

AWS Strategic Plan Initiative

Authors: Strategic Planning Committee

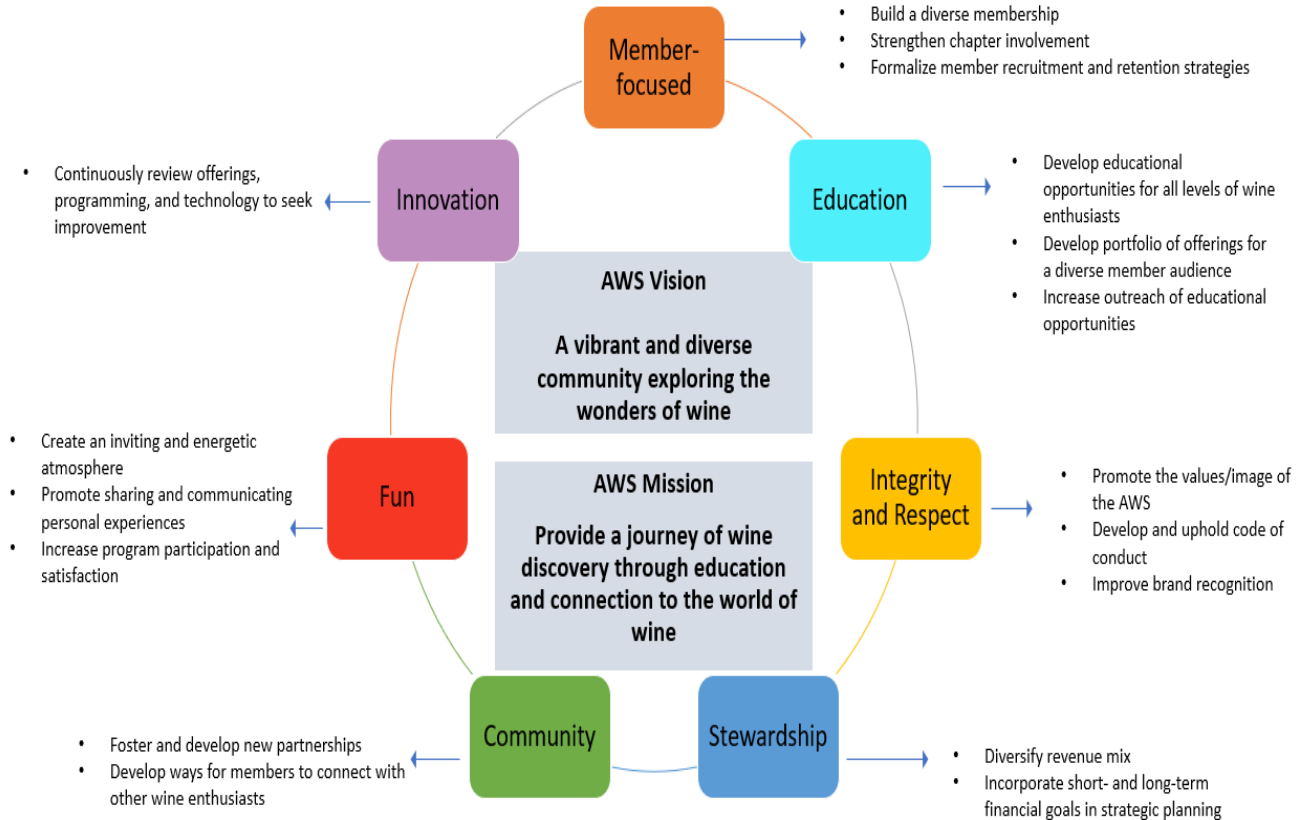
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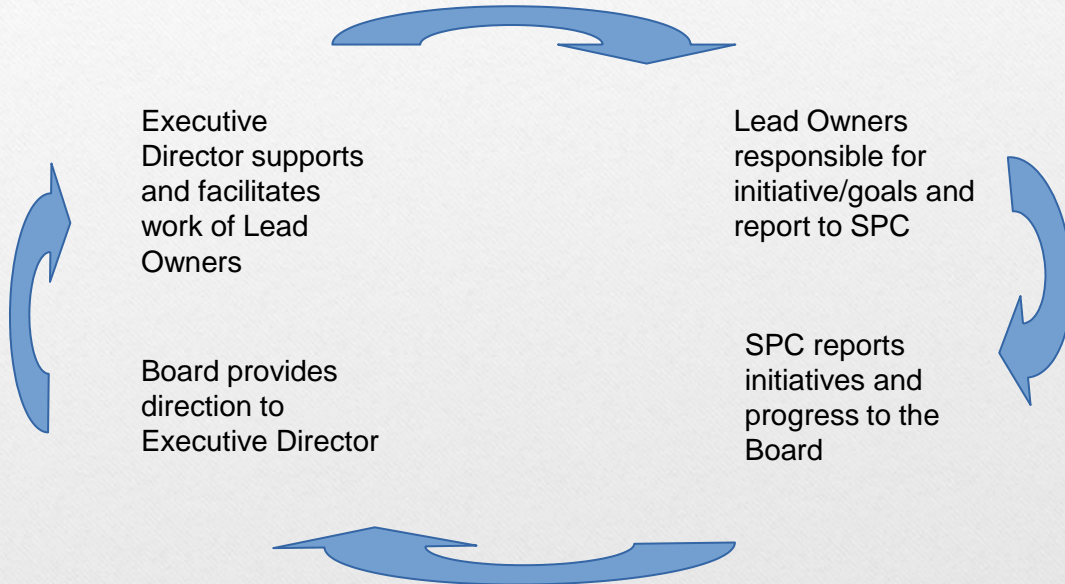
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Revised 11/8/2023

American Wine Society Mission, Vision and Core Values



Reporting and Support of Goals



Terminology used in Goal Setting

Initiative: Recommended action item for each goal

Stakeholder: Who is affected by the initiative and outcome of the initiative?

Lead Owner: The person who is responsible for the success of the initiative. The lead can delegate to a team, committee, individual, etc.

Measurement: Metric to gauge progress and success of the initiative.

Priority: SPC recommended (given all initiatives), with BOD and Executive Director Approval.

Due date: Dates to be determined and finalized to coordinate with annual and 5-year budgeting and planning.

Suggested priority: The numbers suggest the priority of the initiative. For example, 1- top priority, 1.5 further down in priority, 2.0 next in priority, etc. The lead owner will establish a time frame/deadline to correspond with the suggested priority.

Core Value

Goal 1: Build a diverse membership

Member-focused

Initiative	Stakeholders	Lead Owner	Measurement	Status
Generate engagement on social media using creator tools (posts, reels, advertisement)	All AWS	Marketing Chair	Likes and views per post	In Progress Started Feb/March 2023
Build Diverse Leadership Teams	Research who is out there	BOD	Number of groups on list that are joined per quarter. Welcome that was used to get them in.	In Progress Started Oct. 2023

Core Value**Goal 2: Strengthen Chapter Involvement**

Member-focused

Initiative	Stakeholders	Lead Owner	Measurement	Status
Regional Ambassador (RA - Visit each Chapter each calendar year and submit semi-annual report on status.	BOD, RAs, Chapter Chairs	Director of Membership	Number of RAs that completed the Goal divided by Total number of RAs.	In Progress (Date Started: October 2023)
Chapter Chairs - More involvement with Director of Membership	BOD, RAs, Chapter Chairs	Director of Membership	CC - Number of Zoom meetings with DoM per quarter	In Progress

Core Value**Goal 3: Formalize Member Recruitment and Retention Strategies**

Initiative	Stakeholders	Lead Owner	Measurement	Status
Utilize Marketing (CRM) tool (New software - Rhythm)	BOD, RAs, Members, Potential Members	Executive Director	Tool selection Completed / Campaigns sent each month	In Progress
Develop membership recruitment plan	BOD, RAs, Members, Potential Members	Director of Membership and Executive Director	Plan creation	Completed New Member Letter, Winery Letter, Non-renewing member Letter for Chapter and RAs. Next: Redo Chapter Chair Playbook and New Member Packet. Develop member recruitment plan
Standardize chapter requirements and processes	All AWS	Governance Chair	Create requirements / How many used each month	In Progress Oct 20

Goal 1: Offer Educational Opportunities For All Levels of Wine Enthusiasts

Core Value

Initiative	Stakeholders	Lead Owner	Measurement	Status
Expand survey to All Members - What are they looking for? Wine Smarts I and II as example.	All AWS	Director of Education	Response rate, Satisfaction rating, Reporting results	Completed 2023 Revisit 2024
Caller segments to OPT IN for Future	BOD, Education Chair, AWS Members	Director of Education	Number of courses / enrolled members	1 st Video Complete Oct. 2023
Continue new member material	BOD, AWS Members	National Office	% of New Members that renew.	Send out Letter, Membership Card, and send e-mail with packet. DoM does Uncork & Discover

Education

Goal 2: Increase Outreach of Educational Opportunities

Core Value

Initiative	Stakeholders	Lead Owner	Measurement	Status
Support AWSEF in seeking out universities that offer courses for Scholarship recipients	President, AWS	AWSEF	How many added per quarter/AWSEF decides	Began expanding March 2023 Will continue

Core Value

Education

Goal 3: Develop Portfolio of offerings for a diverse member audience

Initiative	Stakeholders	Lead Owner	Measurement	Status
Group/Categorize educational offerings and publish to Available platforms	BOD, Director of Education	Director of Education provides list to Executive Director	Determine method for cataloging/grouping portfolio of offerings	Ongoing
Update Educational Materials	BOD, Director of Education	Director of Education	# of educational resources	Ongoing
Research a Learning Management System (LMS) software to help track member courses.	BOD	Executive Director	Track course sign ups / completions	Executive Director and IT Chair researching software

Goal 1: Promote the Values/Image of the AWS

Core Value

Integrity and Respect

Initiative	Stakeholders	Lead Owner	Measurement	Status
Publish on Web.	AWS	Executive Director.	List media sites to post. create consistent messaging	In Progress
Talk on Interviews / Videos / Podcasts, as appropriate	AWS	Executive Director.	Create materials to be included in board members, staff, orientation.	In Progress

Goal 2: Develop and Uphold Code of Conduct

Core Value

Initiative	Stakeholders	Lead Owner	Measurement	Status
Publish the guidelines.	All AWS	Governance Committee	Publish developed Policy on website	In Progress

Core Value **Goal 3: Improve Brand Recognition**

Integrity and
Respect

Initiative	Stakeholders	Lead Owner	Measurement	Status
Market to ALL Wineries in ALL States	BOD, RAs, ALL Members	Marketing Chair	Obtain listing of wineries in the US. Create AWS marketing to distribute	In Progress
Follow up on marketing to wineries	BOD, RAs, ALL Members	Marketing Chair:	RAs follow up on marketing to explain how AWS can help them.	Committee Developing Plan
Social Media,	BOD, RAs, ALL Members	Marketing Committee: sub-committee	Number of events per quarter / Attendee counts	Start date 2023 Continual

Core Value

Stewardship

Goal 1: Diversify Revenue Mix

Initiative	Stakeholders	Lead Owner	Measurement	Status
Define what the streams are today - What options are available to maintain 501c3 status for Fundraising?	BOD, Legal Counsel, Finance Chair	Finance Chair	list out current revenue streams. have each stakeholder identify two additional revenue streams pertinent to their area of expertise. review revenue streams on matrix value vs return. Measurements CRU 100	Complete for now
Perform Review by Independent Auditor Annually	BOD	BOD	Obtain "Clean" Review	Completed 2022
Identify financials on website	BOD, Legal Counsel, Finance Chair	Finance Chair	Complete IRS report	Completed 2022

Core Value

Stewardship

Goal 2: Incorporate Short and Long-Term Financial Goals in Strategic Planning

Initiative	Stakeholders	Lead Owner	Measurement	Suggested Priority
Make the SPC a Standard team and annual process	President, BOD	SPC Chair	Incorporate with budgeting and annual plan	In Progress

Goal 1: Develop Ways for Members to Connect With Other Wine Enthusiasts

Core Value

Community

Initiative	Stakeholders	Lead Owner	Measurement	Status
Create New Landing Page with Link to Social Media	All AWS	Executive Director	Measure current interaction and potential use. Determine format – blog vs interaction/communication tool.	Revamping website In Progress
Determine appropriate social media marketing. We are on - Facebook? Twitter? Pinterest?, others but not much seen - Wine Folly? Reverse Wine Snob?	All AWS	Marketing Chair	Number of Social Media platform posts per month and number of interactions	Status
Secure a Social Media Coordinator / Webmaster	BOD	Marketing Chair. Executive Director oversee	Define Duties/Job Description	Completed
RE-Design Website - Engage External Professional Company to create and perform Conduct User Experience Sessions	BOD	Internal Web-site: IT External Web-site:	Hits from Unique IPs per week/month,	In Progress

Core Value

Community

Goal 2: Foster and Develop Partnerships

Initiative	Stakeholders	Lead Owner	Measurement	Status
RAs Query ALL Chapters for their current needs and requirements for partnerships.	BOD, ALL AWS	RAs report to DoM	How many RAs provided needs and requirement to DoM for partnerships.	Response in progress
Marketing Committee Develop Policy for AWS Welcome here.	BOD, RAs, ALL AWS	Marketing Committee.	Marketing Committee complete Policy.	In progress

Core Value

Fun

Goal 1: Create an Inviting and Energetic Atmosphere

Initiative	Stakeholders	Lead Owner	Measurement	Status
Stories in periodicals, Podcasts on social media, Speaking at the Regional or National conferences	BOD, RAs, ALL AWS	Marketing committee & other committees	Stories per year	Ongoing

Core Value

Fun

Goal 2: Increase Program Participation and Satisfaction

Initiative	Stakeholders	Lead Owner	Measurement	Status
Chapter and RA regional event participation	BOD, RAs, ALL AWS	RA and Chapter Chairs.	# of Regional Events	1 completed in 2023

Core Value

Fun

Goal 3: Promote Sharing of and Communicating Personal Experiences

Initiative	Stakeholders	Lead Owner	Measurement	Status
Uncork & Discover	BOD, RAs, ALL AWS	Director of Membership	Quarterly	Started 2022 Ongoing

Core Value

Goal: Continuously Review Offerings, Programming, and Technology to Seek Improvement

Innovation

Initiative	Stakeholders	Lead Owner	Measurement	Status
SPC, BOD, RAs review activity.	BOD, RAs, SPC	Executive Director & BoD		Started 2022 Ongoing
Start IT Committee to keep up with IT landscape	BOD, RAs, SPC	IT Committee.	Update for improvement, report to Board of Directors monthly.	Started Oct. 2022
Implement prioritization matrix/decision making process for annual review of ALL Tasks.	BOD, ED, SPC	Executive Director/BOD	Quarterly reports to Board of Directors	Started September 2021 Ongoing