



# Strategic Planning Process Executive January 22, 2023

<b>Strategic Formulation</b>
<b>1. Renewal of mission, vision and values</b>
<b>a) Vision</b> ACER-CART is a national organization, dedicated to providing leadership to its community of Members and to forging relationships with like-minded groups to promote objectives on behalf of retired teachers and other seniors.
<b>b) Mission Statement</b> ACER-CART is an engaging, inclusive and caring community accountable to its membership. It is the national voice for retired teachers, responsive to the needs and concerns of its Members and committed to excellence.
<b>c) Values</b>
<b>2. Analysis and environmental scans</b>
a. Internal strengths and weaknesses
b. External opportunities and threats
c. External factors that influence organization
d. Analysis of strategic positioning



3. Identification of critical success factors and strategic issues
4. Development of goals, objectives, strategies and initiatives
5. Identification of performance indicators and targets.
<b>6. Gathering input and information</b>
a. Internal and external scans and analysis
b. Member survey
c. Input session with Board
d. Key stakeholder groups to gather qualitative input
7. Develop key performance indicators, targets, objectives and strategic initiatives to support the strategic goals
8. Present strategic plan to AGM for approval.



9. Strategic Implementation
10. Annual operational plans
11. All strategies and initiatives directly tied to strategic goals, KPI's and targets
<b>12. Strategic Evaluation</b>
13. Reporting on progress at every executive meeting
14. Member surveys

