



## **Pennsylvania Society of Association Excellence 2015-2017 Strategic Plan**

### **Mission Statement:**

The mission of the Pennsylvania Society for Association Excellence is to create a community of association leaders that inspire and promote excellence.

### **Vision Statement:**

PASAE provides gold-standard, innovative services to the association community.

### **Core Customer:**

The primary customers of the Pennsylvania Society for Association Excellence are Chief Staff Executives and their leadership teams.

### **Strategic Positions**

- Position PASAE as the leading provider of information, resources and recognition for members who embrace excellence in association management.
- Position PASAE as the leading provider of services for associations that strive for organizational excellence.
- Position PASAE as a model of excellence and innovation in association management.

## **Position 1 – Position PASAE as the leading provider of information, resources and recognition for members who embrace excellence in association management.**

### **Desired Outcomes:**

- PASAE members will see increased value in belonging to the organization.
- More members will become engaged within the PASAE community.
- PASAE members will be recognized by their peers and within their organizations for excellent performance.

### **Objective 1.1**

Provide high-level training opportunities for PASAE’s primary customers.

#### **Possible Action Plans**

- A. Conduct focus groups with CEO’s to determine specific areas for training.
- B. Consider setting up round tables for senior staff.
- C. Encourage senior staff members to seek the CAE designation.
- D. Use technology to connect members with national thought leaders.
- E. Work with the Foundation to acquire grants for educational events.

### **Objective 1.2**

Develop new ways to recognize “excellence” in member associations to supplement the new Laurel Awards program.

#### **Possible Action Plans**

- A. Evaluate the new awards system to determine if the criteria needs tweaking to reflect the strategic plan’s focus on excellence.
- B. Attempt to develop an overall definition of excellence in association management.
- C. Consider an award for a voluntary leader who led an association to excellence.

### **Objective 1.3**

Evaluate all PASAE events and adjust as needed to support the new mission and focus on excellence.

#### **Possible Action Plans**

- A. Consider re-naming events around the theme of excellence.
- B. Evaluate a new program/event that could be used to recognize members and their organizations. (see Obj. 1.2 and 2.1)
- C. Experiment with new meeting/event formats, activities and technologies to expose members to new ideas.

## **Position 2 – Position PASAE as the leading provider of services for associations that strive for organizational excellence.**

### **Desired Outcomes:**

- PASAE member organizations will be recognized nationally as leaders/innovators.
- PASAE will discover sources of non-dues income from services provided to member organizations.
- PASAE member organizations will have clear benchmarks for determining excellent performance.

### **Objective 2.1**

Consider the development of a program that recognizes all member organizations who achieve/exceed benchmarks of excellence.

#### **Possible Action Plans**

- A. Network with other organizations to see who already does this type of recognition.
- B. Consider ways of making this a non-dues income source by charging an application fee.
- C. Consider a scoring or ranking system to help compare excellence in associations.

### **Objective 2.2**

Develop benchmarks of excellence for associations to use to evaluate performance.

#### **Possible Action Plans**

- A. After deciding which benchmarks are appropriate, collect data from all member organizations to use in setting benchmarks.
- B. Look for newer benchmarks, such as social media effectiveness, that may not be well-established in the industry.
- C. Consider publishing benchmarks once a year and determine if this should be member-only information or shared more broadly.

### **Objective 2.3**

Investigate the possibility of establishing an affinity/discount program for services that could be delivered to members of all PASAE member organizations.

#### **Possible Action Plans**

- A. Review ASAE offerings and avoid duplication/competition.
- B. Work with PASAE Business members to see if they would be able to participate in this type of program.
- C. Establish performance guidelines to evaluate programs, such as scope of appeal to members, savings discount, and revenue to PASAE, etc.

### **Objective 2.4**

Define PASAE's role in assisting member organizations with legislative and political activities.

#### **Possible Action Plans**

- A. Evaluate the possibility of hosting an event with members and legislative staff.
- B. Consider publishing a Who's Who guide of associations that could be provided to legislators and their staff.
- C. Investigate a partnership with PAGR to develop benchmarks for PASAE associations lobbying efforts including PAC dollars raised/spent, key legislation passed, etc.

### **Objective 2.5**

Develop services for member organizations that help foster excellence.

#### **Possible Action Plans**

- A. Consider developing leadership training for Board and Committee members that can help member organizations.
- B. Consider offering spokesperson training to leaders of member organizations.
- C. Consider developing a peer review program within PASAE to evaluate the structure and processes of member organizations.

## **Position 3 – Position PASAE as a model of excellence and innovation in association management.**

### **Desired Outcomes:**

- Members will gain ideas from participating in PASAE.
- PASAE will develop a culture of experimentation and innovation.
- Other organizations will seek PASAE as a partner.

### **Objective 3.1**

Evaluate and improve the collection, updating and use of PASAE's member records.

#### **Possible Action Plans**

- A. Evaluate the current membership software and upgrade if needed.
- B. After determining what data is important to collect, perform a census of PASAE members to get the most current member data.
- C. Give priority to collecting data on primary customers.
- D. Develop a system that keeps the data clean and up-to-date.

### **Objective 3.2**

Evaluate PASAE's Committee structure to make sure it is in-sync with the strategic plan.

#### **Possible Action Plans**

- A. Consider combining all educational activities at PASAE events under the purview of one committee.
- B. Evaluate the make-up of the Board to make sure it is representative of the members and fosters future leaders.
- C. Start using a chair/vice chair system to lead committees and provide training for the next leader.

### **Objective 3.3**

Re-evaluate the role of the business members in PASAE to strengthen their relationship as a strategic partner.

#### **Possible Action Plans**

- A. Re-examine the definition of *Business Member* to make sure it is clear.
- B. Involve Business Members in re-working the sponsorship program to provide value for supporting PASAE.
- C. Evaluate the existing successful programs at other SAE's to look for ideas.
- D. Consider a member-to-member program that encourages members to work with business members.

### **Objective 3.4**

Re-examine the financial structure of PASAE and its relationship with the PASAE Foundation.

#### **Possible Action Plans**

- A. Appoint a joint task force with the Foundation to consider the option of changing PASAE's tax status to a 501(C)(3).
- B. Review current financial policies to make sure they remain relevant.
- C. Evaluate PASAE revenues with a SWOT analysis to prepare for future shifts.