

# SACRS SPRING CONFERENCE 2025

MAY 13-16 • OMNI HOTELS & RESORTS, RANCHO LAS PALMAS • RANCHO MIRAGE, CA



## Strategic Planning

As an Organization's Compass

Lisa Johnson, Assistant CEO, ACERA

# SACRS SPRING CONFERENCE 2025

MAY 13-16 • OMNI HOTELS & RESORTS, RANCHO LAS PALMAS • RANCHO MIRAGE, CA



## WHY IS STRATEGIC PLANNING IMPORTANT?

- To ensure everyone within the organization is working towards the same goals.
- To encourage a systematic and objective approach to decision-making.
- To help organizations identify their strengths and weaknesses, as well as opportunities and threats.
- To enable organizations to identify their core competencies and leverage them to create value for members, beneficiaries, and stakeholders.

# SACRS SPRING CONFERENCE 2025

MAY 13-16 • OMNI HOTELS & RESORTS, RANCHO LAS PALMAS • RANCHO MIRAGE, CA



BEGIN WITH THE END IN MIND...

- Steven R. Covey



Strategic Planning is a vehicle organizations use in their efforts to fulfill the organization's Mission, Vision, and Values.

# SACRS SPRING CONFERENCE 2025

MAY 13-16 • OMNI HOTELS & RESORTS, RANCHO LAS PALMAS • RANCHO MIRAGE, CA



## Key Steps



Convene the Management Team who will help lead the strategic planning efforts.



Conduct a 360-degree survey of members, participating employers, trustees, vendors, and staff.



Review Survey Results and perform a SWOT analysis to categorize the feedback.



Hold a series of meetings to brainstorm and select short and long-term projects.

# SACRS SPRING CONFERENCE 2025

MAY 13-16 • OMNI HOTELS & RESORTS, RANCHO LAS PALMAS • RANCHO MIRAGE, CA



## The Overall Process

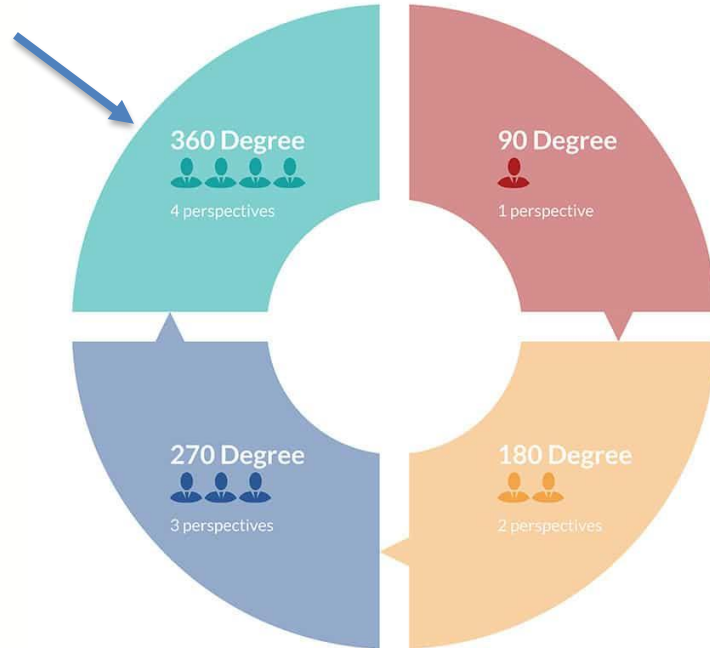


# SACRS SPRING CONFERENCE 2025

MAY 13-16 • OMNI HOTELS & RESORTS, RANCHO LAS PALMAS • RANCHO MIRAGE, CA



Begin by Surveying  
Stakeholders for  
Feedback



# SACRS SPRING CONFERENCE 2025

MAY 13-16 • OMNI HOTELS & RESORTS, RANCHO LAS PALMAS • RANCHO MIRAGE, CA



## Perform SWOT Analysis of Survey Feedback



### Strengths

What does your organization do better than similarly sized systems?

### Weaknesses

Where does your organization struggle? What areas need improvement?

### Opportunities

What external factors could help your organization grow?

### Threats

What external factors could harm your organization?

# SACRS SPRING CONFERENCE 2025

MAY 13-16 • OMNI HOTELS & RESORTS, RANCHO LAS PALMAS • RANCHO MIRAGE, CA



## Examples of SWOT Revelations

S

Excellent Member  
Communication

W

Pension Admin  
System  
Modernization  
Needs

O

Expand  
communications  
methods with  
employers

T

Market Volatility

# SACRS SPRING CONFERENCE 2025

MAY 13-16 • OMNI HOTELS & RESORTS, RANCHO LAS PALMAS • RANCHO MIRAGE, CA



## Areas that typically arise as Strengths/Weaknesses

### **Internal and Business Partner Perspective**

- Technological Innovation
- Process Improvement
- Operational Efficiency
- Agility in adapting to Emerging Trends

### **Member/Beneficiary Perspective**

- Convenient but approachable technology
- Communication methods
- Customer Service
- Value of provided Benefits

# SACRS SPRING CONFERENCE 2025

MAY 13-16 • OMNI HOTELS & RESORTS, RANCHO LAS PALMAS • RANCHO MIRAGE, CA



## Strategic Planning Benefits from an Internal and External Perspective

### Look Inward

- Provides Direction and Focus
- Enhances Decision-Making
- Improves Resource Allocation
- Improves Employee Engagement and Motivation

### Look Outward

- Enhances Service Delivery to members and beneficiaries
- Provides a great opportunity to engage stakeholders
- Fosters innovation and adaptability

# SACRS SPRING CONFERENCE 2025

MAY 13-16 • OMNI HOTELS & RESORTS, RANCHO LAS PALMAS • RANCHO MIRAGE, CA



## Our Approach

- We hired a strategic planning consultant.
- The senior leadership team was convened to work on strategy.
- A series of meetings were held with the consultants and as a leadership team.
- We developed a 3-Year plan to help execute our mission.
- Using feedback analysis, we reviewed our resources, set priorities, and chose several business projects and set achievable goals.
- We continue to monitor status and progress regularly.
- Lastly and most importantly, we celebrate our wins!



# SACRS SPRING CONFERENCE 2025

MAY 13-16 • OMNI HOTELS & RESORTS, RANCHO LAS PALMAS • RANCHO MIRAGE, CA



## Questions?