

Strategic Planning

At the onset of strategic planning, be sure to consider 5 essential questions before drafting goals. The resulting discussions will be beneficial for leadership understanding and buy-in.

Considerations

- 1. Does it fit inside our mission?**

All activities and efforts should fit inside the mission statement to respect the founders and protect the organization's tax status. Is the mission statement distinct and contemporary? Be careful: treat it like the Constitution, opening it only rarely and wisely to refresh it.

Many organizations add vision and value statements to clarify purpose.
- 2. Who is the primary customer?**

Often the association's secondary and tertiary members exhaust the resources from the primary members for whom the organization was created. Be sure the primary members are on the minds of leadership. Don't let new market segments, an abundance of supplier members, etc. distract.
- 3. What is the economic impact?**

The question is a *reality-check* that should be asked often by the treasurer or finance committee. There are plenty of worthy projects an organization can undertake but resources are limited in the form of 1) staff, 2) committees, 3) volunteers and 4) funds. A plan without resources is simply an illusion.
- 4. Do we know our audiences?**

The strategic plan "positions" the organization. It is an indication to others about the strengths or weakness of the association. How will 1) members, 2) prospects, 3) government, 4) consumers, 5) allied organizations and the 6) media perceive your plan?
- 5. Does the organization have real value?**

Some organizations live in the 60s by offering benefits described as a newsletter, social meetings and rental car discounts. They don't *add value* to the information they process.

Ask the questions, Are we meeting the critical needs of members? Do we *add value* to what passes through our organization? Do members receive a return on investment (ROI)? Can benefits be honed and others dropped? What's our *golden handcuff benefit?

***Golden Handcuff Benefit – A benefit so valuable that no member would drop out of the organization.**

2009-2010 Strategic Planning Meeting Notes

NEW GAHU Mission: GAHU will improve its members' ability to meet the health, financial and retirement security needs of all Georgians through education, advocacy and professional development.

In the future, we will be paid to solve problems. Complexity and competing priorities in the new age of American Healthcare will make it imperative that the GAHU member is better prepared to solve problems for our clients.

Major Needs of our Members: Educate our members. Create political awareness for our Members.

GAHU's Role: Support our Chapters first, thereby enabling them to better serve our Members. That is the primary focus. The second area of focus should be Legislative.

Membership and Retention should be pushed to the Local Chapter and GAHU needs to do everything it can to help the Locals with these important committees.

There should be increased focus on Committee Support. The comments reflected that many of the smaller Locals need substantial help from GAHU at the Committee level. This touches on education, legislation and in developing future leaders within the Associations. "It's hard to recruit a new Board position if that person is immediately burned out by the work"

There was also discussion around expense sharing to help the locals. Specifically, are there creative ways to work "en masse" with the Locals to help bring in a major speaker that can "make the rounds" and give us better pricing for the chance to work in more speaking engagements over a short span of time.

Need more financial support to get more Board and Local members to CapCon.

Membership Goal: 800 Net Members

Fundraising: Raffle still works. Perhaps a new program might be to pick new Members to go to CapCon and once they commit, then we do smaller fundraisers to help offset costs. Utilize expertise within Peachtree Gov't Affairs.

Technology: More discussion around Chapter Pages. Agreement that GAHU should do a technology review and get bids for providers to ensure we maintain best pricing possible.

Convention: Needs flexibility, improved programs, member outreach (especially to outlying chapters) Need to prove ROI for vendors. Perhaps there are ways to coordinate fundraising at the Local level to subsidize participation.

Media: Information flow should be from Local → GAHU. Locals also need timely updates from GAHU.

Education: There were comments made suggesting Brainshark and other technologies to aid in our Education efforts.

HUPAC/GAHUPAC: Goal is 20% participation. Get to \$2,000/month regular flow (GAHUPAC) and 100% Board participation.

Government Affairs: More state participation amongst ALL Chapters. Show up!! Need more cross-committee collaboration.