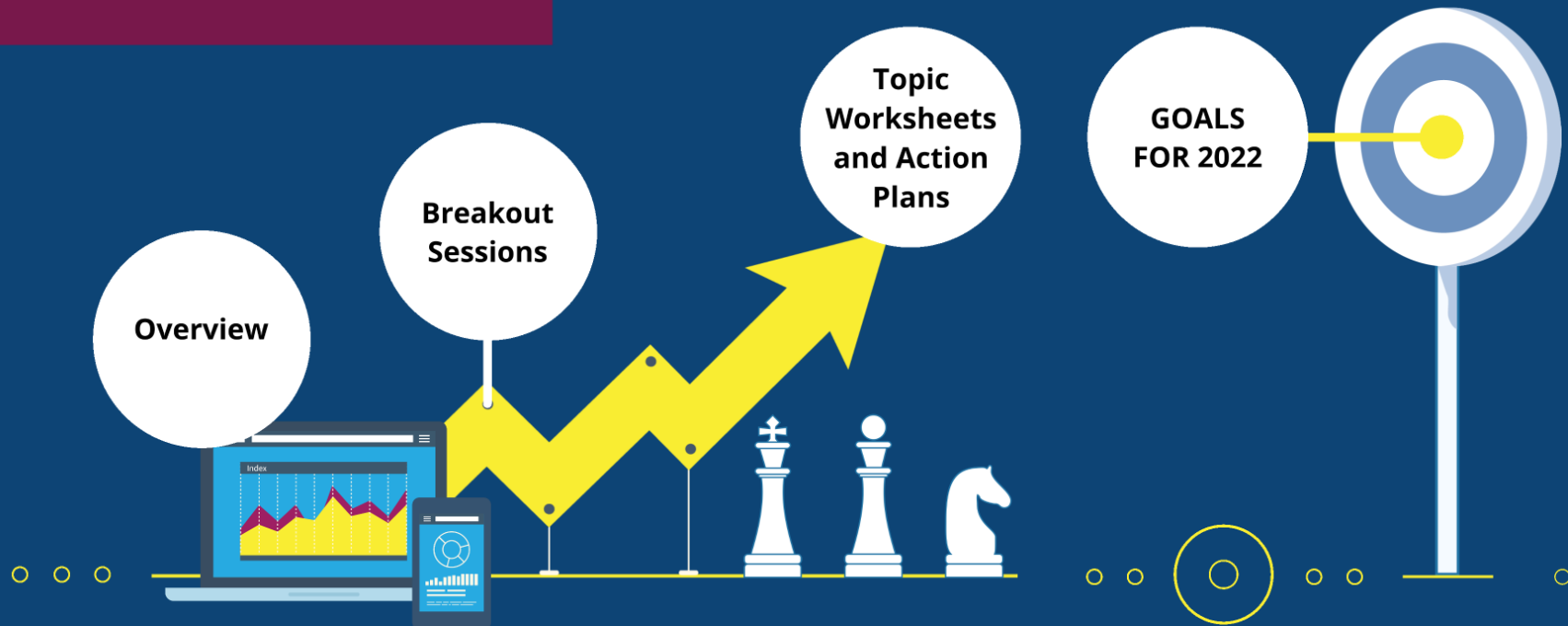


STRATEGY & PLANNING AFTER THE TRAINING



Session Overview



Carrie Kiley, MBA
*Senior Manager,
Affiliate Relations*



Bill Stanton
Affiliate Manager

Agenda

Leveraging the Training to Establish Goals:

- Effectively utilizing breakout sessions
- Using the Topic Worksheets
- Using the Action Plan
- How to set goals - using SMART goals for your affiliate



Session Overview



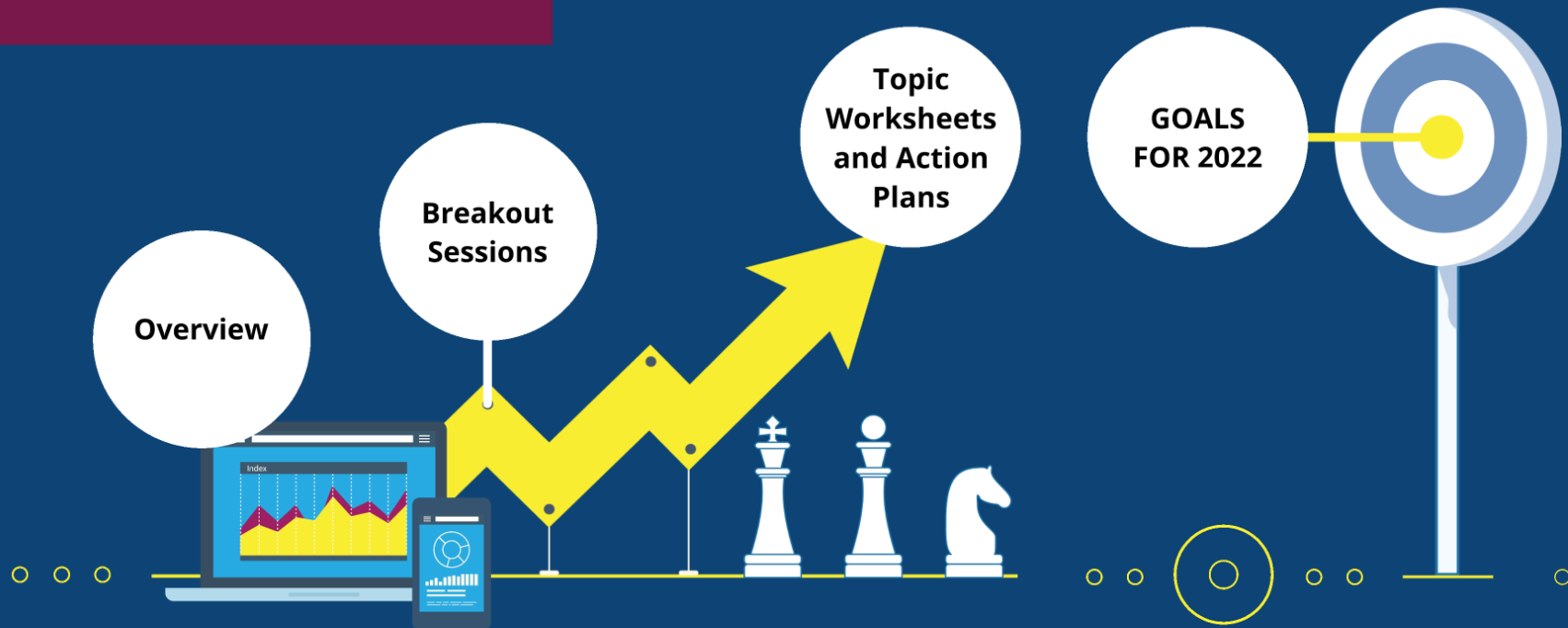
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STRATEGY & PLANNING AFTER THE TRAINING



Utilizing Breakout Sessions



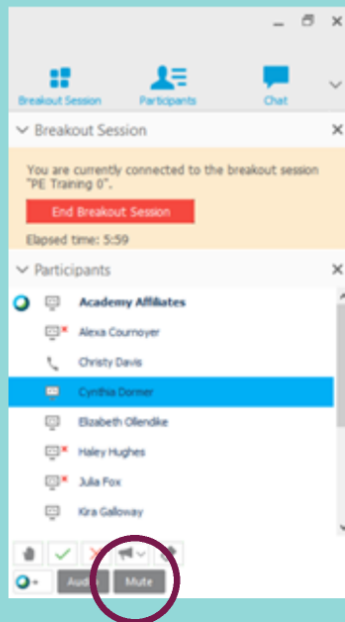
Tech Tips

**Question
Sheets**

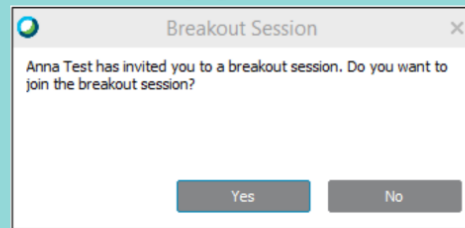
**Active
Listening**

Tech Tips

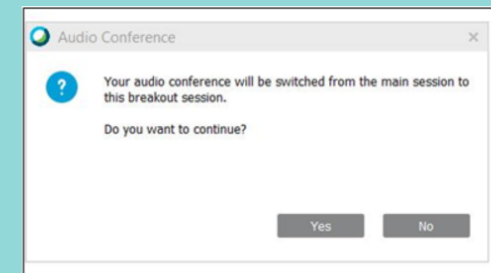
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JOIN

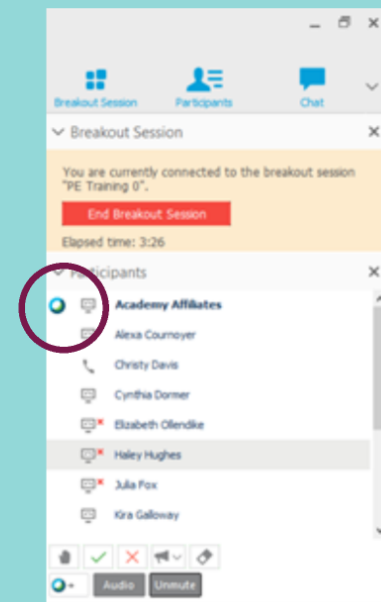


AUDIO



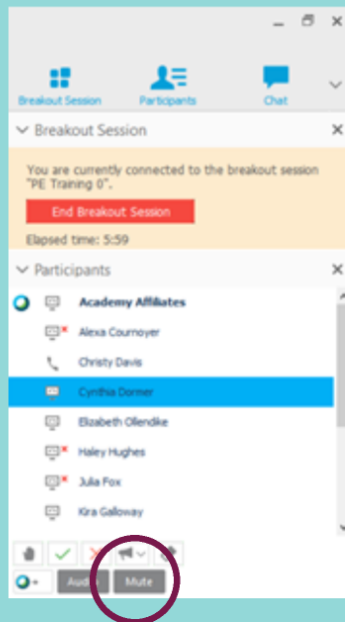
Be sure to highlight yourself and click the mute and unmute below the participant list.

The person who has the WebEx icon next to their name is the moderator, and is able to mute and unmute all participants when their name is highlighted.

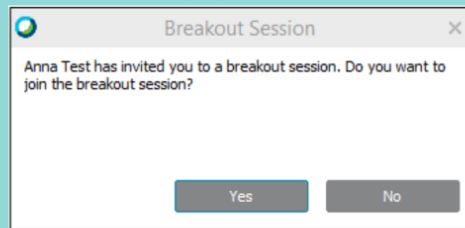


Tech Tips

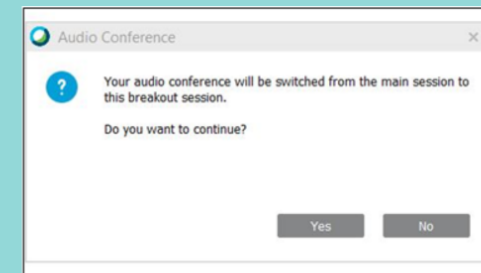
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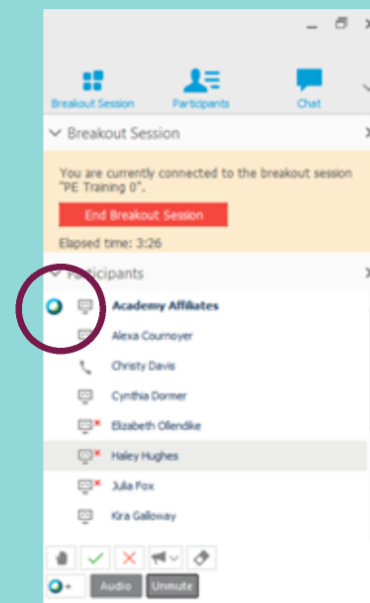


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Utilizing Breakout Sessions



Tech Tips

**Question
Sheets**

**Active
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Question Sheets

Affiliate Operations Overview

Policies and Procedures

Q: When are they usually update, and what is the process?

- This is built into a position description
- Everyone helps update sections relevant to them

Q: Why are they not regularly utilized?

- Lack of understanding of how to use them
- Maybe out of date or don't apply
- Lack of continuity
- Conflicting information

Q: What are some first steps your affiliate could take to make these documents more useful?

- Educate the board on what we have available and what they are at initial meeting
- Creating a better format and including more information

Q: What could your affiliate leadership do to integrate these documents into planning for the year?

Position Descriptions

Q: When are they usually update, and what is the process?

- This is built into a position description
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Q: Why are they not regularly utilized?

- Maybe out of date or don't apply
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- Conflicting information
- Not enough information to be useful in office

Q: What are some first steps your affiliate could take to make these documents more useful?

- Use position descriptions as a recruitment tool; create training materials for after a volunteer starts
- Creating a better format and including more information

Q: What could your affiliate leadership do to integrate these documents into evaluating programs/needs?

Organizational Chart/Structure

Q: When is it usually update, and what is the process?

- This is built into a position description
- The Executive Director updates and tracks

Q: How is it utilized?

- Website for public and members
- Training and orientation documents for volunteers

Q: What are some first steps your affiliate could take to make this documents more useful?

- Ensure it is up to date and reflects how positions report into each other
- Creating a better format and including more information

Q: What could your affiliate leadership do to integrate this document into evaluating programs/needs?

Meeting Agendas and Minutes

Use as a starting point or
if conversation falters or
goes off track

Try to keep focused on the
topic at hand

Share your affiliate's
successes and struggles

Brainstorm with your
group on new ideas

Q: How are agendas created?

- Reports submitted – timeline established
- Use of consent and working agenda
- Notes taken within working agenda for minutes

Q: Why are they not regularly utilized?

- Lack of understanding of how to use them
- Lack of engagement in reading materials before meetings (consent agenda and minutes specifically)
- Confusion of board responsibility – why do I need to read this and be prepared?

Q: What are some first steps your affiliate could take to make these documents more useful?

- Educate the board on their responsibility and importance of meeting preparation
- Creating a better format
- Having a consistent timeline for submitting reports and getting agendas out for review

Q: What could your affiliate leadership do to effectively track activities/ideas that come out of meetings?

Strategic Plan

Q: When is it usually update, and what is the process?

- This is built into a position description
- Committee is formed and tasked with this

Q: Why is the strategic plan not regularly utilized?

- Lack of understanding of how to use it
- Maybe out of date or doesn't apply
- Lack of continuity
- Conflicting information with standard programs/activities

Q: What are some first steps your affiliate could take to make this documents more useful?

- Educate the board on what the plan is and which parts are their responsibility
- Creating a better format and including more information
- Yearly planning is set using the strategic plan
- Implementing tracking of activities on a regular basis
- Educate difference between strategic plan versus your annual plan of activities

Q: What could your affiliate leadership do to integrate the strategic plan into planning for the year?

Question Sheets

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Utilizing Breakout Sessions



Tech Tips

**Question
Sheets**

**Active
Listening**

Active Listening Virtually

- Eliminate your supportive language - Mmm, uh-huh, oh, etc.
- Close programs with pop up notifications
- Put your phone across the room
- Be concise with feedback and allow others to participate
- Introduce yourself when talking
- Include all participants - who hasn't spoken yet?
- Get comfortable with silence - give people time to process



Utilizing Breakout Sessions

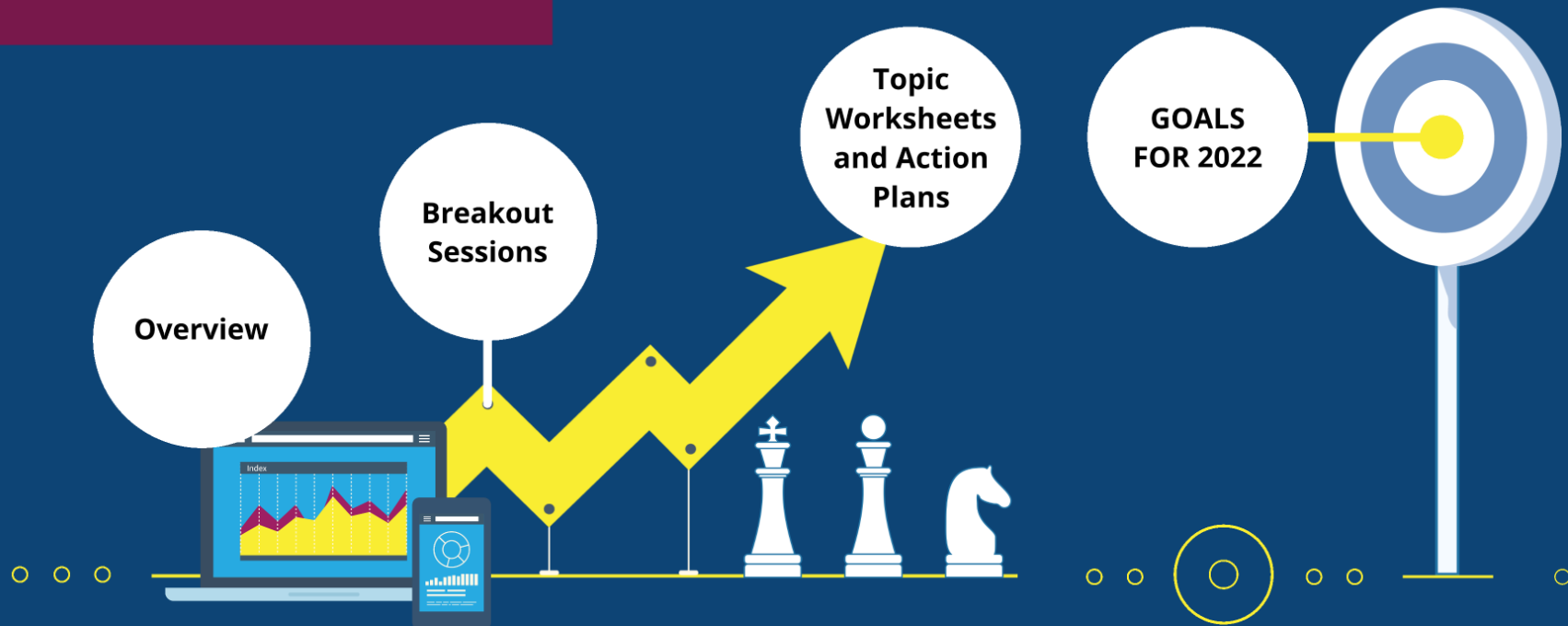


Tech Tips

**Question
Sheets**

**Active
Listening**

STRATEGY & PLANNING AFTER THE TRAINING



Worksheets



You won't remember everything - write things down as you go. Then take time to further reflect and refine

**Topic
Worksheets**

Action Plan

Topic Worksheets

There is a set of questions for each topic - all questions are the same



Topic #1 Brainstorming: Affiliate Operations Basics

Based on the topics discussed in this segment, what are things your affiliate is doing well?
What things does your affiliate know it needs to work on?

Use to organize and flesh out
your thoughts after each
session/day

Worksheets




You won't remember everything - write things down as you go. Then take time to further reflect and refine

**Topic
Worksheets**

Action Plan

Action Plan

Each Topic has a section to establish goals and assign responsibility

 Academy of Nutrition and Dietetics

President Elect Action Plan

After each topic presented you were given time to create an action plan for you are president of your affiliate based on your affiliate's specific strategic plan. Take the information gathered in each topic to create short, mid-term, and long term goals to supplement the strategic plan.

Topic #1	Affiliate Operations Basics			
	Short Term (0-6 months)	Mid-Term (7-12 months)	Long Term (1-3 years)	Lead Position(s)

Utilize after the training to refine your goals and prioritize your ideas based on affiliate needs

Worksheets

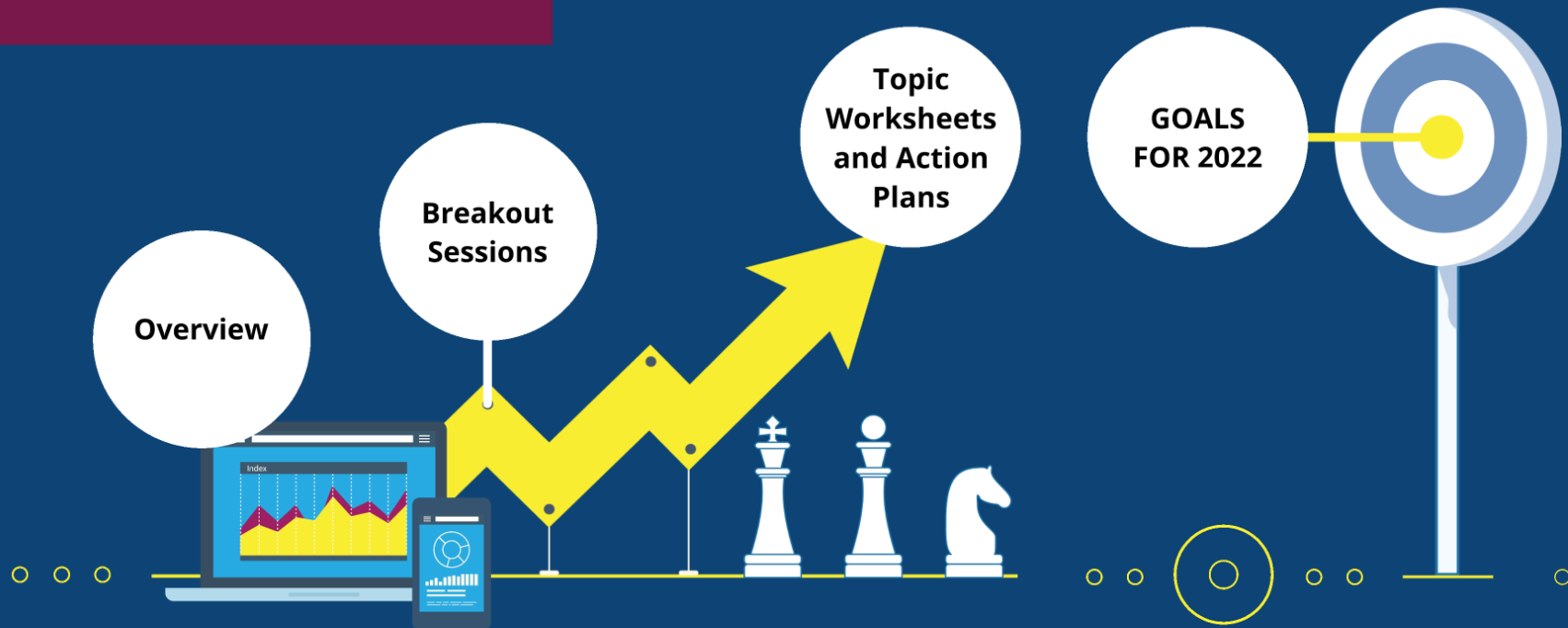


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**Topic
Worksheets**

Action Plan

STRATEGY & PLANNING AFTER THE TRAINING



Goals for 2022

Your ideas are a starting point - bring back to your leaders for refinement and discussion



Keep in mind three key factors:
Establish a Timeline
Resources Needed
Delegating Tasks

S

M

A

R

T

S - Specific

The key is to start with a specific goal using the 5 W questions

- what
- when
- who
- why
- where



Goals for 2022

Your ideas are a starting point - bring back to your leaders for refinement and discussion



Keep in mind three key factors:
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