Strategic Planning Meets Strategic Execution

From the Drawing Board to the Dashboard

Introduction to Strategic Planning
This section provides an introduction to Strategic Planning basics, terminology and key elements to a productive planning session.

Strategic Planning Roles
This section introduces the important and specific roles to be filled by volunteer leaders and/or staff to ensure the strategic plan is successfully executed.

Strategic Plan Template
Use this template to establish measurable goals and overall strategies for achieving the strategic objectives of the organization. Essentially this is the strategic plan of the organization.

Promotional Strategic Plan Template
Use this document to promote the strategic plan to your membership, key stakeholders and the public.

Action Plan Template
After completing the strategic plan template, utilize this template to establish an action plan to achieve the desired goals and objective; this is a working document for staff, committees and board volunteers.

Dashboard Template
This template can be used to track performance measures and targets, as established in the strategic plan template. This template is an excellent resource for Board updates as a quick snapshot of where the organization is in achieving its goals.

Resources and Samples
Articles by Bill Pawlucy, CAE, founder of Association Options, Inc. as well as a sample pre-planning survey, additional dashboard samples and examples for keeping the strategic goals top of mind.
Introduction to Strategic Planning

Importance of the Strategic Plan

The strategic plan is nearly as important as the governing documents. In the hierarchy of documents, a strategic plan ranks fifth. The absence of a plan can be detrimental in achieving the mission.

Guiding Documents

1. Mission Statement (purpose for existence)
2. Articles of Incorporation (relation to state government)
3. Bylaws (relation to members)
4. Policies (interpretation of governing docs)
5. Strategic Plan (3 to 5 year roadmap)
6. Annual Budget (annual financial plan)
7. Business Plan (annual program of work)

The strategic plan is a critical element for any organization as it:

• Serves as a roadmap for guiding the organization over the next 3-5 years
• Prevents the organization from changing direction with every new leader
• Ensures alignment of committees and volunteers working towards common goals
• Aids in budget planning to ensure achievement of goals
• Allows for staff and volunteers to plan for annual allocation of resources
• Creates industry and public awareness of your organization, its goals and importance
Creating the Plan

Creating the strategic plan begins with a Board retreat aimed at drafting the plan, holding discussions about organizational needs, and amending and dropping programs. The goal of the retreat is to end with the establishment of 3-5 goals with supporting strategies to guide the organization over the next three years.

There are several steps to create the plan during the retreat:

- **Set the Scene** – relieve anxieties and promote comfort; responsibility of the President and Executive Director
- **Establish Terminology** – ensure everyone has the same understanding of key words such as goals, mission, strategies, etc.
- **Review Reports** – begin with review of prior plans and what was accomplished or is unfinished
- **Perform a SWOT Analysis** – some begin with a discussion of internal organization strengths and weaknesses and external opportunities and threats
- **Discuss Brand Platform** – review and reaffirm or adapt the mission statement, vision and value statements
- **Set Goals** – establish 3-5 goal statements
- **Identify Strategies** – determine approaches to agreed upon goals
- **Agree Upon Performance Measures** – decide on performance metrics to promote accountability in achievement of goals
Preparing for the retreat can be as important as the resulting plan. Getting the right people, right location and right facilitator are among the critical factors. Below are suggested tips for preparing for the retreat:

<table>
<thead>
<tr>
<th><strong>Setting the Scene</strong></th>
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</table>
| **Determine the Need for a Plan** | • Reach consensus that a plan is essential for good governance  
• Discuss expectations for cost, attendees, location and desired outcomes |
| **Select Date and Timeframe** | • Allow at least 60 days to plan  
• Deserves to be its own event  
• Typical Board needs 7-8 hours over 1 or 2 days |
| **Select the Setting** | • Find a comfortable location with natural light and space to move  
• Avoid long and narrow rooms  
• Avoid loud settings prone to interruptions  
• Set room in an open-U board table  
• Universities and business centers often offer low cost meeting options |
| **Find a Facilitator** | • Facilitator keeps the meeting moving and ensures discussions/decisions achieved in set timeframe  
• Facilitator involves everyone and can balance participants that dominate  
• If budget is limited, it does not have to be a paid facilitator; can be current or past Board member dedicated to keeping the meeting on track |
| **Select the Participants** | • Board of Directors is responsible for setting the strategic direction  
• Small Boards can consider including committee chairs, past presidents and staff |
| **Survey Attendees in Advance** | • Helps establish common group themes  
• Identifies potential issues, roadblocks or conversations that could potentially derail planning  
• Utilize free/low cost tools such as SurveyMonkey  
• *Sample survey provided in this Toolkit!* |
Establishing Terminology

Below is common terminology used in the planning process. Discuss terminology with the Board at the start of the retreat.

- **Strategic Plan**: A process and resulting document to guide the organization. A roadmap for the leadership, staff and committees.
- **Mission**: The reason for the organization’s existence; its purpose statement.
- **Vision**: Vivid description and aspiration to describe how the organization desires to be perceived.
- **Values**: Guiding principles embraced by leadership and staff.
- **Goals**: Statements that represent where resources will be focused to achieve the mission. Generally 3-5 realistic, well-stated goals.
- **Strategies**: The programs and projects for achieving the goals; realistic yet innovative.
- **Tactics & Metrics**: Deadlines, delegation and key performance measures.
- **Action Plan**: Transition of the strategic plan into a one-year operating plan.
- **Dashboard**: Document for tracking progress to goals; specifically tracks to agreed upon performance metrics.

Reports

In preparation for the planning process, it is important for the Board to review available data and past plans. Reports for Board review prior to planning may include:

- Prior Strategic Plans or Goals
- Accomplishments to date
- What is left to be accomplished
- Member surveys/data
- Pre-Session survey results (*sample survey included in this toolkit*)
  - Desired outcomes for the retreat/planning process
  - Strengths, Weaknesses, Opportunities, Threats (SWOT Analysis)
  - Top goals/priorities for the next 3 years
  - What the organization should start/stop doing
After reviewing available data, reports and pre-session survey data, it is important to revisit the organization’s mission, vision and values statements.

The mission statement defines the organization and its purpose while an organization’s vision statement speaks to its goals and aspirations. Values are an organization’s core beliefs and principles. When combined, the mission, vision and values statements help distinguish your organization from other organizations while communicating purpose and value to its members, prospects, clients and stakeholders. It is important that the strategic plan and goals support the achievement of the organization’s mission and align with its vision and values.

We recommend the organization identify 3-5 strategic goals to be achieved over the next 3 years. Any more and the plan can become unmanageable. Depending upon the resources available to the organization, an organization may want to focus only three goals over the next three years. Goal statements should state the goal, performance metric and timeframe for achieving the goal.

**Example Goal Statement:** Accelerate Membership Growth (*The Goal*). Increase membership from 320-350 (*The Metric*) by December 31, 2016 (*Timeframe*).

As part of the goal setting, Board’s often find it helpful to state the rationale or importance of the goal. A sample rationale to support the above goal is as follows:

**Example Rationale:** Membership growth will continue to be of utmost importance to the Association, for several reasons: it drives revenue, which in 2013 amounted to almost $270,000 in dues payments; it provides a stable base for the Association’s programs; and it demonstrates organizational vitality better than any other indicator, which is particularly important during the current competition for dues dollars.
After agreeing upon 3-5 goal statements, the Board next moves in strategy setting, which is the identification of 3-5 strategies for achieving each goal. Sample strategies for the above goal and rationale are:

**Strategies:**

1. Establish a Member Retention and Recruitment Committee for individual outreach efforts
2. Establish and implement plan for member recruitment of former and non-members
3. Identify and target areas with the greatest potential for new members

The next steps is to identify performance metrics for each strategy over the next three years. The metrics are what the organization hopes to accomplish each year and are specific to each strategy. The metrics can be project to be completed (I.e. “Create a vendor membership program”) or a measure (I.e. “Attract 50 new vendor members by year-end”).

This data serves as the baseline information for the *Strategic Plan Template* included in this Toolkit as shown below:
Avoid the following pitfalls when building the strategic plan:

- Goals that serve individual Board members versus goals that carryout the mission of the organization and/or allow it to better serve its members
- Goals that do not relate to the overall mission and vision of the organization.
- Too many goals; beyond the capacity of the organization.
- Too tactical; simply a “to-do list.”
- Short term (1 year) rather than visionary thinking (3 to 5 years).
- Poorly timed; the plan is not finished at the retreat.
- The wrong - or too many - people at the retreat.
- Lack of performance measures.
- Leaders or staff ignoring the plan.
Following the retreat, implementing the plan is just as important as developing the plan. All too often an organization will develop a plan only to have it sit on the shelf. The following provides suggested timeframes for ensuring implementation of the plan.

### Strategic Plan Implementation

- **30 Days**
  - Circulate Plan Draft after the Retreat
  - Final Input by Stakeholders

- **90 Days**
  - Approval of the Plan by a Motion of the Board
  - Member Awareness
  - Brochure – Marketable Format
  - Action Plan for Committees and Staff
  - Create dashboard for progress tracking

- **1st Year**
  - Monitor Progress of the Plan
  - End of Year Review

- **3rd Year**
  - Rewrite of a the Plan after 3 to 5 Years

The following implementation templates are included in this toolkit for: Action Plan, Dashboard, and Promotional Strategic Plan.
Strategic Planning Roles

Plan Champion

The overall champion of the strategic plan is the Chief Elected Officer of the nonprofit organization. This title may be President, Chairperson or other variation but it is the volunteer leader who was elected to lead the organization. The plan champion is also referred to as the “keeper of the plan”

Responsibility: Ensure that the strategic plan and all of its elements are moving forward. This does not mean that the plan champion is hands-on in every element of the plan but is aware of progress. In addition, the plan champion does monitor the plan via a dashboard, which should track key performance indicators (KPI)

Goal Champion

During the planning process, the organization will identify a set of goals, typically three to five that are executed upon during a three to five year period. It is recommended that each goal be assigned a goal champion. In this case, each goal should have both a volunteer leader and a staff leader attached to ensuring the success of that goal.

Responsibility: Staff has full responsibility of executing on that goal item throughout the year by managing the strategies, actions and tactics for that goal. The volunteer leader is the person that can help move things along on the Board level where it might be difficult for the staff person. This teamwork approach ensures movement at all levels and helps to eliminate any potential barriers. Also, during Board discussions, the volunteer goal champion can best articulate this goal if needed and beyond what is included in the strategic plan dashboard.

Task Owner

In the strategic plan action planning documents, a task owner is typically assigned for each tactical item listed in a key strategy. There may be multiple task owners in a specific strategy and not just one individual. The task owner is typically a staff person but given the nature of the tactic, this may be a Board, committee or other volunteer leader.

Responsibility: The task owner is responsible for the completion of the task, while utilizing internal resources, to accomplish the task. In addition, the task owner will work with a committee on the completion of a task item. The task owner is also responsible for updating the status of the project and the level of completeness of the project.

These are basic guidelines to use but your organization’s plan will dictate the best allocation of resources and what makes the most common sense. Also, empowering staff to execute on the plan will allow the Board to effectively govern while Staff manages the organization. Implementing the plan does not have to be daunting but an enjoyable process where the leaders and staff are working in harmony.
**[Organization] Strategic Plan**  
**2015 – 2017**

*Use this template to establish measureable goals and overall strategies for achieving the strategic objectives of the organization. Essentially this is the strategic plan of the organization.*

<table>
<thead>
<tr>
<th>Strategic Goal</th>
<th>Strategy</th>
<th>Performance Measures</th>
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</thead>
</table>
| Provide unmatched, high-quality programs and services that deliver exceptional member value | Rationalize program and service offerings following the principles in Race for Relevance | Collect data on current program and service performance (quantitative and qualitative).  
Develop a plan to either a) phase out programs that are no longer producing a margin or b) repurpose them to effectively contribute to the success of the organization.  
Create fully developed process maps, costs and profit centers for the organization to effectively make management decisions around program sunsetting or repurposing. |
| Solicit member feedback via VOC and member opinion surveys to determine value of current programs and need for future programs | [Performance measurement year 1] | [Performance measurement year 2] | [Performance measurement year 3] |
| Develop an understanding of current program and services contributions to the organization’s margin | [Performance measurement year 1] | [Performance measurement year 2] | [Performance measurement year 3] |
| [Strategy] | [Performance measurement year 1] | [Performance measurement year 2] | [Performance measurement year 3] |
| [GOAL 2] | | | |

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2015 – 2017 Strategic Plan
Use this document to promote the strategic plan to the membership

Mission

[Organization’s Mission]

Member Value
Provide unmatched, high-quality programs and services

- Develop an understanding of current program and services contributions to the organization's margin
- Solicit member feedback via VOC and member opinion surveys to determine value of current programs and need for future programs
- Rationalize program and service offerings following the principles in Race for Relevance

[Area of Work]
[Goal]

- Strategy 1
- Strategy 2
- Strategy 3

[Area of Work]
[Goal]

- Strategy 1
- Strategy 2
- Strategy 3

[Area of Work]
[Goal]

- Strategy 1
- Strategy 2
- Strategy 3

Organization contact info
**Goal:** Provide unmatched, high-quality programs and services that deliver exceptional member value

**Strategy:** Rationalize program and service offerings following the principles in Race for Relevance

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<tbody>
<tr>
<td>1</td>
<td>Assign Board task force and charge them with completing program analysis</td>
<td>[Name]</td>
<td>Board President</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>2</td>
<td>Utilize program matrix in Race for Relevance to evaluate each program and service offering</td>
<td>[Name]</td>
<td>Board Task Force</td>
<td></td>
<td></td>
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<tr>
<td>3</td>
<td>Collect data on each program and service offering</td>
<td>[Name]</td>
<td>Board Task Force</td>
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<tr>
<td>4</td>
<td>Report data to Board</td>
<td>[Name]</td>
<td>Board Task Force</td>
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<td>5</td>
<td>[Tactic]</td>
<td>[Name]</td>
<td>Board Task Force</td>
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<td>6</td>
<td>[Tactic]</td>
<td>[Name]</td>
<td>Board Task Force</td>
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<td>7</td>
<td>[Tactic]</td>
<td>[Name]</td>
<td>Board Task Force</td>
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<tr>
<td>8</td>
<td>[Tactic]</td>
<td>[Name]</td>
<td>Board Task Force</td>
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</table>

**Goal:** [Enter Next Goal]

**Strategy:** [Enter strategy to achieve goal]

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<td>[Tactic]</td>
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Use this document to establish an action plan to achieve desired goals; this is a working document for staff, committee and board volunteers.

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### [Organization] Strategic Plan Dashboard 2015

<table>
<thead>
<tr>
<th>Strategic Goal</th>
<th>Strategy</th>
<th>2015 Target/Measure</th>
<th>Champion</th>
<th>% Complete YTD</th>
<th>Status Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Provide unmatched, high-quality programs and services that deliver exceptional member value</td>
<td>1.1 Rationalize program and service offerings following the principles in Race for Relevance</td>
<td>Collect data on current program and service performance (quantitative and qualitative).</td>
<td>Joe Leader</td>
<td></td>
<td><img src="image" alt="Green" /></td>
</tr>
<tr>
<td></td>
<td></td>
<td>[Enter target 2]</td>
<td>Joe Leader</td>
<td></td>
<td><img src="image" alt="Red" /></td>
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<td></td>
<td>1.2 Solicit member feedback via VOC and member opinion surveys to determine value of current programs and need for future programs</td>
<td>[Enter target 1]</td>
<td>[Enter Champion]</td>
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<td>[Enter target 2]</td>
<td>[Enter Champion]</td>
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<td>1.3 Develop an understanding of current program and services contributions to the organization’s margin</td>
<td>[Enter target 1]</td>
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<td>[Enter target 2]</td>
<td>[Enter Champion]</td>
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<td>1.4 Strategy</td>
<td>[Enter target 1]</td>
<td>[Enter Champion]</td>
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<td></td>
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<td>[Enter target 2]</td>
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**Color Coding:**
- Green: 84% or above
- Yellow: 56-83%
- Red: 55% or less

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Use this template to track performance measurements and targets. This template is an excellent resource Board updates as a quick snapshot of where the organization is in achieving its goals.
1. Please complete this sentence to reflect what outcome(s) you desire for the meeting: The strategic planning session will be a success if we...

2. What are the organization’s top three strengths?

3. What are the organization’s biggest weaknesses?

4. What opportunities are available to the organization? (these can be opportunities emerging in the profession, expanding upon something the organization is already doing or starting something new)

5. What are the potential obstacles to the organization’s success?

6. What do you believe should be the top three goals and priorities for the organization moving forward?

7. Is there anything the organization has been doing that it should stop doing? If so, why?

8. Are there any benefits, services or activities the organization should start doing? If so, why?

9. Please provide any other comments or concerns regarding the organization:

10. Please provide any other comments or concerns regarding the Strategic Planning process:

For organizations doing a Strategic Plan refresh, you may consider asking participants to rank the importance of the organization’s current goals and identify the top three strategies for achieving those goals.

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Strategic planning is the first step in the execution of an overall plan. The strategic plan establishes a key process approach to begin thinking about the future of the organization. If the strategic plan is a process, then what is a logical approach to monitoring and tracking results? The results of a strategic plan live in a dashboard that is customized by the organization executing the strategic plan.

The strategic planning dashboard is a tool that provides a snapshot of the organization's progress to its strategic plan at a certain point in time. It monitors execution from the first day that the strategic plan is deployed within the organization. The dashboard is important in that it does the following:

1. keeps staff on track and focused on the plan
2. provides the volunteer leaders that are champions of the plan's actions a dashboard to monitor progress to the plan
3. provides the board with a tool that succinctly sums up progress and allows the board to concentrate on a path moving forward rather than wading through report after report on each strategic item
What is in a dashboard? The following are key items that are essential in any organization's dashboard.

**Measurable objectives.** List each strategic objective with a measure that makes sense. For example, "achieve 90 percent overall member satisfaction." This makes it clear, measurable and achievable.

**Core competencies.** List the organization's core competencies related to that strategic goal. These are core competencies that were identified during the strategic planning session. Tying goals to core competencies brings resources that are currently in place to achieve that specific goal.

**Long-term and short-term goals.** List out and identify that specific goal's short-term and long-term action plans. For example, "short-term: establish training on member needs and expectations" and "long-term: reinforce member focus at each level of the organization."

**Human-resource plans.** What is it going to take in terms of staff time and consultants to achieve the goals and objectives set? For example, "improve staff training on members' needs, requirements, and expectations."

**Key performance indicators.** List your actual and future KPIs. For example, "in 2012, achieve a 90 percent customer satisfaction score; in 2013, achieve a 92 percent customer satisfaction score; and in 2016, achieve a 94 percent customer satisfaction score." Listing your KPIs and progressively improving them enables the organization to achieve levels on a year-by-year or even quarter-by-quarter basis.
Outcomes, measures, and results. Finally, list your outcomes, measures, and results in your last column. What this means is that there are supporting charts and graphs that support your progress to the plan in each area. This visual approach allows an at-a-glance view of progress to the goals.

Taking your strategic plan from the drawing board to the dashboard is very doable and required in order to achieve the goals and objectives set during the strategic planning session. Make it simple to start and build on it every year. There are plenty of dashboard samples online and from your colleagues. There is no need to recreate the wheel when samples already exist. As the English cleric Charles Caleb Colton once said, "imitation is the sincerest form of flattery." Flatter a colleague today.

Bill Pawlucy, MPA, CAE, is founder of Association Options, Inc. a company that focuses on practical strategic planning (corporate and nonprofit), management assessments, Baldrige Award process implementation, AMC search and evaluation, facilitation, and governance modeling. He is also the executive director of the International Association of Interviewers and is an appointee to the U.S. Department of Commerce Board of Examiners for the Baldrige Presidential Award. Website: www.associationoptions.com
Performance excellence in a nonprofit cannot occur without performance measures. After the strategic plan is formed, a set of goals and strategies are outlined along with tactics, and hopefully a tie to the organization’s budget.

But are performance measures also identified? Without performance measures, organizations operate in a vacuum, not knowing their competitive position.

Understanding an organization’s competitive position is key in the Malcolm Baldrige National Quality Award, which was established to recognize outstanding performance of organizations. The Baldrige process is deeply rooted in performance measures that "are the key tool that communicates the organization’s important goals to everyone involved and drives performance towards those ends."

There are five key areas of measurement identified by the Baldrige award that should be monitored by nonprofit organizations:

1. Member satisfaction: Know satisfaction numbers as they directly translate into the value perceived by members around the products, benefits and services an organization offers. Knowing member satisfaction is essential to adjusting products, benefits and services to ensure high levels
of satisfaction.

**2. Product and service performance:** In the books, "Race for Relevance" and "Road to Relevance," Harrison Coerver, CAE, and Mary Byers, CAE, speak to focusing on the strength of your products, benefits and services. Understanding impact and true costs will allow an organization to both improve products and services as well as determine the effectiveness and need for those products and services.

**3. Financial and marketplace performance:** Measuring an organization's financial performance is typical within most nonprofit organizations. Measuring financial performance against other organizations is not so typical and is the next step in understanding its performance in the marketplace.

**4. HR results:** An organization's HR is rooted in the staff, volunteer leaders and other volunteers that serve. An understanding of the resources available, the allocation of those resources and their impact is important in ensuring the organization is properly staffed to achieve its strategic goals.

**5. Operational performance:** In delivering a set of programs, benefits and services, an organization needs to assess its own performance to meet the needs of its members. Measuring operational performance allows an organization to make "just in time" changes to its operation to meet the needs of its members.

The key to tracking performance is good data. Good data comes with an investment in technology and its proper use.

Does your organization have the proper technology to track data in these five areas? Doing so will help drive organizational excellence.

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**About the Author**

William Pawlucy, CAE, MPA, MBNQA serves as founder and CEO of Association Options, a global management consulting firm that helps nonprofit associations in strategic planning, board training, leadership alignment, management assessments and searches and special long-term projects. Bill has almost two decades of experience working with nonprofits as a chief staff executive and a consultant.
Agenda

Reflecting Strategic Goals

Welcome 
Approval of Minutes 
Financial Report 

Strategic Goals 

I. Advocacy 
   GR Committee 
PAC 

II. Membership Service/Satisfaction 
   Membership Committee 
   Value Proposition Task Force 

III. Communications and PR 
   PR Committee 
   PR Consultant 

IV. Education and Training 
   Certification Committee 
   Professional Development 

Old Business 
   Chairman 
New Business 
   Chairman 
Adjournment 
   Chairman 

Mission Statement – To protect and advance the industry for the benefit of…….
Conflict of Interest – Should a conflict of interest arise, either real or perceived, please bring it to the attention of the chairman.
Antitrust Avoidance Statement – No discussions shall be held that may infer or lead to antitrust violations.
Strategic Plan Business Card format

Keep the strategic plan in the forefront of leaders and stakeholders by creating a business card. Inexpensive to print and easy for leadership to promote the organization by having the mission and goals in their wallets.
2013 – Key Trends Impacting the Food Production Chain

**Trend 1**
Rising middle classes in developing countries demand more protein and produce while the U.S. faces lingering economic insecurity and agriculture feels societal pressure to change practices.

**Trend 2**
Big data emerges as a powerful source of value generation from farm to retail.

**Trend 3**
Game changers: science, technology, and the pressure to contain health care costs.

**Trend 4**
Evolving consumer definitions of value ramp up demand opportunities.

Source: Food Foresight, Nuffer, Smith, Tucker, Inc. April 2013 (updated annually)

Inventory, Production, Spending and Consumption

- As the cow herd declines, beef production has become increasingly more difficult to maintain.
- While per capita consumption continues to decline, spending continues to increase due to rising prices.

International Markets

- The U.S. was once again a net exporter in 2012.
- Value per head slaughtered continues to increase.

U.S. Beef Exports & Forecast

- U.S. beef exports continue positive recovery.

The Changing U.S. Consumer

- Millennials continue to grow.
- While per capita consumption continues to decline, spending continues to increase due to rising prices.
- Concerns about beef and chicken are both declining.

Retail and Foodservice

- Beef trails chicken on perceptions of nutritional content.

Safety & Nutrition

- Beef trails chicken on perceptions of nutritional content.
<table>
<thead>
<tr>
<th>STRATEGIC OBJECTIVES</th>
<th>MEASUREMENTS</th>
<th>FREQUENCY</th>
<th>LEADER</th>
<th>2012 TARGET</th>
<th>RESULTS YTD</th>
<th>% YTD GOAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Leadership</td>
<td>Progress Toward Priority Policy Goals (pg. 1)</td>
<td>q</td>
<td>Carmen</td>
<td>55%</td>
<td>65.00%</td>
<td>118%</td>
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<tr>
<td>Business Leadership</td>
<td>Member Engagement Growth - Core (pg. 1)</td>
<td>q</td>
<td>Shawna</td>
<td>20%</td>
<td>13.75%</td>
<td>68%</td>
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<tr>
<td>Business Leadership</td>
<td>Member Engagement Growth - Top Investors (pg. 1)</td>
<td>q</td>
<td>Shawna</td>
<td>50%</td>
<td>42.37%</td>
<td>83%</td>
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<tr>
<td>Top Investors (pg. 1)</td>
<td>m</td>
<td>Jeremy</td>
<td>400</td>
<td>369%</td>
<td>97%</td>
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<tr>
<td>Chamber Membership (pg. 2)</td>
<td>m</td>
<td>Steve</td>
<td>2,500</td>
<td>2123</td>
<td>92%</td>
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<tr>
<td>Job Creation and Entrepreneurship</td>
<td>New Jobs (pg. 2)</td>
<td>m</td>
<td>Eileen</td>
<td>4,000</td>
<td>1,548</td>
<td>111%</td>
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<tr>
<td>Job Creation and Entrepreneurship</td>
<td>Average Salary</td>
<td>m</td>
<td>Eileen</td>
<td>$42,000</td>
<td>$43,209</td>
<td>108%</td>
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<td>Job Creation and Entrepreneurship</td>
<td>Located/Funded Projects</td>
<td>m</td>
<td>Eileen</td>
<td>100</td>
<td>34</td>
<td>110%</td>
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<tr>
<td>Job Creation and Entrepreneurship</td>
<td>Capital Secured (pg. 3)</td>
<td>m</td>
<td>Bobby</td>
<td>$10,000,000</td>
<td>$3,076,000</td>
<td>74%</td>
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<tr>
<td>Job Creation and Entrepreneurship</td>
<td>New Capital Investment</td>
<td>m</td>
<td>Eileen</td>
<td>$210,000,000</td>
<td>$99,308,000</td>
<td>131%</td>
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<tr>
<td>Human Capital</td>
<td>Percent of Deals Funded by Angel Group</td>
<td>m</td>
<td>Bobby</td>
<td>50%</td>
<td>40.00%</td>
<td>80%</td>
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<tr>
<td>Human Capital</td>
<td>Talent Index (pg. 4)</td>
<td>q</td>
<td>Kathy</td>
<td>TBD - Q3</td>
<td>0%</td>
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<tr>
<td>Human Capital</td>
<td># of Adults with a Bachelors Degree</td>
<td>q</td>
<td>Kathy</td>
<td>1,500</td>
<td>0%</td>
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<tr>
<td>Global Opportunity</td>
<td># of GLI Member Companies Exporting (pg. 4)</td>
<td>q</td>
<td>Eileen</td>
<td>TBD - Q1</td>
<td>0%</td>
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<tr>
<td>Global Opportunity</td>
<td># of Member Companies Entering New Global Markets (pg. 4)</td>
<td>q</td>
<td>Eileen</td>
<td>TBD - Q1</td>
<td>0%</td>
<td></td>
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<tr>
<td>Profitable Market-Driven Revenue</td>
<td>Sponsorship and Advertising Revenue (pg. 5)</td>
<td>m</td>
<td>Shawna</td>
<td>$749,000</td>
<td>$376,328</td>
<td>86%</td>
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<tr>
<td>Profitable Market-Driven Revenue</td>
<td>Net Products &amp; Services Revenue (pg. 5)</td>
<td>m</td>
<td>Shawna</td>
<td>$494,000</td>
<td>$347,851</td>
<td>89%</td>
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<tr>
<td>Profitable Market-Driven Revenue</td>
<td>New Product Net Revenue (pg. 5)</td>
<td>m</td>
<td>Shawna</td>
<td>$21,000</td>
<td>$4,792</td>
<td>61%</td>
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<tr>
<td>Purpose-Driven Investment</td>
<td>Top Investment Portfolio (pg. 6)</td>
<td>m</td>
<td>Jeremy</td>
<td>$3,515,250</td>
<td>$1,249,545</td>
<td>89%</td>
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<tr>
<td>Purpose-Driven Investment</td>
<td>Grants &amp; Gifts Development (pg. 6)</td>
<td>m</td>
<td>Jeremy</td>
<td>$788,000</td>
<td>$279,694</td>
<td>154%</td>
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<td>Purpose-Driven Investment</td>
<td>Government Contracts (pg. 6)</td>
<td>m</td>
<td>Mark</td>
<td>$1,252,700</td>
<td>$521,959</td>
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<tr>
<td>Positive Net Finances</td>
<td>Net Worth (Assets) (pg. 6)</td>
<td>m</td>
<td>Mark</td>
<td>$1,475,000</td>
<td>$1,156,518</td>
<td>97%</td>
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<tr>
<td>Positive Net Finances</td>
<td>Net Profit (Activities) (pg. 7)</td>
<td>m</td>
<td>Mark</td>
<td>$3,000</td>
<td>$(264,788)</td>
<td>80%</td>
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<tr>
<td>Valued Connections</td>
<td>Strong Supporter (pg. 7)</td>
<td>m</td>
<td>Jennifer</td>
<td>52%</td>
<td>32.80%</td>
<td>65%</td>
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<tr>
<td>Engaged and Inspired People</td>
<td>Employee Engagement (pg. 8)</td>
<td>a</td>
<td>Connie</td>
<td>100%</td>
<td>0%</td>
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<td>Engaged and Inspired People</td>
<td>Investment in Development (pg. 8)</td>
<td>q</td>
<td>Connie</td>
<td>$45,000</td>
<td>$16,613</td>
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<tr>
<td>Engaged and Inspired People</td>
<td>Fit (pg. 8)</td>
<td>m</td>
<td>Connie</td>
<td>75%</td>
<td>72.00%</td>
<td>96%</td>
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<td>Execute a Growth Strategy</td>
<td>% of Green on BSC (pg. 8)</td>
<td>q</td>
<td>Tracee</td>
<td>84%</td>
<td>50.00%</td>
<td>68%</td>
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<tr>
<td>Enabling Technology and Knowledge</td>
<td>Technology Plan (pg. 9)</td>
<td>q</td>
<td>Susan</td>
<td>100%</td>
<td>60.00%</td>
<td>60%</td>
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<tr>
<td>Inclusive</td>
<td>Knowledge-On-Top (pg. 9)</td>
<td>q</td>
<td>Susan</td>
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<td>60.00%</td>
<td>60%</td>
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<tr>
<td>Inclusive</td>
<td>Staff Diversity Reflective of Community (pg. 9)</td>
<td>m</td>
<td>Connie</td>
<td>85%</td>
<td>70.50%</td>
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<tr>
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<td>Supplier Diversity Reflective of Community (pg. 9)</td>
<td>q</td>
<td>Christy</td>
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<td>84%</td>
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<tr>
<td>Inclusive</td>
<td>Customer Diversity Reflective of Community (pg. 9)</td>
<td>m</td>
<td>Erin</td>
<td>100%</td>
<td>87.83%</td>
<td>88%</td>
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<tr>
<td>Collaborative</td>
<td>Board Diversity Reflective of Community (pg. 10)</td>
<td>a</td>
<td>Tracee</td>
<td>100%</td>
<td>64.32%</td>
<td>64%</td>
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<tr>
<td>Collaborative</td>
<td>Collaboration Assessment (pg. 10)</td>
<td>q</td>
<td>Erin</td>
<td>100%</td>
<td>on hold</td>
<td></td>
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<tr>
<td>Collaborative</td>
<td>Company Investment in Ideas (pg. 10)</td>
<td>q</td>
<td>Erin</td>
<td>100%</td>
<td>on hold</td>
<td></td>
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<tr>
<td>Collaborative</td>
<td>Curiosity Points (pg. 10)</td>
<td>q</td>
<td>Erin</td>
<td>100%</td>
<td>on hold</td>
<td></td>
</tr>
</tbody>
</table>

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