Welcome to the AESS Officers 2019 Strategic Planning Meeting

“What do you mean, ‘we never got around to developing a strategic plan’?”
Why Vision 2020?

- Logical target date for accomplishing many goals and objectives from previous strategic planning exercises
- Place emphasis on **actions**
- Prepares AESS for the next society review cycle in the year 2020
- Concurrent with terms of the executive team
- Resonates with 20/20 eyesight; connotating a clear vision for the near, mid, and far term
- Catchy – instantly appealing and memorable
Strategic Plans
Strategic Plan Hierarchy

- **Mission**: Why we exist/What we do
- **Vision**: What we want to be
- **Goals**: What we must achieve to get there
- **Objectives**: Intended results produced by implementing strategies
- **Action Plans**: Collection of objectives needed to meet the goals
- **Performance Metrics**: Indicators of success

**Process:**
- Articulate and execute
- Review and refine
## Goals vs. Objectives

Suggest we adopt consistent usage

<table>
<thead>
<tr>
<th></th>
<th>Goals</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition</strong></td>
<td>Desired outcomes of efforts over time</td>
<td>Intended results produced by implementing strategies</td>
</tr>
<tr>
<td><strong>Timeframe</strong></td>
<td>Long-term</td>
<td>Near-term</td>
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<tr>
<td><strong>Magnitude</strong></td>
<td>Major</td>
<td>Incremental</td>
</tr>
<tr>
<td><strong>Outcomes</strong></td>
<td>General</td>
<td>Specific &amp; measurable</td>
</tr>
<tr>
<td><strong>Purpose of actions</strong></td>
<td>Movement in a direction leading to desired results</td>
<td>Aimed at accomplishing certain tasks</td>
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<td><strong>Example</strong></td>
<td>Retire by age 65</td>
<td>Must save $20,000 this year to stay on track</td>
</tr>
<tr>
<td><strong>Hierarchy</strong></td>
<td>Goals control Objectives</td>
<td>Objectives can modify a goal</td>
</tr>
</tbody>
</table>
Definitions for Objectives, Action Plans and Performance Metrics

- **OBJECTIVES**: specific, measurable, achievable, realistic, and timed results produced while implementing strategies

- **ACTION PLANS**: collection of objectives that, in total, must be accomplished to reach a goal of the organization

- **PERFORMANCE METRICS**: measures by which achievement of goals and objectives can be determined
“SMART” Objectives
Guidance for writing objectives

- **S**pecific: Details exactly what needs to be done
- **M**easurable: Achievement or progress can be measured
- **A**chievable: Objective is accepted by those responsible for achieving it
- **R**ealistic: Objective is possible to attain (important for motivational effect)
- **T**imed: Time period for achievement is clearly stated

*A also means assigned and accepted
** R also means relevant
Objective Template
One/each using SMART Format

S – Statement of the objective
M – Performance metric for measuring progress
A – Assigned to:
R – Relevant to which goal(s) and how?
T – Time period for performance
Guidance for Selecting Performance Metrics

- Focus on the critical few, not the trivial many
- Ensure the metric measures performance toward achievement of the goal or objective
- Ensure that data for the metric is valid and obtainable
- The metric should be actionable/controllable
  - Example: Member Satisfaction
    - Price of offering
    - Convenience of service
    - Timeliness of information
    - Consistent quality
Meeting Ground Rules
Everyone’s participation is important

Please:

- Be involved in the discussion.
- Wait to be recognized before speaking.
- Share time and avoid interrupting others.
- Treat each other with mutual respect.
- Try to avoid sidebar conversations.
- Stay physically and mentally present.
- Try to avoid tending to non-meeting business.
- Try to adhere to the allotted presentation time.
- Do your best to show up on time and come prepared.
- Leave cell phones & other electronic devices in “silent” mode.
- Dress appropriately: business casual, no shorts or tee-shirts.

4/17/2019
Questions?