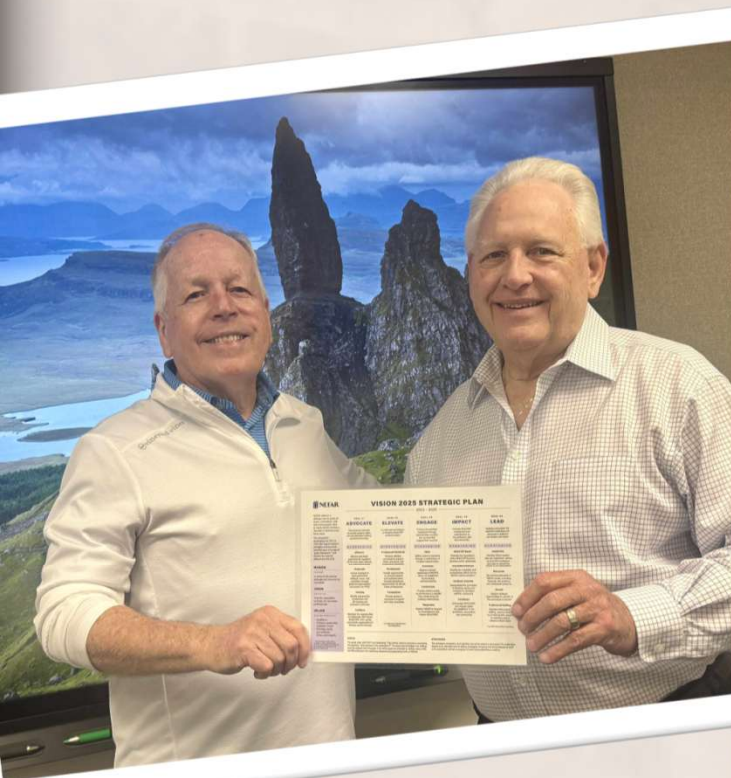


Strategic Plan

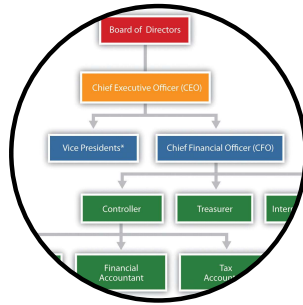
The Roadmap



Purposes of a Plan



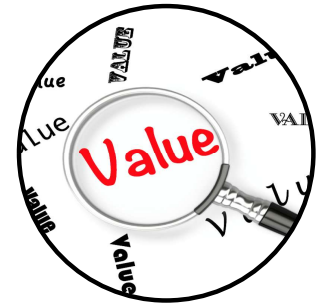
**Guide
Transitioning
Boards**



**Empower the
Staff**



**Align
Resources &
Committees**



**Communicate
Value**

STRATEGIC PLANNING

Organizations with a good strategic plan are more successful. The plan provides a roadmap for leadership and staff. They work as a team to achieve consistent goals over several years. The *Strategic Planning* guide describes the preparations for planning, developing the plan, and implementation.

Why Have a Strategic Plan

1. **Roadmap** – The plan identifies the 'destination' and guides the board of directors, committees and staff.
2. **Continuity/Sustainability** – Without a plan the organization is susceptible to mission drift and simply being reactionary.
3. **Prioritization** – Planning allows leaders to identify the important issues and programs; and to drop programs that are ineffective or irrelevant.
4. **Allocation of Resources** – Planning is the disciplined allocation of resources (time and money).
5. **Assignment and Timeline** – Good plans include performance measures and assignments indicating how and when projects will be done.
6. **Awareness** – The plan should be compelling to members and stakeholders.

Terminology of Planning

Understanding of and consistent use of terminology is important to guide discussions.

Mission – The purpose for existence; crisp sentence or two – easy to articulate.

Vision – Statement of aspiration; how the organization will be perceived.

Values – Guiding principles of the leadership and staff.

Goals – The core competencies to which resources will be allocated. In setting goals, consider the acronym SMART - Specific, Measurable, Attainable, Relevant and Timely.

Strategies – Approaches and programs for achieving the mission and goals.

Tactics – Assignments, accountability and deadlines.

Performance Measures – Methods to measure progress.

Business Plan – An annual detailed program of work linked to the strategic plan.



Trends in Planning

- Set just 3 to 7 goals; allowing the organization to focus efforts on its core competencies.
- A mission statement that is visionary can replace the need for separate mission and

vision statements.

- Promote the plan to members and prospects by converting it to a brochure or posting on the website.
- Report on the plan's progress by reviewing at board meetings and at least annually.

Span of the Plan

3- 5 Years

Most plans span three years. Planning annually tends to cause short-term thinking. Plans exceeding 5 years may be unrealistic in rapidly evolving environments.

Planning Retreat

With preparation, focus and the right set up a strategic plan can be developed in a day or two. Because discussions will be intense, it is best to do the plan over two consecutive days --- giving everyone a relaxing break after the first day.

The room should be set up in an open-U, with a flip chart at the front. Ensure that seating is comfortable, and food and amenities are nearby. Natural light is preferred to a room without windows.

Brand Statements

The mission, as well as vision and values, serve as a "promise" to the community. The statements

PLANNING TERMINOLOGY

Mission

Vision

Values

Goals (Core Standards)

Strategies

Performance Measures

Tactics (Committees & Staff)

SCAN ME





Powerful Advocacy



Business Solutions



Accountability & Economic Growth



World Class Chamber



2020 Strategic Plan

USTA
NORTH CAROLINA

be recognized as an efficient, high-performing Chamber of Commerce.

Brochure

The following implementation strategies support the Chamber's four organizational goals:



Powerful Advocacy

- With input from many Chamber members, identify a compelling legislative agenda to advance Michigan.
- Maintain a highly effective lobbying team.
- Increase funding for political action.
- Retain business-friendly majorities in the State House and Michigan Senate.
- Retain a rule of law majority on the Michigan Supreme Court.
- Continue to collaborate with local chambers and trade or professional associations on issues of mutual interest.
- Deliver winning messaging on key issues, ballot proposals or election campaigns.
- Continue to be a strong leader of the Chamber Federation at the state and national level.



Business Solutions

- Continue to provide high quality member benefits, products and services through Chamber Services.
- Develop new products and services beneficial to customers and profitable to the Chamber.
- Customize existing communications and open new channels of communication to more effectively reach current and prospective members and customers.
- Emphasize diversity in the growth of membership and strength of the Chamber.
- Achieve goals for membership growth and retention.
- Develop volunteer leaders and Chamber staff to serve as "Ambassadors" for the Chamber at the local level and in the policy arena.



Accountability & Economic Growth

- Drive public policy debate for more efficient and effective government at the federal, state and local levels.
- Continue to partner with the US Chamber to educate and inform voters about the growing need for Congress and our next President to take bold action in 2017-18 on federal entitlement reform.
- Collaborate with education and economic development partners to close Michigan's talent gap by improving workforce readiness for high school and college graduates.
- Promote entrepreneurship, leadership and diversity initiatives through the Chamber Foundation.



World Class Chamber

- Attract visionary volunteer leaders at the Chamber.
- Increase member engagement through annual regional meetings, Chamber of Commerce Day in Lansing and other special events.
- Improve Chamber marketing, advertising and communications through enhanced messaging and better use of technology.
- Encourage personal and professional development for Chamber staff.
- Improve the linkage between the Chamber Foundation, Chamber Services and the Michigan Chamber by promoting the "One Chamber" theme.
- Continue to rely on performance metrics and benchmarking of best practices to monitor progress toward the long term goal of 10,000 members or regular customers and \$10 million per year in revenue by 2020.
- Engage and provide services to local chambers.
- Earn recognitions and awards of excellence.
- Maintain leadership roles in the Chamber Federation.



New York State Association of REALTORS®, Inc.

STRATEGIC PLAN 2018-2020

OUR MISSION

NYSAR advocates for REALTORS® and their consumers, elevates professional competence, seeks local board collaboration and promotes the value of REALTOR® membership and engagement.

OUR VISION

NYSAR is the indispensable business partner for real estate professionals and local boards/associations in New York State.



ADVOCATE

NYSAR is the most trusted and influential advocate for real estate business interests and private property rights in New York State.

We will:

- ▶ Proactively develop and expand opportunities to address local regulatory and legislative issues in partnership with local associations.
- ▶ Fully utilize REALTOR® Party resources.
- ▶ Engage consumers in our grassroots advocacy efforts.



ELEVATE

NYSAR continually raises the bar of professionalism for New York brokers, agents, appraisers and REALTOR® associations.

We will:

- ▶ Deliver timely, innovative and market-driven education programs that expand member's business skills, promote risk management and increase professional competence.
- ▶ Work with local boards to ensure an effective and compliant professional standards enforcement program that includes regional and statewide options.
- ▶ Expand and strengthen our cooperative leadership development efforts.



ENGAGE

NYSAR engages with industry partners and consumers in order to create timely programs and services that meet the demands of a rapidly evolving marketplace.

We will:

- ▶ Gather and analyze more robust member, consumer and market data to better meet the business needs of brokers, agents, associations and MLSs.
- ▶ Develop opportunities for brokerages, local associations and MLSs that strengthen cooperation and promote mutually beneficial relationships.
- ▶ Expand partnerships with regional industry and advocacy organizations.



PROMOTE

NYSAR promotes its unique value and the value of the REALTOR® brand to consumers, members and licensees.

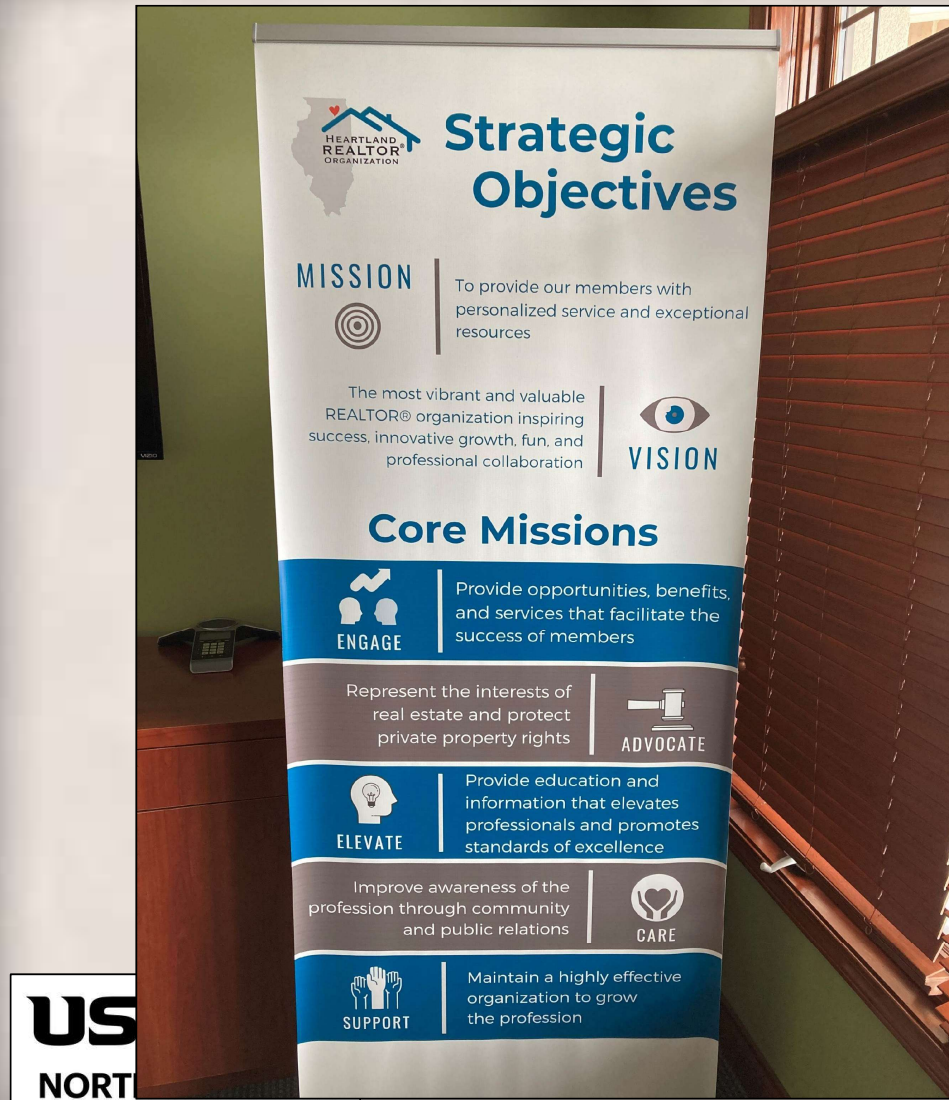
We will:

- ▶ Be the "Voice for Real Estate," positioning NYSAR as the preeminent source of information on market data and trends thus elevating member and consumer perception of REALTOR® value.
- ▶ Reinforce our value proposition to members and utilize NAR resources to support and strengthen the perception of the REALTOR® brand.
- ▶ Promote careers in real estate and the value of being a REALTOR®.

New York State Association of REALTORS®
130 Washington Avenue, Albany, NY 12210

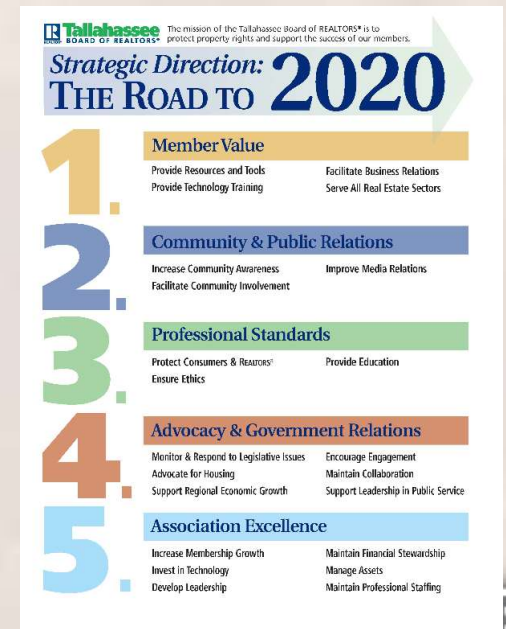
P 518.463.0300
F 518.462.5474

www.NYSAR.com
info@nysar.com



Pop Up Banner at Meetings

Business Card



USTA North Carolina Strategic Pillars

USTA North Carolina Strategic Pillars

Organizational Excellence

Employ sound fiscal management while requiring financial accountability.

Broaden technology and project management planning for operational competencies, service improvement and disaster recovery.

Conduct respective succession plans to recruit, develop and retain staff and volunteers.

Infrastructure

Work with local communities to construct and maintain tennis facilities available to the most people.

Assist rural and under-resourced communities lay the foundation for local tennis organization and play.

Coordinate and deliver digital infrastructure for all stakeholders.

Programming

Provide and publicize quality programming to grow participation for all ages and abilities.

Support recruitment, training, retention and education of new and existing coaches, instructors, officials and tournament directors.

Actively engage schools and public parks to facilitate tennis participation.

Hospitality

Provide a welcoming atmosphere for all.

Encourage active participation on the court and in the organization.

Foster fearlessness, transparency, trust and exchange of ideas.

Cultivate a societal commitment to touching lives through tennis.

Community

Engage all ages and populations by providing tennis opportunities.

Advocate for tennis locally, statewide, and beyond.

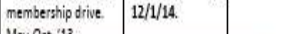
Enhance player experience by providing coaching, social connections, and fun opportunities.

Collaborate, connect and communicate with Community Tennis Associations, other USTA partners and stakeholders.

Tracking the Plan

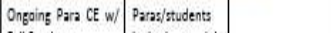
IMPLEMENTING THE MOA STRATEGIC PLAN- BUSINESS PLAN 2013-2015

As Of Dec. 30, 2014 KEY: Green = In progress/Completed. Yellow = Initialized. Red = No progress.

GOALS AND STRATEGIES	Incoming President (Yr. 1) Cook 2012-2013	President (Yr. 2) Ford 2013-2014	President (Yr. 3) Hodge 2014-2015	Notes & Accountability Committee Assignments Desired Outcomes Key Performance Indications
1. THE MEMBERSHIP COMMUNITY				
A) Growth (Recruitment and Retention) – Develop strategies that increase market share ¹ and retain members.				Ongoing.
1) Market Share				
a. Clarify number of potential members and set metrics for growth and retention.				Work with Chris Balderson.
b. Identify changing needs of members; and why they may or may not join.				"Together As One" Campaign terminated May '14. Three new members from the campaign.
c. Membership Committee to develop a plan and set yearly metrics.				
	10% or 25 new members. Two new members as of 12/13.	Extended 12/1/14.		
B) Communications – Improve member understanding of MOA through improved communications and use of intelligent technology to improve processes such registration, postings, etc.				Ongoing. Evaluate, concentrate on methods. "New AMS 12/2/14 provides all for members.

¹ Current benchmark of 61.2% of potential members.

IMPLEMENTING THE MOA STRATEGIC PLAN- BUSINESS PLAN 2013-2015

1) Enhance two-way communications.			Ongoing. "New website 12/2/14 will enhance two-way communications. Online Website, Magazine, Seminars.
2) Promote MOA history of achievements.			
3) Utilize local societies for communications.			Implemented bi-monthly email from Communications Coordinator. '14
4) Improve use of Facebook and social media.			Ongoing. Steady increase in followers. Continuing integrating w/events information.
5) Clarify differences in organisations, i.e. AOA, AOS, etc.			??
C.) Access to Information – Report value of access to information (i.e. employee contracts) and expertise (lobbyist, attorney, staff, leaders) as an exclusive benefit of membership.			Continue AOA PR process Ongoing in magazine, e-blasts and communications with members.
D.) Benefits and Services - Provide benefits and services to meet the career long needs of optometrists and practices.			Continue MOA communications/social media/ AOA promotion of EyeCare, AOAExcel to members – resources.
1) Develop, package and promote benefits and services that recognize the varied work settings of optometrists.			James Hardie, OD developing "Real Eyes" program. Dr. Adam Goff joining Hardie to assist (12/14). Ongoing.
2) Recognize the unique and varied needs of optometrists as they transition in their career from student to retirement.			AOA Excel
3) Provide publications, journal, directory, as resources for members.			Communications Director, PR Committee, The Michigan Optometrist and new Editing Committee (4/14.)
4) Provide training and support of para-optometrists, students, etc.			Paras joined MOA committees 2014.
			

Mission and Brand Platform

- **Mission** Statement – Purpose
- **Vision** Statement – Intended Outcome
- **Values** – Guiding Principles



Planning Process

- Board Responsibility
- Facilitator
- 3 to 6 Goals
- Strategies, Programs and Priorities
- Performance Metrics
- Program of Work