

2024 **PROPOSED**

Strategic Plan Objectives for Committee Deployment

Presented at Annual Meeting, Dec. 15th, 2023

Environmental Scanning (Updated thru committee discussions, 2023)

Below is the “consensus” output using all the inputs from the work teams.

NOTE: the columns DO NOT have a numerical or linear relationship; each list stands alone.

Strategic Advantages	Strategic Challenges
SA1: A small core of highly passionate volunteers	SC1: Obtaining, engaging, and retaining volunteers across their lifecycle
SA2: Performance Excellence Framework knowledge	SC2: Longer-term financial sustainability; reserves
SA3: BPEP/Alliance partnership; sole regional provider	SC3: Few customers within the region using and PE Framework and demonstrating results
SA4: Dedicated ED (with a pulse on PENW markets and strong relationships with peers in the Alliance and BPEP program)	SC4: Customer and stakeholder uncertainty created by Dept of Commerce review of the BPEP program
SA5: An array of new programs and offerings intended to support organizations across their lifecycle (Exploring, Implementing, Refining/Sharing, Beyond)	SC5: Implementing BPEP program changes into action plans to keep PENW programs consistent with new requirements.

Performance Excellence | North West

2023 PENW Strategic Objectives/Action Plans – PROPOSED ACTIVITIES for 2024

Green = Action Plan Fully or Mostly completed
Yellow = Action Plan Mostly or Somewhat completed and work extends into 2024

FINANCE Work team

Key Outcome	Link to Adv/Challenge	Strategic Objective	Short-Term Plans	Longer-Term Plans	Workforce Plans	Key Result Metric
Achieve sustainability through revenue growth and enhancement of PENW financial governance and planning.	SA4 SC2, SC4	Refine and improve committee data reports in support of enhanced data-driven decisions.	1) Increase bank balance by \$30k by Dec 31, 2024. (Shared Goal for Board in 2024)	The longer-term goal is to achieve 500 days in cash reserves to increase financial stability.		Cash balance end of 2023 vs. cash balance end of 2024.
			2) Support the development & implementation of committee metrics to monitor progress quarterly.			Committee metrics proposed, March 31, 2023 Subcommittee Tracking begins in April 2024
			3) Explore, evaluate, and recommend to Board partnerships to expand revenues.		New Mexico's "Best of the Best", reselling Communities of Excellence, and Assn of Manf Excellence (AME)	Evaluate and propose potential partnerships quarterly.

Performance Excellence | North West

GOVERNANCE Work Team

Key Outcome	Link to Adv/Challenge	Strategic Objective	Short-Term Plans	Longer-Term Plans	Workforce Plans	Key Result Metric
Develop capability and capacity for Board Leadership to support organizational improvement	SA3, SC5	Increase the number of Board Members and their Satisfaction by Dec. 31, 2024.	1) Define board committee structure, roles, and reporting responsibilities (note-taking)	Recruit at-large committee members to expand future board capabilities and capacities in 2024 in support of the new subcommittee structure.		Work with subcommittees to implement standard practices in each group by the end of Q2.
			2) Recruit up to four (4) new board members in 2024.			Work to bring on two new board members by July 1 st and Dec. 1 st .
			3) Support Subcommittee recruitment of new 'at large' members to expand the subcommittees to up to six members.			Onboard new committee members as approved throughout the year.
			4) Onboard new members and ensure their satisfaction.			

Performance Excellence | North West

WORKFORCE Work Team

Key Outcome	Link to Adv / Challenge	Strategic Objective	Short-Term Plans	Longer-Term Plans	Workforce Plans	Key Result Metric
<p>Develop workforce capability and capacity to align with short-term operational and longer-term strategic needs.</p>	<p>SA1, SA2, SC1</p>	<p>Develop volunteers' capability and capacity by Dec. 31, 2024.</p>	<p>1) Develop a process to define/verify workforce requirements (engagement survey)</p>			<p>Track #s in each segment of the workforce.</p> <ul style="list-style-type: none"> -Examiners -Judges -Board -Other
			<p>2) Create mechanisms to communicate and engage members to support PENW activities</p>			<p>Measure and report Workforce Engagement by segment; develop a baseline and set a target for CY24.</p>
			<p>3) Explore and use social media and targeted emails to engage the volunteer workforce.</p>			
			<p>5) Aligning PENW recognition process to BPEP changes (Q3)</p>			
			<p>6) Aligning PENW Judges/Examiner processes to BPEP changes (Q3)</p>			

Performance Excellence | North West

CUSTOMER Work Team

Key Outcome	Link to Adv/Challenge	Strategic Objective	Short-Term Plans	Longer-Term Plans	Workforce Plans	Key Result Metric
<p>Provide customers with value-added programming in support of sustainable improvement</p>	<p>SA2, SA3, SA4 SC3, SC4, SC5</p>	<p>Enhance customer satisfaction with all PENW services across their lifecycle by Dec. 31, 2024.</p>	<p>1) Determine the potential impact of BPEP program changes and develop appropriate channels to communicate with customers.</p>	<p>1) Develop a PENW content website/library for customers to access content and offer as a Membership Benefit and Knowledge repository.</p>	<p>ED to establish a Customer Advisory Team to review new and existing programs; keep them relevant and up-to-date.</p>	<p>Report Levels of revenue and enrollment quarterly</p>
			<p>2) Update Membership Level 1 course, "Charting your Course" and Level 2 course, "What's in Your Pack?" with new BPEP Results/Fast Track process.</p>	<p>Demonstrate the impact of using results to drive internal improvements early in customer acquisition.</p>		
			<p>3) Conduct a formal program evaluation of the Learning Symposium and Implement Improvements by March 30th.</p>			<p>Increase in attendance? Increase in revenue? expand % of members vs. paid?</p>
			<p>4) Enhance PENW Customer Dis/Satisfaction & Engagement data collection; include and report regularly on PENW Scorecard.</p>			<p>Report initial customer metrics by July 1st.</p>