



## **Mission Statement**

approved 9/07

Recognition Professionals International's mission is to enhance organizational performance through workforce recognition by:

- providing access to best practice standards, education, research and the exchange of ideas
- creating opportunities for our diverse membership to grow professionally
- advocating recognition and engagement strategies as a means to promote organizational excellence

## **Vision Statement**

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Recognition Professionals International is the leading resource for global strategic workforce recognition.

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Objectives:

- I. **MEMBERSHIP** Deliver a member value proposition designed to address the needs of our diverse membership.
- II. **PRODUCT & SERVICES** Create a suite of educational products that our target members need and are cost effective.
- III. **MARKETING** Be known globally as the resource for education and training in recognition.
- IV. **ORGANIZATIONAL STRUCTURE/STRATEGY**  
Develop Recognition Professionals International organizational structure to convey our vision/mission.
- V. **FINANCIAL STRENGTH** Develop financial resources to achieve identified goals and provide for RPI's continuing growth.



<b>MEMBERSHIP</b> Deliver a member value proposition designed to address the needs of our diverse membership.	<b>Action item</b>	<b>Responsibility</b> Leader: Susie Lyons	<b>Implementation and proposed completion dates</b>
		2008 Task Force: Lisa Massiello, Michelle Smith, Carole Erken, Tommy Lee Hayes- Brown	
Implement / continue specific programs to increase membership	Ambassador Program <ul style="list-style-type: none"> <li>» E-mail to members requesting contact information for referrals</li> <li>» Specific program for membership referrals by CRP graduates <ul style="list-style-type: none"> <li>— Engage members</li> </ul> </li> </ul>	Marketing Committee & Staff, Task Force	On-going
	Gift memberships	Staff	On-going
	Review AE Inc. analytic tools for analyzing membership statistics, incorporate results into membership development planning	Staff	On-going
Attract members thru regional offerings	Round tables  Develop a recommendation on formal regional groups/chapters	Create Task force	1/09
Engage members to solicit / refer new members by membership segment	Industry  Geographic (international, national, regional, local) <ul style="list-style-type: none"> <li>» Review our member value proposition to evaluate its relevance for international members</li> </ul> Personal networks	Marketing Committee & Staff	



<p><b>MEMBERSHIP—Continued</b></p> <p>Implement Member Recognition Programs</p>	<p>Recognition for length of membership milestones</p> <p>Lifetime Achievement</p> <p>Recognition Champion</p> <p>Committee service</p> <p>Task Force or other special project service</p> <ul style="list-style-type: none"> <li>» Solicit member articles for newsletters, website, blog</li> <li>» Create a leadership development plan to identify and nurture members who may move to committee chair, task force member, Board Director, Exec Committee, Conference Chair etc. This process will enable volunteers to properly assess if they can realistically commit to assignments               <ul style="list-style-type: none"> <li>— Build a Leadership Matrix which outlines the time and other commitments needed for various leadership roles (committee chair, task force member, Board Director, Exec Committee, Conference Chair etc.) so volunteers can properly assess if they can realistically commit to assignments</li> <li>— Create a formal recognition program that mirrors the Leadership Matrix, where awards and recognition for each volunteer role is established up front</li> </ul> </li> </ul>	<p>Create Task Force:</p>	<p>4/08 recommendations</p> <p>9/08 implement</p>
<p>Review membership attrition annually and plan to reduce attrition</p>	<p>Member surveys</p> <p>Exit Survey</p>	<p>Marketing Committee/ Executive Committee /</p>	<p>On-going</p>



<p><b>MEMBERSHIP—Continued</b></p> <p>Review membership attrition annually and plan to reduce attrition</p>	<p>Personal contacts from members to solicit renewal</p> <p>Transition individual membership to organizational membership with single designated representative to facilitate membership continuation when individual representative leaves the organization</p> <p>New member engagement</p> <ul style="list-style-type: none"> <li>» Continue welcome calls</li> <li>» Communication plan for new members</li> <li>» Assign "mentor" for e-mail, networking and conferences</li> </ul>	<p>Executive Director</p>	
<p>Review and develop Membership Options</p>	<p>Review membership offerings</p> <ul style="list-style-type: none"> <li>» Requests for &gt; 10 members</li> <li>» Discounts for multi-year membership fee payments</li> </ul>	<p>Executive Committee &amp; Executive Director</p>	
<p>Grow membership annually by 15%</p>	<p>Review achievement and programs annually</p>		<p>On-going</p>
<p>Focus on alliances to offer greater value to our members</p>	<p>Explore alliances with industry associations (e.g. American Trucking Association, American Bankers Association, American Hospital Association, counterparts in Canada and other countries)</p> <p>Northwestern University Continued review of possible strategic partnerships, if doing so would advance our mission (SHRM, IMA, HR organizations, etc.)</p>	<p>Executive Committee &amp; Executive Director &amp; Publicist</p>	<p>On-going</p>



<b>PRODUCT &amp; SERVICES</b> Create a suite of Recognition and Reward products that our target members need and are cost effective.	<b>Action item</b>	<b>Responsibility</b> Co-Leaders: Theresa Howell, Robbie Floyd	<b>Implementation and proposed completion dates</b>
		2008 Task Force: Lisa Massiello, Carole Erken, Cheryl Miller, Steve Richardson, Dee Hansford, John O'Brien	
Develop focused sessions and short programs for target members » Manager training » Webinars	Determine feasibility re: resources, costs	Task Force	4/08
Marketplace—feasibility cost, policies and procedures » Speakers Bureau	Add other products to marketplace: » Consultants, authors, product providers, etc... » Establish structure and recommend appropriate tool(s) to facilitate » Define product & services to be offered	Task Force	4/08 Findings-On-going
Provide CRP education in a self-contained method without onsite facilitator	Include this in action item relating to training/webinars	Task Force	1/09
Revitalize research function to establish organizational credibility » Investigate alliances » Recruit research experts to leadership	Partner with research organizations and offer our membership as potential study candidates  Determine if we can buy research  Determine new research subject matter  Offer Forum feedback of RPI research requirements	Research Committee, Forum representative	1/09        4/08



<p><b>PRODUCT &amp; SERVICES—Continued</b></p> <p>Conferences » Look at different ways to plan conferences</p>	<p>Conference “audit” » Provide Board scripted presentations » Annual State of Association/President’s Address</p> <p>Post event focus group</p>	<p>Executive Committee, Conference Chair, Executive Director</p> <p>Taskforce</p>	<p>4/08</p>
<p>Credibility of materials by RPI leaders</p> <ul style="list-style-type: none"> <li>■ Promotion of industry expert (gain a RPI face)</li> <li>■ Leverage work of Board members to gain credibility for RPI</li> <li>■ Create speaker policies and requirements</li> </ul>	<p>Increase speaking engagements</p> <p>Identify “high performing members’ as possible participants</p> <p>Create Speakers’ policies and procedures</p>	<p>Executive Committee, Publicist, Executive Director</p>	<p>4/08</p>
<p>Finalize CRP re-certification process</p>	<p>Add mandatory volunteer requirement</p>	<p>Executive Committee, Education Committee</p>	<p>4/08</p>
<p>CRP graduate special events</p>	<p>Poll recent grads Track progress of CRP grads CRP only incentive/events, Master’s Series</p>	<p>Education Committee</p>	<p>1/09</p>
<p>Best Practice Program — Nomination requirements – Must be a RPI member</p>	<p>Best Practice team review/revise criteria</p>	<p>Best Practice Team</p>	<p>4/08</p>



<b>MARKETING</b> Be known globally as the resource for education and training in recognition and advance the effective use of recognition through education, resources and tools	<b>Action item</b>	<b>Responsibility</b> Leader: Peter Hart	<b>Implementation and proposed completion dates</b>
		2008 Task Force: Tommy Lee Hayes-Brown, Cheryl Miller, Kevin Cronin	
Create Marketing Plan	Create trade show exhibition strategy and plan	Marketing Committee	Complete 12/07
	Promote participation in CRP	Marketing Committee & Executive Director	On-going
	Publicize achievement of CRP certifications	Publicist	As needed
	Promote participation in Best Practice & Recognition Champion Award programs	Marketing Committee, Executive Director & Best Practice Committee	2/08
	Publicize BP & Recognition Champion winners	Publicist	As needed
	Explore and develop other opportunities for press releases and corporate outreach efforts	Marketing Committee & Publicist	On-going
Obtain a publicist	Create job description, budget & time requirements	Marketing Committee	Complete 12/07
	Share with IMA, Forum, IRF or Motivation Show?	Michelle	Complete 1/08
	Post job on RPI website	Executive Director	



<b>MARKETING-Continued</b>	Compile list of “vendors” Create and distribute RFP	Executive Director Executive Director	
Target line supervisors	Evaluate media and other options to reach supervisors Determine effective messaging for this group Craft outreach plans and timelines to reach this group	Marketing Committee	
Set media placement goals	Assess viable media to target Establish annual goals for each media opportunity Create and plan content for media placement	Marketing Committee & Publicist	2/08
Leverage technology and website	Conduct technology and web evaluation to locate weaknesses and areas for improvement	Marketing Committee & Executive Director	On-going
Explore global perspective/relevance in all marketing materials	Determine our viewpoint re: international membership (actively pursue or not) Review all marketing materials to assess their alignment with our international viewpoint	Marketing Committee Executive Director	2009 2009
Develop and support strategic partnerships	Assess opportunities; evaluate pros & cons of each	Executive Committee	On-going





<b>MARKETING-Continued</b> Evaluate and determine policies and procedures relating to RPI brand use and protection	Create criteria and policy for RPI endorsements	Marketing Committee & Publicist	On-going
Grow Resource Provider membership	Create greater value for Recognition Providers by adding more opportunities for exposure	Membership	On-going
Increase awareness of RPI products & services » Recognition Marketplace	Promote products & services to appropriate constituency	Marketing Committee & Conference Committee	3/08



<b>ORGANIZATIONAL STRUCTURE/STRATEGY</b> Develop Recognition Professionals International organizational structure to convey our vision/mission and to promote high standards of professionalism in the industry	<b>Action item</b>	<b>Responsibility Leader:</b> Jacqueline Coulter	<b>Implementation and proposed completion dates</b>
		2008 Task Force: Tom Miller	
Benchmark and understand marketplace of resources available	Conduct benchmark study; create Exec Summary and recommendations for Board	Executive Director	
Evaluate and determine policies and procedures relating to current and ongoing sponsorships and endorsements.	Create list of current and new opportunities; assess pros and cons of each  Craft strategy and policy for sponsorships & endorsements	Executive Director  Task Force	
Educational Director	Create job description, budget & time requirements  Share with IMA &/or Forum?	Executive Director  Task Force	Complete 12/07  Complete 1/08
Continuously maintain the integrity of governing Association documents and insure they reflect and support current Association best practices (review annually)	Update Bylaws » Define Board member meeting attendance requirement  Create Policy: » Executive Vice President is expected to succeed to President » Past President remains on Executive Committee for 1 year	Task Force  Task Force	Complete 1/08  Complete 1/08  Complete 1/08



<p><b>ORGANIZATIONAL STRUCTURE/STRATEGY-- Continued</b></p>	<p>Create RPI Policies</p> <p>Create job descriptions and expectations for Executive Director, all support staff, Board of Directors, Executive Committee, all Committee and Task Force Chairs</p>	<p>Board &amp; Exec Director</p>	
<p>Thoroughly review and update the Strategic Plan every year</p>	<p>Incoming President to compile team and conduct annual Plan review meeting</p>	<p>Task Force</p>	<p>December 07 &amp; Ongoing Novembers</p>
<p>Review all management/staff performance annually, as well as the use and optimization of all AE Inc. resources</p>	<p>Do '07 review for Exec Dir</p> <p>Conduct annual review of AEI</p>	<p>Executive Committee</p>	<p>December 07 &amp; Ongoing Novembers</p> <p>November 08 &amp; ongoing Novembers</p>
<p>Continuously identify and nurture future RPI leadership, while developing current leadership</p>	<p>Board training session</p> <p>Develop and employ Leadership Matrix</p> <p>Create Leadership Development Plan</p>	<p>AE Inc./Executive Director</p> <p>Task Force</p> <p>Task Force</p>	<p>Feb 08 meeting</p>
<p>Establish email protocols for communications with Board and members</p>	<p>Monthly Board Updates</p> <p>Monthly update to members</p> <p>Establish guidelines for email communications</p>	<p>Executive Director</p> <p>Executive Director</p> <p>Board</p>	<p>Ongoing</p> <p>Ongoing</p> <p>Complete 2/08</p>



<b>FINANCIAL STRENGTH</b> Develop financial resources to achieve identified goals and provide for RPI's continuing growth.	<b>Action item</b>	<b>Responsibility</b> Leaders: Executive Director, Executive Committee	<b>Implementation and proposed completion dates</b>
Establish an annual budget that will support the goals and objectives of the Association. Sources of revenue to include: Dues; Product Sales (seminars, resources, networking functions, services); Advertising; Sponsorship; Education Fund Donations; Interest from Reserves; Show Contributions (Motivation Show) and new income producing products.	Establish draft annual budget  Revise and approve annual budget	Executive Director  Board, Executive Director	November 08 & ongoing Novembers  12/08—ongoing Decembers
Market benefits of contributing to education initiatives		Staff	1/08—ongoing
Establish a reserve fund in the amount of six (6) months operating expenses. Utilize excess reserves for development of new revenue producing products and services.		Board, Executive Director	1/08—ongoing