

IPELRA ACTION PLANNING FOR TOP TIER GOALS JUNE 2019 UPDATE

SHORT-TERM COMPLEX GOAL					
GOAL #1: Identify long-term membership profile and resources.					
OVERALL STRATEGY: Align membership with public sector professionals that benefit most from our core mission.					
OBJECTIVE DESCRIPTIONS	ACTION ITEMS TO ATTAIN OBJECTIVE	LEAD COORDINATOR/ ENTITY RESPONSIBLE	TARGET START DATE	REVISED DUE DATE	STATUS
Identify target member-Who are we serving?	a. Analyze current membership demographics including: position, geography, and organization. Could use Excel 365 or GIS/other b. Identify a list of public sectors jurisdictions that exist c. Retrieve a list of petitions filed, Board data d. Survey sample of both participants (attend training but not members) and members to measure their value proposition and satisfaction with services	Membership Committee Chair	November 2017		a. Completed b. Completed c. Completed d. Completed Notes: Most of IPELRA's current membership consists of municipalities around the Chicagoland area and surrounding suburbs. The Board decided to use existing survey data from 2016.
Analyze data from membership research	a. What is the impact of decisions to change structure? b. What resources would be needed (cost/benefit analysis) c. Evaluate criteria for targeting membership. Are there major groups not included-why?	Membership Committee Chair	July 2018		a. Completed b. Completed c. Completed Notes: The Board decided not to change the structure of the Association Membership.
Resolve recurring question "are we going to expand?"	a. Assess <ul style="list-style-type: none"> • the impact of expansions (cost/benefit analysis) • resource needs • mission-alignment • ability and capacity to serve membership/add 	Membership Committee Chair	July 2018		a. Completed Notes: The Board accepted the Committee's recommendation to expand. <ul style="list-style-type: none"> - Neighboring jurisdictions (Cities/Villages, Fire Districts, and Counties)

					<ul style="list-style-type: none"> - Partner with local Universities to encourage student membership and training attendance (NIU, UIC, Northwestern) - Evaluate creating a training curriculum that can be used for various purposes (Training Committee) - Create a one-page flyer on student membership with discounted training rates (Marketing/Communications Committee)
Explore expanding the Ambassador program to include mentoring and orientation	<ul style="list-style-type: none"> a. Assess results and impacts of current Ambassador’s program including costs b. Survey recent participants on their experience and connection to membership, matriculation, improvement suggestions c. Create a benefits sheet for program to include ½ day training, leadership development, etc. d. Explore expanding program to include mentoring/coaching and orientation e. Explore a new member’s reception f. Establish a lead Ambassador or Coordinator g. Contact NPELRA to see about adding questions related to how to contact mentorees, interests as a member, etc. h. Expand membership committee 	Marketing	January 2019		<ul style="list-style-type: none"> a. Completed b. No Update c. No Update d. Completed e. Completed f. Completed g. Completed h. Completed <p>Notes: The Board decided that the Association should leverage the National mentor program rather than creating a separate program.</p>

SHORT-TERM ROUTINE GOAL					
GOAL #2: Identify the impacts and scope of growth on IPELRA members and the organization.					
OVERALL STRATEGY	Match capacity and resources to service levels and expectations in concert with members.				
OBJECTIVE DESCRIPTIONS	ACTION ITEMS TO ATTAIN OBJECTIVE	LEAD COORDINATOR/ ENTITY RESPONSIBLE	TARGET START DATE	REVISED DUE DATE	STATUS
Explore/define administrative support resources for current and future activities, expectations, services and programs	<ul style="list-style-type: none"> a. Conduct independent staffing analysis and work process to align service delivery with expectations and capacity. Include exploration of other similar organizations b. Explore/analyze financial trend analysis of revenues and expenses to sustain operations: membership fees, sponsorships, other revenues c. Survey/ask Board/committees what administrative tasks are being done at the committee level that can be done in-house, what needs to be outsourced. Identifying top needs can help prioritize budget. 	President and Past President	July 2019		<ul style="list-style-type: none"> a. No Update b. No Update c. No Update
Align organizational capacity to match eventual membership profile targets	<ul style="list-style-type: none"> a. Explore budget prioritization given needs of Board/Committees b. Submit budget needs to treasurer c. Board approves budget 	Treasurer	July 2019		<ul style="list-style-type: none"> a. No Update b. Ongoing c. Ongoing

LONG-TERM ROUTINE GOAL					
GOAL #3: Evaluate our membership categories and structure.					
OVERALL STRATEGY	Maintain Association’s competitive value position among peer organizations.				
OBJECTIVE DESCRIPTIONS	ACTION ITEMS TO ATTAIN OBJECTIVE	LEAD COORDINATOR/ ENTITY RESPONSIBLE	TARGET START DATE	REVISED DUE DATE	STATUS
Explore opportunities for career starter memberships	<ul style="list-style-type: none"> a. Look at discounted rates for career starters b. Define what is a career starter (career change, new to career, etc.) 	Membership Committee Chair	January 2018		<ul style="list-style-type: none"> a. In progress b. In progress
Evaluate current membership categories and dues structure	<ul style="list-style-type: none"> a. Examine categories and fee structures (how do rates compare?) b. Explore different models including other PELRAs c. Determine reliance on membership structure as part of revenue stream d. Consider reciprocal membership discounts e. Explore automatic renewals f. Review creating something similar to NPELRA’s Benefits sheet at the state level 	Membership Committee Chair	July 2018		<ul style="list-style-type: none"> a. In progress b. In progress c. In progress d. In progress e. No Update f. No Update

SHORT-TERM COMPLEX GOAL					
GOAL #4: Design a succession plan for leadership on IPELRA Board and Committees					
OVERALL STRATEGY	Assure continuity and ongoing flow of leadership to Board and the committees				
OBJECTIVE DESCRIPTIONS	ACTION ITEMS TO ATTAIN OBJECTIVE	LEAD COORDINATOR/ ENTITY RESPONSIBLE	DATE TO BEGIN	REVISED DATE DUE	STATUS
Create leadership continuity for Board and Committees	<ul style="list-style-type: none"> a. Provide exposure and awareness of opportunities and roles b. Create a structure or committee for inviting on to Board c. Share/distribute Board descriptions d. Create central repository of Board and Committee information e. New board orientation f. Review new board member application g. Reexamine length of terms in a Board position h. Determine the maximum amount of time a Board member can serve in the same position. 	President/Past President	January 2018		<ul style="list-style-type: none"> a. Incorporated into Board Orientation Book b. No Update c. Incorporated into Board Orientation Book d. Completed e. In progress f. Completed g. Completed <p>Notes: The Board decided that the expected term should remain two years per Board position. Additionally, the Board decided to maintain flexibility in the maximum amount of time a Board member can serve in the same position.</p>
Make organization attractive to the next generation of new leaders	<ul style="list-style-type: none"> a. Conduct more efficient meetings b. Explore virtual meetings c. Follow-thru on mentorship initiatives d. Explore incentive or recognition program (reduced registration, etc.) e. Hold focus group, create ad hoc committee of younger/newer member, or a social event to ask questions about participation f. Develop recommendations based on focus group 	President/Past President	November 2018		<ul style="list-style-type: none"> a. In progress b. No Update c. Completed – see notes in Ambassador Program Objective d. In progress e. No Update f. No Update

SHORT-TERM ROUTINE

GOAL #5: Develop a long-term financial plan for sustainability.

OVERALL STRATEGY	Become financially sustainable to meet current and future association needs.				
OBJECTIVE DESCRIPTIONS	ACTION ITEMS TO ATTAIN OBJECTIVE	LEAD COORDINATOR/ ENTITY RESPONSIBLE	DATE TO BEGIN	REVISED DATE DUE	STATUS
Explore our sponsorship model and sponsor participation and revenue	<ul style="list-style-type: none"> a. Analyze current sponsorship structure and fees and look at other revenue options b. Work with sponsors to determine what they want or what is missing? New ways to highlight sponsors. c. Develop a Sponsorship policy to include speakerships and advertising for sponsors d. Conduct a comparative analysis of peer group professional associations e. Expand Sponsorship Committee f. Develop revenue models, projections, and options g. Make recommendations 	Sponsorship Committee Chair	December 2017		<ul style="list-style-type: none"> a. Completed b. Completed c. Completed d. Completed e. In Progress f. In Progress g. In Progress

LONG-TERM COMPLEX GOAL

GOAL #6: Implement and execute results of the short-term organizational analysis.

OVERALL STRATEGY

Put in place the organizational structure that aligns with our mission and identified service levels.

OBJECTIVE DESCRIPTIONS	ACTION ITEMS TO ATTAIN OBJECTIVE	LEAD COORDINATOR/ ENTITY RESPONSIBLE	DATE TO BEGIN	REVISED DATE DUE	STATUS
Conduct analysis of how other similar organizations operate and function	a. Prepare a question sheet for contacting organizations <ul style="list-style-type: none"> • How large is membership • Dues structure • Services paid for • Executive director structure • Board member, meeting structure b. Identify contact list c. Reach out to contacts that Board and Committees already have first d. Review websites of other similar organization	President/Vice President/Assistant Vice President	April 2018		a. No Update b. Completed c. No Update d. No Update
Staff or contract for desired capacity identified in analysis	a. Establish a budget b. Prepare job specs/scope c. Prepare a transition plan d. Look at legality-not set up as an employer	President/Past President	January 2021		a. No Update b. No Update c. No Update d. No Update
Maximize available technologies to improve training delivery system and process efficiencies	a. Establish a budget b. Prepare specifications c. Prepare a transition plan	Training Committee	January 2021		a. No Update b. No Update c. No Update

LONG-TERM COMPLEX GOAL

GOAL #7: Assess and evaluate the branding and marketing of IPELRA services/resources.

OVERALL STRATEGY

Present a consistent and positive branding message to members and non-members alike.

OBJECTIVE DESCRIPTIONS	ACTION ITEMS TO ATTAIN OBJECTIVE	LEAD COORDINATOR/ ENTITY RESPONSIBLE	DATE TO BEGIN	REVISED DATE DUE	STATUS
Evaluate current marketing and branding efforts.	<ul style="list-style-type: none"> a. Review current marketing efforts b. Evaluate additional markets that may need to be included c. Cost/benefit of current marketing efforts (i.e. video, pens, social media, etc.) d. Include new mission on letterhead, Website, all materials e. Consistently update information on social media 	Marketing/Communications Committee Chair	January 2018	January 2021	<ul style="list-style-type: none"> a. No Update b. Completed c. No Update d. In Progress e. In Progress
Develop a marketing plan for current members AND identified target membership	<ul style="list-style-type: none"> a. Retain marketing expertise b. Clarify, identity, and incorporate values c. Incorporate identified target membership data d. Implement approved strategies e. Evaluate results (what is working, what is not?) 	Marketing/Communications Committee Chair	July 2020	January 2022	<ul style="list-style-type: none"> a. No Update b. No Update c. No Update d. No Update e. No Update

LONG-TERM ROUTINE GOAL					
GOAL #8: Implement our long-term financial plan.					
OVERALL STRATEGY	Adhere to financial policies and annual budget plans and priorities.				
OBJECTIVE DESCRIPTIONS	ACTION ITEMS TO ATTAIN OBJECTIVE	LEAD COORDINATOR / ENTITY RESPONSIBLE	DATE TO BEGIN	REVISED DATE DUE	STATUS
Prepare financial trend analysis	<ul style="list-style-type: none"> a. Explore and evaluate past, present, and future revenues and expenses b. Align and adjust as needed 	Treasurer	October 2020		<ul style="list-style-type: none"> a. No Update b. No Update
Work through short-term goals to determine long-term financial plan	<ul style="list-style-type: none"> a. Establish priorities b. Determine expenses c. Determine revenues d. Create a fund balance policy 	Treasurer	January 2022		<ul style="list-style-type: none"> a. No Update b. No Update c. No Update d. No Update
Evaluate multi-year budgeting	<ul style="list-style-type: none"> a. Evaluate fit and benefits of multi-year approach b. Make a decision and develop transition plan if needed c. Identify reporting requirements 	Treasurer	January 2022		<ul style="list-style-type: none"> a. No Update b. No Update c. No Update
Comply with all financial reporting requirements	<ul style="list-style-type: none"> a. Select auditor b. Review and file reports 	Treasurer	July 2022		<ul style="list-style-type: none"> a. Completed b. Ongoing
Review current financial reporting to members	<ul style="list-style-type: none"> a. Develop and/or update policies and approach on internal reporting b. Review and update as necessary reports for the board c. Review and update as necessary annual financial report for members 	Treasurer	November 2022		<ul style="list-style-type: none"> a. In Progress b. In Progress c. No Update