

SME

Society for
Mining, Metallurgy
& Exploration [®]

***Long-Term
Strategic Plan
2015***

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Table of Contents

Background/Process	2
LONG TERM VIEW	3
Vision	3
Mission	3
Core Values	4
CURRENT SITUATION	5
Strengths	5
Weaknesses	5
Opportunities	6
Threats	6
STRATEGIC PRIORITIES	7
Goals	7
Strategies	8
IMPLEMENTATION	10
Action Plans.....	10

Background/Process

This report summarizes the results of the long-term strategic planning process conducted with The Society for Mining, Metallurgy and Exploration (SME). The process was led by the SME Board of Directors and key staff and facilitated by Jim Sisson of Vantage Associates, Inc. Vantage Associates is a consulting firm that specializes in helping organizations improve performance through Strategic Planning.

This process was developed to achieve the following objectives:

- Build a consensus for the Vision and direction of SME
- Gather input from key constituent groups to better understand their perspective
- Align the organization's capabilities and competencies with the opportunities
- Establish priorities for the next several years
- Identify the critical issues and develop specific action plans with measureable results

The overall process was conducted between June and December of 2014 and was designed to include the perspectives and input from a broad set of constituencies. In preparation for the planning retreat, Vantage used one-on-one interviews and an online strategy questionnaire to gather input from Board Members, key staff and volunteer leaders throughout the organization. This input was shared with the planning committee during the planning retreat on September 18 in Phoenix and provided guidance and perspective to the planning committee as it established priorities for the future of SME.

The second phase of the planning process focused on implementation. A Strategic Plan is only as good as its implementation. The direction provided by the planning committee was used by the SME staff to develop specific Action Plans to support each of the long-term goals defined in the Strategic Plan. These Action Plans in responsibilities, priorities and measures of success. These action plans form the basis of accountability by communicating expectations and tracking progress over time.

It is important to recognize that this plan represents the best thinking of the leadership within the current environment defined by the local and global economies, the industry, and the regulatory and political climates. To remain relevant, the plan must be reviewed and updated on a regular basis. As the situation changes the plan should be adjusted to reflect shifting priorities. These small adjustments occur throughout the year.

It is also important to refresh the plan every two or three years. This gives the current leadership an opportunity to revise and validate the priorities of the organization with in the current environment.

LONG TERM VIEW

Vision

*A **Vision** is a statement of what the organization would like to be in the future. A vision is not a statement of who we are or what we do, but of what we would like to become.*

SME's long-term Vision is:

- **To be the premier resource and advocate for the mining community we serve**

Mission

*A **Mission** is a statement defining the overall purpose and scope of responsibility of an organization. It explains the reason for being.*

SME's Mission is:

- **SME serves professionals in the mining community and supports the advancement of the industry**

Core Values

Core Values are commonly-held beliefs to which an organization commits itself. Ultimately and ideally, an organization's values should guide the behavior of every individual within the organization. Core Values help define the culture of the organization.

SME's has three major core values each of which are defined by a set of more specific values. SME's Core Values are:

- **Member First**
 - **Member Satisfaction**
 - **Respect**
 - **Inclusiveness**
 - **Transparency**
 - **Networking**
- **Professional Excellence**
 - **Ethical Behavior**
 - **Service to Society**
 - **Lifelong Learning**
 - **Collaboration**
- **Innovation**
 - **Zero Harm**
 - **Knowledge Transfer**
 - **Educational Support**

CURRENT SITUATION

Current Situation is a fair and honest assessment of the current state of the organization and the environment in which it operates. Strengths and Weaknesses are internal and therefore the organization has some control over them. Opportunities and Threats are external and are usually generated by a trend or change in the environment in which it operates. Because they are external, they can be managed, leveraged, or mitigated but not controlled.

Strengths

- Technical information sharing
- Staff capability
- Volunteer commitment
- Financial strength
- Diverse organization
- Strong student chapters
- Good relationships with universities
- Professional networking
- Meetings
- Publications
- Professional accreditation

Weaknesses

- Connection between SME and local chapters
- US and English centric
- Not identifying and developing leaders
- “Good ole boy” perception
- Branding (internal and external)
- Marketing

Opportunities

- International member growth
- Growth among US members both traditional and non-traditional
- Explain the social economic value of mining
- Transition students to full membership
- Use technology to reach international members
- Globalization (Automated language translations)
- Growing demand for peer review
- Consolidation of societies and associations
- Corporate membership

Threats

- Demographics (fewer people in the industry)
- Growing regulation
- Industry cycles
- Pressure on mining schools
- Loss of specific expertise in industry due to retirements
- Negative perception of mining profession
- Competition among associations for members
- Younger generation interact differently

STRATEGIC PRIORITIES

Goals

*Long-Term **Goals** are the highest priorities that guide and characterize the organization. Goals define how an organization will focus its limited financial and human resources. Goals should focus on the result the organization is trying to achieve while action plans focus on how the goal will be achieved.*

SME will focus on the follow goals:

Goal A: Provide resources for sustainable professional and educational development programs

Goal B: Be the primary resource of fact-based mining and underground construction information

Goal C: Improve the perception of mining industry among the public and key constituents

Goal D: Grow membership

Goal E: Maintain a financially secure and stable organization

Goal F: Nurture a vibrant engaged global network of local sections

Strategies

Strategies outline how the results identified in the Goals will be accomplished. Some strategies represent a commitment to continuing or improving existing activities while others are new activities that will be undertaken to accomplish the goals

SME will focus on the follow strategies for each of the Goals:

Goal A: Provide resources for sustainable professional and educational development programs

- 1. Continuously Improve Content at all SME Meetings.**
- 2. Deliver the premier monthly publication in the industry.**
- 3. Increase usage and participation in OneMine.**
- 4. Add high quality and relevant titles to the library.**
- 5. Offer appropriate services for maintaining credentials and professional certifications.**
- 6. Establish the SME Web Platform as the industry resource for all critical mining information.**
- 7. Develop a strategy/plan to provide customers with access to mobile devices/ tablets for SME products.**

Goal B: Be the primary resource of fact-based mining and underground construction information

- 1. Identify all outside stakeholder groups for mining and underground construction.**
- 2. Establish a unique message that SME/UCA determines is a priority.**
- 3. Determine a cost effective method to distribute message.**

Goal C: Improve the perception of mining industry among the public and key constituents

- 1. Identify what organizations SME should work with to meet this objective and develop a “mini” strategic plan with related/identified parties to address.**

Goal D: Grow membership with a focus on:

- 1. 20,000 members by the year 2020!**
 - ◆ Determine geographic growth areas for SME membership.**
- 2. Define market segments for SME memberships.**
- 3. Explore joint membership among GMPA groups.**
- 4. Evaluate cyber memberships.**
- 5. Form corporate partnership to grow SME membership.**
- 6. Capture 50% of the geographically relevant mining engineering schools with student chapters.**

Goal E: Maintain a financially secure and stable organization

- 1. Maintain transparent budget review and development process.**
- 2. Improve the performance review process of all current/future SME products.**
- 3. Review SME’s investments and financial resources.**
- 4. Seek continuous operational financial improvement (grow revenues/control costs so we can expand benefits to members).**

Goal F: Nurture a vibrant engaged global network of local sections

- 1. Determine Local Section awareness at national level.**
- 2. Identify all current and possible touch points between national staff and local staff/ volunteer leadership.**
- 3. Grow Local Sections internationally.**
- 4. Create financial incentive for a partnership between National and Local Sections.**

IMPLEMENTATION

Action Plans

Action Plans are the specific steps that will be taken to implement the Strategies. Each step should include 1) what action will be taken, 2) when it be accomplished, and 3) who will be responsible for seeing it is done. The follow Action Plans also provide an indication of the priority associated with each action step and how progress will be measures and how success will be defined. Action Plans are a power tool for monitoring the progress and identifying areas that need additional attention.