History

- History of AMS attempts at Strategic Planning go back almost 20 years.
- After the 2016 Governance Review, the number one recommendation that was given to the AMS was the need for a Strategic Plan to guide the organization.
- Since then, successive Presidents, Executive Teams, Steering Committees, and Councils have attempted and failed to produce any meaningful progress towards the full completion of a Strategic Plan.
- Due to a lack of a Strategic Plan, the organization continues to lack an overarching guide to help with goal setting, project planning, and strategic direction based on values.
A BRIEF TIMELINE

2001
Leading the Way Strategic Plan
Limited usage, one progress report submitted 2 years after adoption even though mandated by Code.

2005
AMS Strategic Framework
More of a strategic document, but was complicated and died in transition.

2010 to 2014
Various Proposals
Various projects proposed from new plan, business plan, and Vision 2030.
AMS Governance Review (2016)

The 2016 AMS Governance Review made a number of strategic recommendations that have yet to be implemented. Here are some key highlights:

1. Create a guiding strategic document for the AMS.
2. Identify strategic objectives of AMS Business Operations.
3. Develop new scorecarding and metrics tracking to evaluate business performance beyond contribution.
4. Revise governance related areas regularly against strategic objectives.
5. Improve the Executive goal setting process so it integrates with overall strategic planning.
6. Have annual Executive goals come from strategic values rather than directly from campaign promises.
7. Improve Council involvement in goal setting for business and service operations.
Since the Governance Review

- Each President since 2016 has attempted to create or begin work on an in-house Strategic Plan in response to the Governance Review, as well as organizational demands.

- All plans and attempts have been either unsuccessful, too preliminary, or were abandoned due to lack of traction.

- Although there are a variety of reasons why plans haven’t worked, especially a lack of internal capacity to produce one, the AMS has not produced a draft strategic plan that is approval-ready since 2005.
What Have We Learned

- Strategic Plans Take Time and Capacity
- Goal Setting Must Carry Weight, but Can’t be Specific.
- Plan Must Have a Strong Implementation Framework.
- Multiple Councils Have Identified Strategic Need
- In-House Attempts to Create a Plan Have Failed
- Still Lots of Room in the AMS for Strategic Development.
Why We Need a Strategic Plan

**Values**
A plan that outlines clear organizational values.

**Strategy**
An outline of our strategic direction moving forward.

**Guidance**
A plan to guide goal setting at all organizational levels.

**Vision**
Setting an exciting direction of where we’re heading.

**Consistency**
Provide better year-over-year continuity.

**Accountability**
Greater accountability mechanisms at all levels.
Hypothetical Scope

- Core Values and Principles
- KPI’s and Scorecarding
- 5 Year Strategy
- Long Term Vision

BROAD to SPECIFIC
Hypothetical Scope - Usage

AMS STRATEGIC PLAN

- REVISED POLICY I-9
  - EXECUTIVE GOAL SETTING
  - COUNCIL GOAL SETTING
- EXECUTIVE COMMITTEE
  - MANAGER GOAL SETTING
  - METRICS SCORECARDS
WHAT’S NEXT?
EXTERNAL CONSULTANT: FULL STRATEGIC PLAN

<table>
<thead>
<tr>
<th>PROS</th>
<th>CONS</th>
</tr>
</thead>
</table>
| ● Most validity.  
● Professional help with plan creation.  
● Offloaded capacity from Executives and Staff.  
● Highest chance of success. | ● High cost.  
● Risk if plan is not properly implemented.  
● Students may not understand rationale for investment at this time. |

- AMS would conduct RFP process.
- Could cost between $40k to $70k.
- Potentially reduced cost due to COVID-19.
- Highest chance of long-term success.
## EXTERNAL CONSULTANT: BUSINESS + SERVICES PLAN

<table>
<thead>
<tr>
<th>PROS</th>
<th>CONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>● More targeted approach, alleviating risk of it not being followed.</td>
<td>● Less Executive and Council involvement in goals.</td>
</tr>
<tr>
<td>● Reduced cost.</td>
<td>● Potential for bloat with high number of Society plans.</td>
</tr>
<tr>
<td>● Provides basis for senior leadership to set goals.</td>
<td></td>
</tr>
</tbody>
</table>

- Would focus on operational scorecarding and values.
- Would base internal performance tracking on plans.
- Potential to run development in-house.
### IN HOUSE DEVELOPMENT: STUDENT STAFF DRIVEN

<table>
<thead>
<tr>
<th>PROS</th>
<th>CONS</th>
</tr>
</thead>
</table>
| - Student-led process.  
- Additional student employment.  
- Lower Cost. | - Potential capacity issues.  
- Lack of professional and strategic experience.  
- Lower validity. |

- AMS would hire Strategic Plan Coordinator under President’s Portfolio.
- Cost would be around $20k to $25k.
- High risk due to lack of experience, capacity issues, implementation questions.
IN HOUSE DEVELOPMENT: SAME AS BEFORE

SCRAP STRATEGIC PLAN
Key Proposal Principles

Regardless of which one of the following proposals may be chosen, the process of creating an AMS Strategic Plan will be primarily student driven. This includes:

1. Creating an Ad Hoc Committee of Council to steer the project, whether it be with an external consultant or with internal stakeholders.

2. Strong channels of communication with Council to report back with updates on the project, from the Executive, the Ad Hoc Committee, and the Managing Director.

3. Extensive student consultation facilitated by either an external consultant or internal stakeholder.

4. Developing ways to ensure a completed Strategic Plan is accessible to the community, not just an internal document.
PROPOSED ACTIONABLES

01
EXTERNAL CONSULTANT
FULL STRATEGIC PLAN
Executive Recommendation:
Highest chance of success, but high cost.

02
EXTERNAL CONSULTANT*
BUSINESS + SERVICES PLAN
Executive Recommendation:
Lower cost, but misses large parts of the AMS.

03
IN HOUSE DEVELOPMENT
STUDENT STAFF LED FULL PLAN
Executive Recommendation:
Lowest cost, but also lower chance of success.