

# PPALM Strategic Plan 2017 - 2021



**PAN-PACIFIC AMERICAN<sup>®</sup>**  
**LEADERS AND MENTORS**  
*Tradition of Service. Strengthened in Community.*

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## ***Message from the Chairman***

*“Being a mentor is one of the best investments you can make in helping others achieve a brighter future.”*



The Pan-Pacific American Leaders and Mentors (PPALM) will reach a significant milestone in 2017 by celebrating our tenth year anniversary. This accomplishment reflects the progressive and steady growth of PPALM as a well-recognized national affinity organization advocating for military and civilian leaders seeking to address their leadership development and mentoring needs.

The PPALM Strategic Plan for the 2017 – 2021 period introduces a long-term plan of action with key objectives to include:

- 1) Restructure the Board of Directors to improve its governance capability;
- 2) Improve delivery of mentoring and leadership development services to its members and partners;
- 3) Improve membership management to ensure we track members accurately;
- 4) Develop system-wide information and communications program; and
- 5) Gain support from sponsors to help resource our mission and long-term objectives.

Simply put, the top priority throughout this five-year plan is the delivery of quality and value-added services to our members.

In 2016, new chapters were established at Fort Bliss in El Paso, Texas , the greater Washington D.C. area, and in Germany. A new chapter at Fort Carson near Colorado Springs, CO was established on June 17, 2017. With our current chapters in Leavenworth, Kansas; the Puget Sound Area, Washington; Honolulu, Hawaii; Huntsville, Ala.; West Point, New York; and Annapolis, Md. PPALM is growing across the United States and overseas.

The Board of Directors’ overall long-range strategy is to provide its deliverable services to the membership. We want to continuously improve our capabilities and measure our performance to support and assist our members. This is our commitment to members as they are the true measure and single most important contributing factor to PPALM’s success.

PPALM's vision has not changed. We will strive to be a leading national, non-profit, all-volunteer organization recognized for its excellence and capability to provide mentoring and leadership services to our members, led by a complement of highly talented and competent leaders from the military and civilian professional sectors.

The next five years will be challenging, but they also present great opportunities to explore and put to good use for PPALM members. There is nothing to prevent PPALM from continuing to succeed. We will continue to do our utmost to serve our members with their needs.

It is my privilege and honor to support you, our members. As a team, together we will work hard to continue growing PPALM and leading and developing the next generation of leaders. This we can do.

A handwritten signature in cursive script that reads "Antonio M Taguba".

Antonio M. Taguba  
Major General, U.S. Army (Retired)  
Chairman

# ***Mission and Core Competencies***

## **MISSION**

To create a professional network of Asian American and Pacific Islander (AAPI) leaders, military and civilian, committed to serving the nation by providing leadership, education, mentoring, and fellowship opportunities. Building on the sacrifices of past generations, we continue to promote diversity, advancement, and retention of all leaders.

## **CORE COMPETENCIES**

<b>Mentorship</b>	Principal focus: formal, informal, and e-mentoring in direct mentor-to-protégé contact.
<b>Leadership</b>	Experienced leaders serve as mentors to protégés to enhance their leadership skills and career progression.
<b>Professional and Educational Development</b>	Promote leadership and career development; assist in military to civilian transitions; partner with other affinity organizations on leadership, training and educational events.
<b>Community Involvement</b>	Promote PPALM objectives and raise awareness of mentoring at community events, academic institutions, and diversity forums.
<b>Outreach and Networking</b>	Develop relationships with potential partners and sponsors. Increase communication on the website and social media, by word of mouth and through contact with PPALM chapters and affinity organizations.

## ***Introduction: On the Horizon for 2017-2021***

The PPALM Strategic Plan 2017-2021 establishes PPALM's long-term direction for the next five years. The plan is focused on the Board of Directors' assessment and evaluation of programs, processes, and technology. It includes numerous recommendations from the membership identifying particular areas and opportunities for improvement.

Our vision is to continue to strive to be a leading national, nonprofit, all-volunteer organization recognized for its competency and capability to provide mentoring and leadership services to our members, led by highly talented and competent leaders from the military and civilian professional arenas. This plan is forward-looking and enumerates key goals, objectives, and measures of performance to ensure PPALM can effectively deliver services and products to its members to meet their mentoring and leadership development.

The five major goals articulated in the plan include:

- Improve communication through various means with members, partners, and sponsors via social media, periodic personal and digital contacts, announcements and scheduled events, testimonials, visits to chapters, and printed materials.
- Improve membership management system through an integrated information management process. The intent is to enable networking, as well as to maintain connectivity with members who relocate, change assignments, retire, or transition.
- Develop and implement in-person and web-based, online leadership education and training programs focused on leadership development, mentoring, career transition planning, and health and wellness.
- Develop an automated mentor-protégé request and selection process, as well as an assessment mechanism to accurately assess and evaluate the effectiveness of mentor-protégé relationship.
- With a restructured Board of Directors, we will explore initiatives to leverage relationships with partners and sponsors to help resource PPALM's mission and long-term objectives.

Throughout this planning document we have outlined a series of supporting functional objectives, tasks, and measures of accountability aimed at accomplishing these goals in the next five years. Periodic updates will be provided to the members, partners, and sponsors, as appropriate.

## *Overarching Goals and Objectives*

Executive Steering Committee	Calendar Year Launch (2017-2021)	Activity and Metric	Resources
<p>Goal 1: Improve our ability to communicate and interact with members as well as gain support from partners and sponsors by articulating the value of mentoring as a critical element in the development of growing leaders.</p>	<b>1<sup>st</sup> Qtr 2017</b>	1. Integrate all functional programs into a fully operational, new-generation PPALM website for updates to the members, partners, and sponsors. Functional programs to be fully integrated and tested.	New website
	<b>2<sup>nd</sup> Qtr 2017</b>	2. Integrate all chapter matters and activities to include, but not limited to, periodic coordination between PPALM national and local chapters, as well as publication of quarterly newsletters, resource requirements, and event information. Ensure all chapters are included in website information and activities, publications, and events. Chapters provided governance oversight in accordance with PPALM national by-laws.	BoD sessions, social media, publications
	<b>3<sup>rd</sup> Qtr 2017 to 1<sup>st</sup> Qtr 2021</b>	3. Expand partnership and sponsorship program to help sustain PPALM’s profile as a nonprofit, national organization. Develop a slate of potential partners and sponsors. Develop and implement an outreach program to reach out to potential partners and sponsors over the next five years. Invite partners and sponsors to all scheduled events to include, but not limited to, conferences, community events, PPALM annual events, and partner events.	Executive Committee, active engagement by BoD and chapters
	<b>1<sup>st</sup> Qtr 2017</b>	4. Develop PPALM information toolkit for utilization by chapters focused on recruitment of new members, partners, and sponsors. Executive Committee members assist chapters in outreach. Information in the toolkit shall be updated semi-annually.	VP Communications, BoD Executive Committee
	<b>2<sup>nd</sup> Qtr 2017</b>	5. Develop training program for new board members in their respective leadership positions. Executive Committee members represent PPALM at events and activities to inform and raise awareness on the value of mentoring and promote the value of PPALM. Every board member will be required to represent PPALM at various activities, able to inform and engage the audience on the mission, vision, and core competencies of the organization. Each board member must demonstrate his or her ability to speak in a public setting.	VP Mentoring, BoD Executive Committee, Special Project Team
	<b>2<sup>nd</sup> Qtr 2017</b>	6. Establish a formal PPALM annual awards program to recognize individuals and groups for excellence in mentoring and leadership development. Proposed: Chairman’s Award for Lifetime Achievement in Public Service (Individual); PPALM Award for Public Service	BoD Executive Committee

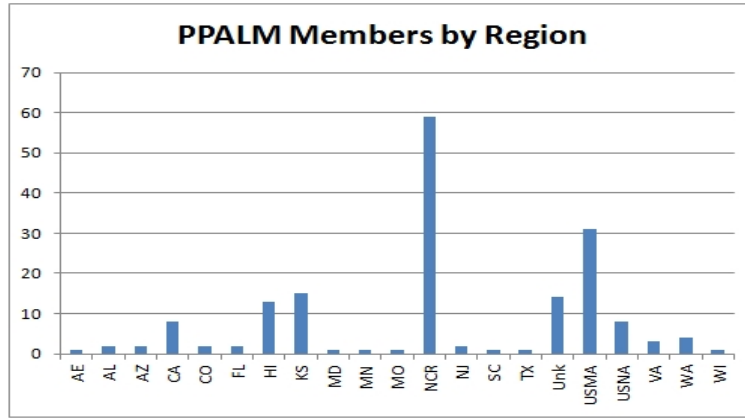
Executive Steering Committee	Calendar Year Launch (2017-2021)	Activity and Metric	Resources
		and Patriotism (Individual); PPALM Award for Sustaining Corporate Sponsorship (Group Award); PPALM Award for Mentorship Excellence (Group or Individual).	
Goal 2: Develop and implement a leadership education and training program focused on mentoring, coaching, and succession planning.	3 <sup>rd</sup> Qtr 2017	1. Organize a joint committee with partners and subject matter experts to develop a leadership education and training program. Assess feasibility of developing the program. Develop a half-day course on leadership, mentorship, coaching and succession planning.	VP Mentoring, BoD Executive Committee, Special Project Team
	2 <sup>nd</sup> Qtr 2018	2. Implement a pilot program of leadership education and training program.	Same as above
Goal 3: Expand membership program by establishing new chapters in select areas.	2 <sup>nd</sup> Qtr 2017	1. Establish criteria for identifying potential areas for PPALM growth. Develop a list of selected areas with high potential for chapter formation. Establish one chapter per year throughout the planning period.	VP Membership
Goal 4: Maintain competent governance by having a team of experienced and high-performing leaders on the Board of Directors.	1 <sup>st</sup> Qtr 2017	1. Evaluate criteria and requirements for elected and appointed board members. Recruit and elect individuals who demonstrate outstanding character qualities and leadership potential, along with requisite experience and skills. Candidates must be willing to serve as an active member of the board or leader of a chapter. Must be able to commit time as a volunteer for the designated term of his or her position.	BoD Nominations Committee
	1 <sup>st</sup> Qtr 2019	2. Review criteria and requirements for membership on the honorary board of advisors. Review and update rules for the election and appointments of nominated candidates. Succession criteria established throughout the tenure of elected and appointed board members.	BoD Executive Committee



Executive Steering Committee	Calendar Year Launch (2017-2021)	Activity and Metric	Resources
Goal 5: Establish a Continuous Improvement Process (CIP) to assess and evaluate the governance, operations, and resource effectiveness of PPALM.	1 <sup>st</sup> Qtr 2018	1. Review the PPALM By-Laws, board and chapter operations and functional programs. Review Board of Directors structure. Review chapter structure. Develop succession plan methodology. Develop Board of Directors Manual.	BoD Executive Committee and General Counsel
	2 <sup>nd</sup> Qtr 2018	2. Establish a semi-annual review process to assess and evaluate the effectiveness of PPALM programs and services. Functional POCs provide detailed reports on status and provide recommendations for innovation. Conduct membership surveys on annual basis. Integrate suggested improvements in support of PPALMs mission.	Board of Directors

# Supporting Goals and Objectives

## Membership Development



AE	Europe	KS	Kansas	Una	Unassigned
AL	Alabama	MD	Maryland	USMA	US Military Academy
AZ	Arizona	MN	Minnesota	USNA	US Naval Academy
CA	California	MO	Missouri	VA	Virginia
CO	Colorado	NCR	National Capital Region	WA	Washington
FL	Florida	NJ	New Jersey	WI	Wisconsin
HI	Hawaii	SC	South Carolina		



The PPALM Membership Development Program develops and sustains the membership base by maintaining a strong relationship with existing members and assisting new members in understanding the services that PPALM provides. Since its inception, PPALM has benefited from a modest but consistent growth rate of 10-20 percent per year across the United States. We were fortunate in the past year to have added a substantial number of U.S. Military Academy cadets and U.S. Naval Academy midshipmen, as well as new junior and field grade officers. Additionally, over the past year we have seen growth with new chapters at Fort Bliss in El Paso, Texas, the greater Washington D.C. area, and Germany.

Since a major component of the PPALM vision is the mentoring and development of young members of the military (officers, warrant officers and enlisted) and civilian professionals, our single most important asset is our membership. The success of our organization relies on our sustaining and growing this membership into a resource that supports all our additional programming.

A strong membership base provides the organization with both depth and breadth of experience and background, which ultimately provides for an enriching experience to all members, regardless of their professional expertise or rank. Furthermore, a strong, active and healthy membership provides the organization the necessary operating funds to support successful mentoring, development, and outreach programs.

In order to meet the needs of our growing membership, the board is championing the development of an integrated website, which will provide seamless service and community connectivity to all its members. We want to anticipate the management and administration requirements necessary for our organization to operate effectively. This includes allowing members to update their profiles, renew their dues, check their membership status, and interact with fellow members. Automating administrative functions would allow the board more time to engage in the activities that matter most, such as strategically communicating with members, sponsors and external audiences and developing new opportunities for professional development within our membership base. Furthermore, better data management will provide program leaders with the best information with which to analyze and improve their respective programs.

The Membership Development Program (MDP) will focus on establishing chapter-level membership directors and/or officers who will assist the board in helping new members and sustaining existing members within their regions. This decentralization of operational function is a trademark of other successful grassroots organizations and is expected to accelerate improved localization of services and development of internal leadership skills. We believe that this complementary responsibility will provide faster, tailored responsiveness as well as promote better communication between regional chapters and leaders at the national level

PPALM is about its membership and as summarized, the MDP hopes to accomplish the following objectives:

- Establish and maintain an integrated website that allows members to access their information, receive services and utilize PPALM-related information.

- Improve communications with PPALM members.
- Improve retention of active members within PPALM.
- Establish membership directors and/or officers in local chapters.

We believe that these actions will inherently grow, sustain, and improve an already high-quality membership base and will contribute towards PPALM’s vision of a first-class nonprofit organization dedicated to mentoring and leadership.

*Membership Program Goals and Objectives*

Membership VP	Calendar Year Launch (2017-2021)	Activity and Metric	Resources
<p>Goal 1: Improve retention of active PPALM members.</p> <p>1. Goal 2: Adapt strategies and online campaigns to grow PPALM online followers on Facebook® and other social media platforms as an effective way to grow PPALM membership.</p> <p>Goal 3: Provide additional service to members via online video meeting tools and membership card.</p>	<p>1<sup>st</sup> Qtr FY2017</p>	<ol style="list-style-type: none"> <li>1. Identify proper on-line video plug-in that could be integrated with PPALM’s Wild Apricot system.</li> <li>2. Follow up return mails from membership mailing campaign.</li> <li>3. Search for staff/members/volunteers to establish membership development committee.</li> <li>4. Identify proper format of online PPALM membership card template form.</li> </ol>	<p>Website development team; PPALM board review and approval.</p>
	<p>2<sup>nd</sup> Qtr FY2017</p>	<ol style="list-style-type: none"> <li>1. Establish membership development committee with a focus on strong ability to engage with members via social media.</li> <li>2. Establish online membership card service for all members.</li> <li>3. Implement online video service into PPALM Wild Apricot system.</li> </ol>	<ol style="list-style-type: none"> <li>1. Web development team support; PPALM board review and approval.</li> </ol>
	<p>3<sup>rd</sup> Qtr FY2017</p>	<ol style="list-style-type: none"> <li>1. Search and Identify AAPI military or veteran members on Facebook and LinkedIn platforms. Establish related database.</li> <li>2. Identify online marketing tools for Facebook and LinkedIn to prepare online campaign to drive fan numbers for PPALM facebook and linkedIn accounts.</li> </ol>	<p>VPs of IT, Communications, and Membership.</p>
	<p>4<sup>th</sup> Qtr FY2017</p>	<ol style="list-style-type: none"> <li>1. Launch online campaigns via Facebook to grow PPALM Facebook followers .</li> <li>2. Identify strategies to convert online PPALM fans on Facebook and LinkedIn to active PPALM members who pay regular membership fees.</li> </ol>	<p>VPs of IT, Communications, Membership, and Finance.</p>
<p>Goal 4: Further steady growth and retention of PPALM membership; develop local decentralized management of local member groups</p>	<p>FY2018</p>	<ol style="list-style-type: none"> <li>1. Implement online strategies to convert online fans to active PPALM members.</li> <li>2. Identify and development of strategies and tools to track the interaction between mentors and protégés.</li> </ol>	<ol style="list-style-type: none"> <li>1. IT team and communication team</li> <li>2. Membership development team</li> <li>3. Finance support</li> </ol>

Membership VP	Calendar Year Launch (2017-2021)	Activity and Metric	Resources
		<ol style="list-style-type: none"> <li>3. Maintain an active community for PPALM and keep PPALM membership retention and growth.</li> <li>4. Interact with mature local chapters to discuss local membership management.</li> </ol>	<ol style="list-style-type: none"> <li>4. Support from Mentorship VPs</li> </ol>
Goal 5: Further steady growth and retention of PPALM membership; develop local decentralized management of local membership groups	FY2019	<ol style="list-style-type: none"> <li>1. Continue growth of PPALM online fans and active members</li> <li>2. Continue maturing of tracking of mentor-protégé interaction and analysis.</li> <li>3. Explore additional products/services that PPALM can provide to its members.</li> <li>4. Establish better member managements in local chapters.</li> </ol>	<ol style="list-style-type: none"> <li>1. IT team and communication team</li> <li>2. Membership development team</li> <li>3. Finance support</li> <li>4. Support from Mentorship VP</li> </ol>
Goal 6: Further steady growth and retention of PPALM membership; develop local decentralized management of local membership groups	FY2020	<ol style="list-style-type: none"> <li>1. Continue growth of PPALM online followers and active members.</li> <li>2. Establish effective and mature means for tracking of mentor-protégé interaction and analysis.</li> <li>3. Integrate and continue to explore more products/services that PPALM can provide to its members.</li> <li>4. Further support local chapter growth via different online supporting tools</li> </ol>	<ol style="list-style-type: none"> <li>1. IT team and communication team</li> <li>2. Membership development team</li> <li>3. Finance support</li> <li>4. Support from Mentorship VPs</li> </ol>
Further steady growth and retention of PPALM membership; develop local decentralized management of local membership groups	FY2021	<ol style="list-style-type: none"> <li>1. Continue growth of PPALM online fans and active members.</li> <li>2. Establish effective and mature means for tracking of mentor-protégé interaction and analysis.</li> <li>3. Integrate and continue to explore more products/services that PPALM can provide to its members.</li> <li>4. Further support local chapter growth via different online supporting tools</li> </ol>	<ol style="list-style-type: none"> <li>1. IT team and communication team</li> <li>2. Membership development team</li> <li>3. Finance support</li> <li>4. Support from Mentorship VPs</li> </ol>

## *Mentorship*

The PPALM Mentorship Program connects protégés with experienced professionals who have achieved personal, professional, and career success. Mentors provide advice, encouragement, feedback, and guidance towards achieving a protégé's full potential. A unique feature of the PPALM Mentorship Program is that its mentors provide realistic, comprehensive, and near real-time assessments of career situations, opportunities, and decision points. For students, cadets, or individuals facing career changes, mentors assist protégés in investigating and understanding possible career choices and evolving opportunities. PPALM actively recruits qualified mentors from within its membership to participate in the mentorship program. The PPALM Mentorship Program complements the Armed Services' Mentorship Programs in developing and maintaining highly competent leaders to serve the nation. The Mentorship Program also encompasses private sector leadership and seeks to expand its community outreach to include greater participation by AAPI civilians in federal service, those in transition from active duty, and those serving in the corporate environment. The program is designed to offer support, guidance, and professional development based on mentors' individual experiences.

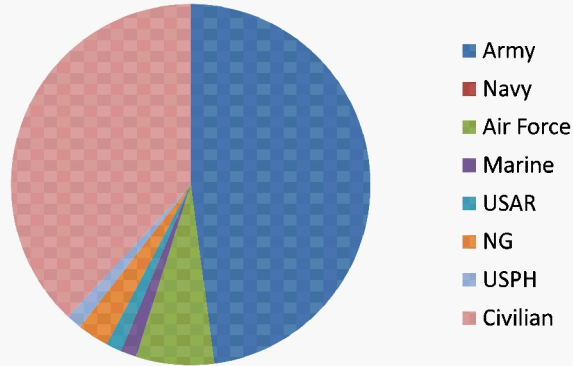


To be most effective, the mentor-protégé relationship requires respect, confidentiality, and compatibility on the part of the mentor and protégé. Each mentoring relationship is unique in terms of duration and style. Therefore, rather than propose one technique for mentoring, PPALM supports a broad range of mentoring relationships. Local chapters are encouraged to facilitate the mentoring styles they find most effective and appropriate for their members.

As noted in the chapter on Membership, a strong membership base results in an organization comprised of individuals from a variety of backgrounds and experiences. The Mentorship Program is fortunate to have mentors from the private and public sectors from a wide range of professions as shown in the charts below. The diverse backgrounds of our mentors coupled with their career experiences are tremendous resources for the protégés in our program. The primary activities of the Mentorship Program for 2017 to 2021 center on improving communication with the mentors and protégés in the program; improving the PPALM website to enable more interaction between mentors and protégés; and developing outreach programs to work with other leadership and mentoring organizations.

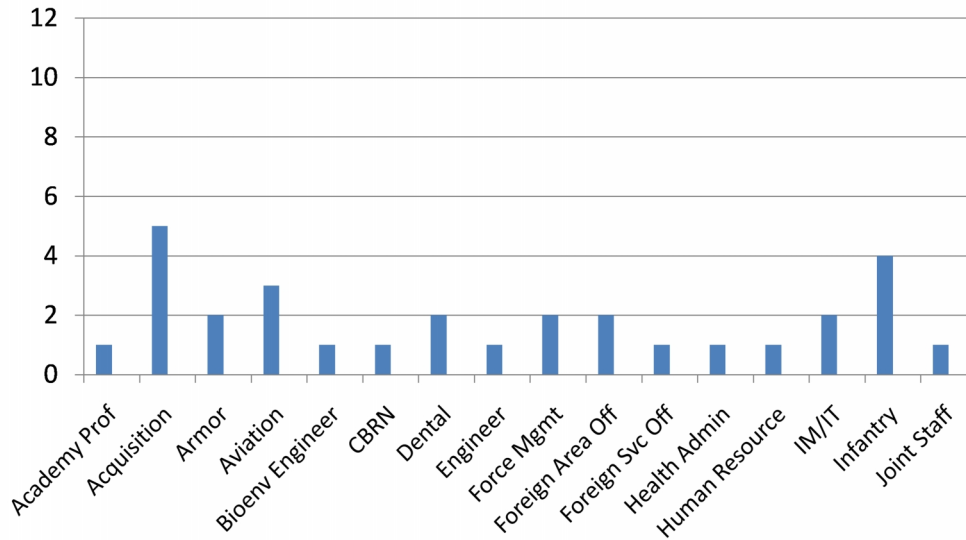
## PPALM Mentors by Service

Armed Forces/Public Health/Civilian

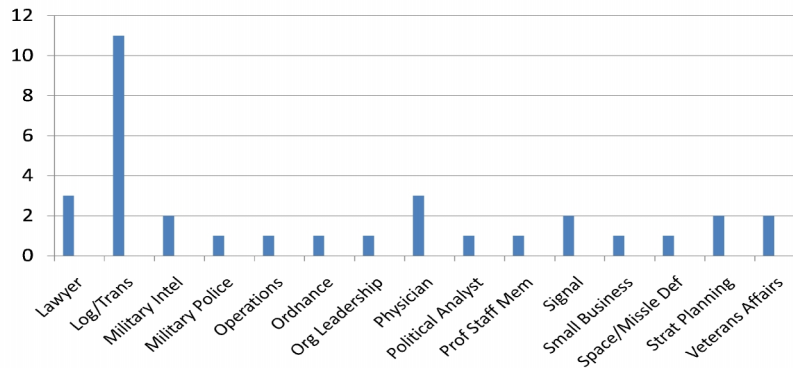


**Notes:** 1) Mentors retired from military service with follow on civilian positions are counted as both military and civilian.  
2) Civilian grouping consists of DoD and non-DoD civilians.

## PPALM Mentors by Profession



## PPALM Mentors by Profession (cont'd)



Note: Information on profession was provided on the applications of most, but not all mentors.

### *Mentorship Goals and Objectives*

Mentorship Program VP	Calendar Year Launch (2017-2021)	Activity and Metric	Resources
Timely Contact with Mentors and Protégés	<b>1<sup>st</sup> Qtr 2017</b>	1. Establish contact with prospective mentor-protégé within two days of receipt of application.	PPALM website and email
		2a. Review mentor database, select prospective mentor(s), and then forward protégé application to prospective mentor(s) within five days.	PPALM website and email
		2b. Contact mentor, then place mentor application in the mentor database within two days.	PPALM website and email
		3. Once a protégés paired with a mentor, place their names in the mentorship database within two days.	PPALM website and email
Maintain Mentorship Database	<b>1<sup>st</sup> Qtr 2017</b>	1. Ensure accuracy of contact information as well as other biographical information on mentors and protégés twice per year.	Coordination with VP Membership
Improve Communication with Mentors and Protégé	<b>1<sup>st</sup> Qtr 2017</b>	1. Reply to all questions and comments from mentors and protégés within two days of receipt.	Email
Improve Communication with Mentors and Protégés	<b>1<sup>st</sup> Qtr 2017</b>	2. Make contact with every mentor and protégé in the program once a quarter.	Email
		3. Post mentorship articles on the PPALM website once a quarter.	PPALM website and email
		4. Write a mentorship article for the PPALM Newsletter once a quarter.	PPALM website



Mentorship Program VP	Calendar Year Launch (2017-2021)	Activity and Metric	Resources
		5. Ensure the PPALM Mentorship Concept Plan is up-to-date by reviewing twice a year.	Coordination with VP Membership
Improve Communication with PPALM Members	3 <sup>rd</sup> Qtr 2017	1. Publicize the Mentorship Program to PPALM members through email messages and other media once a quarter.	Coordination with VP, Communications and Publications
		1a. Inform members on how to join the mentorship program, state the need for mentors in particular fields, and encourage members to sign up as mentors and protégés.	Coordination with VP, Communications and Publications
		1b. Obtain mentorship success stories from those in the program and communicate them to the membership.	Coordination with mentors and protégés
	1 <sup>st</sup> Qtr 2018	2. Recruit mentorship POCs from chapters.	Support from chapters
		3. Provide guidance to chapter POCs as required.	Support from chapters
Outreach	3 <sup>rd</sup> Qtr 2017	1. In compliance with Executive Committee Goal 2, Objective 1, participate in a joint committee with partners and SMEs to develop a leadership education and training program. Assist in implementing a fully developed half-day course on leadership, mentoring, coaching, and succession planning.	Coordination with Executive Committee and all other VPs
		1. In compliance with Executive Committee Goal 2, Objective 2, participate in pilot test with a partner leadership training program to successfully implement the PPALM mentoring and leadership training program.	Coordination with Executive Committee and all other VPs
	1 <sup>st</sup> Qtr 2018	1. Publicize the Mentorship Program to outside organizations.	Coordination with VP Communication
		2. Participate in outside organization functions (AAGEN, JAVA, service Academies, high schools, etc.) two times a year.	Coordination with VP Communication
		3. Coordinate with other mentorship organizations in the U.S. for possible partnerships.	Coordinate with national mentorship organizations
	Improve the PPALM Website	1 <sup>st</sup> Qtr 2017	1. Participate in the development of the new PPALM website.
1a. Coordinate with the VP Membership and the VP Finance to streamline the application process.			Coordinate with VP Membership and VP Finance
1b. Coordinate with the website designer to streamline the mentor-protégé matching process.			Coordinate with the website designer
3 <sup>rd</sup> Qtr 2017		1c. Coordinate with the website designer to allow PPALM mentors and protégé to access information on the website	Coordinate with the website designer

Mentorship Program VP	Calendar Year Launch (2017-2021)	Activity and Metric	Resources
		through a competency analytics displaying the skills and experiences of mentors and protégés.	
Assist the US Armed Forces in articulating the importance of diversity in the Total Force.	1 <sup>st</sup> Qtr 2017 to 4 <sup>th</sup> Qtr 2021	Work with VP Membership to develop a more streamlined and intuitive mentor-protégé program by 3 <sup>rd</sup> Qtr 2017.	



## *Communications*

Taking advantage of 21st century technology, PPALM has re-engineered its communication process externally and internally to allow the highest efficiency and effectiveness among its current and future members, supporters and sponsors. The results of the 2013 PPALM membership survey demonstrate the successful diversification of our member communications. This includes e-mails (93%), PPALM website usage (26%), and expansion into social media, including LinkedIn (17%), Facebook (16%), and Twitter (3.5%). Internally, we will integrate our functional communications process within the Board of Directors to streamline capability and workload for improved interoperability across platforms. All communications will remain focused on ensuring that PPALM is recognized by members, partners, and sponsors as having a strong and credible reputation for leadership development and mentorship services in the federal and civilian sectors, interests in culture, military service, a depth of experience and exceptional values.

### *Communications Goals and Objectives*

<b>Communications and Publications</b>	<b>Calendar Year Launch (2017-2021)</b>	<b>Activity and Metric</b>	<b>Resources</b>
Goal 1: Communicate PPALM's overarching mission to support and provide a network for the professional development and advancement of our members both in the public and private sectors.	<b>1<sup>st</sup> Qtr 2017 to 4<sup>th</sup> Qtr 2021</b>	Aim to publish three newsletters a year and maintain regular frequency of social media outreach.	BoD members provide quarterly input, chapter support and event articles.
Goal 2: Assist Outreach Program to establish a program of educational and leadership training opportunities that contribute to professional and personal development through mentorship website.	<b>1<sup>st</sup> Qtr 2017 to 4<sup>th</sup> Qtr 2021</b>	Send out monthly activities and events information as well as reminders to increase community engagement and membership.	BoD members provide quarterly updates to new website. VP Comm will monitor and QC monthly.
Goal 3: Use digital platforms to enhance better awareness of our interests in culture, military service, experience and values.	<b>1<sup>st</sup> Qtr 2017 to 4<sup>th</sup> Qtr 2021</b>	Review new website analytics quarterly to identify gaps to improve system requirements with Wild Apricot.	VP Comm and VP IT will aim to keep information on website current.
Goal 4: Develop program to enhance communications capabilities	<b>1<sup>st</sup> Qtr 2017</b>	Implement a fully capable communications program to enable members, partners, and sponsors to conduct a multitude of media exchanges.	VP Communications, Mentoring, and Membership.

# *Information Management*

The PPALM Information Management mission:

Provide PPALM with secure information technology, communications, and digital property support. Safeguard PPALM members' information and reputations. Advise the board on technology decisions.

In 2015, the preponderance of the US workforce -- and thus PPALM's target audience of protégés and mentees -- are millennials, aged 20-34, who are more connected and more technologically savvy than any generation. In order to reach this demographic, PPALM created an IM VP position to ensure that our core competencies of mentorship and networking were optimizing the use of technology. Doing so means that PPALM will engage our members and the general public with multiple digital properties and communication media that are enhanced and enabled by technology. While being more open and accessible, the IM VP will ensure that the reputation, information, and privacy of PPALM members are secured by industry best practices. Moreover, the IM VP will advise the board on technology decisions in service to the PPALM mission, including being a technology mentor to PPALM's member mentors.

## *Information Management Goals and Objectives*

Information Management VP	Calendar Year Launch (2014-2018)	Activity and Metric	Resources
Assess PPALM's use of technology	Quarterly	1. Review all aspects of technology used by PPALM to achieve our mission.	Google Apps, WildApricot, GoDaddy, FreeConferenceCall, etc.
Perform security audit of PPALM digital properties	Quarterly	1. Test and assess the security and operations of the digital properties and technology used by PPALM. Ensure cybersecurity best practices are used.	Google Apps, WildApricot, GoDaddy, FreeConferenceCall, etc.

# *Outreach Strategy*

PPALM's success cannot rely solely on its membership. We must seek and incorporate support from partners and sponsors who share our vision and mission in growing leaders through a series of professional development programs - training, education, and mentoring. Not only will our partners be able to provide financial support, but we can leverage their capability and capacity to help gain new members, provide them with reciprocal support with mentoring, and conduct joint ventures in training and education deliverables – career transition, scheduled events, and media outreach.

## *Outreach Objective Guidance:*

- Establish an outreach planning team responsible for developing, prioritizing and implementing PPALM's outreach to, and partnerships with, nonprofit affinity groups, corporations, federal and state organizations, military services, and professional associations.
  - Sustain current partnership, sponsorship, and association with Asian American Government Executive Network (AAGEN), AARP, Knowledge Advantage, Inc., Association of the United States Army (AUSA), Asia Pacific American Institute for Congressional Studies (APAICS), Federal Asian Pacific American Council (FAPAC), Department of the Army Leadership and Diversity Office, Army Historical Foundation, and Who's Who in Asian America Communities (WWAAC), and ROCKS Inc. (African American Leadership organization). Build successful partnerships with civic organizations through increasing interactions with civic leaders, groups and institutions, and involving our board members in meaningful relationships within the community.
  - Develop a strategy to encourage individual or private sector sponsorship.
  - Seek partnerships and sponsorship with at least one corporation, affinity group, government, and nonprofit organization in 2017 to 2021.
  - Develop a collaborative strategy to provide professional development and mentoring services with partners and sponsors to develop and/or sustain long-term relationships.
  - Invite sponsors and partners to PPALM key events and PPALM-supported events, including but not limited to, PPALM annual meetings, APAICS – PPALM Military Leadership Appreciation Luncheon, AAGEN annual leadership workshop, US Army Soldier Experience Series, veterans and memorial celebrations, and AAPI Heritage Month observance.

- Collaborate with potential partners to develop programs, e.g., health and wellness program, leveraging or building upon the potential partners' existing services and other capabilities.
- Broaden PPALM's partnerships to create or encourage leadership representation in the civilian public service and private business arenas.
- Maintain pace with military and civilian human capital development through increased strategic engagement activities with chapters of 1 per quarter.
- Increase chapters by allowing BoD to conduct speaking engagements once a year in the chapters' regional school or event.

PPALM's outreach strategy and plans is an essential element to advancing its mission and objectives. Building a coalition of sponsors, partners, and associations will help us ensure the future of our organization beyond 2017-2021.



# ***Annex A: Mentorship***

## **Scope:**

The PPALM Mentorship Program applies to all PPALM members. A “Code of Conduct” is under development, which will govern personal interaction and acceptable conduct between mentors and protégés. PPALM has a strict policy against all forms of discrimination and harassment, and mentors and protégés commit to comply with that policy by participating in the Mentorship Program. PPALM urges all participants in the Mentorship Program to report any misconduct by a participant to the Vice President, Mentorship, who will then investigate and address the claim of misconduct in a timely manner.

## **Concept:**

The PPALM Mentorship Program consists of the National Headquarters, the Mentorship Committee, Chapters, Mentors, and Protégés.

### 1. National Headquarters:

The PPALM Mentorship Program is sponsored at the national level by the PPALM Board of Directors. The Vice President for Mentorship chairs the PPALM Mentorship Committee. Members of the committee are comprised of Points of Contact from chapters and other volunteers.

### 2. PPALM Mentorship Committee: The committee is responsible for:

- Developing the PPALM Mentorship Plan.
- Receiving requests from current members who desire to be mentors or protégés.
- Coordinating with the Vice President for Membership to identify new PPALM members.
- Contacting new members and suggesting participation in the mentorship program as a mentor or protégé.
- Sending a questionnaire to prospective protégés to facilitate the mentor selection process.
- Maintaining an active list of protégés and mentors.
- Facilitating protégé to mentor relationships.
- Receiving and safeguarding exit interviews (if completed) from mentors and protégés.
- Posting PPALM mentorship events on the PPALM website.
- Posting published articles and articles submitted by the chapters to the PPALM website.

### 3. Chapters:

To facilitate mentorship programs at the local level, it is highly recommended that each PPALM chapter tailor its mentorship program to reflect its members' needs. Chapters must appoint members as their POCs to serve on the PPALM Mentorship Committee. Current chapters are:

- Huntsville, Ala.
- Honolulu, Hawaii
- Leavenworth, Kan.
- Puget Sound, Wash.
- United States Military Academy, New York
- United States Naval Academy, Md.
- Fort Bliss, El Paso, Texas
- Greater Washington D.C. area
- Germany/Europe
- Fort Carson, Colorado Springs (under development)

4. Responsibilities: Chapters will identify a POC responsible for:

- Managing local mentorship programs.
- Serving as a member of the national PPALM Mentorship Committee.
- Submitting information on local mentorship events for inclusion in the PPALM newsletter and posting to the PPALM website.

5. Mentors:

PPALM members can become mentors by submitting a mentor application through the PPALM website or in a message via email to the Vice President for Mentorship. Mentors are responsible for:

- Participating in the initial interview with the prospective protégé (this can be accomplished via email or telephone).
- Accepting the decision by the protégé whether to pursue the mentor-protégé relationship.
- Assisting the protégé in developing a career development plan.
- Maintaining communication with the protégé (e.g., face-to-face contact, telephone, e-mail, the PPALM website, or one of the social networking forums.) NOTE: Postings on social network sites will not include information considered confidential, privileged, or private in nature. Administrators will moderate discussions on the PPALM Facebook site and remove any content deemed inappropriate.
- Suggesting appropriate training and developmental opportunities to the protégé.
- Completing an exit interview and submitting the completed document to the PPALM Vice-President for Mentorship. At any time in the mentorship process, mentors have the option to terminate the mentor/protégé relationship.



## 6. Protégés:

PPALM members can become protégés by submitting a protégé application through the PPALM website or in a message via e-mail to the Vice President for Mentorship. Protégés are responsible for:

- Participating in the initial interview with the prospective mentor.
- Notifying the prospective mentor of his/her decision to pursue the mentor-protégé relationship.
- Working with the mentor to complete a career development plan.
- Actively participating in the mentor-protégé relationship.
- Considering the advice and guidance of the mentor and taking action for self-improvement.
- Being responsible for his/her own growth, actions, values, and work ethic.
- Completing an exit interview and submitting the completed document to the PPALM Vice-President for Mentorship.

At any time in the mentorship process, protégés have the option to terminate the mentor-protégé relationship and request a change of mentor. The BoD may, at any time and without advance notice, terminate a mentorship relationship if, in the sole judgment of the BoD, the mentorship relationship poses a threat or harm to PPALM and/or its membership.

## ***Annex B: Chapter Development***

### **Purpose**

As part of PPALM's growth strategy, the establishment of chapters is a critical element in the continuum of PPALM's mission and objectives. It will help maintain PPALM's visibility at the local level, and assist in membership growth and community outreach. PPALM is authorized under its operating documents to create or approve the creation chapters.

### **Objective Guidance**

This annex describes the concept of PPALM chapter development under the auspices of the national organization. The intent is to provide those interested in forming a chapter with several organizational and operational options. As more fully described below, PPALM offers three options: Category A, Category B, and Category C chapters. There are specific requirements that apply to each, and the PPALM BoD has the sole and exclusive authority to develop, amend, and revise those requirements, as appropriate. Chapter approval is completely discretionary on the part of the board, and, once granted, can be revoked by the board if, in its sole and exclusive judgment, chapter revocation is in the interest of PPALM.

### **Request to Form a Chapter**

Individuals and groups interested in forming a chapter must comply with certain initial requirements established by PPALM national headquarters. A written request must be submitted to PPALM that will include a letter of intent ("Letter of Intent") addressing in detail the following minimum requirements: 1) description of group purpose and vision consistent with the national organization's mission, objectives, and core capabilities; 2) a list of at least 10 active members; 3) a list of officers (to include a chapter chairperson, a chapter vice-chairperson, and a chapter secretary; 4) a board of directors, if appropriate; 5) articles of incorporation, if appropriate; 6) ability to conduct organized meetings; and 7) an initial action plan outlining the milestones to function as a chapter. In the Letter of Intent, the proponents of the chapter must clearly indicate whether they are seeking to form a Category A, Category B, or Category C chapter.

### **Category A**

Category A chapters do not have a legal existence separate and apart from the national organization. One might think of this chapter as a "committee" under the aegis of the national organization (i.e., PPALM). Category A chapters report to the national organization and operate

under the authority of the board. Chapters usually start as Category A chapters. Category A chapters must operate subject to all applicable state and federal law, including but not limited to, rules, regulations and policies that govern activities on federal properties and military facilities.

### **Category B**

Category B chapters are separate, fully incorporated legal entities under applicable state law. A “Category B” chapter:

- Is legally incorporated as a non-stock, nonprofit corporation;
- Obtains 501(c)(3) tax-exempt status via a group exemption request filed by the national organization (in other words, the chapter operates under the national organization’s 501(c)(3) tax exemption);
- Has its own board of directors, officers, by-laws, etc.;
- Is subject to the national organization’s general oversight and control as a “subordinate” organization pursuant to the Internal Revenue Service’s group exemption regulations;
- Files its own state-required documents (e.g., annual reports);
- May choose to file separate tax returns or be included under the national organization’s federal filing;
- Must operate subject to all applicable state and federal law, including but not limited to, rules, regulations and policies that govern activities on federal properties and military facilities.

### **Category C**

Category C chapters are separate, fully incorporated legal entities under applicable state law. A “Category C” chapter:

- Is legally incorporated as a non-stock, nonprofit corporation;
- Obtains its own 501(c)(3) tax-exempt status;
- Has its own board of directors, officers, by-laws, etc.;

- Is independently run but must comply with the national organization's chapter requirements, including but not limited to, requirements intended to maintain national consistency across all chapters and requirements to protect and preserve PPALM's identity, (e.g., Category C chapters must provide regular updates to PPALM, must meet periodically with PPALM board, etc.);
- Prepares and files its own state and federal filings, including tax returns and annual reports;
- Must operate subject to all applicable state and federal law, including but not limited to, rules, regulations and policies that govern activities on federal properties and military facilities.

### **Withdrawal or Revocation of Chapters**

A chapter may, at any time but with at least 30 calendar days' prior written notice, voluntarily withdraw from PPALM as a chapter. A chapter seeking withdrawal must file a letter with the PPALM board detailing the reason for the withdrawal. The PPALM board may grant a chapter's withdrawal request, subject to that chapter's compliance with all applicable PPALM requirements and state and federal law.

The PPALM board may, at its sole and exclusive discretion but with prior written notice, revoke a chapter's authorization as a PPALM Chapter. PPALM's written letter of revocation will identify the reason for the revocation (e.g., misfeasance, malfeasance, failure to comply with rules and regulations, etc.). The board's decision is non-appealable and final. In case of an emergent situation (for example, where continued operation of the chapter will, in the sole judgment of the PPALM board, poses immediate and irretrievable harm to PPALM), the PPALM board may, at its sole and exclusive option, immediately and without prior notice to the chapter terminate the chapter's existence and/or relationship with PPALM.

### **Questions Regarding Chapter Formation and Requirements**

Questions regarding chapter formation and requirements may be addressed to PPALM's Chairman, MG Tony Taguba (U.S. Army, Ret.), with a copy to PPALM's General Counsel, A. Enrico C. Soriano.

## ***Annex C: Calendar of Events and Major Activities***

### **Major Activities**

<b>Activity</b>	<b>Monthly Schedule</b>
Annual General Membership Meeting & Reception	October
Association of United States Army Convention	October
Board of Director Nominations – Open	January
Board of Director Elections	March-April
New Board of Director Announcements	May
Asian Pacific American Heritage Month	May
APAICS-PPALM Military Appreciation Luncheon	May
AAGEN Leadership Training Workshop	June
Professional and Wellness Seminar	June
PPALM Update to Honorary Board	July
WWAAC	September

### **Board of Directors Meetings**

The PPALM BoD meets on the third Saturday of each month except for December. Members may request to attend the board meetings, subject to the board's discretion.

## ***Annex D: Plan Development Team***

### **Board of Directors**

Antonio M. Taguba  
Major General, U.S. Army (Ret.)  
Chairman

Vice Chairman (Open)

A. Enrico C. Soriano, Esq.  
Managing Partner, Axxis Law Group, PLLC  
Executive Director (Interim)

Lida Peterson, CPPM, CDMP, CTA  
President, Connected International Meeting Professionals Association (CIMPA)  
Executive Secretary

Paul Shelton  
Colonel, U.S. Army (Ret.)  
Vice President, Mentorship

Alyson Kil, MD  
Captain, U.S. Army  
Vice President, Finance

Renee Lee  
Major, District of Columbia Air National Guard  
Vice President, Communications

Jason Yee  
Captain, District of Columbia Air National Guard  
Vice President, Information Management

Xiaxiou (Sean) Lin, Ph.D  
Captain, US Army  
Vice President, Membership

A.Enrico C. Soriano, Esq.  
Managing Partner, Axxis Law Group, PLLC  
General Counsel

## Contributors

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Editor

## Supporters



## LEGAL NOTICE

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