



Greater Crandall Chamber of Commerce 2015 Strategic Plan

May 15, 2010

Consultant:

Bobbi Bilnoski, Principal

Concinnity Network



2015 Strategic Plan

Greater Crandall Chamber of Commerce

VISION

Leading Change. Creating Opportunity.

MISSION

Our mission is to . . .

Promote and support commerce in Greater Crandall.

To serve our members we provide:

1. Business Education Programs:

- Educational Workshops and Programs on topics of interest to our members.
- Local and Regional Business Networking Opportunities.

2. Business Support Services:

- Business Management Tools and Support Services like ribbon cuttings, surveys, mentors.
- Information Center to promote the region and attract tourists, visitors, and potential residents

3. Legislative Advocacy:

- Advocate for the business and economic development needs of the Greater Crandall region.
- Member access to elected and appointed officials and advocacy to help

4. Special Events:

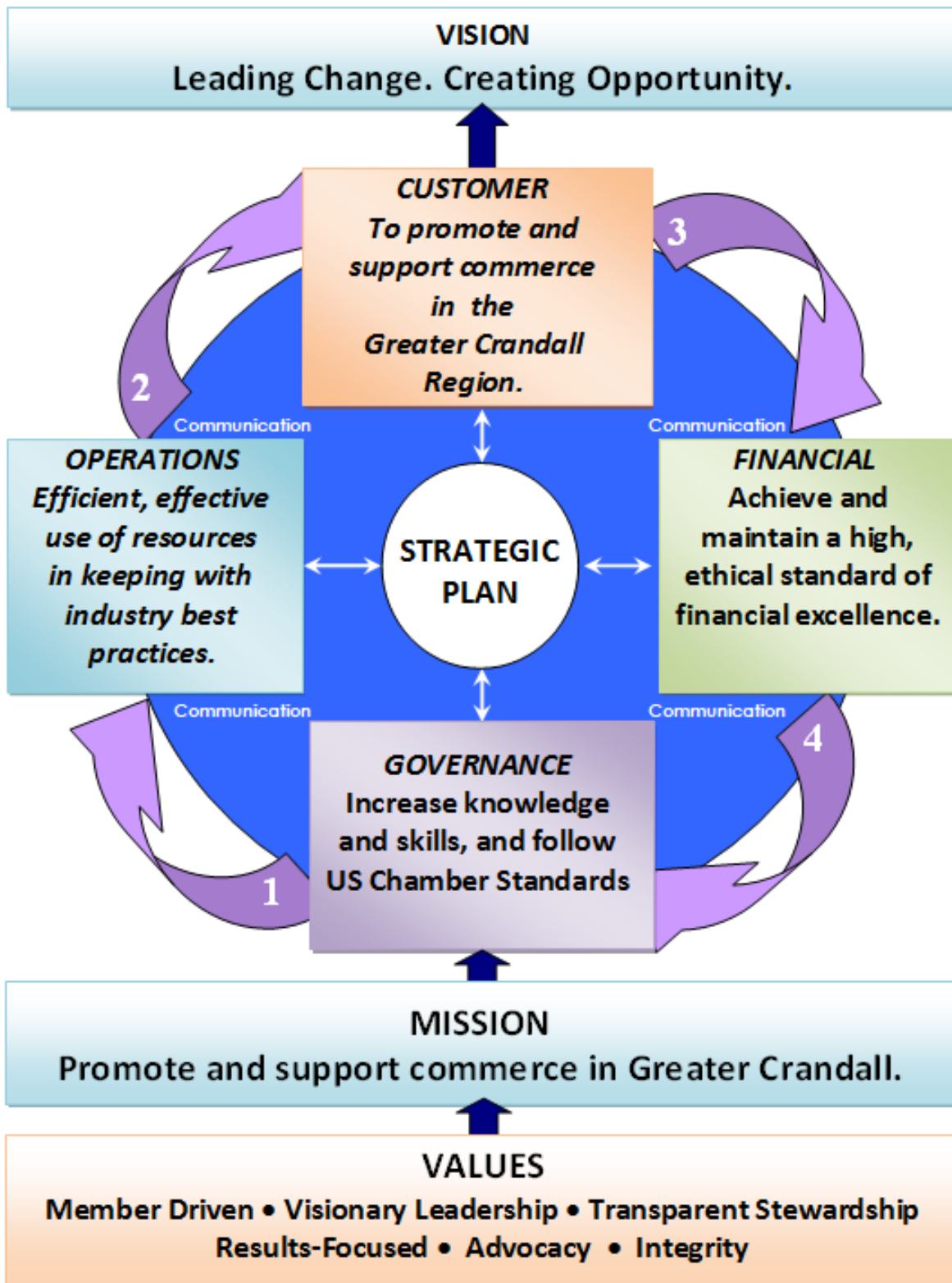
- Host Special Events to Raise Funds and Community Awareness.
- Engage the community with Family Friendly events.

VALUES

1. **Member Driven** – *We value and respect our diverse membership and listen to their voice when making decisions and plans for the future.*
2. **Visionary Leadership** – *Our board makes strategic decisions to ensure long-term sustainability.*
3. **Transparent Stewardship** – *Protect the financial and physical resources and comply with standards and best practices in our industry.*
4. **Results-Focused** – *We are committed to achieving our goals and hold each other accountable for commitments.*
5. **Advocacy** – *We are proactive advocates and promote the needs of our members to government, as they are the engine for growth and key to a vibrant community.*
6. **Integrity** – *We operated by a Code of Conduct and high ethical standards.*

2015 Strategic Plan

Greater Crandall Chamber of Commerce



Greater Crandall Chamber of Commerce Strategic Plan 2010 - 2015

Customer (Members & Visitors) Perspective

STRATEGIC GOAL:

To promote and support commerce in the Greater Crandall Region.

OBJECTIVES

- A. Provide Quality Member Programs/Services. [PROGRAM/EVENT COMMITTEE]
- B. Establish Regional Networking and Educational Events with other local chambers of commerce. [PROGRAM/EVENT COMMITTEE]
- C. Offer a variety of membership levels with clearly defined benefits for each. [MEMBERSHIP COMMITTEE]
- D. 100% of Crandall businesses support the chamber. [MEMBERSHIP COMMITTEE]
- E. Demonstrate professionalism and follow-thru on requests for information. [CHAIRMAN'S TASK FORCE]

Internal Operations Perspective

STRATEGIC GOAL:

Efficient, effective use of resources in keeping with industry best practices.

OBJECTIVES

- A. **TECHNOLOGY:** Establish Technology Systems and Policies to support program and operational growth [OPERATIONS TASK FORCE]
- B. **MARKETING:** Work with the Economic Development Corporation (EDC) and the City of Crandall to establish a new "unified" brand image for all three with distinct logos for each entity. Collaborate to implement a joint marketing plan to create a positive community image. [CHAIRMAN'S TASK FORCE]
- C. **COMMUNICATIONS:** Proactive, accountable leadership in maintaining communications with our customers. [MEMBERSHIP COMMITTEE]
- D. **FACILITY:** Establish a professional, unique office presence on Main Street in Crandall. [CHAIRMAN'S TASK FORCE]
- E. **OPERATIONS:** Establish Operational policies and procedures. [CHAIRMAN'S TASK FORCE]

Governance & Leadership Perspective

STRATEGIC GOAL:

Increase the knowledge and skills of the board, staff, and volunteers and follow US Chamber Standards

OBJECTIVES

- A. Update all governing documents and policies in keeping with US Chamber, State of Texas and the IRS guidelines and mandates. [BOARD DEVELOPMENT COMMITTEE]
- B. Be recognized by our members for pro-active, informed leadership. [BOARD DEVELOPMENT COMMITTEE]
- C. Keep members informed on current government and legislative affairs. [MEMBERSHIP COMMITTEE]
- D. Establish strategic partnerships with the Economic Development Corporation (EDC) and the City of Crandall and regional chambers of commerce. [CHAIRMAN'S TASK FORCE]
- E. Build financial resources and operational systems to support a full-time paid staff. [CHAIRMAN'S TASK FORCE]
- F. Increase Board & Member engagement on committees. [BOARD DEVELOPMENT COMMITTEE]

Financial Perspective

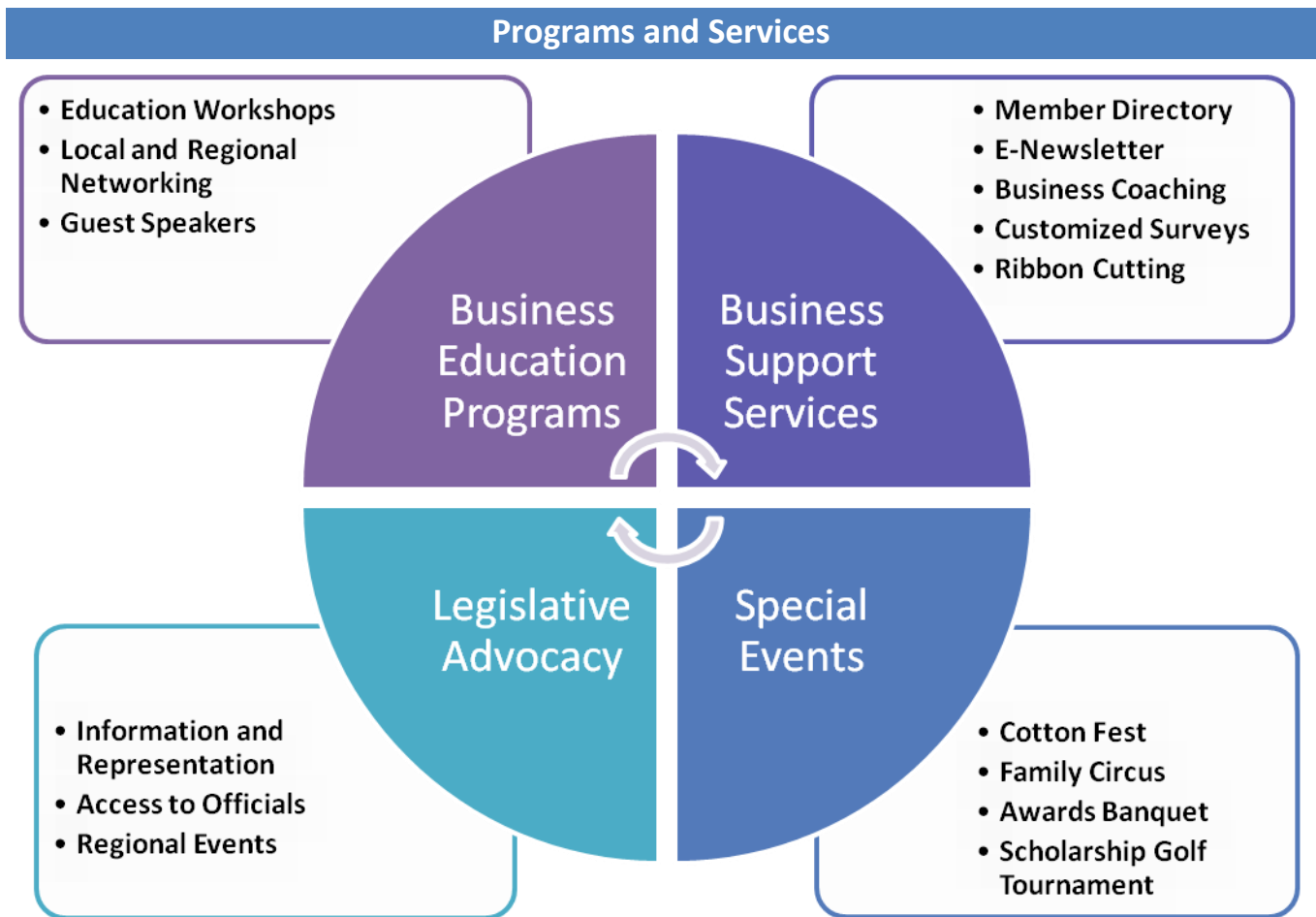
STRATEGIC GOAL:

Achieve and maintain a high, ethical standard of financial administrative excellence.

OBJECTIVES

- A. Establish Financial Administration, Reporting, Policies, and Procedures in keeping with industry standards and best practices. [FINANCE COMMITTEE]
- B. Increase and diversify revenue and pursue new fee-based programs and services. [PROGRAM/EVENT COMMITTEE]
- C. Establish continuity and accountability of leadership in maintaining accurate transparent, financial leadership. [FINANCE COMMITTEE]

Greater Crandall Chamber of Commerce



LIST OF PROGRAMS & SERVICES:

- | | |
|---|---|
| <p>1) Business Education Programs</p> <ul style="list-style-type: none"> a. US Chamber Information b. Educational Seminars and Workshops c. Guest Speakers <p>2) Business Support Services</p> <ul style="list-style-type: none"> a. Information and Referrals b. Ribbon Cutting Ceremonies c. Newsletters d. Emails on current events e. Welcome Packets for Visitors and new Businesses f. Chamber Plaques to hang in place of business g. Membership Directory – online, in print h. Bulk-rate Mailing Services i. Customized Business Survey Services | <ul style="list-style-type: none"> j. Advertising and Marketing Opportunities k. Profile new members l. Local “Shop Crandall” promotional campaigns. <p>3) Legislative Advocacy</p> <ul style="list-style-type: none"> a. Advocacy to local, state and federal agencies b. Access to elected and appointed officials c. Regional networking meetings with other local chambers d. Unified voice on key legislative issues and affairs <p>4) Special Events</p> <ul style="list-style-type: none"> a. Annual fundraising events – Cottonfest, Circus, etc. b. Annual Recognition and Award Banquet c. Community events |
|---|---|

Strategic Work Plan

Customer (Members & Visitors) Perspective

STRATEGIC GOAL: *To promote and support commerce in the Greater Crandall Region.*

OBJECTIVES

A. Provide Quality Member Programs/Services. [PROGRAM/EVENT COMMITTEE]

- 1) Align programs and services with member feedback on the survey.
- 2) Create innovative programs that generate a fee, to decrease dependency on dues.
- 3) Offer new business support services as a part of Chamber membership – i.e. customized online surveys, bulk mail privileges, mentoring, templates and business tools.

B. Establish Regional Networking and Educational Events with other local chambers of commerce.

[PROGRAM/EVENT COMMITTEE]

- 1) Create a strong network of local Chamber board chairs and executive directors.
- 2) Create collaborative initiatives and events with local chambers.
- 3) Create a regional Chamber Institute for the benefit of all chambers in the region.

C. Clearly define the benefits of membership levels. [MEMBERSHIP COMMITTEE]

- 1) Offer a variety of affordable membership with clear benefits for each level.
- 2) Align member benefits with the Chamber events and opportunities
- 3) Create added value services as member benefits and ancillary services for purchase.

D. 100% of Crandall businesses support the chamber. [MEMBERSHIP COMMITTEE]

- 1) Create a current list of all businesses in Crandall, and in our service area, and determine what percent are current members.
- 2) Enroll the top three restaurants/businesses in Crandall as chamber members.
- 3) Launch a new membership campaign, using the strategic plan as motivation to join.
- 4) Increase member participation on board committees to help implement the strategic plan.

E. Demonstrate professionalism and follow-thru on requests for information. [CHAIR]

- 1) Develop Written Customer Service Policy and Procedures
- 2) Respond to requests within 48 hours, with a follow up to ensure the information arrived.
- 3) Set the GCCOC apart from other chambers in the way we respond to and treat our members and guests.

OUTCOME MEASURES

- % increase in membership, annually
- # of member networking events & opportunities
- Customer satisfaction regarding programs and services (determined by surveys and feedback)
- 100% of businesses in Crandall are members by 2015

Internal Operations Perspective

STRATEGIC GOAL: *Efficient, effective use of resources in keeping with industry best practices.*

OBJECTIVES

A. TECHNOLOGY: Establish Technology Systems and Policies to support program and operational growth.

[OPERATIONS TASK FORCE]

- 1) Explore purchasing the Chamber Master program to integrate memberships, finances, special events.
<http://www.chambermaster.com/directory/include/help/Videos/Overview/Overview.html>
- 2) Conduct a needs assessment and create a 3-year Technology Investment Plan and associated policies, and secure it thru corporate and foundation grants.
- 3) Update all current technology/software.
- 4) Ensure proper protection and back up of financial and member information.

B. MARKETING: Establish a new Brand & Marketing Plan to establish a positive community image and reputation. [MEMBERSHIP COMMITTEE]

- 1) Partner with the City and the EDC to sponsor a logo contest to develop a new, unified “brand” for Crandall yet a unique logo for each organization.
- 4) Partner with the City and the EDC to review, refine, and implement a unified Comprehensive Marketing Plan for Crandall. (Audience Analysis, Budget, Value Proposition, Brand Identity, Logo, Positioning.)
- 5) Establish a Public Relations Plan. (spokesperson, unified message, promotional campaign, communication plan)
- 6) Establish Year-Round Event Calendar, post on the web site, and publish in weekly e-blast.

C. COMMUNICATIONS: Proactive, accountable leadership in maintaining communications with our customers. [MEMBERSHIP COMMITTEE]

- 1) **Internal:** Develop a weekly email communication and quarterly printed newsletter, inserted into the Crandall Communicator.
- 2) **External:** Develop a new Chamber “Welcome Package” for members and visitors.
- 3) Develop a more robust website for members and visitors, linking to our local and regional partners.

D. FACILITY: Establish a professional, unique office presence on Main Street in Crandall. [CHAIR]

- 1) Explore opportunities to share an office space on Main Street.
- 2) Explore a unique opportunity for office space – i.e. refurbished train . . .

E. OPERATIONS: Establish operational policies and procedures. [CHAIR]

- 1) Create Standard Operating Procedures Manual.
- 2) Update operational/employee policies.
- 3) Document chamber processes – i.e. Cottonfest, Banquet, reimbursements, membership.

OUTCOME MEASURES

- % increase in members & partners
- % increase in hits on website
- % increase in positive media articles
- % increase in attendance at events
- Date of accomplishment of key milestones.

Governance & Leadership Perspective

STRATEGIC GOAL

Increase the knowledge and skills of the board, staff, and volunteers and follow US Chamber Standards

OBJECTIVES

A. Update all governing documents and policies in keeping with US Chamber, State of Texas and the IRS guidelines and mandates. [BOARD DEVELOPMENT COMMITTEE]

- 1) Conduct a board review and revision of bylaws to improve clarity, readability, and compliance with chamber practices.
- 2) Conduct legal counsel review and revision bylaws and all governing documents.
- 3) Adopt board and organizational policies: Code of Ethics/Conduct, Whistleblower, Document Retention, Electronic Voting, Financial Investment, Gift, Confidentiality, Conflict of Interest, etc.
- 4) Establish a board orientation handbook with updated policies and procedures, expectations, financial and program information, etc.

B. Be recognized by our members for pro-active, informed leadership. [BOARD DEVELOPMENT COMMITTEE]

- 1) Join the US Chamber to obtain access to current information on chamber issues.
- 2) Plan quarterly board education workshops to review and discuss current issues and plan how to inform and mobilize the membership.

C. Keep members informed on current government and legislative affairs. [MEMBERSHIP COMMITTEE]

- 1) Host local and regional events with other chambers to share information.
- 2) Establish targeted communications to educate members on government and legislative affairs.

D. Establish strategic partnerships with the Economic Development Corporation (EDC) and the City of Crandall and regional chambers of commerce. [CHAIRMAN'S TASK FORCE]

- 1) Establish Strategic Alliances with local chamber organizations and create a matrix of local chambers, their leadership, and programs.
- 2) Explore common needs and ideas for regional campaigns, learning events and opportunities
- 3) Host meetings of local chamber boards and executive directors to share information and work collaboratively on common issues.
- 4) Link all local chambers to our website and vice versa.

E. Build financial resources and operational systems to support a full-time paid staff. [CHAIR & BOARD MEMBERS]

- 1) Create a future organizational chart
- 2) Estimate revenue needed to bring on full-time staff
- 3) Establish personnel policies and SOP's to govern paid and volunteer staff.

F. Increase Board & Member engagement on committees. [BOARD DEVELOPMENT COMMITTEE]

- 1) Increase board engagement and involvement and encourage committee based decision making model)
- 2) Establish Board Committees – to execute the work of the board and organization
- 3) Establish a new Board Recruiting /Orientation Process

OUTCOME MEASURES

- 100 % compliance of all governing documents with state and federal requirements
- % increase in collaborative projects with local Chambers
- System in place to monitor and report progress on strategic goals and objectives.
- Publish board orientation notebooks
- # of board trainings and educational opportunities
- % increase in board and member participation on committees

Financial Perspective

STRATEGIC GOAL: *Achieve and maintain a high, ethical standard of financial administrative excellence.*

OBJECTIVES

- A. Establish Financial Administration, Reporting, Policies, and Procedures** [FINANCE COMMITTEE]
- 1) Improve Record Keeping (incorporates recommendations in the organizational assessment report including, *in-kind goods, annual budget, operating budget, chart of accounts, P&L, 990 reporting*)
 - 2) Meet or exceed all standard nonprofit financial ratios according to Charity Navigator and the US Chamber.
 - 3) Establish giving, financial, and investment policies and procedures.
 - 4) Maintain appropriate accountability and auditing oversight.
 - 5) Establish and maintain a 6-9 month Operational Reserve
- B. Increase and diversify revenue and pursue new fee-based programs and services.** [PROGRAM/EVENTS COMMITTEE]
- 1) Increase all levels of membership.
 - 2) Draft and implement a comprehensive Fund Development Plan (expand donor base, increase individual and corporate giving, increase grant funding, social enterprise fee for service, etc.
 - 3) Increase profitability of all Chamber Events.
- C. Establish continuity and accountability of leadership in maintaining accurate transparent, financial leadership.** [CHAIR & FINANCE COMMITTEE]
- 1)

OUTCOME MEASURES

- Clean Audits of Finances and Donor Intent
- Tracking, and reporting in place to oversee investments in all programs and initiatives
- % increase / # of donations, grants, contributions
- % increase / # of new donors
- Rate of return on P.I. Investment
- % increase and balance of Operational Cash Reserve fund

Board Committees

MEMBERSHIP COMMITTEE

Chair: Laura Henry **Members:** Jo, Todd, Kim, Terri (Ken)

CUSTOMER GOAL: *To promote and support commerce in the Greater Crandall Region.*

OBJECTIVE C: Offer a variety of membership levels with clearly defined benefits for each.

OBJECTIVE D: 100% of Crandall businesses support the chamber.

GOVERNANCE/LEADERSHIP GOAL: *Increase the knowledge and skills of the board, staff, and volunteers and follow US Chamber Standards*

OBJECTIVE C: Keep members informed on current government and legislative affairs.

Priorities:

- 1) Design & execute the logo contest
- 2) Design and print new resident welcome packets and new business/chamber membership pocket folders
- 3) Design and draft the E-Newsletter

PROGRAM/EVENTS COMMITTEE

Chair: Terri Shatter **Co-chair:** Billy Posey
Members: Denny, Craig W.(Ken)

CUSTOMER GOAL: *To promote and support commerce in the Greater Crandall Region.*

OBJECTIVE A: Provide Quality Member Programs/Services.

OBJECTIVE B: Establish Regional Networking and Educational Events with other local chambers of commerce.

FINANCIAL GOAL: *Achieve and maintain a high, ethical standard of financial administrative excellence.*

OBJECTIVE B: Increase and diversify revenue and pursue new fee-based programs and services.

Priorities:

- 1) Cottonfest Event
- 2) Scholarship Golf Tournament
- 3) Create a calendar of events for 2010-2011

FINANCE COMMITTEE

Chair: Wayne Lukaris **Members:** Heath, Reta, Traci (Ken)

FINANCIAL GOAL: *Achieve and maintain a high, ethical standard of financial administrative excellence.*

OBJECTIVE A: Establish Financial administration, Reporting, Policies, and Procedures in keeping with industry standards and best practices.

OBJECTIVE C: Establish continuity and accountability of leadership in maintaining accurate, transparent, financial leadership.

Priorities:

- 1) Comply with US Chamber Financial Best Practices
- 2) Meet with Frank Sommerville and Eileen Sommerville to get a quote regarding Financial Policies and Procedures.

BOARD DEVELOPMENT COMMITTEE

Chair: Theresa Ostrander **Members:** Terri, (Ken)

GOVERNANCE/LEADERSHIP GOAL: *Increase the knowledge and skills of the board, staff, and volunteers and follow US Chamber Standards*

OBJECTIVE A: Update all governing documents and policies in keeping with US Chamber, State of Texas and the IRS guidelines and mandates.

OBJECTIVE B: Be recognized by our members for pro-active, informed leadership.

OBJECTIVE D: Establish strategic partnerships with regional chambers. [CHAIR & BOARD MEMBERS]

Priorities:

- 1) Meet with Frank Sommerville and Eileen Sommerville to get a quote regarding Bylaws, Articles, Legal documents, Policies and Procedures.

INTERNAL OPERATIONS TASK FORCE	
Chair: Todd Purifoy Members: Billy, Denny (Ken)	
OPERATIONS GOAL: <i>Efficient, effective use of resources in keeping with industry best practices.</i>	
OBJECTIVE A: TECHNOLOGY: Establish Technology Systems and Policies to support program and operational growth	
Priorities:	
<ol style="list-style-type: none"> 1) Schedule the presentation by Chamber Master (and others) to determine if it is a good fit for the Crandall Chamber. 2) Make recommendations to the board. 	

CHAIRMAN'S TASK FORCE	
Chair: Ken Godey Members: Wayne, Heath	
CUSTOMER GOAL: <i>To promote and support commerce in the Greater Crandall Region.</i>	
OBJECTIVE E: Demonstrate professionalism and follow-thru on requests for information.	
GOVERNANCE/LEADERSHIP GOAL: <i>Increase the knowledge and skills of the board, staff, and volunteers and follow US Chamber Standards</i>	
OBJECTIVE D: Establish strategic partnerships with regional chambers.	
OBJECTIVE E: Build financial resources and operational systems to support a full-time paid staff.	
OPERATIONS GOAL: <i>Efficient, effective use of resources in keeping with industry best practices.</i>	
OBJECTIVE B: Establish a new Brand and Marketing Plan to create a positive community image and reputation.	
OBJECTIVE D: FACILITY: Establish a professional, unique office presence on Main Street in Crandall. [CHAIR]	
OBJECTIVE E: OPERATIONS: Establish Operational policies and procedures.	
Priorities:	
<ol style="list-style-type: none"> 1) Attend all committee meetings and hold the chairs accountable for priority action items. 2) Meet with the Board Chair of all local chambers to develop relationships (Forney, Terrell, Seagoville, Kaufman) 3) Meet Gina Spagnola, President of the Galveston Chamber of Commerce. GSpagnola@galvestonchamber.com 	

Budget Items: Estimate \$5300 - \$9800

\$3000	Chamber Master (\$1500 Set Up Fee & \$129 mo., 1 month free with year contract = \$3000 total first year, \$1419 yr thereafter)
\$500 or \$5000	Logo Contest (\$500) with EDC and City (\$500 each) or \$20K (\$5K each entity) to hire a professional company to run the Contest, Create the Contest Website, Receive and judge submissions, Take concept to finished design, Completed Graphic Package and Design Standards for each entity
\$1000	Print new member pocket folders and marketing collateral
\$0	Create E-Newsletter (no-cost)
\$300	Communicator Pull Out Section – Share strategic plan
\$200	Join Survey Monkey – professional rate
\$300	US Chamber membership
\$TBD	Legal review of bylaws and articles