



IAAO

Strategic Planning Toolkit

Working together to promote the growth
and development of the mass appraisal
industry around the world



IAAO

INTERNATIONAL ASSOCIATION
of **ASSESSING OFFICERS**

Valuing the World

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DOES YOUR IAAO CHAPTER WANT TO...

inspire members to get engaged? Create activities and events that make an impact? Provide tools for chapter committees to be successful in their efforts? Provide programming that educates, connects, and advocates for property tax and valuation professionals?

THIS TOOLKIT WAS MADE FOR YOU.

It contains the elements of strategic planning—a framework to help you determine where your chapter is going and why, as well as what you should focus on to get there. This is your toolkit to use as you see fit for your chapter. It is intended to be a guide, not a mandate.

We have included practical exercises to use during a strategic planning process and a list of strategic planning components. The foundation of the plan reflects the vision of IAAO.

You can use this framework to support the overall IAAO mission on a local level.

We have made this toolkit robust, discussing processes that you ultimately may not use for your chapter's planning. The toolkit is intended to be comprehensive so you can choose what works for your chapter and also learn about processes you can use in your office.

There is no right way to do a strategic plan. The best approach is to find a process that works for you and follow through. You know you should plan and why, but sometimes you need help with that process.

The following toolkit provides insight to you and your board from broad perspectives. We share what we have learned from working with our own and other chapters. We have found this to be a rewarding process, and we hope you find value in it as well. Make the most of your IAAO involvement by charting a successful path for you, your board and your chapter members.

LET'S GET STARTED.

WHY DO STRATEGIC PLANNING?

Because it can help your chapter address critical issues and find innovative ways to achieve goals. It can provide continuity for new leadership and focus resources efficiently and effectively.

It provides a forum to gain commitment from the board and bring your group together to work on common goals. It allows your chapter to make a significant impact!

THE BASICS

These considerations apply to the overall strategic planning process, not necessarily the planning meeting.



If you fail to plan, then you plan to fail. Be proactive about the future.

WHO

Get the right people involved.

- Incoming chapter leadership
- Other chapter stakeholders, such as new, long-term, and out-going board members
- Members of the Chapter board and/or staff
- An assigned administrator to arrange meetings and record information at the planning session
- An independent facilitator to help guide the discussion and keep participants on track

WHAT

Strategic planning takes you outside the day-to-day activities of your chapter and into the big picture, helping your chapter leadership to determine where you are now, where you are going, and how you will get there. It is the time to challenge the "because-we've-always-done-that..." mentality that may hinder planning chapter activities. Ultimately, it sets the ground rules for making choices on what you will and will not do.

WHEN

Strategic planning is an ongoing process, not a single event. However, we want to emphasize that not all elements of this process have to be done each year. The goal is to choose which components of the process to focus on that will drive specificity and success.

- Every 3-5 Years: Strategic Planning Meeting
 - ✓ Vision and Mission (chapter plan should align with IAAO's)
 - ✓ Strengths, Weaknesses, Opportunities, and Threats
 - ✓ Objectives, Goals, and Strategies
- Annually: Board Planning
 - ✓ Prior to the end of the IAAO fiscal year and board changeover; ideally, shortly after the Presidents' Leadership Symposium
 - ✓ What to accomplish:
 - × Review and update strategic plan
 - × Set priorities and annual goals
 - × Create action plan

WHERE

The meeting should be held in a casual setting (not an office), so participants will feel relaxed and undistracted. The goal is to stimulate creative thinking and collaboration.

THE PROCESS

These steps are a recommendation but not the only recipe for creating a strategic plan; other sources may recommend entirely different steps or conduct them in a different order. However, the steps outlined below describe the basic work that needs to be done and the typical products of the process. Once you start strategic planning, you'll soon find your own approach to the process. Although this process appears systematic and rational, it is often iterative and evolves substantially over time.



Conduct pre-work



Plan the meeting



Conduct the planning meeting



Implement



Evaluate

01

PHASE ONE | PRE-WORK

Much of the work that goes into making a chapter strategic planning session successful occurs before the actual meeting convenes. Gathering information and insights about your chapter, its members, its competitors, potential collaborators, and the external environment will give you a foundation upon which to form the plan.

It is also helpful to have some historical knowledge about why the organization is in its current state, the internal and external factors that impact it, and a clear sense of any preferences or biases of the members.

Strategic planning works best when it is a data-driven process with decision-making based on current, reliable information and not opinions or conjecture. It's necessary to do the pre-work to obtain the data and also give participants time to digest it before applying it in the strategic planning process. Typically, this pre-work involves five main areas: the environment, stakeholder input, competitive analysis and influences, elephants in the room and sacred cows, and blue sky thinking.

1 THE ENVIRONMENT: CURRENT AND FUTURE

Most important to a successful strategic plan is having a realistic view of what the environmental influences will be on the organization in the near future or during the planning horizon time frame.

Environmental Scans

Environmental scans are a way to study the political, economic, social, and technological factors that influence an organization and its future. Each area should be examined in terms of trends, issues, events, and expectations that will affect an organization. An environmental scan helps an organization to be aware of factors that it cannot control but that will impact its future.

2 STAKEHOLDER INPUT

Chapters should, at a minimum, gather stakeholder input. This input will provide important direction on setting strategic objectives. The following are a few ways to gather the information you need.

Focus Groups

Focus groups are a qualitative research method that engages members or stakeholders to gain information about their beliefs, opinions, perceptions, and attitudes about any component of an organization's service. In this moderated group setting, focus group participants freely interact with questions or concepts presented by a skilled facilitator.

Focus groups are particularly valuable for getting feedback on new projects or ideas.

Today, focus groups can be conducted in person or by teleconference. Their primary value is as a source of qualitative information that offers insight into unknown areas. Focus groups are excellent for exploring issues and gathering insights that can later be used to develop quantitative market research questions used with other research methods, such as surveys, to gain additional insights.

Electronic Surveys

Many chapters conduct electronic surveys each year. The questions can address a variety of topics and be both qualitative and quantitative. While they don't allow for the in-depth responses and probing that can happen during interviews and focus groups, they do allow chapters to reach a broader group of stakeholders. Convenience and time factors make this an appealing option to gain stakeholder input.



In this process, review chapter bylaws to ensure your ultimate plan and bylaws will support and reinforce each other.

One-on-one Interviews

Interviews allow key stakeholders to express their opinions and to offer personal insights without the influence of others in a focus group. There is usually a common outline for each interview, and the primary goal is to capture qualitative data that such a conversation can reveal.

Interview individuals who will and those who will not be part of the chapter planning sessions. For those participating in the planning, the one-on-one interviews also can be used to discuss their goals so that they come with some advance thinking to contribute.

Consider interviewing past chapter leaders and members who may have left the organization to learn their perceptions.

3 COMPETITIVE ANALYSIS AND INFLUENCES

When creating a strategic plan for a professional organization, it's easy to be too inwardly-focused. In order to market an organization well, it's important to understand who the competition is and make a competitor analysis part of strategic planning. To differentiate a chapter, it is helpful to know with what you are competing for members' support as well as factors that may not yet be present.

To conduct a competitive analysis, begin by taking an inventory of the resources for which you and other professional organizations must compete. Just as for-profit companies face competition for customers, professional organizations must deal with competition for the often-scarce resources needed to operate their programs and serve their members. These resources include sponsorships, speakers, and volunteers. Use this inventory to identify which resources are especially important to your organization and the areas where the shortfalls are particularly problematic. Understanding the gaps in your resources can serve as a starting point for developing strategies for overcoming these constraints.

To find this information, take a look at your target audiences. To what other organizations do they give

their time and money? If you don't know for sure, ask them, or try to find some demographic research about what organizations they're most likely to support.

The point of the competitive analysis is to identify possible advantages your chapter has over other organizations and how to use that information to develop and market programs and involvement that speak to a strategic position. The competitive analysis also can identify organizations you might be able to collaborate with, rather than solely compete against.



Many chapters do not conduct a full competitive analysis during their planning process. At a minimum, it is important to know what your competitive advantage is and basic areas needing improvement.

4 ELEPHANTS IN THE ROOM & SACRED COWS

Although it would be ideal if there were no constraints on the strategic planning process, reality often dictates some issues that need to be acknowledged up front before good planning can begin.

"Elephants in the room" are those big things that, if you don't acknowledge them, will scuttle the best laid plans. They need to be addressed to clear the air. For example, a chapter might be on the verge of financial ruin, and so planning objectives need to bear this in mind. Or there may be bad blood between board members, so it helps to clear the air and agree

to work together for this effort, or at least agree to disagree amicably.

"Sacred cows" are a bit different and refer to things that usually can't be easily changed, discarded, or negotiated because they are valued by all or some of your stakeholders. Often, there are things in the history of a chapter or traditions that might suggest sacred cows.

5 BLUE-SKY THINKING

During strategic planning, no idea is a bad idea. Use the following questions to encourage "blue-sky" creative thinking. These questions may be distributed ahead of time so that participants can consider them and be prepared for the actual planning process. They also can be used to develop an environmental scan that solicits input from members.

- What non-traditional or off-the-wall/out-of-the-box ideas are worth exploration in our deliberations or plan?
- In the first 12 months of this new plan, what has urgency and must be a priority to be accomplished?
- What are the organization's top three weaknesses that should be shored up over the next three years?
- If you could see one positive change for the organization over the next three years, what would it be?
- What are the organization's top three strengths that should be leveraged as we move forward?
- If we are successful in formulating a successful



TALK WITH OTHER CHAPTERS

It can be helpful to reach out to other chapters. IAAO offers several options for chapter leaders to connect, including the Presidents' Leadership Symposium, IAAO conferences, and AssessorNet. IAAO headquarters is another resource to gain ideas and insight on seizing opportunities and addressing challenges.

- road map for the organization, what are the top five questions we will have answered in the strategic plan?
- If you could change one thing about the organization, what would it be (if money were no object)?

02

PHASE TWO | PLAN THE MEETING

Holding a successful planning meeting is a key factor in the success of your board and the success of your chapter. Setting aside this time to meet should accomplish the following goals:

- encourage a positive working relationship amongst board members
- encourage participation of new leaders to advance new ideas and fresh approaches to chapter management
- create a working plan for the upcoming year—goals, objectives, and measurements of success

This meeting is not normally:

- a meeting where committee chairs or incoming and outgoing board members hand over handbooks of policies and procedures and go through them in detail
- a meeting to plan programs or events in detail (speakers or topics)
- a meeting to list sponsor targets and decide sponsorship levels
- a meeting to discuss tactics for building membership

THE STRATEGIC PLANNING MEETING

Many IAAO chapters schedule an annual board retreat where strategic planning takes place. This is often the kick-off meeting of the new board and can include both incoming and outgoing directors. Although IAAO chapters vary greatly in their make-up—large, small, medium, new, long-standing, serving a single metropolitan area, or serving a state (or multiple states)—the goal is to revisit the existing strategic plan or create a new strategic plan during this meeting.

Some chapters schedule planning sessions with individual committees months in advance of the retreat. In other cases, the incoming president might meet with each of the chairs (both incoming and outgoing) on a one-on-one basis prior to the retreat. The objective is to have a relatively seamless transition from year to year.

It is important to note that a transition meeting is not the same as a strategic planning meeting. A transition meeting focuses on the tactical transfer of information from person to person in order to successfully run a committee and/or perform in a board position. The strategic planning session focuses on the big picture of the chapter.

THE ATTENDEES

100% Board Attendance is Critical

It is important that all board members attend and fully participate in the entire session. This should be made clear to members when they decide to run for the chapter board. Set your meeting date early, and communicate it to those who must be involved.



Throughout the year, the current board should identify future leaders in preparation for succession planning. Integrating some of these potential leaders into your planning session will encourage new ideas and keep the chapter looking at ways to continuously improve its processes and raise the bar.

Outgoing/Former Board Members

It can be helpful to selectively integrate former board members in this session. They possess historical information and a unique perspective that can be beneficial to the process. Find those who are interested in supporting incoming leadership and seeing the chapter progress to the next level.

Committee Chairs

Including committee chairs in the annual planning meeting is an opportunity to engage potential future board leadership. A key element of success will be implementation, so it is important that committees understand and buy in to chapter goals and priorities. Their participation in setting measures of success or deliverables for the coming year can help move the process along.

LOCATION

Your venue will depend on the budget available. Options include a hotel suite, conference room, private dining room, or even the home of one of the members. The key is to meet away from an office or your

usual chapter meeting space. The location should be comfortable and allow the participants to spread out. Also allow room for flip charts (and wall space if you plan on sticking notes up on the wall) and have audio/visual available. Refreshments are a must, along with meals.

Outside of the physical environment, the atmosphere should be one of inclusion and positivity, rather than being dismissive or overly critical of new ideas. This helps build the plan on a positive foundation and enhance relationships among board members. The president-elect or facilitator can set this tone at the beginning of the meeting.

DURATION

The duration of the strategic planning meeting can vary depending on the chapter's needs and what is covered. At minimum, chapters should schedule a half-day for strategic planning. Others may wish to break up the session into two days (example: starting Friday afternoon and finishing up Saturday). Each chapter will have unique dynamics that will guide what works best for them. If you plan to incorporate transition-of-duties conversations and more specific action planning, allow more time.

FACILITATION

It is helpful to have a facilitator who can be a time-keeper, ensure balanced participation, bring the conversation back on point when it drifts, and keep the group on task. You might find this skill in a past leader of your chapter, but make sure they understand that the role is to facilitate and not participate. Chapters can engage past presidents from other chapters, IAAO board members, or headquarters

staff to facilitate the process. These outside perspectives will bring new insight to the board and enhance the planning process.

An outside facilitator benefits the process in many ways.

- There is a designated person to keep order, prevent issues from becoming personal, and keep the process on track without becoming emotionally involved.
- Everyone else is free to get involved in the process without worrying about process issues.
- A skilled person is available to deal constructively with any conflicts that may arise.
- The facilitator can raise issues and assist the board with difficult conversations.
- Someone with extensive experience is available to offer insights, ideas, and an outside perspective.

It is very difficult to be facilitator, note taker, and participant—if you try to do this, your planning meeting is likely to fall off-track or your plan will not be well documented. Invest in a facilitator to make this a productive session for everyone with a good result for your chapter.



In addition to engaging a facilitator, it is important to identify an assigned administrator to help arrange meetings, record key information at the planning session, and monitor the status of plan preparation.

THE AGENDA

Now you are ready to set up the actual planning process and to layout a meeting agenda. There are important things to remember.

- Know what you want to achieve—have clear outcomes for the process.
- Know what you have to cover to achieve these outcomes—know what steps you have to work through.
- Know what additional issues need to be dealt with in the time available.
- Prioritize the discussion areas.
- Don't be inflexible, but do have a commitment to time-keeping.
- Make sure someone records what is said and, most importantly, what is agreed upon (a record of important discussions and decisions).
- Whether or not you decide to use an outside facilitator, make sure that someone is responsible for and prepared to lead each part of the discussion.
- Build in steps that involve all participants. You need to create buy-in and enthusiasm for the strategic plan and associated action plan.
- If you have asked people to do preparatory work, make sure this is taken into account in the agenda so that the participants feel their efforts are valued.

If you are using an outside facilitator, have them participate in planning the agenda for your meeting. They should understand what you want to accomplish from each segment of the agenda.

03

PHASE THREE | CONDUCT THE MEETING

The day is here, and it's time to get to the meat of the strategic planning process. This is defining the strategic framework within which your chapter operates. A strategic framework can include the following:

- Where are we now?
 - ✓ Celebrate the past
 - ✓ Clearly articulated values
 - ✓ A mission
 - ✓ SOAR or SWOT
 - ✓ Overview of the pre-work
- Where are we going?
 - ✓ A clearly stated vision
 - ✓ Competitive overview / advantage
- How will we get there?
 - ✓ The strategic objectives of the organization
 - ✓ The goals/priorities/initiatives on which the organization intends to focus
 - ✓ Action items

BEGINNING THE SESSION

An icebreaker is a great way to begin the planning meeting. This can be a fun game that gets all the participants involved and interacting with each other. The activity is designed to focus your board on the task at hand, begin in a positive way and get their minds off the stresses of their day. Ask them to share something about themselves to lay the foundation for team building. Here are some ideas for icebreakers:

- Use of a personality of skill assessment tool such as StrengthsFinder©. This tool reveals the top five talents of the individual and helps explain how he/she connects with others, learns and gathers information, is motivated, and is inspired. By understanding each other's differences, you can find common ground and work better together.
- Partner up and interview each other and then share what you learned.
- Ask each participant to bring an item (requires preparation) or sketch an image that represents either:
 - ✓ a part of who they are (this makes it more personal)
 - ✓ the topic to be discussed at the meeting (represents your IAAO chapter or the future of your IAAO chapter)
- Give each participant an 8.5"x11" sheet of paper, markers, and tape (you will need wall space). For 10 minutes, think about the other people in the room and write down stand-out, positive memories of working together, learning from each other, or participating in some way in IAAO or the chapter. For another 10 minutes, draw the

memories, share them, and then tape them to the wall. Ask for volunteers to discuss the memories they posted. This is a good way to acknowledge the team's efforts and create a positive vibe before kicking off the retreat.

- Ask everyone to make two statements about themselves—one that is true and one that is not true. Attendees have to guess which statement is not true.

WHERE WE ARE NOW

Celebrate the Past

The purpose of this exercise is to take a critical look back at the past year. It is important that the board members responsible for the previous year are involved in this review.

Each current board member should take a few minutes to review the successes of the past year and offer commentary on ways to improve going forward. This is not a critique of the people involved; rather, it is a critical look at the activity for which the board member is responsible. Each board position (including secretary and treasurer) should participate in this critical activity. It is both a time to celebrate and a time to reflect.

Values

Your chapter's values are the shared values that underpin your work as an organization and your relationships with members and other stakeholders. Your organizational values will determine your strategies and your operational principles.

Clarifying and reaching consensus on your organizational values is important because it provides a basis for making difficult decisions. The kinds of decisions

you need to make based on your organizational values include:

- Should we work with this group of people or organization?
- Is what we are doing worthwhile or could the money/effort be better spent doing something else?
- Is the way we are going about this project consistent with our values? If not, what should we do?
- Is the work we are doing consistent with our stated values?

The best way to identify your chapter's values is through a brainstorming exercise. As a group, everyone should identify a word or words they feel represent the chapter. Put all of these words on a flip chart (or several, if needed). Once you feel everyone has had an opportunity to weigh in, narrow the list down to the top five.

This an important area to use the feedback you gained in pre-work. In the feedback from members and other stakeholders in surveys or focus groups, can you find any common threads of words they conveyed about the chapter that tie to the words your board members identified? These common threads are a good indication that the values you identified are a true representation of the chapter.



Core values reflect what is truly important to an organization. They do not change from time to time, situation to situation or person to person. They are the underpinning of the chapter's culture.

Mission

A mission statement articulates your objectives and includes the particular way in which an organization intends to make a contribution towards its vision.

A mission statement will have four components:

- what the organization is
- what the organization aims to do or achieve
- who the work is for (the target group) and who it is done with
- how it does its work—in broad terms, what methods it uses

Great mission statements:

- focus on a target audience
- are written in clear and simple language
- represent the collective thinking of the leaders
- resonate within the entire organization
- are memorable and easy for anyone to articulate
- inspire and evoke the passion of the organization's purpose

The IAAO Mission Statement

IAAO is a global community of mass appraisal experts who promote excellence in property appraisal, assessment administration and property tax policy, through professional development, research and standards.

IAAO chapters should follow the IAAO mission statement and use it to guide their efforts.

Chapter leaders should review the IAAO Procedural Rules sections 12.1 and 12.2 to ensure the chapter's mission supports and complements IAAO's as required.

SOAR or SWOT Analysis

Now it is time to start evaluating the chapter as a whole organization—the sum of all its parts. This is an interactive process that involves the entire board brainstorming together. Typically, responses are recorded on flip charts and posted around the room.

SOAR Analysis

A SOAR analysis is an organizational development method that assumes the questions we ask will focus our attention in a particular direction. SOAR is an acronym for:

Strengths

What are our greatest assets?

Opportunities

What are the best additional opportunities for us?

Aspirations

What is our preferred future?

Results

What are the measurable results we want to achieve?

Primarily, SOAR focuses on expanding what an organization does well rather than on eliminating what it does badly. Through an inquiry method which appreciates the positive and engages all levels of the organization, it seeks to renew, develop, and build on these attributes.

As a self-defined "asset-based approach," it starts with the belief that every organization and every person in that organization has positive aspects that can be built upon for the betterment of the organization. When all members of an organization are motivated to understand and value the most favorable features of its culture, it can make steady improvements.

Fundamental to the rationale for using this method is research that concluded excessive focus on dysfunctions can actually cause them to become worse or fail to become better. This method gains its power from appreciating and valuing the best of what is, envisioning what might be, engaging in dialogue about what should be, and innovating what will be. Thus, the SOAR analysis should be referred to often during the strategic planning process and kept in front of the leadership on a least a quarterly basis to use as a measurement tool and to celebrate the successful accomplishments of your chapter's strategic plan.

SWOT Analysis

A SWOT analysis is a planning method used to evaluate an organization's external and internal:

Strengths

Weaknesses

Opportunities

Threats

It can be used on a macro level for the chapter or a micro level for a specific project.

The SWOT analysis can be helpful in determining an organization's competitive advantage as it seeks information about competitors and tries to match strengths to opportunities. Conversely, it can be used to turn weaknesses or threats into strengths or opportunities, particularly helpful for new endeavors or service offerings.

When employing this method, it is important that the group doesn't get carried away focusing on external factors like competitors without spending the appropriate resources in examining the internal factors that are more under their control.

WHERE WE ARE GOING

The purpose of this exercise is to begin to think about the coming program year on a committee-by-committee basis. It is very important that the incoming board members responsible be involved in this exercise.

The ideal situation is if the incoming and outgoing board members both can be included.

Each current and incoming board member should take a few minutes to talk about plans for the coming year as it pertains to their area of responsibility. The intent is not to describe tactics, but rather, it is to offer a broad-brush description of the key items that each director plans to accomplish in the coming year.

Vision

The vision statement answers the question, "Where do we want to go?" It captures the organization's guiding philosophy and inspires its members, volunteers, and stakeholders. Unlike the mission statement, a vision statement is for you and the other members of your organization and looks at the future.

The vision is the starting point for the strategic framework. It shapes the framework and gives the organization a basis on which to answer the following question:

Will this goal, objective, or activity make a contribution to our vision?

A great vision statement will:

- create a captivating picture of the future in its ideal state, share an image of what the organization will become; capture aspirations and dreams and straddle the possible and impossible
- reflect the essence of an organization's mission and values
- address what impact your chapter wants to have on society and community
- unite an organization in a common, coherent strategic direction
- convey sense of organizational purpose so that participants see themselves as part of a larger whole not merely a small piece, and are then engage to contribute to something bigger than themselves
- inspire, energize, and motivate

The IAAO Vision Statement

IAAO will be the global leader and pre-eminent source of standards, professional development and research in property appraisal, assessment administration and property tax policy.

Chapters can use the IAAO vision statement or create their own as long as it is consistent with the overall IAAO vision.

HOW WILL WE GET THERE

Strategic Objectives

Strategic objectives are long-term and connect the mission to the vision. Holistic objectives encompass four areas: financial, customer (membership), operational (programming), and people (volunteers).

What are the key activities that you need to perform in order to achieve your vision?

Examples:

- Increase membership
- Improve overall programming
- Increase member retention
- Continually improve internal processes
- Improve organizational structure
- Improve committee communications
- Develop leadership abilities and potential of board/future board

Goals

Short-term goals convert strategic objectives into specific performance targets. Effective goals clearly state what you want to accomplish, when you want to accomplish it, how you're going to do it, and who's going to be responsible. Each goal should be specific and measurable.

What's the difference between a smart goal and an unsmart goal? Measurement.

- **Unsmart Goal:** We want more members.

- **Smart Goal:** The membership committee will increase new membership by 20% by the end of this year.

Goals:

- Compel the organization to action
- Should be specific enough so results can be quantified and measured
- Should be simple and easy to understand
- Should be realistic and attainable
- Should convey responsibility and ownership
- Should be acceptable to those who must execute them

Action Items

Action items are specific steps that will lead to implementation of your goals. They include start and end dates and appoint a responsible person. Ensure your action items are comprehensive enough to achieve your goals.

Actions items:

- identify the specific steps that will be taken to achieve the strategic objectives—where the rubber meets the road
- support each objective
- point toward operations, procedures, and processes
- describe who does what, when it will be completed, and how the organization will know when it has been completed
- require the monitoring of progress

04

PHASE FOUR | IMPLEMENT

So, now it's time to get things rolling: Time to implement the action plan!

The completed action plan should include:

- Tasks/activities to be implemented
- Responsible parties
- Time frame for implementation and completion

THE IMPLEMENTATION

It is fine for the objectives and goals to be simple, big picture, and dynamic. Leave the flushing out of action item details to the chapter's committees and volunteers. Why? Because these very people—who are essential to the success of your chapter—want and need to get involved in implementing and achieving the activities and goals of the plan. Their participation and involvement facilitate the investment of themselves in the chapter and IAAO as a larger association.

Having as many members as possible involved in implementing the activities that support achievement of the plan brings amazing value and benefits. When this is done effectively, great things happen for members and the chapter.

- Members become a part of achieving something together and they become a part of something larger than themselves.
- Members contribute ideas and volunteer their time and energy to spread the workload around.
- Members share the chapter activities they are involved in, creating a buzz.
- Members learn from one another, which fosters continuous learning and sharing.
- Members get to know one another and develop lasting relationships growing networks and friendships.

The chapter's committees likely will be best equipped to flesh out the details of the activities and gain the benefits of camaraderie, teamwork, and planning/refinement of said activities. Inviting

people to be involved in implementation is extremely important to the chapter—do not underestimate the power of this one thing! If the same people do the work all the time, other members may feel excluded, disconnected, or not truly a part of the whole. Inviting them to participate in specific tasks or asking for their assistance on a committee or team can truly be a gift.



What if you don't have many committees? Or what if the board IS the committee? First of all, set some goals to implement a committee structure and recruit volunteers and future leaders. During your strategic planning session you may end up getting into some details, but still try to spend the time identifying big picture goals and champions, and leave the granular activities—like planning specifics on your monthly programs, for example—for follow-up meetings.

Detailed Approach

(Special task force)

Contact five to seven (total) new, mid-term, and long-term members. Invite them to be a special task force responsible for working with appropriate volunteers and creating a matrix of the following, which are essential to implementation of the plan:

- objectives
- goals
- specific tasks
- time frames
- responsible individuals or committees
- form of measurement
- status

The task force might be led by one or two board members, with other board members participating as available.

The task force's purpose, in addition to creating the matrix, would also involve periodic check-ins with the responsible individuals to monitor status of the tasks, and measure how the chapter is doing in terms of meeting its objectives and goals. Measurement can be simple. Find what is best for your chapter.

One example of monitoring the status of meeting goals could be using color indicators. Red would mean the task is not progressing and needs immediate/focused attention, yellow would mean there's some progress with room for improvement and green would mean the task is progressing well or completed.

High-Level Approach

(Committees)

Board members ask committees to develop their respective goals and tasks in support of overall objectives. Committees (not the board) determine the details, such as the number and frequency of educational programs, networking events, community outreach opportunities, recruiting campaigns, etc.

Each committee is chaired by a member who keeps the overall chapter board updated on committee activities and ensures the committees are getting the support and resources they need to complete their tasks and meet their goals. Through this arrangement, the board provides support and is able to make adjustments to help committees as needed. Examples of adjustments might include:

- Matching additional volunteers with a committee that is in need of assistance
- Stepping up PR for a committee with an upcoming program
- Assisting before any issue or concern becomes a serious problem

The individual committees would be responsible for self-evaluating based on their respective goals and tasks. The committee chairs would then update the chapter board.

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PHASE FIVE | EVALUATE

Now that you have created the plan, the resulting benefits include:

- direction/alignment
- accountability
- teamwork
- measurement

The action plan—with the components identified in Phase 4 (tasks/activities, responsible parties, and time frame)—should be very familiar to you throughout the year. Do not assume you create the plan and file it away—communicate it clearly to your members. Review it together at board meetings, make sure the committee chairs and committee members have the plan and that they know what part they share in it, post it on the chapter website, etc. The more visible and accessible the plan, and the better it is understood by your chapter membership, the higher the likelihood that you will meet your goals and objectives.

SMARTER GOALS

Consider your goals, objectives, and the tasks/activities in your action plan. Assuming you set SMARTER goals, the progress towards them will be measurable!

SMARTER is a mnemonic to help us remember essential elements when setting goals. SMARTER goals involve the following:

Specific

You identify the goal precisely and clearly. For example, “join a health club and work out three times a week” versus “get in shape.”

Measurable

You establish criteria to measure progress toward reaching the goal. How will you know when the goal is achieved?

Attainable

You have or will develop the capacity and capability to actually reach or attain the goal. You may have to develop abilities or skills or change behaviors to be successful.

Realistic

Are you willing and able to work towards the goal? The goal is not unreasonably optimistic.

Timely

There is an identified time frame for reaching the goal. This creates a sense of urgency.

Evaluate

You assess and evaluate progress regularly and adjust as needed.

Reevaluate

You review and assess whether you achieved the goal, determine what went well and what did not, identify what you learned, and record the results.

Implementation, Evaluation & Measurement

Examples:

1. Perhaps a goal is to increase senior-level participation/retention in your chapter. (Ideas for HOW to attract and maintain senior-level participation can be shared between chapters—reach out and take advantage of the resources throughout IAAO. But for now, back to measurement.)

Keep track of who attends each event and collect demographic data:

- ✓ primary job function (e.g., chief appraiser, deputy appraiser, assistant, etc.)
- ✓ primary discipline (e.g., assessment, administration, mapping, etc.)
- ✓ years as member; years in industry, firm size, gender, etc.

Beginning with a set of such data as a benchmark, you implement your activities and track their impacts over the course of the year, monitoring progress toward participation/retention and adjusting the plan accordingly. At intervals during

the year and at year-end, you have new data to compare with the original data.

2. Let’s say a chapter’s goal is to increase the participation of members in the chapter’s social media initiatives. Your benchmark at the beginning of the year might be the number of followers on Twitter, Facebook, participants in your LinkedIn group, comments/shares/retweets, etc.

So what’s next? Could you create an online survey to gain member perspectives on, interest in, and degree of use of social media? Could you ask meeting and event attendees relevant questions by a show of hands to get an indication of interest? Could you see who from your chapter follows or “likes” IAAO and target those individuals for involvement? These are just a couple of easy ways to gauge potential interest.

As a result, you might offer an informal, after-hours, hands-on social media 101 session, or series of sessions. Perhaps you host these at a member’s office, invite social media super-users to lead the session, and track during the year the change in followers, comments, shares, etc. At the end of the year, you are able to document the percentage increase in participation accordingly. Keep in mind that a like or follow is not necessarily participation/engagement. Look more at interactions. Measurements should keep you focused in the right direction.

3. Your chapter wants to develop relationships with local colleges and universities to make them familiar with IAAO and give students the chance to learn about career opportunities in property tax policy and valuation. Committee members and volunteers may develop a target list of schools to

contact, assign volunteers, and schedule milestone dates to check progress.

In this case, measurement may involve quantifying the telephone contacts and introductory meetings held with individual schools, or the number of presentations made to student groups, or conducting a before-and-after survey of awareness/interest from the school administrators, etc. During the year and at year-end, progress toward the goal can be tracked/measured accordingly.

Summary

After implementing, evaluating, and measuring performance according to your action plan, the chapter board can aggregate the data and review, as well as discuss implications for the future. The data is valuable for a number of purposes, including:

- preparing the board for future planning sessions
- supporting IAAO award submissions
- communicating with the chapter members during the year to keep them abreast of the chapter’s accomplishments
- adding accomplishments to your professional resume (for example, “led membership committee in 200% increase in new members over two-year period” or “through leadership of outreach committee, achieved 100% awareness of the profession with four local colleges and universities, with 100% interest in internship program”)

YOU DID IT!

This framework is for you to use as appropriate for your chapter. It is intended to provide a framework for setting your board up for success and ultimately the chapter as well. The goal is to get a process started and see what works. Your chapter will get better and better at it each year.

Just as this toolkit is full of ideas and samples, IAAO is a broad network of talented professionals who can benefit your efforts. Reach out to IAAO Headquarters if you need direction. Call on past presidents or board members who can offer advice, and engage other leaders who are a wealth of information and perspective.

Most importantly, celebrate your success. Too often, we are so focused on tomorrow’s tasks, that we forget to recognize successes today. Don’t wait until the end of the year to recognize achievement. Celebrate small victories along the way. Did you achieve a big goal? Bring in breakfast to the next board meeting. Recognize a committee for reaching a goal at the next chapter event. Add your achievements to the chapter website. Go on a fun outing. No matter how big or small, by celebrating success along the way you’ll keep everyone excited and engaged.

CELEBRATE YOUR SUCCESS!



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