

# ARMA HOUSTON STRATEGIC PLAN 2016 & beyond

## **MISSION – The reason the chapter exists**

To provide education and research opportunities to advance Information Governance and to promote Records and Information Management Practices.

## **MANDATES - What the chapter is supposed to do**

- Educate & mentor members and Community
- Recruit and retain members
- Provide networking opportunities
- Promote best practices
- Engage the membership
- Advertise job opportunities
- Promote leadership development

## **STAKEHOLDERS - Who is interested in or is affected by the chapter**

- Members
- Vendors
- Member employers
- ARMA International and SW Region
- Other Information organizations
- Students
- Community

## **SWOT (Strengths, Weaknesses, Opportunities, Threats) ANALYSIS**

### **Strengths**

- Fiscal strength
- Large membership
- Educational opportunities
- Volunteers
- Diversity in experience and members
- Experienced, knowledgeable & dedicated Chapter leaders
- Provide opportunity for long lasting friendship

### **Weaknesses**

- Leadership development
- Legacy ARMA membership
- Reliance on vendor support
- Communication deficiencies
- Succession Planning
- Updating and following procedures
- Mentoring volunteers
- Large membership
- Lack of member participations
- Large geographic area
- Diversity in employers

### **Opportunities**

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- More volunteers (new talent)
- Leadership development
- Increase records & information management projects
- Community involvement
- Networking
- Education
- Increase dialog with vendors
- Publicity
- Communications
- SW Region connection
- Learning from other chapters' successes
- Learning more about changing information environment
- Bring in outside resources for leadership training
- Leverage technology to improve processes

## Threats

- Perception of lack of value for membership
- Employers who do not support involvement
- Decreased vendor support (value)
- Lack of new volunteers
- Involvement without technical or practical knowledge
- Economic uncertainty
- Change in membership demographics results in time/space restraints for participation

**VISION OF SUCCESS** - How we **will** know we are succeeding as a chapter WE WILL:

- Increase participation from membership
- Offer variety of educational content
- Be fiscally responsible
- Publish an informative ARMAadilla
- Recognize vendor involvement
- Reach out to community and other ARMA Chapters
- Reach out to institutions of higher learning
- Have a strong and professional board
- Foster an environment for thoughtful innovation for Chapter leadership
- Meet or exceed our mandates
- Frequent & effective communication with membership
- Specific leadership training
- Networking Social (other than Holiday)

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## 2016 & Beyond

<u>Chapter Maintenance</u>	<u>Responsible Board Member</u>
<ul style="list-style-type: none"> <li>• Review retention policy &amp; schedule</li> <li>• Review contents kept</li> <li>• Purge Records</li> <li>• Ensure Minutes are consolidated and archived</li> <li>• Annual Chapter of the Year and Archived</li> <li>• Vendor Relations</li> <li>• Strategic Planning review meeting retaining some previous members for continuity</li> <li>• Member Resource Directory</li> <li>• Annual Member Survey in May</li> <li>• Website</li> <li>• Financial Funding (Budget)</li> <li>• Presidents Reports</li> <li>• Financial Reports (ARMA International)</li> </ul>	<p>Secretary Secretary/BOD Secretary/BOD Secretary EVP Immediate Past President</p> <p>EVP VP Membership EVP VP Communication Treasurer/Past President President/EVP Treasurer/Past President</p>
<p><u>Outside Activities</u></p> <ul style="list-style-type: none"> <li>• Provide speakers to outside organizations and SW Region</li> <li>• Increase involvement with local high schools, community colleges and universities</li> <li>• Encourage members to write for publications</li> <li>• Encourage members to report outside activities</li> <li>• Partner /collaborate with other professional organizations for seminars and other events</li> </ul>	<p>BOD</p> <p>VP Marketing &amp; Outreach BOD EVP VP Marketing &amp; Outreach/ VP Professional Development</p>
<p><u>Education</u></p> <p>More innovation in programming</p> <p>Map programs and conference to professional competencies in Information Governance and Records and Information Management</p> <p>Industry Specific Groups (Legal, Energy, etc.) Sponsorship opportunities</p>	<p>VP Programs, Conference, VP Professional Development</p> <p>VP Chapter Meetings /Conference VP Professional Development BOD</p>
<p><u>Professional Development</u></p> <p>Budget for sponsoring BOD members to regional leadership conference</p> <p>Leadership development workshop</p> <p>Leadership column in ARMAadilla</p> <p>Mentoring for succession as leaders</p> <p>Get committee members plugged in beyond committee assignment i.e.:</p> <ul style="list-style-type: none"> <li>• Write for the ARMAadilla</li> <li>• Assist in projects</li> </ul>	<p>President</p> <p>President President BOD BOD</p> <p>BOD BOD</p>

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- Mentoring BOD
- Seminar/Workshop BOD
- ICRM Liaison BOD

## Public Relations

- Social Media VP Communications
- Web presence VP Communications
- Publicize all projects to members and community VP Communications
- Newsletter – ARMA Adilla VP Communications
- Email communications via ARMA Adilla Bi-Weekly VP Communications
- Strategic Plan should be on the Web public page EVP
- Standardized BOD email signature BOD

## Projects & Community Outreach

*Community Outreach* should be limited to (2) per year outside of established Highlighting for Literacy project.

- Highlighting for Literacy VP Community Outreach & Fundraising

### **Projects:**

- Harris County Archives EVP

### **Fundraising:**

- Fundraising Event(s) VP Community Outreach & Fundraising

**FINANCIAL IMPLICATIONS** – Budget needs to be reviewed to allow for any unbudgeted projects or programs that may be implemented

- New initiatives must be vetted against budget

## **TIME LINE and IMPLEMENTATION**

Review and Adoption (August 2016)

- Review draft plan and compare strategic issues against Chapter mission statement
- Determine if either the initiative or mission statement need revision and make adjustments
- Formally adopt final plan at August Board of Directors meeting
- Publish adopted plan on the website