

In Attendance:

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Situational Analysis

“Where we are now.”

Internal Analysis (S & W of SWOT)

This analysis focuses on our organization independent of external factors. It is a time to look at who we are, how we drive value, what our strengths and weaknesses are and more.

Strengths	<ul style="list-style-type: none"> ▪ Organizational membership structure ▪ Program mix ▪ Membership balance ▪ Unique market – operationally geared and focused (“nuggets”) ▪ Strong, supportive national backbone ▪ Financial strength ▪ “Local” to our base
Weaknesses	<ul style="list-style-type: none"> ▪ Struggle with engagement/commitment (program mix/org membership structure consideration) <ul style="list-style-type: none"> ○ Accountability levels ▪ Engaging and retaining volunteers ▪ Regional spread (Member concentrations across states) ▪ Accountability ▪ Question: Do we have the structure and resources to grow? ▪ Need to train attendees to show the value of attendance and participation

Environmental Analysis (PEST)

Before we begin identifying our opportunities and threats in the marketplace, it is important to first identify what is going on in the external environment.

Political	<ul style="list-style-type: none"> ▪ “AIG Effect” – Bad industry reputation ▪ Questioning value of meetings and events ▪ ~ In some respect ~ Breaking the organizational ceiling <ul style="list-style-type: none"> ○ Industry organizations and events sought and attended for content versus networking alone
Economic	<ul style="list-style-type: none"> ▪ Down: Attendance, revenue, jobs, help, workforce ▪ Up: Fear and suspicion (especially around nature of “partnerships”) ▪ Priorities (time, money, resources, etc)
Social	<ul style="list-style-type: none"> ▪ Up: Responsibility, desire for work-life balance ▪ Down: Morale ▪ Priorities (time, money, presence, etc) ▪ Skill development stagnating ▪ Concept: If you’re standing still, you’re falling behind
Technological	<ul style="list-style-type: none"> ▪ New media/Social networks ▪ Emerging meeting technologies ▪ Registration systems and platforms ▪ Advertisements (form and value changing)

Internal Analysis (O & T of SWOT)

This analysis focuses on our organization's opportunities and threats in consideration of external factors (as identified in the PEST analysis and other conversations).

Opportunities	<ul style="list-style-type: none">▪ Fill industry gap by focusing on skill development rather than networking alone (value – “nuggets”)▪ Reach remote communities – Fee for online view of audio and/or video feed of programs▪ Extend the life of a program – Community through new media (blog, website, etc)<ul style="list-style-type: none">○ Request that speakers monitor blog, forum, etc for trailing Q&A▪ Program/Education: Guide through change
Threats	<ul style="list-style-type: none">▪ Member permission to attend (based on allocation of organization funds)▪ Bad value perception▪ Volume of monthly programs offered in our regional area

Brainstorm

“Where we want to go.”

Now that we've looked at where we stand, it's time to take everything into consideration and look at where we want to go in 2010. The brainstorm categories are roughly divided into two general areas: what we want to continue and what we want to accomplish for the first time.

Continue

- Regular Programming
- Focus: Content/Value/“Nuggets”
- Website maintenance and value
- Lack of “clickish” culture
- Welcome committee activity and engagement
- Chapter member survey
- Attract and encourage “new blood” and new volunteers
- Annual golf tournament
- Directory (every two years)

New

- Solidify sustainable chapter foundation
- Consider/evaluate revenue streams
- Extend geographic reach
 - Regional committees
- Golf tournament – Golf Lessons?
- More robust newsletter
 - Member authors
 - IAEE Chapter content share
 - Spotlight around the nation
- Communicate with org member liaisons
 - Need to ID liaisons
- Work with IAEE national to communicate with locally-based members associated with HQs or markets in other chapters
- Informal programming/networking that's facilitated, if not planned
- Chapter specific membership list – Click through to IAEE national
- Social media presence
- ADMIN possibility
- Membership mix value reflected in newsletter, website, etc

Priorities

“What we're going to focus on.”

Now that we've considered numerous opportunities for 2010, it is time to narrow down our focus and priorities so that we can realistically accomplish our goals, working strategically with our resources and market position.

Geographic Reach – Regional committees

Communication – Frequency, mode, etc

Membership – ID members in our list or allocated to different chapters; ID member mix - operationally

In order to better realize our established priorities, we called out the following for each: ownership, end vision, tasks, resource needs, and preliminary timelines.

	Geographic Reach	Communication	Membership
End Vision	<ul style="list-style-type: none"> ▪ 2 remote programs in Utah (2nd RMC member concentration) – locally owned and operated, regionally supported ▪ See value → increased involvement → positive word-of-mouth → increased membership 	<ul style="list-style-type: none"> ▪ Clear communication of benefits/takeaways ▪ Pre/post continuation of value, community, communication, enticement to “be there” ▪ Tool utilization – Reach, know members’ meetings events (ex: triplit) 	<ul style="list-style-type: none"> ▪ Know our members ▪ Hone into needs (survey) ▪ Member mix beyond programs – Website, newsletter, etc ▪ Continue to welcome and engage members
Ownership	<ul style="list-style-type: none"> ▪ Denise (RMC Board Liaison) ▪ Local member - TBD 	<ul style="list-style-type: none"> ▪ Adrian (LinkedIn) 	<ul style="list-style-type: none"> ▪ TBD
Tasks	<ul style="list-style-type: none"> ▪ Find a local contact (Denise) ▪ Examine database and send local member list to our designated local contact ▪ Develop resource and expectations summary sheet (tools, topic ideas, inclusion in newsletter, board support, etc) ▪ Face to face strengthen relationships at Expo! Expo! 	<ul style="list-style-type: none"> ▪ LinkedIn – Set up and link on RMC site (Adrian) ▪ Speaker procedure standard development (Handout) – Permission and availability check for pre/post engagement ▪ LinkedIn and Triplit in Next Newsletter (Adrian) ▪ Repeat program magnet 	<ul style="list-style-type: none"> ▪ Scrub membership list – look for incorrect addresses. Start with RMC board scrub ▪ ID member org liaisons – educate and manage to engage and communicate with true members ▪ Survey ▪ Cross-check 1st timers – Star stickers? – Call for raising hands
Resources Needed	<ul style="list-style-type: none"> ▪ Technology – Slide and audio OR video share ▪ Scrubbed membership list ▪ \$, name badges, signage, handouts (1 board person “on the ground”) – Lunch event for day trip 	<ul style="list-style-type: none"> ▪ Tap into other Chapter news/resources ▪ Technology for audio/slides/video (Linda) ▪ Foam board with map and dry erase markers – Where have you been? Where are you going? Meeting locations? - Capture for the newsletters 	<ul style="list-style-type: none"> ▪ Survey Monkey – where do our members want us to be ▪ Sticker stars
Preliminary Timelines	<ul style="list-style-type: none"> ▪ Establish local contact by end of August ▪ Go/No-go decision by the end of August for remote program goals ▪ List scrub (covered in Membership priority) ▪ Resource and Expectation sheet development if RMC moves forward with the remote program ▪ General program goal? – April and September 2010 	<ul style="list-style-type: none"> ▪ LinkedIn – Set up and report by next meeting – Responding to a need, not driving (Adrian) ▪ Triplit for the newsletter (Adrian, Nora) ▪ Program magnet – Print before Jan 2010 program ▪ Audio/Video capture resource (Linda) 	<ul style="list-style-type: none"> ▪ Contact Anne or Jodi for liaison list and chapter list reconciliation data ▪ Board to perform initial data scrub

OVERALL 2010 FOCUS:

VALUE

Sought, Communicated, Delivered, Reinforced