

GMA SHRM

Strategic Plan for July 1, 2010 to June 30, 2011

On January 13, 2010, members of the Greater Madison Area Society for Human Resource Management met to develop a strategic plan. The end result of the meeting was an agreement not to invent new goals for the chapter but to build on work already in place. The objective was to keep goals simple and manageable and tied to current work or committee goals.

With that in mind, the group developed four main initiatives. Each initiative has an over-arching **three year strategic goal** to help volunteers remain committed and focused in each area for the long term. In addition, there are **tactical goals** – tasks we wish to accomplish in 2010-11. Finally, there are **operational goals**, which are tasks we seek to “operationalize” in the second year of the initiative.

Each tactical goal has a **Goal Champion**. This is an individual who has a history with the goal or is passionate about its success. The idea is to use the passion of the Goal Champion to bring strength and commitment to the strategic initiative. Most tactical goals also have a **committee interface**. This is a committee with a vested interest in the goal and to whom the Goal Champion can assign tasks and seek assistance from committee leaders. The committee can also adopt the tactical goal as one of its committee goals, thus further ensuring the initiative’s success.

- Strategic Planning Idea: Incorporate “governance” role in Secretary/Treasurer duties to create a point person tracking deadlines and progress on initiatives.
- Strategic Planning Idea: Develop an advisory board of Past Presidents who will review our initiatives a couple of times per year and provide advice and guidance.

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Strategic Initiative - Community Outreach			
Three Year Strategic Goal: GMA SHRM will become the #1 resource for the media on HR-related issues and will collaborate regularly each year with community partnerships through businesses and other non-profit associations.			
2010-11 Tactical Goals (First Year)			
Goal 1: Become a subject matter expert contact for the media by developing a process and procedure for media requests			
<i>Goal Champion: Jake Siudzinski</i>			
<i>Committee Interface: Communications and Marketing</i>			
Task	Assigned To	Deadline	Status/Comments
Assess prior attempts at developing a process and procedure for media requests and report to Communications and Marketing	Dave Furlan	11/1/2010	
Develop necessary resources and procedures and communicate to Board, chapter admin, and C&M leaders	Jake, Chris Storlie/C&M	12/1/2010	
Evaluate developing LocalNet on members-only section of website and recommend changes to help find chapter spokespersons	Jake, Wendy, Chris Storlie/C&M	12/1/2010	
Distribute press release describing some basic findings in 2010 compensation and benefit surveys	Chris Storlie, Joan Provencher	9/1/2010	completed
Goal 2: Partner with community organizations to deliver our HR 101 presentation to business leaders			
<i>Goal Champion: Melissa Wieland</i>			
<i>Committee Interface: Diversity (business leaders who are women, Hispanic, etc.)</i>			
Task	Assigned To	Deadline	Status/Comments
Assess status of current presentation and relationship with WWBIC.	Melissa	10/1/2010	
Contact United Way and other umbrella non-profit groups to determine if there are other programs like WWBIC that would benefit from the presentation	Melissa	10/1/2010	
➤ Strategic Planning Idea: Approach Hispanic Chamber and OPEN to incorporate diversity			
Goal 3: Market our organization to the community through programming, government affairs and philanthropic efforts.			
<i>Goal Champion: Dave Furlan</i>			
<i>Committee Interface: Programming and Government Affairs</i>			
Task	Assigned To	Deadline	Status/Comments
Re-evaluate collaborative opportunities with chambers and determine whether we should re-establish our ties	Dave Furlan and Cassy Van Dyke	12/31/10	Work with Zach and Tammy on govt affairs angle
Review list of organizations which	Chris Storlie	12/31/10	

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Strategic Initiative - Community Outreach			
receive our monthly press release on upcoming programs; check Internet and publications to see who is publishing them; add missing organizations by checking on media contact updates under Goal 1			
Select an organization to support during the fiscal year and plan for Human Capital Conference	Kari Lauritsen	9/1/10	completed
Develop a marketing flyer to use with organizations and at events (e.g., Business Expos) to communicate our value to the community	Dave Furlan	12/31/10	Sue Estes has put something together-Dave will contact her
Two Year Operational Goals			
Goal 1: GMA SHRM will respond to all media requests within 24 hours			
Goal 2: GMA SHRM will send out a media kit to our media contacts annually with updated information about our chapter (e.g., current Board of Directors, how to contact us with a request, etc.)			
Goal 3: GMA SHRM will offer an ongoing presentation to two community organizations on the topic of Human Resources			
Goal 4: GMA SHRM will have ongoing contact with chambers of commerce identified as important to our community outreach			
Goal 5: GMA SHRM will have a marketing flyer available to distribute and will update it at least annually with new information about our chapter			

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Strategic Initiative – Member Engagement			
Three Year Strategic Goal: GMA SHRM will provide services and benefits that capture the needs of members throughout the lifetime of their membership.			
2010-11 Tactical Goals (First Year)			
Goal 1: Research -- obtain membership data through a multi-prong survey approach and measurement of demographics			
<i>Goal Champion: JoAnna Vanderpoel and Jake Siudzinski</i>			
<i>Committee Interface: Membership</i>			
Task	Assigned To	Deadline	Status/Comments
Member survey – use what was created in 2009	Chris Berg-Thacker	7/1/2010	Completed. Next step: JoAnna recommend time frame for next survey by 2/1/11
Retention Survey – phone or email survey to ask why people leave GMA SHRM – focus on national members?	JoAnna/Membership	Later in FY	
Volunteer Survey – committee chairs administer survey to determine volunteer profile	JoAnna/Membership	Later in FY	
Senior executive/manager survey; polls at program meetings to find out why people attend	Jeff	Later in FY	
Implement demographic measurement <ul style="list-style-type: none"> • Determine demographics to measure • Determine whether obtained at once for current members or upon renewal • Create system to require demographics for new members 	Jake	7/1/2010	
Goal 2: Ensure a positive first impression of GMA SHRM for new members by providing access to services and benefits quickly and easily (NOTE: a new <u>member</u> can be either new to the profession or comes to us with years of experience)			
<i>Goal Champion: Chris Berg-Thacker/JoAnna Vanderpoel</i>			
<i>Committee Interface: Membership</i>			
Task	Assigned To	Deadline	Status/Comments
Review current on-boarding process and make adjustments	Membership	7/1/2010	Completed
Develop on-boarding process for new members	Membership	August 1, 2010	Completed
Goal 3: Implement small projects to increase membership and engagement of both new and experienced HR professionals by communicating benefits and services targeted to the stage in their career			
<i>Goal Champion: Jeff Russell</i>			
<i>Committee Interface: Membership and Programming</i>			
Task	Assigned To	Deadline	Status/Comments

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Strategic Initiative – Member Engagement			
Provide programming assistance to enhance partnerships with student chapters	Kris Schmitt, Education and Professional Development	7/1/2010	Completed - engages current members with students
Develop targeted resource groups based on member areas of interest (e.g., small HR)	Karla King, Amy Herek / Programming	7/1/2010	Completed for Solo HR; Global HR as a group?
Re-brand and evaluate programming for 2011 based on member and programming surveys	Jeff	11/1/10	Completed
<p>Goal 4: Continue “Pay It Forward” program and leverage it to increase the number of chapter volunteers <i>Goal Champion: Chris Berg-Thacker/JoAnna Vanderpoel</i> <i>Committee Interface: Membership</i></p>			
Task	Assigned To	Deadline	Status/Comments
Create process to follow up with Pay It Forward members who have completed volunteer hours about continuing to serve the chapter.	Membership	ongoing	
Extend Pay It Forward to recent graduates	JoAnna and Kris	9/1/10	Completed
Two Year Operational Goals			
Goal 1: GMA SHRM will send a retention survey to all individuals who do not renew their membership			
Goal 2: 95% retention of members who remain HR professionals in the Madison area			
Goal 3: Onboarding process is delivered to all new members and is reviewed throughout the year by Membership to ensure it continues to deliver value			
Goal 4: All former student chapter members who remain in the Madison area as HR professionals become GMA SHRM members			

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Strategic Initiative – Operational Excellence			
Three Year Strategic Goal: GMA SHRM will create a framework of processes and procedures to ensure the continuity, longevity, and long-term success of the chapter, especially during periods of leadership changes.			
2010-11 Tactical Goals (First Year)			
Goal 1: Knowledge transfer and orientation of new volunteer leaders <i>Goal Champion: Kari Lauritsen</i>			
Task	Assigned To	Deadline	Status/Comments
Work with Government Affairs on completing their onboarding binder as a template for all committees; incorporate volunteer recruitment tips for new co-chairs (part of 2009-10 volunteer initiative)	Zach, Tammy	9/1/10	complete-pending Board input
Review VLRC for other ideas	Kari	11/1/10	
Bring onboarding materials online to Communities section / come up with training & distribution method for committee chairs	Kari	2/1/11	
Develop binder for Board purposes	Kari	3/1/11	
Develop and implement onboarding for new Board Members; Conduct another “Intro to Financials” session in 2010	Dave	completed	Need to review & refine this year’s program
Set transition strategy for all incoming/outgoing volunteer leaders, including events following/during mid-year check-in	Kari	3/1/11	
Goal 2: Succession planning <i>Goal Champion: Dave Furlan</i>			
Task	Assigned To	Deadline	Status/Comments
Check VLRC or other resources for models	Dave		completed
Incorporate President Elect nominee idea	Dave		completed
Review minimum board term limits – examine 2 yr. role for some positions and VP role as pre-requisite for President Elect	Dave	12/1/10	
Governance role for Secretary/Treasurer position (see note above on first page)	Dave	12/1/10	
Succession discussion with board members and their committee chairs	Dave		started and ongoing
Two Year Operational Goals			
Goal 1: GMA SHRM has an online onboarding “binder” for each committee			
Goal 2: GMA SHRM has an online onboarding “binder” for new Board members			
Goal 3: President Elect nominee selected by January of each year			
Goal 4: President Elect has scheduled calls throughout the year with Board members and Committee Chairs about succession planning			

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Strategic Initiative – Effective Use of Technology for GMA SHRM			
<p>Three Year Strategic Goal: GMA SHRM will execute an ongoing evaluation, including budget implications, of technology resources available. The evaluation will respond to the ever-changing opportunities available in order to effectively communicate to members and bring added value to their membership.</p>			
2010-11 Tactical Goals (First Year)			
<p>Goal 1: Conduct basic research to determine our options and best approaches; develop an initial project scope <i>Goal Champion: Jake Siudzinski and Cassy VanDyke</i> <i>Committee Interface? Yes, Communications & Marketing</i></p>			
Task	Assigned To	Deadline	Status/Comments
Evaluate metrics from current GMA SHRM website		7/1/10	completed
Establish benchmarks based on other chapters/organizations of a similar size and scope. Other questions: Who updates our website? How often? Who manages content (C&M calendar as driver)? What about social media? What is the future of the newsletter? Hire an intern to manage social media?	Jake or committee project leader	10/1/10	Benchmarks for website researched; highlighted items are pending
Review VLRC for resources	Jake or committee project leader	7/1/10	completed?
Develop our purpose and objectives for 2010-11 along with budget implications.	Board	7/1/10	completed – initiate conversation at January strategic planning for 2011-12
<p>Goal 2: Develop project timelines and tie to committee goals <i>Goal Champion: Jake Siudzinski and Cassy VanDyke</i> <i>Committee Interface? Yes, Communications and Marketing</i></p>			
Task	Assigned To	Deadline	Status/Comments
Evaluate developing LocalNet on members-only section of website	Jake, Wendy, Chris	12/1/10	
Develop LinkedIn guru/expert and incorporate messages to GMA SHRM group with chapter communications calendar	Melissa, Jake, Chris	12/31/10	need a back up person
Two Year Operational Goals			
<p>Goal 1: Website/social media changed regularly based on ongoing evaluation and recommendation from Board and Communications and Marketing Committee</p>			
<p>Goal 2: Strategic Planning Sessions place emphasis on technology with objective of ensuring budget for upcoming fiscal year supports initiatives</p>			
<p>Goal 3: Communications and Marketing calendar drives content on a weekly and monthly basis to website, e-blasts, social media and other chapter communications</p>			