

STRATEGIC PLANNING

June 21, 2023

10:00 – 11:00 AM

How We Will Do it Today

and Tomorrow and The Next

THE CASCADE OF STRATEGIC CHOICES:



Yesterday Compared to Today



Successful Strategic Planning

The way we always did it

- Strengths
- Weaknesses
- Opportunities
- Threats

The ways we will try going forward

- Strengths
- Weaknesses
- Opportunities
- Threats

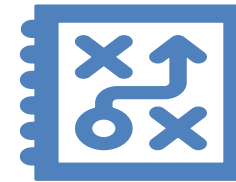
Mission Statement = “Why?”



To make your statement work, you must involve all stakeholders in developing the mission statement – all other goals will flow from this.



This means, all board members, committee chairs, and your Executive Director if you have one.



Without this involvement, you will not have buy-in on your strategic plan and will have difficulty in implementation.

[OnStrategy Video](#)

Our mission is...

- The mission of NABIP-Dallas is to serve the needs of our members, clients, and industry by providing professional development, networking, and access to innovative industry tools.

A Suggested Framework for Goals

- ❖ Your goals should be very specific to your chapter
- ❖ Many chapters use the Pacesetter or Landmark awards to plan their chapter's year and activities
- ❖ These awards were designed to achieve the best functioning chapters

Developing Goals

- ❖ Goals must be SMART to be effective
- ❖ A SMART goal is:
 - **S**pecific
 - **M**easurable
 - **A**chievable and **A**ssignable
 - **R**elevant to the Mission and **R**ealistic
 - Has a **T**ime frame for achievement

Finally on Goals

- ❖ Make your goals your own, but make sure they are **SMART** goals!
- ❖ This means that every goal is **specific**.
 - NOT – We will have programs that our members value
 - BUT – We will have 1 program that addresses the cost of healthcare and the impact on health insurance
- ❖ This means that you have a way to **measure** whether or not you have achieved the goal.
 - If the goal can't be measured it should not be a part of your strategic plan
- ❖ The goal must be **achievable** and **realistic** - something you can actually do AND
- ❖ It must be **assigned** to someone or some committee - someone must be **accountable** and there must be a **timeline** for completion.

Attendees

- President – Taylor Kirkhart
- Past President – Jennifer Stanley
- Secretary – Cindy Goodman
- Treasurer – David Weber
- Awards – Carmen Freeman and Caitlin Mathis
- Membership – Karen Burkholder
- Communications – Jared Leshin
- Legislative Chair – Claire Pancerz
- Public Service – Kim Waters
- Sponsorship – Suzanne Crim
- Vanguard – Stephen Snyder
- Trustee – Rita Rolf
- Executive Assistant – Patricia Pattison

Agenda

- I. Introduction/Opening Remarks
- II. Review the NABIP-Dallas Mission Statement
- III. Discuss Goals, Objectives, and Budget Considerations for the following chairs: Awards, Membership, Communications, Sponsorship, Public Service, Vanguard, Legislative Chair, Professional Development
- IV. Other Topics:
 - I. Filling open positions
 - II. Upcoming events
 - III. Social media/communications strategy
 - IV. Google Workspace
 - V. Process/template for board reports
 - VI. Golf tournament with Fort Worth
 - VII. Webinar presentation (LinkedIn tips)

2023 – 2024 Goals

- Awards – Submit for state awards and Pacesetter; website award
 - Hold regular monthly meetings to collect information for awards and provide updates
- Membership – Increase membership by 10% by July 2024
- Communications – Send out weekly email promotions for upcoming events, increase LinkedIn followers to over 500 by the end of 2023
- Legislation – Invite legislators to monthly meetings; schedule Capitol Conference appointments by January 2024
- Public Service – Determine charity that aligns with our industry
- Sponsorship – Annual total sponsorship goal of \$42k
- Vanguard – Host Vanguard Happy Hour event in December 2023