

# WESTERN REGION INTERGOVERNMENTAL PERSONNEL ASSESSMENT COUNCIL (WRIPAC)

## Strategic Plan 2009-2014

### INTRODUCTION

In April 2009, several members of WRIPAC (officers and one lifetime WRIPAC member) met for a day-long session in Sacramento, California to update WRIPAC's strategic plan. The question the group addressed was "What can we, as officers and members of WRIPAC, do to promote, grow, and maintain our organization as a thriving, vital resource to the human resources field in the Western region?"

Through a series of focused conversations and consensus workshops, the participants:

- Conducted an environmental assessment – The group evaluated the current environment as it pertains to WRIPAC, and discussed WRIPAC's stakeholders, internal environment, external influences, recent accomplishments, and advantages.
- Created a practical vision for WRIPAC's future – The group then developed a vision of what WRIPAC wants to see in 5 years as a result of its strategic actions
- Discussed the underlying barriers to achieving the vision – The group identified the blocks and barriers that are preventing WRIPAC from realizing its vision
- Developed strategic directions for which WRIPAC can aim – The group outlined broad, overarching themes that will help set the focus for change
- Created a focused implementation plan – Finally, the group began to craft courses of action that will help to operationalize the strategic directions

The participants identified five general strategic directions with specific implementation steps outlined for each:

1. Clarifying Our Values and Identifying Our Purpose
2. Recruiting, Developing, and Retaining Present and Future WRIPAC Members
3. Providing Resources for the Transfer of Knowledge Within the Organization
4. Promoting the Sustainability of Our Organization
5. Creating Something of Value for Our Member Agencies

Although this strategic plan is intended to cover a five-year period, it is broken down into one-year increments, each containing specific accomplishments that, if addressed, will move WRIPAC toward realizing its vision. It is intended that detailed implementation plans will be developed for each accomplishment and reviewed every 180 days to track progress and provide the opportunity for adjustments to the plans. WRIPAC board members intend to review the strategic plan on a yearly basis.

## **ENVIRONMENTAL ASSESSMENT**

### **WHO WE ARE**

WRIPAC is an organization of over 30 representatives from human resource-related departments of public sector agencies in California, Nevada, and Arizona. Its vision is to promote excellence and efficiency in personnel selection practices. With a commitment to the open exchange of ideas and information, WRIPAC brings value to member agencies by keeping current with best practices, minimizing financial and legal liability, and maximizing cost effectiveness.

### **BASIC DATA**

- WRIPAC has a history of almost 30 years of service to the public sector human resources field
- The organization is comprised of member representatives of 37 agencies and has 8 lifetime members
- The organization represents three states (California, Nevada, and Arizona)
- There is no membership fee to join
- The organization provides valuable services to the field including training, monographs, and test material sharing
- Attendance at meetings is free for both members and guests

### **OUR STAKEHOLDERS**

- Member jurisdictions
- Individual representatives
- Other selection professionals
- Other private/public organizations
- Job applicants
- Member agency employees

### **OUR INTERNAL ENVIRONMENT**

- Sound financial position
- Products in demand (though some need updating)
- Efficient use of members' time
- Skilled members
- Responsive to changing needs
- Promoting efficient communications

- Opportunities for social networking

## **EXTERNAL INFLUENCES**

- Court decisions, laws, regulations
- Technology – increasing capabilities and accessibility
- Fiscal constraints
- Taxpayer's demands for accountability and utility
- Regulatory agencies
- Labor market
- Innovations in human resources

## **RECENT ACCOMPLISHMENTS**

- Job analysis manual recently updated
- WRIPAC brochure created/updated
- Website updated with new look/content
- New monographs created
- Increase in number and type of training offerings
- Test sharing re-implemented
- Improved communication
- Interagency cooperation

## **CURRENT TRENDS**

- Downturn in economy
- Baby boomers retiring
- Membership falling off
- Lack of fundamental knowledge in new generation of human resources professionals
- More recruits from private sector
- More desire to have public sector selection procedures mirror private sector
- Less emphasis on rules and more flexibility in personnel practices
- More emphasis on the use of technology

## **ADVANTAGES**

- Committed group of officers
- Strong history/good reputation
- Strong academic background (increases credibility)
- Steady income from training
- Personal touch
- Stable constituency
- We have fun!

## PRACTICAL VISION

“What do we want to see in place in three to five years as a result of our actions?”

Prestigious Leader in Public Sector Assessment and Development	More Widespread, Relevant, and Cutting Edge Training for a Variety of Levels	New, Up-to-Date, Creative Products and Services	Larger and More Diverse Membership Base in the Western Region	Established Leadership Development and Succession Plan	A More Committed, Engaged, and Stable Membership	Active, Collaborative Partnerships with Other Similar Organizations
<ul style="list-style-type: none"> <li>• Leader in promoting public sector employment</li> <li>• Well-respected and known in the HR community</li> <li>• Organizational advocacy-individual member alignment with good testing</li> <li>• Notoriety at higher levels of organizations</li> <li>• Leader in training field</li> <li>• Industry prestige</li> </ul>	<ul style="list-style-type: none"> <li>• More agency-hosted training in addition to pre-meetings</li> <li>• Variety of training: entry-level through advanced</li> <li>• On-site training beyond NV and CA</li> <li>• Training more well-attended</li> <li>• Relevant, cutting edge training and info sharing (“What’s hot”)</li> </ul>	<ul style="list-style-type: none"> <li>• New and updated products for members</li> <li>• Creative assessment techniques including tech solutions</li> <li>• Certification program for training</li> <li>• Automation: item banks and online services</li> </ul>	<ul style="list-style-type: none"> <li>• Membership increased, more people involved</li> <li>• More participation of other states aside from NV and CA</li> <li>• Larger, active membership base</li> <li>• Increased marketing to more agencies</li> </ul>	<ul style="list-style-type: none"> <li>• Succession plan for WRIPAC leadership and trainers</li> <li>• Leadership development for newer practitioners</li> <li>• Assign new members a mentor</li> </ul>	<ul style="list-style-type: none"> <li>• Fully engaged, enthusiastic collegial membership</li> <li>• More committed members</li> <li>• Committees stable and producing more</li> </ul>	<ul style="list-style-type: none"> <li>• Network, partner with other like agencies nationwide</li> <li>• Partnership with IPAC, SIOP, etc.</li> </ul>

## UNDERLYING CONTRADICTIONS

“What is blocking us from moving toward our vision?”

Lack of Organizational Value and Identity	Economic Challenges	Apathetic and Passive Attitude Toward Participation	We Are Not Coping with Generational Differences	We Are Not Doing Knowledge Transfer	Insufficient Internal and External Marketing	Need for a Shared Vision
<ul style="list-style-type: none"> <li>• Awareness of organizational value and utility</li> <li>• Educate members re: value of social networking</li> <li>• Members do not value the organization</li> <li>• People do not “need” what we are providing or they are getting it somewhere else</li> </ul>	<ul style="list-style-type: none"> <li>• Training needs to be planned ahead for (budget, etc.)</li> <li>• Economic challenges</li> <li>• Distances people have to travel</li> </ul>	<ul style="list-style-type: none"> <li>• Member apathy, complacency, and “laziness”</li> <li>• Members less willing to give time</li> <li>• Volunteer duties less of a priority</li> </ul>	<ul style="list-style-type: none"> <li>• Communication needs of different members</li> <li>• Meetings and clubs aren’t cool anymore</li> <li>• Risk aversion/ fear of technology</li> </ul>	<ul style="list-style-type: none"> <li>• Trainers with time and the right experience</li> <li>• Loss of institutional knowledge</li> </ul>	<ul style="list-style-type: none"> <li>• Do not engage new and potential members enough</li> <li>• Insufficient marketing</li> </ul>	<ul style="list-style-type: none"> <li>• Organizational drift</li> <li>• Belief in the process: identification of a common goal</li> </ul> <div style="background-color: #cccccc; padding: 10px; text-align: center; margin-top: 20px;"> <p><b>Lack of Consistency and Continuity of Attendees</b></p> </div>

# FIVE-YEAR STRATEGIC DIRECTIONS

**“What innovative, substantial actions will deal with the underlying contradictions and move us toward our vision?”**

***Develop Operations Manuals for Officers and Host Committees***

- Develop SOP’s for holding trainings and meetings
- Document all WRIPAC accomplishments, procedures, and practices
- Documentation: make readily available
- Plan training and meeting sites for 1 year – issue in March (core training)

***Engage and Educate Attendees***

- Develop mentoring program for new members
- Create subcommittee of new member committee: PR or welcoming committee
- Educate new members of services and benefits
- Increase personal involvement between officers and members
- Create Facebook, Twitter, My Space page/profile
- Focus group with younger attendees

***Create Incentive Program to Foster Participation***

- Offer incentives to attend, volunteer
- Offer various formats: 2 per time slot, webinar, call-in committee and business meetings
- Incentivize committee meeting participation

***Develop and Implement a Succession Plan for Internal Trainers and Leadership***

- Create a succession plan
- Develop training for: giving a presentation, running a meeting, etc.

***Clarify Our Values and Identify Our Purpose***

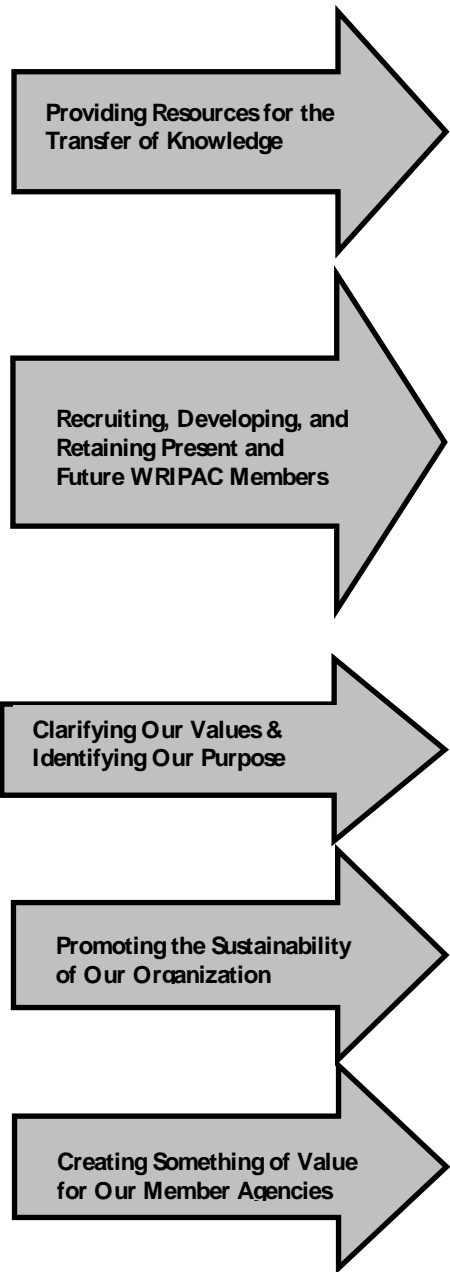
- Clarify values and educate membership (history of WRIPAC, etc.)
- Identify our purpose and philosophy
- Broaden what assessment means beyond recruitment

***Develop and Implement a Marketing Plan***

- Develop a marketing plan
- Identify training needs of potential member agencies

***Create “Something Big” of Value for Our Member Agencies***

- Big ticket benefit to agency (e.g. online clerical testing, cooperative testing, etc.)



## BRAINSTORM OF FIVE-YEAR ACCOMPLISHMENTS

**“What will be our specific, measurable accomplishments for the next five years?”**

### **Strategic Direction:** Clarifying Our Values and Identifying Our Purpose

Current Reality	5-Year Accomplishments	Success Indicators
<ul style="list-style-type: none"> <li>• Members unclear as to purpose and philosophy</li> </ul>	<ol style="list-style-type: none"> <li>1. Focus group to reevaluate WRIPAC’s vision, mission, and values</li> <li>2. Vision, mission, and values adopted by membership</li> <li>3. Develop slogan and publicize on all documents and website</li> <li>4. Reevaluate constitution and by-laws to ensure consistency with strategic plan and vision, mission, and values</li> </ol>	<ul style="list-style-type: none"> <li>• Every member knows what WRIPAC’s purpose and philosophy is</li> <li>• WRIPAC has a unified and sustained focus</li> </ul>

## BRAINSTORM OF FIVE-YEAR ACCOMPLISHMENTS

“What will be our specific, measurable accomplishments for the next five years?”

**Strategic Direction:** Recruiting, Developing, and Retaining Present and Future WRIPAC Members

Current Reality	5-Year Accomplishments	Success Indicators
<ul style="list-style-type: none"> <li>• No recruitment plan</li> <li>• Some members are retiring</li> <li>• No incentive program</li> <li>• Limited engagement of younger members</li> <li>• No succession plan</li> <li>• Committee meeting participation is inconsistent and low</li> <li>• Value of WRIPAC inconsistently expressed</li> </ul>	<ol style="list-style-type: none"> <li>1. Develop and implement mentoring program</li> <li>2. Identify potential WRIPAC leaders</li> <li>3. Train potential WRIPAC leaders</li> <li>4. Realign committees around the new Strategic Plan</li> <li>5. Educate membership on value of WRIPAC</li> </ol>	<ul style="list-style-type: none"> <li>• Increased, consistent attendance</li> <li>• Members are more engaged</li> <li>• Members of all ages</li> <li>• Many members from which to choose for leadership roles</li> <li>• Committees are producing valuable stuff</li> <li>• Members are easily able to justify coming to WRIPAC meetings/trainings</li> </ul>

## BRAINSTORM OF FIVE-YEAR ACCOMPLISHMENTS

“What will be our specific, measurable accomplishments for the next five years?”

**Strategic Direction:** Providing Resources for the Transfer of Knowledge Within the Organization

Current Reality	5-Year Accomplishments	Success Indicators
<ul style="list-style-type: none"> <li>• Misplaced our SOP's</li> <li>• Misplaced host committee binder</li> <li>• New/existing members afraid to take on leadership roles</li> <li>• Lack of knowledge of roles and responsibilities</li> <li>• Difficult for agencies to plan for future training and meetings</li> </ul>	<ol style="list-style-type: none"> <li>1. Search and destroy or update of existing documents</li> <li>2. Identify and assign topics for SOP's</li> <li>3. Draft and review documents</li> <li>4. Finalize and post on website</li> <li>5. Make a decision log on website to increase transparency</li> </ol>	<ul style="list-style-type: none"> <li>• We will have SOP manuals</li> <li>• Roles and responsibilities will be clear</li> <li>• Agencies will be able to better plan future budgets</li> <li>• More membership participation in administrative functions</li> <li>• Documentation of decisions and prior activity will be readily available</li> </ul>

## BRAINSTORM OF FIVE-YEAR ACCOMPLISHMENTS

“What will be our specific, measurable accomplishments for the next five years?”

### Strategic Direction: Promoting the Sustainability of Our Organization

Current Reality	5-Year Accomplishments	Success Indicators
<ul style="list-style-type: none"> <li>• Missing marketing plan (outdated?)</li> <li>• Targeting members of like organizations only</li> <li>• Focus is on individual training sessions rather than on WRIPAC as a whole</li> <li>• Agency membership is down</li> </ul>	<ol style="list-style-type: none"> <li>1. Research previous/other marketing plans</li> <li>2. Evaluate appropriateness of different marketing/outreach methods</li> <li>3. Identify target audience</li> <li>4. Develop and implement marketing plan</li> <li>5. Evaluate effectiveness of marketing plan and update as needed (continuous)</li> </ol>	<ul style="list-style-type: none"> <li>• Participation by agencies in all three states in our region</li> <li>• Updated marketing plan in place</li> <li>• Presence at trade shows, marketing materials, training newsletter, etc.</li> <li>• Membership is up</li> <li>• We are casting our net wider</li> </ul>

## BRAINSTORM OF FIVE-YEAR ACCOMPLISHMENTS

“What will be our specific, measurable accomplishments for the next five years?”

### Strategic Direction: Creating Something of Value for Our Member Agencies

Current Reality	5-Year Accomplishments	Success Indicators
<ul style="list-style-type: none"> <li>• Test sharing and information sharing (not full participation)</li> <li>• Training</li> <li>• Monographs (some limited/outdated)</li> <li>• Not enough incentive for agencies to stay</li> </ul>	<ol style="list-style-type: none"> <li>1. Conduct agency needs assessment</li> <li>2. Research and prioritize feasibility of identified needs</li> <li>3. Development and implementation</li> <li>4. Follow up – evaluate, update, and monitor (continuous)</li> <li>5. Educate members regarding WRIPAC’s test sharing philosophy and procedures</li> <li>6. Update monographs/write new monographs</li> <li>7. Research other avenues for developing and distributing monograph information (video, podcasts, webinars, etc.)</li> </ol>	<ul style="list-style-type: none"> <li>• Full participation of members</li> <li>• Updated and new monographs</li> <li>• A valuable service that WRIPAC is known for that encourages people to join and stay with WRIPAC</li> </ul>

## FIVE-YEAR CALENDAR

“What is our timeline for completion of our five-year accomplishments?”

STRATEGIC DIRECTIONS	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
<b>Clarifying Our Values and Identifying Our Purpose</b>	<ul style="list-style-type: none"> <li>Focus group to reevaluate WRIPAC's vision, mission, and values</li> </ul>	<ul style="list-style-type: none"> <li>Adopt vision, mission, and values</li> <li>Reevaluate constitution and by-laws to ensure consistency with strategic plan and vision, mission, and values</li> </ul>			
<b>Recruiting, Developing, and Retaining Present and Future WRIPAC Members</b>	<ul style="list-style-type: none"> <li>Realign committees around Strategic Plan</li> <li>Educate membership on value of WRIPAC</li> </ul>	<ul style="list-style-type: none"> <li>Develop and implement mentoring program</li> <li>Identify potential WRIPAC leaders</li> </ul>	<ul style="list-style-type: none"> <li>Train potential WRIPAC leaders</li> </ul>		
<b>Providing Resources for the Transfer of Knowledge Within the Organization</b>	<ul style="list-style-type: none"> <li>Identify and assign topics for SOP's</li> <li>Search and destroy or update existing documents</li> <li>Create decision log on website to increase transparency</li> </ul>	<ul style="list-style-type: none"> <li>Draft and review SOP documents</li> </ul>	<ul style="list-style-type: none"> <li>Develop slogan and publicize on all documents and website</li> <li>Finalize and post final SOP's on website</li> </ul>		
<b>Promoting the Sustainability of Our Organization</b>	<ul style="list-style-type: none"> <li>Research previous/other marketing plans</li> <li>Evaluate the appropriateness of different marketing and outreach methods</li> <li>Identify our target audience</li> </ul>	<ul style="list-style-type: none"> <li>Develop and implement marketing plan</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate the effectiveness of marketing plan and update as needed (continuous)</li> </ul>		
<b>Creating Something of Value for Our Member Agencies</b>	<ul style="list-style-type: none"> <li>Educate members regarding current perks/services (test sharing, round table, etc.)</li> <li>Conduct agency needs assessment</li> </ul>	<ul style="list-style-type: none"> <li>Research and prioritize feasibility of the identified agency needs</li> </ul>	<ul style="list-style-type: none"> <li>Develop and implement new product/service</li> </ul>	<ul style="list-style-type: none"> <li>Research and write new monographs, video, podcasts, etc.</li> <li>Update monographs regularly</li> </ul>	<ul style="list-style-type: none"> <li>Follow up: evaluate, update, and monitor final product (continuous)</li> </ul>

**YEAR 1 IMPLEMENTATION\*****“What are the implementation steps for our first-year accomplishments?”**

<b>STRATEGIC DIRECTIONS</b>	<b>STEPS</b>	<b>ASSIGNMENT</b>
<b>Clarifying Our Values and Identifying Our Purpose</b>	1. Conduct a focus group to reevaluate WRIPAC’s vision, mission, and values	Strategic Planning Committee – June ‘09
<b>Recruiting, Developing, and Retaining Present and Future WRIPAC Members</b>	2. Realign committees around Strategic Plan (current committees: Marketing, Model Civil Service, Monograph, New Members, Scholarship, Training and Programs, Job Analysis, and Web Source) 3. Educate membership on value of WRIPAC (same as # 10?)	Strategic Planning Committee – June ‘09
<b>Providing Resources for the Transfer of Knowledge Within the Organization</b>	4. Identify and assign topics for SOP’s (for holding trainings and meetings, for committees, for mentoring?) 5. Search and destroy or update existing documents 6. Create decision log on website to increase transparency	SOP/Documentation Committee – Jan. ‘09
<b>Promoting the Sustainability of Our Organization</b>	7. Research previous/other marketing plans (content, format, etc.) 8. Evaluate the appropriateness of different marketing and outreach methods (e.g. trade shows, promotional materials, training newsletters, etc.) 9. Identify our target audience	Marketing Committee – Jan. ‘09
<b>Creating Something of Value for Our Member Agencies</b>	10. Educate members regarding current perks/services (test sharing, round table, etc.) (same as #3) 11. Conduct agency needs assessment	New Product Committee – Jan. ‘09

\* To be reviewed one year after implementation. Year-2 accomplishments will be set at that time.