



MITW 2023 STRATEGIC PLAN ADMINISTRATION RETREAT REPORT



INTRODUCTION

The Menominee Indian Tribe of Wisconsin (MITW) Administration Department staff requested that CIC coordinate and facilitate a retreat for representatives from the Administration Committee and the Administration Department. The purpose of this retreat was to review, discuss, and gather feedback on the 2023 MITW Strategic Plan goals and objectives. The retreat was held on July 6-7, 2023.

RETREAT OVERVIEW

The retreat was held at Island Resort and Casino in Harris, MI. This retreat was intended to review the goals and objectives, gather additional information, and plan for the next steps for the completion of the strategic plan and preparation for the plan's approval by the Menominee Tribal Legislature (MTL). The agenda focused on each planning pillar (Culture, Economic Development, Education, Health, Justice, Natural Resources, and Social/Community). The attendees worked in a large group to provide insight into how each pillar's goals and objectives are aligned with the Tribe's departments. The plan was reviewed to ensure the SWOT analysis future story (Opportunities and Threats; Passions and Priorities) align with each pillar's goals. The group reviewed the objectives to confirm that the objectives will lead to the completion of the goals.

Responsibility
+
Accountability
=
OWNERSHIP

Edward J. Krueger, Director
Center for Innovative Change

PARTICIPANTS

The meeting included the following participants from the Administration Department and the Administrative Committee:

Patricia Peters
Anmarie Johnson
Joshua Pyatskowitz

Stephanie Awonohopay
Antoine Chevalier
Marci Hawpetoss

Melissa Besaw
Brenda Tomow

The facilitators and videographer were:

Edward J. Krueger

Beckie Murdock

Gary Dodge, Jr.

WORKGROUP MEETING AGENDA REVIEW

The participants checked in on the evening of Wednesday, July 5. The retreat began on Thursday, July 6 with the following agenda:

WORKGROUP MEETING AGENDA REVIEW (CONTINUED)

Thursday, July 6

Opening: Annmarie Johnson provided opening comments. She indicated that she hoped this meeting would provide the participants time to review the plan, have input into the plan, and gain commitment to moving the plan through the approval process and into the implementation phase.

Edward Krueger worked with the group to identify their expectations for the meeting and to discuss the challenges and opportunities they see.

Participant Expectations:

- The planning process has enhanced positive communication and teamwork within the Tribe's departments and with the Administration Department. It is helping bring everyone to the same page, and while there may be different viewpoints, everyone has the same overall goal/s. Directors work well together. The planning process will help the community with important issues like homelessness and other topics. There are more events for the youth. The meetings provide an opportunity to contribute, get things done, express ideas, and plan for implementation. The Tribe is making positive, forward progress. Directors are more open to hearing each other. Directors have great ideas and are bringing those to the meetings. Administration and finance are giving them the tools to move past obstacles. It is important to follow through on commitments. Commit more time to be there in the future. Time management and commitment. Recognizing the good work departments are doing – they don't get enough credit for the things that they do.
- With the work that has gone into the process, it is hoped that things don't drastically change as the Tribe's organizational structure changes (elections). There needs to be a focus on keeping it alive – so it doesn't fall by the wayside. The Administration Department needs to commit to keeping things moving forward through changes in administration/legislative changes. You can see the commitment from the Directors to get the goals/objectives to this point. Put more time into the plan, use the pillars to review the needs/requests, and implement them into the HR Department policies and procedures. Keep the plan in mind when doing the work.
- Planning fits in well with grant writing. The grants team's role in the process is to help secure funding and resources for the activities. As funds are secured, it creates organizational change to bring the community along. The grants team is critical for the implementation of the plan. The plan affects everyone. In many areas, the grants team is not subject matter experts, so they need to do a lot of research. Create tools and a process from the grants team to foster and support two-way communication between the grants team and other departments. The department is putting software in place to organize and manage grants. The Grants Department is committed to the process of aligning with the strategic plan to show how the plan fits/inspires the work.
- It's easier to align with the goals/objectives and to stay focused and on task. There is a need for shared responsibility for writing and implementing grants.

WORKGROUP MEETING AGENDA REVIEW (CONTINUED)

Participant Expectations (continued):

- People spent time during the retreats building relationships. This makes it easier to resolve problems and recognize what needs to happen to work together. Get a standardized form for reporting on the work being done by departments. Measure what people are doing monthly. The plan is only as good as the people who are committed to implementing the goals/objectives. There will be challenges in the next couple of years – the strategic plan can help move through financial challenges. There is a need for a technical process of compiling and reporting on data to use it to review what's happening in an efficient/timely manner. When the federal government distributes money, there's accountability. The Tribe needs to ensure accountability for the implementation of the plan.
- Initially, when working with the Tribe, there was no communication between the management areas (HR/Management/Finance). It has improved over the years, and the plan can help this to continue and improve. The departments that have a “That's not my department's responsibility” mentality hold everything back. The plan can get things moving forward together. Some department directors didn't know the plan existed. There needs to be a strategy to keep things moving forward through changes in the legislature as well as within administration/department director positions. A lack of collaboration affects everyone and slows down the process, resulting in unwanted consequences. Finance is working on their communication with staff to ensure that accurate data is reported. Finance isn't an island; they represent the work being done by all departments within the Tribe. Backup documentation is needed for expenses to be prepared for audits. Finance is nearing the end of creating a procedures manual that will provide more consistency in financial reporting. Review the plan – biannually or quarterly. All departments are part of the process. This year's exit interview included more administration/legislative representation – more collaboration and agreement on what needs to happen. Make sure the plan continues to be reviewed and kept alive.
- This is not only for the current changes but to put a process in place for change in future generations. The process needs to be viewed for the positive changes that are occurring and to be supportive of changes to how work is currently being done. Communication and collaboration feel like a success already. Some directors were already using the plan as a guide, but this should be a way to keep everyone involved in moving the plan forward – working together with respect for each other. In the back of the mind is a constant process of improvement for the future.
- The meetings provide an opportunity to reconnect with the directors. During this period of change, there are many dual efforts of the old system and the department where the business models have changed. The Tribe needs to look to the future. Change is about organizational development. We need to change to survive. When people are traumatized, things stop, and people forget what they were doing. The Tribe is amid major change and a new era of support is needed (post-COVID).

WORKGROUP MEETING AGENDA REVIEW (CONTINUED)

Participant Expectations (continued):

- Training and development are needed to relook at models and the current needs of employees, directors, and the community. This group needs to help people get where they need to be now and to always be looking toward future needs.
- The planning process provides the opportunity to reinvigorate networking. Creativity needs to come from within; they need to own it. Fly the plane while you are building it and keep moving forward. It is important to know the external trends and what's happening. Labor/turnover is not new, but there needs to be a plan that looks at solutions. The Tribe is evolving. There is a desire to help people and a commitment to getting things done. Many individuals struggle with learning how to ask for help. There is great creativity within the employees, directors, and the community – the community is the motivation to keep things on track and aligned with the needs of the community. Constantly ask questions, look at the organization's health, and learn from what happens. This group should ensure synergy (elevator talks) to keep major points alive and moving forward. Nurture and grow individuals. Workgroup disagreements and misunderstandings address underlying conditions rather than focusing on the symptoms of those conditions. "Not my job" ... it's all our job. We are change agents, community members, Tribal members, and family members. Take care of people – commit to the policy – keep it alive and fluid. Commit to using all roles to help with accountability and forward motion. We need data to monitor and recognize the progress being made toward the completion of the goals/objectives.

The remainder of day one was spent reviewing each pillar's goals and objectives, making additions and edits where needed. Updated goals/objectives for each pillar will be attached to this report.

At various points throughout the two-day meeting, participants were involved in group exercises to look at specific considerations around implementing a large-scale project like this one.

Friday, July 7, 2023

Friday morning's session began with an icebreaker related to change. The participants were put into pairs and one person was asked to change 4 things about their appearance while their partner was not looking, to see if they could then identify the changes. Most participants immediately put everything back to where it was before the exercise. This helped demonstrate how frequently we are resistant to change and how important it is to be aware of how others respond to change. The role of the administration and the directors will be to ensure resistance to change is addressed as it occurs. This will greatly support the implementation of the plan and provide positive messaging to the community about the benefits of implementing the proposed changes.

Helping Move Through Change

The group discussed potential challenges the group might face in helping departments and the community be receptive to the changes that will result from the implementation of the strategic plan. The discussion on ways to support change included:

- Know the plan; speak to it. Communicate (2) and market the plan. Disseminate copies of the plan.
- Ensure objectives have timelines and deadlines that support follow-through for the implementation of the objectives.
- Identify problem areas in achieving goals and break down what they specifically don't agree with.
- Provide continual check-ins with staff to see how the Administration Department can better support their work.
- Ask, "What do you need from me to help? What tools are needed?"
- Educate the community and the departments (3) on input opportunities; listen to feedback; gain.
- Provide examples of how this process works and highlight the improvements.
- Motivate by sharing examples of successes.
- Ask why they are resistant to change; present options; create teams to advance the plan.

Change is a **THREAT**
When it is done **TO US**;
an **OPPORTUNITY**
When it is done **BY US**;

**WITHOUT
INVOLVEMENT**
there can be little
COMMITMENT.

Being Responsive to Challenges as They Occur

Any time there is a major effort such as this 2023 Strategic Plan, it is important to reflect on anticipated challenges with plan implementation. The group discussed potential challenges, including:

- Funding for implementation.
- Not recognizing the accomplishments.
- Scarcity mindset.
- Time management.
- Obtaining agreement about the work to be accomplished.
- Lack of understanding related to how/why/what strategic planning is.
- How to keep the plan on track.
- Lack of performance data.
- Lack of clarity on the plan.
- Accountability to be built into the plan.
- Need to obtain buy-in and support.

The group brainstormed approaches to work with these challenges and discussed the following:

- Use strategic planning policy to guide forward motion, roles, and responsibilities.
- Create a marketing plan that includes an educational component.
- Hold a kick-off meeting.
- Communicate updates and provide ongoing progress reports to departments and the community (3) on the goals/objectives (5).
- Ensure the plan has a continued presence in the community; be visible.
- Design community presentations for updates by the workgroups.

Being Responsive to Challenges as They Occur (continued)

- Use the concept of sub-clans to create teams focused on specific topics, (e.g., language, food sovereignty).
- Define success, what is success? ... and what are the variables: How will this be measured?
- Design a data model with automated reports and a standardized reporting form.
- Have deadlines to keep the work on track; stay on track; keep the plan relevant and reference often when planning/directing departments.
- Ensure accountability by meeting with whole departments to discuss the plan and what they can do as individuals to support implementation.
- Create onboarding that focuses on positive enforcement and encouragement.
- Communicate examples and have in-depth discussions on successes from the first plan (2); maybe include input from grants?
- Design an educational component: What is Strategic Planning?
- Create tools and have training on implementation, data/information gathering, and tracking performance.
- Time management – a new approach to planning that includes more virtual participation.
- Time: mandate a specific date/time for the strategic plan. Collect information or data through reports.
- Create an Administration planning team; just like the grants team.
- Align grant writing and tribal budget process; include partnerships in all applications for funding.
- Seek additional funding through grants!
- Funding: Collaborate with other departments to seek funding sources that can help address the issue/s.

Benefits of Collaboration

The participants provided insights into the benefits of collaboration as it relates to the development and implementation of the MITW 2023 Strategic Plan. Some of the benefits included:

- #1 rule: RESPECT. Create a safe environment to share ideas.
- Provide continued data reporting.
- Empower small groups (2- people) closest to the situation to make changes (plans and policies).
- Create “task list” tools for each team, around specific objectives.
- Build leaders, conduct leadership training, and project management training.
- Use the communication plan to disseminate information.
- Ensuring all Administration Department staff are committed to the Strategic Plan and the implementation of the plan.
- Use community engagement and 90-day plans to support collaboration.
- If community engagement workshops are used for the implementation of the plan, have a representative from each department in attendance.

Benefits of Collaboration (continued)

- Be cheerleaders and motivators and be responsive to questions.
- Email updates.
- Conduct team building sessions and provide training that brings departments together.
- Mandated meetings; encourage community engagement.
- Include strategic planning as part of job evaluation and performance measures.
- Find positives; be strength-based.
- Provide more large-scale gatherings; shorter; close to home for directors.
- Highlight successful collaborations. One example is culture camp.
- Use meetings to discuss and support collaboration: daily meetings; special meetings; general council meetings; MTL meetings; Director's meetings; and committee meetings.

Consistency in Messaging to the Departments and the Community

The group discussed the importance of providing a unified approach to how messaging is delivered from the Administration Department and the Legislature to the community as well as to department staff and key stakeholders. The group's discussion included recommendations for the following key components and considerations to be included in messaging:

- Strategic planning is not a new concept for the Menominee. Ancestors knew strategy.
- This plan is a continuation of an existing process that has been updated for our current concerns.
- Making the time to evaluate the organization is critical to its success.
- Share reasons why strategic planning is important. Planning reduces chaos.
- Without strategic planning you do not know the current state of the Tribal Organization.
- Strategic planning creates a roadmap for an organization that enables us to track progress through established goals.
- Strategic planning creates the framework to complete specific goals in a timely, realistic way.
- The strategic planning process advances the Tribe in an organized thought process.
- The planning process should be shared to gain more community support.
- Community: This is how you can hold leadership accountable; it is an opportunity to guarantee you are heard.
- It is difficult for the Tribe to show change/improvement that is small scale over longer periods of time. This is a positive method for sharing success and reflection.
- Strategic planning will show that we are organized and have put the necessary preparation into plans. This will make it easier to gain support from outside sources.
- The plan is for the future of our families – it will pave the way for a better life.
- Get committees involved – all areas within the Tribe.
- Share data from the 2007 plan (information gained and the positives that were achieved).
- Create visuals [videos (2)] to support planning; include data or statistics.

Consistency in Messaging to the Departments and the Community (continued)

- Create a visual dashboard for reporting to the community on the progress being made to implement the plan (2).
- Planning provides the tools, such as training, mentoring, and education, that will lead to success.
- The more we work together, the less everyone must carry.
- Provide comparisons of before and after completion of goals/objectives.

Parking Lot

Some topics were added to the parking lot for future discussion and review. These topics included:

- Topics to review with the Legislature:
 - Taxation
 - Tribal businesses
 - Department budgets for 2025 (consolidation of departments, i.e., Historic Preservation with Language and Culture; MLCC with Education).
- Broad records management system needs.
- Succession planning (e.g., Historic Preservation).
- Revisit fee schedule and identify uncaptured revenue.

Meeting Key Takeaways

Prior to the conclusion of the meeting, participants were asked to share their key takeaways from the meeting. Their comments included:

- This meeting is a reminder that this is not a short-range plan – a multi-year plan that may take 5-10 years to complete. Ideally, the process will bring the Departments closer to the goals.
- A high level of commitment will be needed to make this successful. It will help us build buy-in with others who are not here.
- Happy with how this is being put together, the collaboration, and the respect everyone has for each other. The comfort level of the participants made it easy to contribute.
- Being here with Tony and Stephanie (HR and Finance Departments) helps see how they are impacted by the planning process. It is important to be present. It gives one power when they are part of the process. It's important to show up.
- The meeting provided an opportunity to learn a lot from others. You don't know until you hear from others what they do and what their objectives are. You can have opinions, but when you hear directly from the people involved, you can then know precisely what the needs are.
- What we have in common and what we are trying to do to assist the Tribe with making change – it takes everyone; it takes the community; it will take time, but the plan has done so much and will continue to have positive outcomes.

Meeting Key Takeaways (continued)

- Great ideas were shared many years ago for the previous plan– it works. Confidence – how much was done – building in so many tools that will contribute to success. The path that has been figured out by everyone. Now there are mechanisms to keep the plan alive and moving forward. Recognize employees and the gifts they have. Sometimes it is taken for granted and not recognized.
- Amazing people – so many good ideas.
- The meeting helped me realize how much work has been done and recognize how much more there is to do.

Next Steps

Brenda Tomow briefed the group on the next steps that will help move the plan forward for completion and approval by the MTL. The next steps include:

- Updated goals and objectives for each pillar will be shared at the Director's Meeting.
- There will be a workgroup meeting scheduled to review housing and homelessness with the necessary stakeholders [this meeting has been scheduled for July 19.
- Week of July 17, Brenda and Beckie will visit the Senior Centers to discuss and get feedback on the plan.
- A meeting will be scheduled with Brenda, the grants team, and CIC to outline the strategic plan document and discuss the details/assignments for completion of the information needed to finalize the plan.
- Additional Director's Meetings will review 90-day plans for goals and objectives and provide information for the logic model for each pillar.
- July 31 will be a community meeting to review the goals and objectives for each pillar.
- August 10-11 will be a two-day retreat for the MTL to discuss the plan's approval process, goals, and objectives that require their feedback, review the 2005-2023 comparative data related to Tribal Government, and map out goals and objectives for MTL.
- September 10 (estimated date) is when a near-final draft will be ready for submission to the MTL.
- September 30 is projected for completion of the plan, approval b MTL, and then the plan will be ready to move into the 90-day community engagement workshops.

The meeting adjourned at 2:30 pm on July 7, 2023.

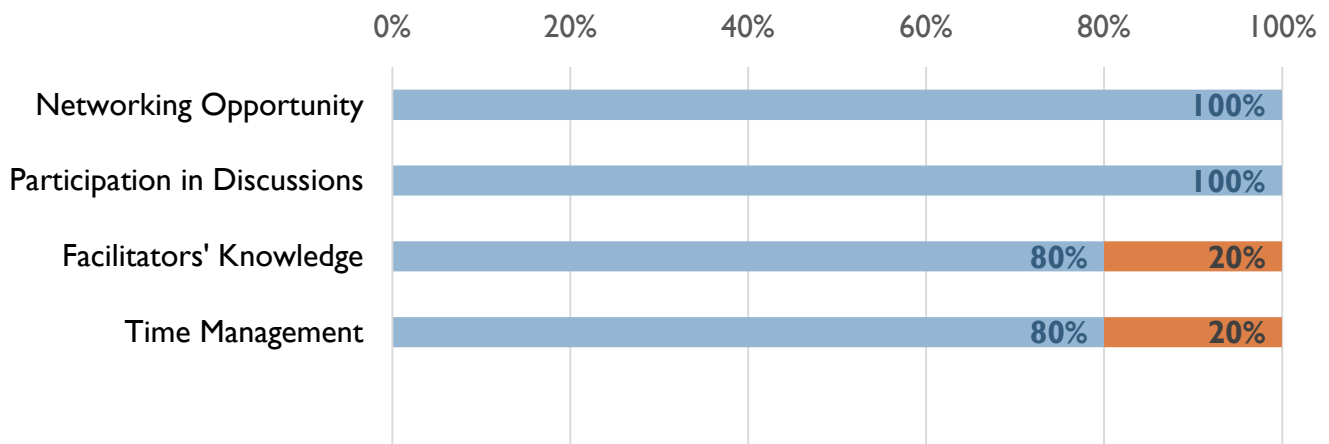
RETREAT EVALUATION

The retreat included 8 participants, two facilitators, and a videographer/recorder. Of the 11 participants, 5 completed evaluation forms at the meeting’s conclusion, either online using SurveyMonkey or using hard-copy evaluation forms provided with their meeting materials.

Evaluation Summary Findings

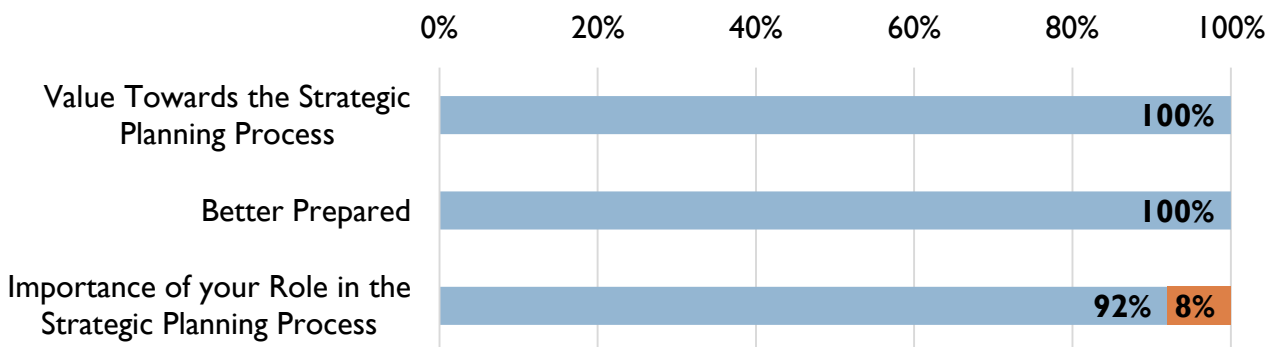
Valuable Aspects of the Meeting:

Participants were asked to rate the retreat for the aspects they found most valuable. The responses are outlined as follows:



Satisfaction Ratings

Participants were asked to rate the meeting’s overall value in helping prepare for the strategic planning process. Their ratings were combined and averaged. 100% of participants felt the meeting was valuable towards the strategic planning process and 100% felt better prepared to support the plan because of this meeting. 92% of participants recognize the importance of their role in the strategic planning process.



Participants were asked to share additional information on takeaways from the meeting, which included:

- A great level of commitment is needed for this process to work.
- Trust; communication; tools; process; activities – long-term outcomes were my key takeaways.
- Revisiting this is a long-term plan with some short-term goals.
- Setting the goals and objectives is so important to the plan's success.

Participants were asked if they had additional comments to share regarding the retreat and the strategic planning process:

- The tools provided are good.
- I was very satisfied with the meeting. There were moments when I felt misunderstood. Thank you for your patience. Maec Waewaenen.
- Good input from a variety of sources to clarify goals and objectives.
- I wish Finance and HR could have had their key managers included as Administration had theirs. More heads achieve better results.

OBSERVATIONS

Location

The Administration Department retreat was held at the Island Resort and Casino in Harris, MI. This retreat helped bring together key staff to discuss insights each participant has related to the inter-departmental operations of the Tribe, the Legislature, and key external stakeholders. From the shared perspectives, goals and objectives were reviewed for relevance, priority, and the likelihood of successful implementation of the overall strategic plan. Once again, bringing staff away from their offices provided an opportunity for discussion that would not occur if the meeting were held close to home/work.

Participants

The participants all recognized the importance of their involvement in the planning process and participated openly to share ideas and opinions. There was a general appreciation for the time taken out to review the progress on the plan and learn more about opportunities for improvement that can be realized through the plan. The participants agreed on the importance of their department in moving the plan forward and recognized the need for sharing positive messaging, consistently, and frequently with the community, the departments, and the MTL.

Recommendations for the Future

The Administration Department plays a critical role in the oversight of the completion and implementation of the MITW Strategic Plan. Another meeting will need to be scheduled to review Justice Pillar's goals and objectives once they are completed. For the plan to be successful, there will need to be frequent, scheduled, update meetings that look at data collection methods, ways to document successes, communication strategies, and opportunities for improvement/adjustment as needed.