Implementing the Strategic Plan
updated November 2013

The Planning Cycle from Three Perspectives
Planning Cycle – President and Board Perspective
(AOP – Annual Operating Plan (details of the current initiatives))

- Discussion with President-Elect regarding next year’s AOP
- Review Progress on Strategic Plan and update (if necessary)
- Review and finalize AOP proposed for next year
- Review budget for next year considering proposed AOP
- Approve budget for next year with consideration for proposed AOP

Throughout the year, Board receives regular progress reports on current AOP
Planning Cycle – President-Elect Perspective

(AOP – Annual Operating Plan  SP – Strategic Plan)

- Brief update to Board on status of AOP for presidential year
- Meet with workgroups at JSM (if they are starting work there)
- Provide second update to Board on status of AOP for presidential year
- Finalize or nearly finalize AOP for presidential year
- Make workgroup appointments; consider JSM launch
- Anticipate impact on budget with Budget Committee
- Using SP and recent AOPs, and with help from ED, develop ideas for AOP for presidential year
- Preliminary discussion with Board in March
- Using SP and recent AOPs, and with help from ED, develop ideas for AOP for presidential year
- Preliminary discussion with Board in March
- Finalize or nearly finalize AOP for presidential year
- Make workgroup appointments; consider JSM launch
- Anticipate impact on budget with Budget Committee

Q1  Q2

Nov/Dec Board Meeting  JSM

Q1  Q2

Nov/Dec Board Meeting  JSM

Q1  Q2

Nov/Dec Board Meeting  JSM

Q1  Q2

Nov/Dec Board Meeting  JSM

Q1  Q2

Nov/Dec Board Meeting  JSM

Q1  Q2

Nov/Dec Board Meeting  JSM
Planning Cycle – Executive Director Perspective
(AOP – Annual Operating Plan    SP – Strategic Plan    P-E – President-Elect)

- Ensure Nominating Committee is familiar with SP; upon selection, ensure candidates are familiar with SP
- Work with P-E on draft AOP
- Orient incoming P-E regarding SP and current AOP
- Initiate annual SP review at Nov/Dec BoD meeting
- Finalize draft AOP with P-E
- Develop draft budget with P-E and Budget Committee
- Work with BoD to finalize budget, ensuring connection to AOP proposed for next year

Throughout the year, ED works on current AOP; makes sure progress is reported regularly