Application: 7564

Page: Entry Information

Chapter
Northeast Florida Chapter

Chapter Size
Small (50-260)

Category
Leadership

Program Name
Strategic Planning

Each question is worth 20 points and will be scored using the following rubric:
(1-5) Poor Didn't effectively answer the question
(6-1) Fair Answered the question
(11-15) Good Answered the question with more detail
(16-20) Excellent Went above and beyond with proven results and visible data

Describe the program and why it fits the category. (20pts)

In August of 2020, our 2021 incoming president recruited and helped hire a new Executive Director after several months of being without one. We shared that we had been a bit stagnant and stymied, due both to the staff transition and to COVID. Our President-Elect was already working towards preparing for her year, so that when January 1 hit, there would be no loss of momentum or operations.

Under our direction, the new ED hit the ground running and helped our organization get back on track, including immediately introducing some new programs, such as our Wham Bam Education CAM (a concentrated education series to present courses with CEUs). We gave her the goal of repositioning the organization to offer better and more consistent operations, member engagement and programming.

When our 2021 President came on board in January, we turned our attention to creating a written Strategic Plan. Before our 2021 board meeting, we asked our new board to send us words they thought described the work we do as an association, and we turned that into a word cloud graphic that became the backdrop of our strategic plan. Then, our President and Executive Director met with each board member and committee chair individually to discuss goals and tactics, which ultimately became the basis of the Strategic Plan.

We turned these action items into a designed document and presented it at the January board meeting, to serve as our Strategic Plan for the year.

How did this program meet the mission and vision of the chapters and CAI as a whole? (20pts)

After we got buy-in from the board regarding our Strategic Plan, we continued to work one-on-one with each committee to solidify their committee description and to support their work to accomplish the goals on the Strategic Plan.

The Plan helped us stay focused, intentional and productive and we referenced it every month to determine where our energy should be. This allowed us to conduct our operations efficiently throughout the year.

The Plan also required us to hold ourselves accountable and ensure that we were providing an impactful and meaningful experience for our members.

In June, we held a mid-year retreat in-person to present the final draft of the Policies & Procedures manual, which was one of our overall goals for the year, and separate from the Strategic Plan goals, which focused on other initiatives. We also had Committee Chairs offer mid-year reports and share with us where they felt they needed additional support.

In October, heading into the fourth quarter, we created a report card of the Strategic Plan so we could see what still needed to be completed for the year.

*******reminded our sponsors of their opportunities to fulfill the

What was the impact on the chapter and its members after completing the program? (Growth of membership, financially, public awareness, membership value, better chapter/member relationship, chapter operations, etc.) (20pts)

Because of the Plan, we became very efficient. It spurred "The List", an ongoing email exchange between our President and Executive Director, where we identified project priorities and deadlines based on the Strategic Plan, but in a more day-to-day, hour-to-hour kind of way. The List email was updated about every three weeks and kept us on track with our to-do's. It offered us a backdrop to provide detailed reports to the board and we included committee reports in there as well.

We also systemized the Committee operations for each committee, where they knew what they needed to do when and reported to us on their efforts each time. We created an easy portal for Committee Chairs to upload their report, using our Wild Apricot event management system. We customized questions on it, asking them to list what they were working on, what they needed help on and any action they needed the board to take. We used these reports to help encourage a consent agenda and reduce the time spent "in the weeds".

As part of the Policies & Procedures manual process, we got very granular with our Fiscal Policies, including implementing the hire of an outsourced bookkeeper to help us with a "checks and balances" approach to our finances.

Each of these focused systems allowed us to accomplish even more than we set out to do initially because our operations got more and more streamlined.

Please provide quanitifiable data supporting the rationale for success. (20pts)

As a result, we were able to accomplish the following initiatives throughout the year:
-Monthly Programs
-Quarterly Magazines
-Three Social Events
-Newsletters (in non-magazine months)
-Increased # of sponsors
-Increased sponsor benefits
-A Management Company CEO roundtable
-A very successful EXPO Trade Show that far exceeded our budgeted revenue
-The completion of a Policies & Procedures manual
-New fiscal procedures
-A focus on LAC via inclusion of legislative articles in every magazine
-Solid member retention
-Growth of our Speakers' Bureau
-Increased social media presence

Based on the results, will the program be a regular part of the chapter's programs in the future and why?

Yes, we will absolutely continue to operate in this way. We like to make the plan, work the plan, and change the plan if it's not working. Being focused in this way allows us to be successful.

A new strategic initiative we just launched is exploring the creation of a Past President's Council, so that we continue the efforts each president has put forth in upleveling our chapter's brand and operations.

Supporting documents including flyers, postcards, pictures, videos etc. can be uploaded below. While they aren't required for your submission we certainly encourage it.

Would you like to upload additional documents?

Yes

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