

**CaISAE SUCCESS PLAN**

Vision: We inspire, empower and connect the best association professionals!		Recent Results					Goals for 22/23	22/23 Results	Goals for 23/24	Mission: Advancing the association profession through knowledge, valued relationships and trusted resources.
Objectives	Measures	Volunteer Group(s) Responsible	FY19	FY20	FY21	FY22	FY23	FY23	FY24	FY 24 Strategies
1. Build a welcoming community among members with a culture and environment that inspires collaboration and produces valued relationships.	Total Association Professional Members	MAG, Regional Councils	969	985	866	1,050	<b>977</b>	<b>991</b>	<b>1,006</b>	<ul style="list-style-type: none"> <li>- Prioritize retention strategies to focus on personal outreach &amp; engagement of newer members (less than three years).</li> <li>- Targeted outreach to associations with no members.</li> <li>- Ensure that regional councils and MAG have a robust number of trained and motivated volunteers to implement strategies.</li> <li>- Pay particular attention to the Oregon region to ensure its success.</li> </ul>
	Total Industry Partner Members	MAG, Regional Councils	499	464	236	311	<b>340</b>	<b>338</b>	<b>343</b>	<ul style="list-style-type: none"> <li>- Prioritize retention strategies to focus personal outreach &amp; engagement strategies toward newer members (less than three years).</li> <li>- Ensure the Regional Councils and Membership Advisory Group have a robust number of properly trained/motivated volunteers to implement strategies.</li> <li>- Target outreach to hotels with a history of membership that lapsed during COVID.</li> </ul>
	Volunteer Satisfaction: Net Promoter Score (NPS = promoters less detractors)	Board/All	64%	n/a (covid interrupted)	61%	82%	<b>65%</b>	<b>76%</b>	<b>65%</b>	<ul style="list-style-type: none"> <li>- Mission and Goals. Provide clarity of mission to each volunteer group.</li> <li>- Establish the expectation/priority that each Committee or Council will use key metrics to establish goals based on the strategic plan.</li> <li>- Volunteer Management. Agendas should engage volunteers in using their strengths.</li> <li>- Orientation. Each Committee or Council will conduct an orientation for its members each year. This clarifies roles and responsibilities and how their work strengthens CaISAE and its mission.</li> <li>- Onboarding. Ensure that each new volunteer receives direct and personal contact to welcome him/her/they.</li> </ul>
	Member Satisfaction: CaISAE's Practice of DEI	Board/All		18%			<b>50%</b>	<b>50%</b>	<b>65% (2025)</b>	<ul style="list-style-type: none"> <li>- Improve CaISAE culture and practice of DEI in collaboration with committees and councils.</li> <li>- Recruit 75 associations committed to enhancing their practice.</li> <li>- Provide at least four education sessions with at least 100 people.</li> </ul>

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2. Create opportunities for members to exchange knowledge and resources.	Seasonal - Association Professional Attendance	Seasonal	417	435	335	372	<b>385</b>	<b>436</b>	<b>381</b>	<ul style="list-style-type: none"> <li>- Provide education programs of the highest quality to increase AP attendance.</li> <li>- Explore and implement targeted marketing strategies to engage members at every level in order to show the value of Seasonal for both education and networking.</li> <li>- Craft and implement member-centric experiences and activities before, during, and after the event.</li> </ul>
	Seasonal - Exhibitor Satisfaction	Seasonal	4.32	4.45	3.63	4.4	<b>4.2</b>	<b>4.31</b>	<b>4.2</b>	<ul style="list-style-type: none"> <li>- Improve value for exhibitors by increasing AP attendance and limiting exhibition opportunities (increasing the attendee-to-exhibitor ratio).</li> <li>- Ensure there is a variety of different and first-time attendees each year (benchmark of 40% different from the previous year).</li> <li>- Ensure EXCHANGE participants exceed the number of exhibitors to provide optimum matching opportunities.</li> <li>- Provide substantive sponsorship opportunities that provide additional valued exposure at various price points.</li> </ul>
3. Build a learning community that is responsive to the changing dynamics of the association and not-for-profit management professions.	ELEVATE - Association Professional Attendance	ELEVATE	<b>137</b>	<b>n/a (covid cancelled)</b>	<b>143</b>	<b>109</b>	<b>126</b>	<b>158</b>	<b>150</b>	<ul style="list-style-type: none"> <li>- Explore and implement targeted marketing strategies to engage members at every level in order to show the value of ELEVATE for education, networking, and professional development.</li> <li>- Create marketing collateral for leadership to educate their staff about the value of ELEVATE.</li> <li>- Create marketing collateral for staff to share with leadership to promote the value of ELEVATE.</li> </ul>
	ELEVATE - Association Professional Satisfaction	ELEVATE	<b>4.49</b>	<b>n/a (covid cancelled)</b>	<b>3.82 (virtual)</b>	<b>4.37</b>	<b>4.2</b>	<b>4.25</b>	<b>4.2</b>	<p><u>Content Strategies:</u></p> <ul style="list-style-type: none"> <li>- Explore and implement strategies that foster member-centric and peer-based learning models.</li> <li>- Test out different education session formats and delivery methods that break the boundaries of the traditional meeting room set-up.</li> <li>- Innovate to intrigue – continuously trying new things to intrigue members, but not to the degree that it alienates loyal attendees.</li> </ul> <p><u>Experience Strategies:</u></p> <ul style="list-style-type: none"> <li>- Seek out venues and supportive CVBs that are fully committed to the partnership with CaISAE and the host community in order to provide engaging, exciting, and unique experiences that promote the destination.</li> <li>- Work with ELEVATE Committee to craft and implement member-centric experiences and activities before, during, and after the event.</li> </ul>

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4. Run CaISAE as an effective model business.	Seasonal Net Profit	Seasonal	265k	310k	97k	193k	<b>245k</b>	<b>284k</b>	<b>307k</b>	<ul style="list-style-type: none"> <li>- Expand the tradeshow floor to the ideal (pre-pandemic) level; sell out the show &amp; EXCHANGE and improve overall value.</li> <li>- Ensure booth and EXCHANGE fees are commensurate with the market.</li> <li>- Reduce or eliminate discounted exhibit fees; selectively provide a limited number of comp booth for high value exchange of services.</li> <li>- Invest smartly in the production of education content.</li> </ul>
	ELEVATE Net Profit	ELEVATE	139k	n/a (covid cancelled)	81k	90k	<b>115k</b>	<b>161k</b>	<b>142k</b>	<ul style="list-style-type: none"> <li>- Continue to partner with host venues and host CVBs that offer competitive pricing in order to keep expenses reasonable and affordable to both CaISAE and attendees.</li> <li>- Design and implement a long-term pricing strategy to ensure alignment of registration fee to market value while keeping within an acceptable threshold for members</li> </ul>
	CaISAE Budget - Net Profit	All	65k	-21k	+9k	-9k	<b>-82k</b>	<b>+11k</b>	<b>-12k</b>	<ul style="list-style-type: none"> <li>- Budget strategy. Ensure budget strategies are focused on revenue and net profit generation. Four of the ten metrics in the strategic plan account for 80% of CaISAE's revenue (and profit): Seasonal Spectacular net profit, ELEVATE net profit and total membership of IPs and APs.</li> <li>- Monitoring and reporting. Ensure a strong process is in place to develop and monitor the budget and finances. The budget is developed by the Treasurer &amp; CEO, reviewed by the Executive Committee and approved by the Board. Each of these groups receives formal quarterly reporting to ensure regular monitoring. The Audit Committee conducts a timely Financial Review or Audit managed annually.</li> </ul>