

AACPM Strategic Planning Committee Report

December 2009

Executive Summary:

The AACPM Strategic Planning Committee, initiated in fall 2008, sought information, ideas and feedback to prioritize short and long term initiatives of the AACPM and its member societies through on-line surveys and feedback from society presidents and AACPM Board members attending the 2009 FL AACPM Conference. This December 2009 report reflects additional feedback following the FL AACPM Conference and changes recommended by members of this Strategic Planning Committee.

A key outcome of this committee's work has been a reassessment of goals, objectives and activities the AACPM Board and the AACPM membership may wish to focus on in 2010 as a way to respond to membership concerns about relevance and value. Believing we are likely to have missed many issues and priorities which we failed to capture or which are or will be apparent to others, this committee has offered a mechanism to thoughtfully validate and align current and new initiatives against this as a living, evolving strategic tool.

We are presenting this report of our committee's work to the 2009 AACPM President-Elect, Joyce Smith, in December 2009. This report, results of the spring 2009 on-line surveys, and the two PowerPoint presentations from the Presidents' Meeting and the Tuesday mid-day discussion session at the 2009 FL National AACPM Professional Development Conference, will be posted online at www.cpmacademy.org by early January 2010.

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Committee Report:

1. Committee:

- A. Committee Creation: At the Presidents' Meeting at the 20th Annual AACPM National Professional Development Conference in September 2008 in Columbus, OH, following discussion of the AACPM's Strategic Plan, the 2008 AACPM President, Greg Hyland, asked for the initiation of a new strategic planning committee for AACPM. The AACPM SOP (Section 6.00) identifies this as one of several responsibilities of the AACPM President-Elect, so this committee served under Steve Mastro in fall 2008 and serves under Joyce Smith in 2009.
- B. Committee Charge: To recommend strategic goals, objectives and activities the AACPM membership and Board should take over the next 3 years which will help the AACPM achieve its mission. Toward that end, this committee will:
 1. solicit committee membership from all state societies
 2. agree on a system which facilitates document sharing & collaboration
 3. identify stakeholder groups
 4. develop & implement a methodology to acquire stakeholder input to inform this draft strategic plan
 5. review previous AACPM strategic plan documents for ideas regarding past AACPM goals & initiatives which may inform the new strategic plan framework &/or goals, objectives & action plan

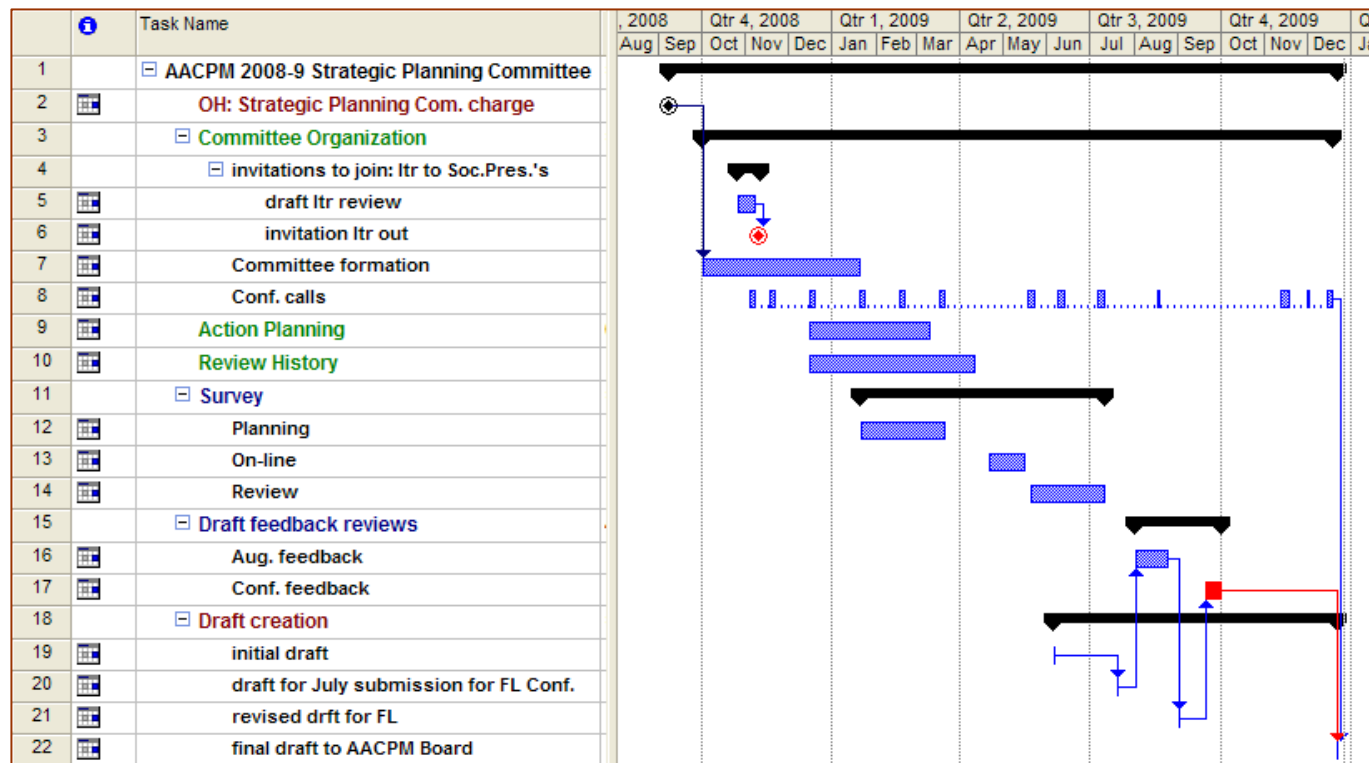
6. provide updates on committee progress through the CPM Connection
7. provide reports for scheduled AACPM Board of Directors' meetings
8. provide information to the AACPM membership in fall 2009, designed to elicit additional feedback & participation in the AACPM strategic planning process
9. provide informational poster(s) of the strategic planning process and proposed plan in a common area at the 21st Annual AACPM Professional Training & Development Conference in FL in Sept. 2009, with an opportunity for additional feedback from Conference attendees; other formal &/or informal methods for generating Conference attendee discussion are considered a priority and will be reviewed with Joyce Smith, the FL Conf. Planning Committee & the AACPM Board by July 2009
10. all sources of feedback will be incorporated into a 2nd/3rd draft which will be presented to the AACPM Board of Directors and the HOD by early Nov. 2009
11. a draft plan document will be posted on the AACPM Web site seeking additional comment from the AACPM membership by late Nov. 2009
12. a final 2009 draft Strategic Plan will be forwarded by the AACPM Board of Directors to the HOD for their approval by mid-Dec. 2009

- C. Committee Membership: In early November 2008, a letter was sent via email to each society president inviting each state society to contribute someone as a partner in this committee work. By January 2009, we had 13 committee members from 12 states participating in this effort. Committee members are listed alphabetically below:

Becky Bryant		AR	501-682-4540	becky.bryant@arkansas.gov
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- D. Committee Collaboration: We created a shared work space using the free Internet collaboration tool, www.wiggio.com where we have also shared historic and current documents & commentary and from which we have initiated conference calls. Microsoft Project was used as a tool to plan, review and communicate our work schedule. In fall 2009, we used www.doodle.com to schedule conference calls.

2. Work Schedule: See Gantt Chart below:



3. History:

- A. Recognition of Past Work: The Committee’s 1st activity was to review documents associated with previous work and the [AACPM Strategic Plan summary](#) posted on the AACPM Web site. Our committee reviewed documents associated with the history of AACPM strategic planning, including work in the 1990’s as well as between 2000 and 2002.
- B. Context of History to Present Work: Our 2008-2009 Committee discussions have recognized the value of past work while leaving open for further consideration, whether new issues would fit within the prior schema of goals, action items, timelines or allocation to AACPM Committees &/or whether they might include any recommendations specifically for state societies.

4. Communications:

Following the September 2008 OH AACPM conference, communication regarding this AACPM Strategic Planning effort out to the AACPM membership has included:

- October 2008 email to Society presidents: letter seeking a representative from each society to the Strategic Planning Committee
- December 2008: follow-up email to Society presidents from Deb Bourbeau seeking a representative from each society
- March 2009: AACPM Newsletter article (Spring Edition) with information about 5 surveys coming soon
- April 2009: on-line email regarding 5 surveys:
 - via email by National CPM Consortium President Terri Callahan and Administrator, Jack Lemons to Consortium members: 1 survey for Consortium members; 1 emailed to current CPM students; 1 emailed to CPM grads who were not society/AACPM members
 - via email by AACPM Board Member at Large Member Affairs, Debbie Smith to society presidents: 1 survey for current AACPM Board members and state society officers; 1 for all society members (= AACPM membership)
- June 2009: AACPM Newsletter article (Summer Edition):
- July 2009: Committee plans to email Society presidents inviting them and their membership to join a Strategic Planning overview and feedback session in Orlando, FL

- September 2009: at FL conference, the Committee:
 - provided poster session version of this report at the Presidents’ Meeting
 - provided draft conclusions and feedback session
- December 2009: Committee is providing a final report to AACPM Board and HOD and will post the report on the AACPM Web site with a link to a blog response & feedback discussion board

5. Surveys:

A. Objectives:

- provide wide participation of stakeholder groups
- generate ideas & identify issues of concern relevant to each stakeholder group
- achieve maximum simplicity and value

B. Creation: surveys were collaboratively developed, edited and then pre-tested 2 times online by our committee membership in an effort to ensure question value, clarity of style and grammatical correctness (we recognized each of these expectations can be challenging to achieve)

C. Recognized short-comings:

- uneven distribution among targeted groups; committee acknowledged reaching stakeholders would be uneven in different states
- some people will respond to more than 1 survey & fit 2 or more stakeholder groups and they might take all relevant surveys; this should not be a problem & any survey taken should reflect perspectives of the targeted stakeholder group
- email distribution not elegant for all

D. Response frequency by stakeholder group:

Stakeholder Target Group	# of respondents:	# of states represented
Consortium Members	17	10 (+ 7 from “other”)
Students	280	8 (+ 9 from “other”)
State Society & AACPM Board Officers	47	15 (+ 1 from “other”)
State Society & AACPM Members	414	18
State Program Graduates	317	5 (+ 74 from “other”)
Totals:	1,075	18 states + other

6. Recommendations:

Normally, a strategic plan identifies actions to be taken which support a purpose. The purpose should be a succinct and clearly defined mission and vision. Then, a strategic plan identifies goals in support of the mission and vision. Within each goal, one or more (SMART) objectives define actions to be taken to achieve each goal. If useful, each objective may be further defined by a sub-list of specific action items.

Among the challenges our committee faced as we drafted this strategic plan:

1. Is the vision and mission of AACPM clearly stated, understood, and part of our culture as a organizational entity? Has it changed? Was understanding any AACPM historical change in purpose (or assessing or directing a new change) a function of 2009’s Evolution Committee? If we are not clear on AACPM’s mission or we had different ideas of what it is, will our objectives, created within this strategic planning process, hit all the right areas and reflect all the right priorities? As a committee, we accept that it may not, but believe that regardless, this strategic plan DOES provide important objectives and measures of success to guide work in 2010 and beyond.
2. Should we build in to this plan the clear expectation that other goals &/or objectives and activities will be defined by the AACPM Board or through recommendations by other committees? We believe, yes. We believe impetus for this committee’s work (reinforced though survey results) was generated by perceptions of the need for improved communication and a greater sense of membership value. The goals we have identified, and even objectives and associated activities we have presented, we believe and accept are likely to not encompass all strategic actions we as AACPM members, our societies, our national committees or the AACPM Board may or should take to best serve the AACPM. We do believe, however, that the very nature of having a strategic plan with specific actionable steps both serves as a key communication tool but also serves to

remind each of us, that the actions we take should be driven toward a common purpose we value for AACPM and further, that the actions we take should be of sufficiently high value as to warrant our time and energy.

3. What method should we propose to use this strategic plan as a communications' tool? We propose that future missions given national committees and as well as other work and projects taken on by the AACPM Board be referenced to specific goals, objectives and activities identified within the strategic plan the HOD and AACPM Board approves. (As recognized in #2 above, since we believe that new work not identified within this plan will be identified and given priority, we propose that the AACPM Board add or insert identified work, as needed, on a semi-annual basis. This will ensure (see Goal D, Objective 2, below) that work performed is tied to the mission of AACPM, documents work on these objectives and helps serve as a communication tool on work. Toward this end, we offer the hierarchy modeled below.
 - As an example, committee work or actions taken can be reported as being in support of Goal B, Objective 2, Activity 1, or being in support of B,2,1. in the 2010 AACPM Strategic Plan.
 - Should an activity be performed that is not identified, but is in support of, say, Goal A, Objective 2, a new activity can be entered and given it's Activity added date, as a reference for when it was added.

		Activity added:	Notes / Progress
Mission: enter the mission of AACPM			
Goal A.: Provide effective communication for the AACPM membership			
Objective 1. : enhance communication between state societies & the AACPM Board			
	Activity A.1.1.: create, model & use blogs and Wikis for AACPM &/or HOD issues in 2010 that can be seen & used by officers of AACPM & state societies	Oct.2009	
Objective 2. : enhance communication between state societies and AACPM members, nationally			
	Activity A.2.1.: create, model & use blogs and Wikis for public sector &/or CPM related issues in 2010 that can be seen & used by the AACPM membership	Oct.2009	
	Activity A.2.2.: continue efforts to explore & model live, Internet-based collaboration tools	Oct.2009	
Goal B.: Provide timely, relevant and effective training to the AACPM membership			
Objective 1. : provide training opportunities aligned with the all 7 key subject areas used to plan training topics for the Annual National conferences			
	Activity B.1.1.: ensure that each training area is represented at each national conference, even if this requires aggressive searches for relevant presenters by the host society	Oct.2009	
	Activity B.1.2.: conduct at least 1 mid-year Webinar on managerial or leadership skills	Oct.2009	
Objective 2. : enhance leadership skills of AACPM members			
	Activity B.2.1.: identify, create, and implement specific training opportunities targeting skills required to perform leadership roles in society and AACPM board positions	Oct.2009	
	Activity B.2.2.: create and implement training opportunities focused on team facilitation skills	Oct.2009	
Objective 3. : provide training specifically targeting technology tools that public sector managers must be familiar with & use in our evolving work place & in better service to the public			
	Activity B.3.1.: provide training in the use of Web 2.0 tools for public managers in 2010	Oct.2009	
	Activity B.3.2.: provide a minimum of 1 Webinar in 2010, designed to discuss how Webinar tools can be used	Oct.2009	
	Activity B.3.3.: provide information via the AACPM Web site and newsletters on topics specifically around the use of technology	Oct.2009	

		in government		
Goal C.: Add value to the AACPM membership				
Objective 1. : enhance leadership skills of AACPM members				
		Activity C.1.1.: when Webinars are conducted, advertise across both the AACPM membership as well as to current CPM students; provide these free to AACPM members but \$10 (?) to non-members (?)	Oct.2009	
Objective 2. : increase AACPM membership				
		Activity C.2.1.: have break-out session at national conferences devoted to CPM students; lead by dynamic AACPM leaders; about AACPM participation & value; do state soc. sign-ups	Oct.2009	
		Activity C.2.2.: produce a CD presentation to show at CPM graduations re. state soc. membership is next step in prof. dev. & continuing ed.	Oct.2009	
Goal D.: Guide a dynamic and relevant evolution of AACPM activities				
Objective 1. : Assess the effectiveness of AACPM initiatives & guide updates to the AACPM strategic plan				
		Activity D.1.1.: conduct annual focus group of Consortium members regarding their current targeted areas of professional development	Oct.2009	
		Activity D.1.2.: any AACPM member may recommend the inclusion, elimination or modification of any Goal, Objective or Activity within this Strategic Plan, at any time, through their HOD representatives, for consideration by the AACPM Board &/or for vote by the HOD at annual meetings or at alternative times determined by the AACPM Board	Dec.2009	
		Activity D.1.3.: as part of an effort to guide updates to this plan, discuss (the Board, a committee or the membership) and recommend (the Board or an HOD member) by Oct. 2010 how this strategic plan may best be maintained as a living guide to a living process reflective of our leadership role in strategic thinking; whether and how an effective plan requires 3 or 5 year “refreshment” or if it can evolve annually	Dec.2009	
Objective 2. : Ensure every AACPM Committee has a defined charge which is aligned with specific Goals, Objectives, and Activities within the approved AACPM Strategic Plan, or at the time of assignment is aligned with a new Activity or Objective or Goal which is officially inserted into the approved AACPM Strategic Plan; this allows the success of any committee’s work by “beginning with the end in mind” and ensures each assignment is given with full thought to the relationship of a committee’s work to specific parts of the AACPM Strategic Plan				
		Activity D.2.1.: AACPM Board annually shall identify the scope and relevance of each AACPM committee’s work to Goals, Objectives and Activities of the approved AACPM Strategic Plan	Oct.2009	
Goal E.: Help state societies be relevant and effective in the achievement of their missions				
Objective 1. : guide a reassessment of each state society’s mission so they can validate the alignment of their work, learn from each other and better professionally model strategic thinking				
		Activity E.1.1.: have every society present their mission statement on their Web page (or on the AACPM Web site) before the fall 2010 National Conference; encourage societies to review each others’ as part of their own reviews	Oct.2009	
		Activity E.1.2.: invite each society (by the fall 2010 National Conference) to share Goals & Action Items they have used, are using or are developing, as their own guides toward	Oct.2009	

	aligning work with strategic thinking		
	Activity E.1.3.: assign or otherwise specifically involve individual AACPM Board members with each state society as a mechanism to increase communication flow and reinforce state and national organization relationships; have reports on society highlights part of each AACPM Board meeting	Dec.2009	
Objective 2. : provide data to aid each state society's strategic thinking			
	Activity E.2.1.: provide spring 2009 Strategic Planning online survey results, by state, to society presidents for their use	Oct.2009	

7. Conclusions:

One concern expressed by members of this AACPM Strategic Planning Committee in December 2009 relates to the legitimacy and credibility of this committee's work, as possibly perceived by members of our own committee, the HOD and/or the AACPM membership. The extent to which this is a concern, we do not know but since this was discussed, describing it here, within this report, is warranted.

Legitimacy of the committee is derived from the initiation of this committee by the 2008 AACPM President, Greg Hyland, at the Presidents' Meeting at the National AACPM Professional Development Conference in OH in September 2008 and the formal charge given this committee by the 2009 AACPM President, Steve Mastro, in February 2009. (see Section 1, A & B of this report)

Credibility of the committee relates to how we have done our work: how effectively we have acquired and then used stakeholder feedback and how useful to our fellow AACPM members are the conclusions and recommendations we have produced. First, we, and we hope the AACPM membership, acknowledge that no system is perfect in acquiring stakeholder participation and, indeed, we have not provided as many nor as effective feedback and participation opportunities as we would have liked nor anticipated we would have done. However, we have tried to be a model in the breadth of stakeholder participation we sought, in our use of relevant tools and in the objective number of responses to feedback and participation opportunities. Further, we have tried to incorporate and reflect feedback in the goals, objectives and activities in this report in a constructive and action-oriented manner, and in a manner designed to encourage ongoing, thoughtful, "strategic" reflection by our membership in the purposeful work each of us prioritizes, advocates and does. Finally, we believe we have offered a specific mechanism for an ongoing feedback loop within Goal D, to keep this "Strategic Plan" alive as a strategic process. If we have accomplished that, it may be our most valuable contribution and may be the best way to assess the credibility of our work.

Acknowledgements:

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