance Measures

- Director's hours per pay month, utilizing Civil Service requirements
- Recommended staffing plan

Objective 4.4: By May 1, 2021, begin development of electronic application for EGP
(Primary-Committee, MVTF Director and staff)

Key Tasks

- 4.4.1 Assign a program manager to the initiative
- 4.4.2 Program manager will become knowledgeable in Salesforce
- 4.4.3 List all steps needed to complete
- 4.4.4 Other tasks TBD

Performance Measure

- Completed list of tasks
- Number of staff hours needed to complete

Objective 4.5: By March 1, 2021, review, and update EGP policies to reflect current best practices

(Primary-Program Manager, staff, MVTF Director, Board, and others)

Key Tasks

- 4.5.1 Assign a program manager for the initiatives
- 4.5.2 Create a list of policies for review and updating
- 4.5.3 Prioritize the list of policies for updating

Key Performance Measures

- Staff time spent per month dedicated policy review on EGP
- List of policies to be updated
- Operational Tasks TBD

Next Steps

The next step is the execution of MVTF's strategic plan. EPD has outlined some suggestions for implementation, based on the strategic planning discussions. They include:

1. Prioritization of the steps identified. Are they realistic in terms of time and resources?
Do you want to change the timelines/deadlines for projects to space them out?
2. Assignment of personnel to manage projects
3. What is the strategic plan influence on the annual budget?
4. Implement projects identified
5. Possibly conduct a Lean Process Improvement on the EGP the process
6. Review and update the existing strategic plan in the future
 - a. What is the timeline for review and revision of the plan? (A year, two years, etc.)
 - b. Have we met the planning actions identified?
 - c. How do we sustain the momentum started here? (celebrate successes)
7. Communication of the plan with stakeholders
 - a. Does the Board roll this out for the 75th anniversary of the MVTF?
 - b. Has the MVTF considered developing a brand logo?
 - c. Does the MVTF need a logo? Do you want one?
8. Complete a survey conducted by EPD

Conclusion

By conducting a strategic planning process, the Board of Trustees have identified goals, strategies, and measures to move the MVTF forward. The Board along with staffers have identified developing a mentoring/ fellowship program to move veterans into community leadership roles. These veterans will in turn, advance and advocate for veterans and families' needs well into the future. Along with this effort, the MVTF is also looking at various ways to modernize the EGP program and partner with other groups to advance their efforts.

Appendix to the Plan

This appendix contains additional information on the planning process, methodology and a list of strategic planning members.

Background of the Planning Process

Why did the Michigan Veterans Trust Fund decide to do a strategic plan? First, because it has never been done and, more important, the Board recognized that the overall decline in numbers and changing demographics of Michigan veterans were factors significant enough to merit an evaluation of its role and the opportunities that the future may hold for the MVTF. In the process of putting together a strategic plan, the Board, along with the director and staff, identified many pertinent issues facing veterans in Michigan. In addition to the decreasing numbers of Michigan veterans, there is a real divide in the makeup of veterans. The World War 2 and Korean War veterans are well into their ninth and tenth decades and have been depleted to a fraction of their original numbers. Vietnam vets are aging, and their declining population has needs and perspectives that are very different from veterans of the Global War on Terrorism (GWOT). These younger veterans are more IT savvy, less likely to join veteran organizations and increasingly comprised of women. To make effective changes in the program, the Board took a closer look at the political, legal, environmental, educational, and other factors that veterans today face.

Second, the MVTF's corpus used to finance the current EGP must grow and remain fiscally robust. The Board and director will continue to partner with the Michigan Department of Treasury to maintain the fund's vitality and to ensure its viability for the benefit of future generations of Michigan veterans. The current value of the fund gives the MVTF the ability to finance the EGP for the foreseeable future while also allowing for the funding of other new initiatives identified in the strategic plan.

In October of 2019, the Board of Trustees approved the creation of a strategic plan. Director Holm sought out EPD to help facilitate and compile the plan as the MVTF had never properly measured the overall effectiveness of the program through metrics and analysis. The process began with a Needs Assessment with the local committees, the Board, and the staff. Starting with the assessment, the Board and staff developed their mission statement, identified stakeholders, best case/worst case scenarios, and strategic issues which in turn helped them to develop their future actions, through goals and objectives. Some of the planning outcomes they identified were:

- Engagement-there is a need for veterans to become community leaders actively engaged in the political process and/or influential in their communities
- Quality of life-a way to ensure and aid a healthy, vibrant, and visible veteran community
- Financial Stability- a viable stream of capital to fund necessary programs
- Customer Service- efficient and user-friendly products for veterans (all on online)

Methodology

The planning process consisted of eight sessions devoted to phases of planning and current state analysis and future state planning. The activities included:

- Mission Statement definition
- SWOT Analysis
- Best/Worst Case Scenario
- Identification of Strategic Issues and Solutions
- Identification of Outcomes, Goals and Objectives

Strategic Planning Members

Board of Trustees	Administrative Staff
Chairperson: Barry Wood, American Legion	Director: Lindell Holm
Vice-Chairperson: Robert Williams, Veterans of Foreign Wars James Dempsey, Disabled American Veterans	Dept. Supervisor: Carolyn Harden Dept. Analyst: Dawn Shinaver
Carol Hebert, AMVETS	Dept. Tech: Erik Napieralski
Jill Mathews, Independent	
Thomas Smith, Independent	
James Tighe, Independent	

Strategy Elements for Michigan Veterans Trust Fund (MVTF)

Mission: *To spearhead the Michigan Veteran community's efforts to help themselves.*

Key Stakeholders:

- Media Michigan Legislature Governor Veteran Service Organizations
- Greenpath Social Service Agencies Mortgage Lenders Utilities Companies
- Contractors Volunteer Agencies Health Care Organizations Veterans/Civil/Criminal
- Courts Local Elected Officials DHHS MSHDA LEO MVAA MEDC VA
- Soc. Security Administration SBA AARP Applicants and their dependents
- MVTF Administrative Staff Director of the Trust Fund Board of Trustees County/Regional Board Veterans and their dependents

Authorities/Mandates: AG Decisions State Legislation

Values: Respect Integrity Service Excellence

Issues

1. How does the MVTF become viable and relevant for the next 50 years to provide the necessary services for future generations of veterans?
2. What are the clearly defined roles and responsibilities and how do we communicate them broadly?
3. What is the annual budgeting process to establish a plan based upon market performance and forecasting to ensure the MVTF does not fall below the \$50 million AND funds additional programs as defined by this strategic plan and available funding?

Goals

1. Develop and invest in community leaders that promote veterans' issues.
2. Invest in programs benefitting and supporting Michigan's veteran community.
3. Ensure the long-term fiscal stability of the corpus to support the priorities of the Board of Trustees.
4. Modernize MVTF operations.

MVTF strategies

- Establish partnership with existing external program(s) to create a 1-to-2-year fellowship that develops up-and-coming leaders
- Pipeline: Leverage fellowship graduate pool to place paid internships in the policy field
- Mentorship: Seek to connect veterans with current & past veterans who are leaders
- Collaborate with veteran service organizations to leverage their clout and structure for mutual benefit
- Collaborate with various entities to support the priorities of the Board
- Look to invest in existing programs by amplifying and expanding their work
- Collaborate with the Governor to ensure statutory protection
- Collaborate with the Legislature to ensure statutory protection
- Collaborate with Treasury to ensure fiscal stability and growth
- Identify and formalize institutional practices
- Ensure MVTF services are easily accessible to Michigan veterans.

Goal 1 Outcome Veteran leaders become actively engaged in the political process and/or become influential in their communities

- Objective 1.1. By 9/1/21 identify existing leadership programs to emulate
- Objective 1.2. By Q2 FY22, evaluate leadership program options
- Objective 1.3. By 9/30/2023 implement a leadership development program

Goal 2 Outcome A healthy, vibrant, and visible veteran community

- Objective 2.1. By 4/1/2021 and then by 7/1 of each year, create a prioritized list of possible veterans' programs to recommend to the Board for support
- Objective 2.2 By 2/1/2022, pilot a veteran-entrepreneur to support investment(s)
- Objective 2.3 By 2/2022, research the possibility of a one-stop communication hub
- Objective 2.4 In FY 21 continue to maintain and develop relationships with current and potential partners that enhance the impact of the EGP

Goal 3 Outcome Viable stream of capital to fund necessary programs

- Objective 3.1. By Q1 FY21 complete a needs forecast that incorporates anticipated funding for the EGP and as well as initiatives as approved by the Board of Trustees
- Objective 3.2 By 1/15/2021 establish a "Strategic Planning Committee" to research possible support and make recommendations to the Board
- Objective 3.3 By April 1 each year, work with MVAA/DMVA policy liaisons to ensure MVTF initiative, programs, priorities are reflected in the budget/legislative agenda

Goal 4 Outcome Efficient and user-friendly products for veterans

- Objective 4.1. By 1/15/21 approve the by laws
- Objective 4.2 By 3/15/2021, Coordinate with DMVA to catalog programs and services
- Objective 4.3 By 12/15/ 2020, determine staffing requirements
- Objective 4.4 By 5/1/2021, begin development of electronic application for EGP
- Objective 4.5 By 3/1, 2022 review and update EGP policies to reflect current best practices