

Item Number	Description	Budget	Due Date	Champion	Status/Note	Return on Investment	Revised May 2018
Key Results Area 1	P Develop alternative communication methods that can help reach a diverse demographic audience			Anne			Status Color Coding: (See below)
1.1	1.2 Update contact list	\$0.00	Nov-17	Mel. DeLeon/ Micah WA			Problem, obstacle or no activity
1.1.1	Request general board email addresses for primary record						
1.1.2	Update/confirm e-mail address						
1.1.3	Identify any additional persons to receive AIM communications and capture their info						
1.1.4	Capture best phone number for Executive Directors						
1.2	Member Communication Survey	\$0.00	Jan-18	Mel. DeLeon/ Micah WA			Issue, falling behind or problem forecast
1.2.1	Draft survey questions (committee creation)			Anne			
1.2.2	Collect and analyze web analytics			Anne			
1.3	Identify pros and cons of social media communication	\$0.00	Feb-18	Mel. DeLeon/ Micah WA			On track, good progress or completed
1.4	Create communications strategy	\$0.00	Apr-18	Micah Matthews			
1.5	AIM newsletter implementation plan	\$1,000.00	May-18	Maegan/Diana – Kim Kirchmeyer			
1.6	Act on info gained from 1.4 (communications strategy)	\$5,000.00	Oct-18	Micah WA			
Key Results Area 2	Identify and remove barriers to member engagement			Kevin			
2.1	Identify potential members (FSMB data)	\$0.00	Nov-17	Jenna			
2.1.1	Request FSMB list			Kevin			
2.1.2	Format data in database			FPMR Staff			
2.1.3	Generate list of current members for AIM Board		Apr-18	FPMR Staff			
2.2	Explore and identify barriers with members/potential members (checklist for personal calls, reg. reps)	\$0.00	Feb-18	Regional Reps			
2.2.1	Regional reps report results at board meeting for further action						

2.3	Make recommendations based on feedback (surveys/calls) in 2.2.1	\$0.00	Apr-18	Mark		
2.3.1	Identify small activities in all operational areas that can be assigned to volunteers who are willing to engage in manageable tasks.					
2.3.2	Create sign up sheet at annual meeting or other AIM meetings that provide an opportunity for volunteers to sign up to participate in KRA activities		Apr-18			
MILESTONE: RECOMMENDATION TO BOARD COMPLETE BY 9/30/18						
2.4	Explore associate members & other membership opportunities					
2.5	Develop and initiate program for new execs. (mentoring/welcome wagon)	\$0.00	Oct-18	Kim/Deborah/Lyle		
2.5.1	Create new welcome message for member and non-member execs					
2.6	Develop member engagement metrics (internal review)	\$1,000.00	Apr-18	Kim/Deborah/Lyle		
2.6.1	Look for comparative documents					
2.7	Create a Regional Rep job description/to do list	\$0.00	Jan-18	Diana/Ian		
2.7.1	Request region rep job description from FSMB		Apr-18	Kathleen		
Key Results Area 3						
	Create a certified licensure tech certification			Meg - Champion	Meg Overall Champion	
3.1	Research program scope	\$0.00	Complete	Meg/Kevin/Connie		
3.2	Develop relationship with/solicit feedback from outside credentialing organizations	\$0.00	Deleted	Meg/Committee/Diana		
MILESTONE: BOARD APPROVAL OF PROGRAM SCOPE						
3.2	Develop program content	\$10,000.00	Sep-18	Meg/Kevin/Connie		
3.2.1	Identify Committee		Jun-18			
3.2.2	Identify categories	See 3.3	Aug-18	Meg/Kevin/Connie		
3.3	Approval of a FirstPoint Contract		Aug-18			
3.4	Develop criteria for venue (Explore)	\$0.00	Jan-18	Meg/Kevin/Connie		
3.6	Develop certification criteria	\$0.00	Jan-19	Meg/Committee		
3.5.1	Minimum work experience and licensure					

3.5.2	Use CMBI & CMBE as examples					
	Look at samples of position descriptions					
3.6	Identify speakers					
3.7	Board budget approval	\$12,000.00	Nov-18	Vice President		
MILESTONE: FIRST EVENT SEPTEMBER 2019						
3.8	Obtain feedback and evaluate and report to board	\$0.00	Nov-19	Meg/Committee		
Key Results Area 4	Create an enhanced website that assists in achieving strategic organizational objectives			Vacant		
4.1	Identify purpose of website	\$0.00	Jul-18	LaSharn Hughes or Texas ED		
4.1.1	Formulate/draft purpose statement (policy)	\$0.00	Jul-18	Blake Maresh		
4.1.2	Board approves draft purpose			BOD		
4.2	Review of website	\$5,000.00	Oct-18	George Zachos		
4.2.1	Website content development/affirmation (Note: use strategic plan feedback to generate content items)	(See 4.2)	Oct-18	George Zachos		
4.2.2	Create ad hoc subcommittee with Ian Marquand, Kim Kirchmeyer, new Mississippi Director and new Tennessee Director to assess current website content and recommend changes.					
4.3	Review Execnet	(See 4.2)	Apr-19	Ian Marquand		
4.3.1	Explore Other Options for ExecNet (committee?)	(See 4.2)	Apr-19	Ian Marquand		
4.3.2	Recommend changes to ExecNet					
4.3.3	Implementation of changes	(See 4.2)	Apr-19	Ian Marquand		
4.4	Create step-by-step screen shot /powerpoint document of how to use website/ExecNet	\$500.00	Apr-19	GeorgeZachos/ Ian Marquand		
4.5	Develop/implement website/Execnet marketing plan	\$500.00	Apr-19	GeorgeZachos/ Ian Marquand		
Key Results Area 5	Boost the content and social value of AIM Face-to-Face meetings			Diana		
5.1	Recruit champions to develop topics/categories	\$0.00	Jan-19	Anne Lawler		

5.1.1	Start discussion re: Recruit champions to develop topics/categories	\$0.00	Apr-18	Anne Lawler		
5.1.2	Identify a list of past speakers and topics					
5.1.3	Identify persons listed in KRA 1 potential members as possible speakers					
5.2	Developing personalized connections	\$0.00		Darren IN		
5.2.1	Identify first-time conference attendees on registration form					
5.2.2	Create a conference mentor/buddy program with assignments to new attendees.					
5.2.3	Consider different presentation formats to promote more networking (roundtables around similarity like size, practice acts, or structure)					
5.3	Revamp awards program best practices	\$5,000.00		Kim CA		
5.3.1	Get update from Kim regarding changes in categories and other revamped practices in awards					
5.3.2	Evaluate named awards to determine differences and viability					
5.3.3	Create awards agenda topic for fall workshop to provide input for changes in awards process					
5.4	Create a meeting format which uses on-site tour and presentations from peers					
5.5	Consider hiring a professional show photographer to help capture moments from conferences and trainings					
5.6	Include staff site inspection of venue; evaluation criteria focused on networking value and reinforcing connections					
Key Results Area 6	<i>Develop resources that ensure no member will be denied access to professional development for financial reasons</i>			David		
6.1	Develop hardship application	\$0.00	May-18	Dave H.		
6.1.1	To create and strengthen policies and procedures		Jun-18	Dave H.		
6.1.2	Get board approval on policies and procedures		Jun-18	Board		
6.1.3	Marketing and communication to let people know we are offering this service on a basis of need			FPMR staff		
6.2	Create webinar program	\$5,000.00	Apr-19	Deborah S.		
6.2.1	Developing webinar topics for webinar program					
6.2.2	Identifying experts who could be compelling					

6.2.3	Preservation and access to recorded webinars and supporting materials					
MILESTONE: LAUNCH JANUARY 2020						
6.3	Explore webstreaming of in-person meetings	\$0.00	Oct-18	Lyle		
6.3.1	Research to find executive for boards who webstream video and audio board sessions		Oct-18			
6.3.2	Develop a cost benefit analysis		Oct-18			
6.4	Evaluate data gathering from 2018 & 2019 initiatives	\$5,000.00	Apr-20	Vice Pres.		

P = This is the priority column. Insert alpha character A, B, C to indicate order of action