



From Plan to Action: Maximizing the Impact of Your Strategic Vision

- Build data-driven plans centered on member voices
- Discover practical ways to align decisions, budgets, and communications with your strategic vision
- Tools for associations of any size to implement best practices immediately

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The Power of Strategic Communication

Unifies Your

Association




- Clarifies vision and plans
- Aligns decisions with vision
- Attracts resources
- Boosts positive perceptions

Provides Insulation

- Helps navigate challenges
- Creates resilience during change
- Maintains focus during disruptions
- Supports consistent messaging



Start with Data

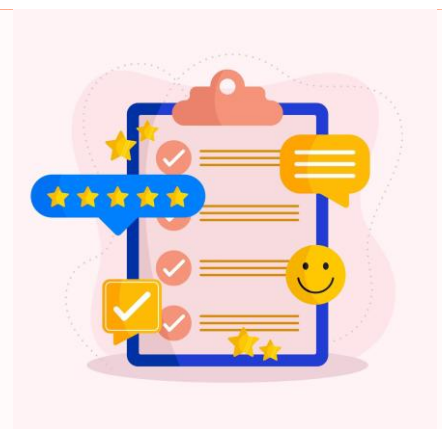
-  Annual Surveys
Collect feedback on current and potential programs
-  Communication
Preferences
Learn how members want to receive information
-  New Ideas
Create space for innovative suggestions



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Survey Tips

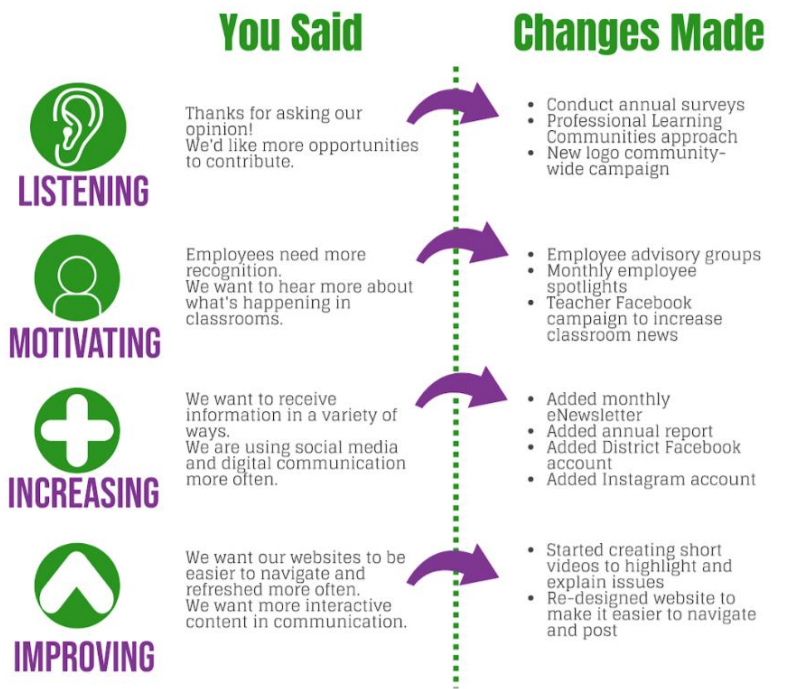
- Ask relevant demographic questions
- Rating scales should be consistent
- Keep the survey to less than 5 minutes
- Pretest and revise
- Let respondents know how long it will take and where they are in the survey
- Create a plan for the survey distribution (AI can help!)
- Tell them what you learned and what you'll change



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Community Inspires New Communication Ideas

Thanks to the participation in public and employee surveys over the past three years, Escalon Unified has reviewed and improved nearly every area of communication.



Let AI Help

◆ Alright, let's create a detailed timeline and schedule for promoting and implementing an association member survey. We'll break it down into phases with specific tasks and deadlines.

Timeline: 8-12 Weeks Total (Adjust as needed)

Phase 1: Planning & Preparation (Weeks 1-3)

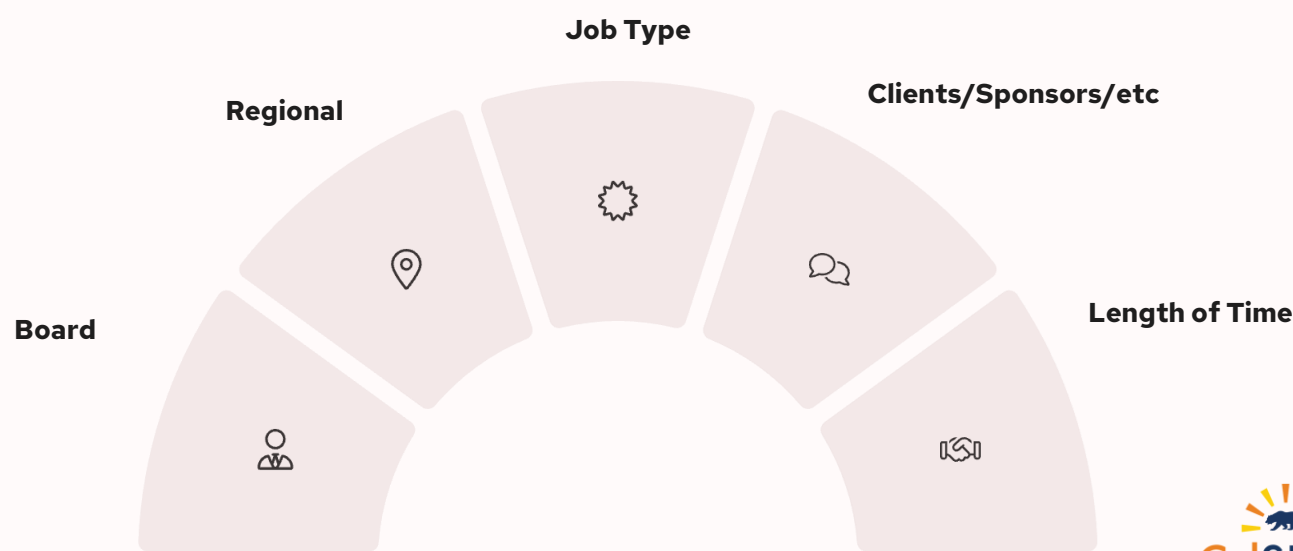
- Week 1:
 - Task: Define survey objectives, KPIs, and target audience segments.
 - Deadline: End of Week 1.
 - Task: Begin drafting survey questions and structure.
 - Deadline: Ongoing.
- Week 2:
 - Task: Finalize survey questions and structure.
 - Deadline: Mid-Week 2.
 - Task: Test survey for clarity, functionality, and mobile optimization.
 - Deadline: End of Week 2.
 - Task: Determine and finalize any survey incentives.
 - Deadline: End of Week 2.
- Week 3:
 - Task: Develop the communication strategy and create promotional materials (email templates, website banners, social media posts).
 - Deadline: End of Week 3.

◆ Here are five survey questions designed for an association's annual member survey, covering key areas for feedback and improvement:

1. "How satisfied are you with the overall value of your association membership?"
 - (Scale: 1 - Very Dissatisfied, 2 - Dissatisfied, 3 - Neutral, 4 - Satisfied, 5 - Very Satisfied)
 - Follow-up (if applicable): "If you selected 1, 2, or 3, please explain what we could do to improve."
 - Rationale: This question directly gauges member satisfaction and identifies areas needing attention. The follow-up allows for actionable feedback.
2. "Which of the following association benefits do you find most valuable? (Select all that apply)"
 - (Checkboxes: Networking events, Educational webinars/workshops, Industry publications/resources, Advocacy efforts, Member discounts, Online forums/communities, Other (please specify))
 - Rationale: This helps prioritize resources and understand which benefits are most impactful to members. The "Other" option allows for unexpected feedback.
3. "How effectively does the association communicate important information to you?"
 - (Scale: 1 - Very Ineffective, 2 - Ineffective, 3 - Neutral, 4 - Effective, 5 - Very Effective)
 - Follow-up: "Which communication channels do you prefer? (Email, Website, Social Media, Newsletter, Member Portal, Other)"







Gather Diverse Perspectives



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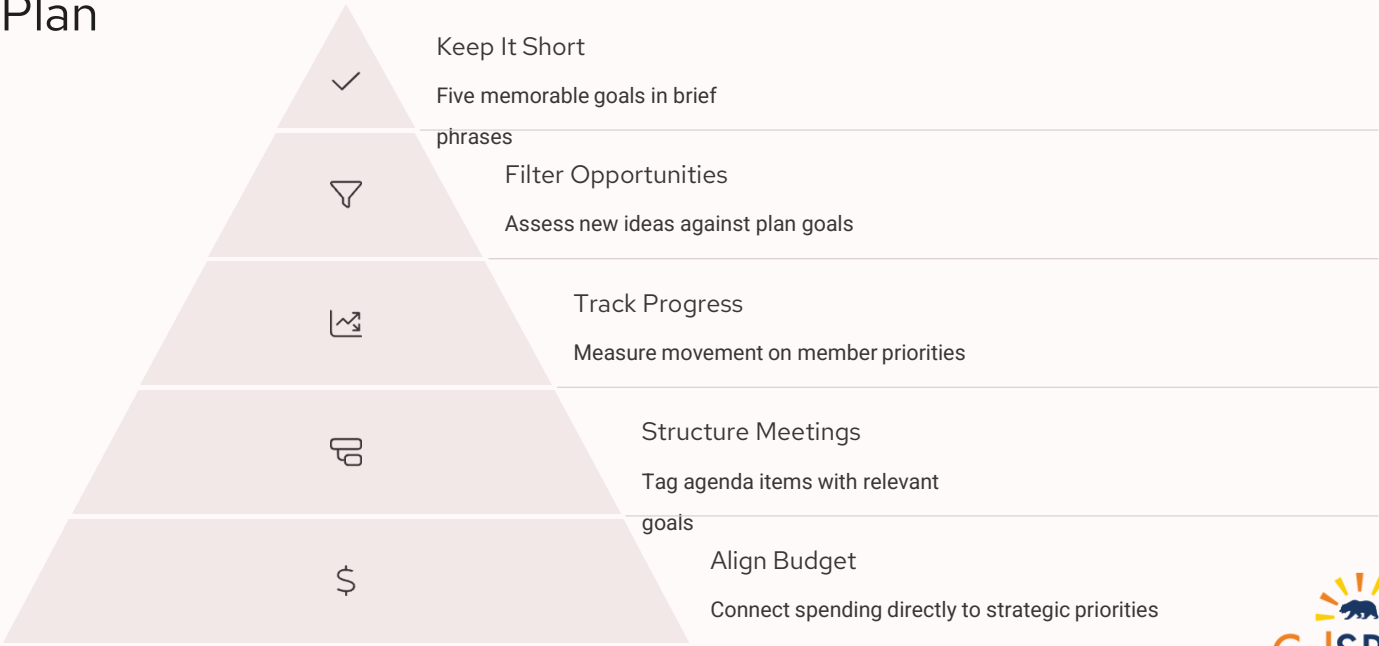
Create Time and Space

-  All In-Person (2021)
Full-day collaborative planning sessions with all stakeholders
-  Plan Updates Distribution
Share progress reports with all members
-  Virtual Meetings (2024)
Two three-hour leadership sessions using Stop/Keep/Add framework
-  Executive Team Retreat
Six-hour in-person session to finalize strategic direction



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Utilizing Your Strategic Plan



CalSPRA Strategic Plan 2024 - 2027

INCREASE INCLUSION, DIVERSITY, EQUITY & ACCESS

- Ask members
- Lens for every goal
- Ambassador program

IMPROVE MEMBER EXPERIENCE

- Member onboarding
- Growth targets
- Pathways for growing

HIGH IMPACT PROGRAMS & SERVICES

- Annual conference & awards
- Crisis consulting
- APR support

INCREASE BRAND AWARENESS

- Statewide presentations
- HS & College Scholarships
- LEA Hiring Kit

ENHANCE & REFINE SYSTEMS

- Volunteer program
- Annual budget & calendar
- Governance Manual

Keep it simple



Extended Board Meeting

- A. ORGANIZATIONAL ITEMS
 - a. Call to Order -
 - i. Roll Call
 - b. Review and Acceptance of Agenda Items
 - c. Review [Meeting Norms for 2025-26](#) Goal 3
 - d. Review **Meeting Minutes: Goal 3**
 - i. [2025 2 7 Agenda Extended Meeting Minutes](#)
 - ii. [2025 2 21 Agenda Executive Minutes](#)
- B. INFORMATION ITEMS
 - a. Treasurer's Report - [Cash Flow Report](#) (Meszaros) Goal 3 (298/100/301,699)
- C. EXTENDED DISCUSSION ITEMS/ACTION ITEMS
 - a. [Content Strategy Meeting](#) (Rabang and Marquis) Goals 1, 3
 - b. [Retreat Planning](#) (Marquis) Goal 3
 - c. Final Hotel Bill (Marquis) Goals 3, 4
 - d. [Regional Sponsor Process](#) (Marquis) Goal 3
- D. STANDING ITEMS
 - a. Any items to add to the Governance Manual? (Meszaros) Goal 3

Agenda Example



Continuing Communication

Transparency

- Share progress updates
- Acknowledge challenges
- Explain decision rationale

Promotion

- Label newsletter items by goal
- Create annual progress reports
- Present at key meetings

Integration

- Connect social media to vision
- Structure meeting agendas by goals
- Reference plan in regular communications





Social Media Connection



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Take every opportunity to connect activities to your strategic plan/vision





- Newsletter
- Social Media
- Presentations
- Programs
- Letterhead and Materials
- Email Signature



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AI as Your Thought Partner

-  Structure Feedback
Create systematic processes for evaluating new programs.
-  Generate Ideas
Develop creative solutions for association challenges.
-  Assess Risks
Evaluate potential benefits and drawbacks of initiatives.
-  Draft Policies
Create clear, equitable guidelines aligned with best practices.



Questions?

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