

NCSSSA STRATEGIC PLANNING INITIATIVE  
SUBMITTED BY MARK D. SHELHAMMER, WV  
ON BEHALF OF THE STRATEGIC PLANNING AD HOC COMMITTEE  
February 3, 2016

SUMMARY

President MaryAnn Motza, Ph.D., asked Mark Shelhammer after the 2015 NCSSSA Conference to continue the work that she had started in developing a 3 – 5 year Strategic Plan for the NCSSSA. Through Dr. Motza’s leadership, a Mission, Vision and Core Values document was created and approved by the Executive Committee.

The mission, vision and core values act as the keystone of any strategic plan, answering important questions such as:

Why do we exist, and for whom? – Mission

Where do we dream to go? – Vision

What rules will guide us? – Core Values

These keystone statements allow the process to continue under a structure that ensures relevancy, progress and a moral compass. Accordingly, objectives need to be developed to allow us to progress towards our vision, to accomplish our mission under the moral obligations of our core values.

A team of NCSSSA members was created to develop 3 – 5 year objectives for the NCSSSA. The team was comprised of:

Mary Griffin, JD, Tennessee

T.J. Reardon, JD, Maryland

James Sawyer, Texas

Mark Shelhammer, Facilitator, West Virginia

Meghann Spring, Montana

These individuals were asked to participate due to their experience in NCSSSA, general acumen, and their ability to work collaboratively. Further, since several individuals in the group are in or will be in key organization leadership positions they would be best served in the “building” process. Each member brought their passion for the organization, their goodwill towards each other and their acumen as leaders to each and every meeting. It was my distinct pleasure to facilitate the efforts of this high performing group.

PROCESS

To enable the team to provide the Executive Committee with the next phase of the Strategic Plan, the team set its sights on the Vision statements:

- Actively promoting NCSSSA to all governors, their designees, and state appointed authorities
- Speaking with a common voice on national policy
- Sharing successful methods and guidelines to achieve the State Administrator’s responsibilities
- Supporting the principles of sovereignty<sup>1</sup>
- Expanding professional and personal growth opportunities available within NCSSSA

Then, through a process of individual brainstorming and consensus building, the team developed the “What to Do” (not to be confused with “How to do”) objective(s) that would help the organization realize its vision. The suitability test for each objective was simple, it had to be SMART! The acronym SMART is define as follows:

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<sup>1</sup> The consensus was that this statement was a core value, and as such no objectives were developed

**Specific** – The object must be clearly stated.

**Measurable** – The objective must have key performance indicator(s).

**Attainable** – The objective must be doable in the time allotted and with available resources.

**Relevant** – The objective must lead towards the Vision.

**Time Sensitive** – The objective must have a completion date.

The team responded to the process in a way that literally “blew my mind!” Each meeting was an opportunity for us to defend our positions and build a consensus (defined as the absence of strong disagreement) for each of the vision statements. The resulting list of objectives is submitted for your review and disposition.

## OBJECTIVES

**Vision Statement: Actively promoting NCSSSA to all governors, their designees, and state appointed authorities.**

Create the Value Proposition

- By end of year 1, the Executive Committee will develop the NCSSSA value proposition (e.g. why are we valuable to the State).
- By end of year 2, each committee chair will develop the value proposition for their committee.
- By the end of year 3, The Executive Committee will measure each committee against the value proposition and report accordingly.

Implement a Communication Strategy

- By end of year 1, Membership Committee define and develop a schedule for periodic communiques.
- By end of year 2, each committee submits information periodically to the Executive Committee.
- By end of year 3, Executive Committee survey stakeholders/adjust accordingly.

**Vision Statement: Speaking with a common voice on national policy**

- By 90 days prior to the spring leadership meeting in Washington DC, develop a list of platform statements for the membership to review with regional leaders to determine which is/are most beneficial.
- By the end of each quarter, the 218 Council liaison will provide reports to the Executive committee for dissemination to the members.
- By the Annual Conference date, develop the national policy agenda for presentation to the members.
- By the end of the quarter following the annual conference, provide an Annual Report of national policy to all governors and other state appointing authorities or delegateddelegee.

**Vision Statement: Sharing successful methods and guidelines to achieve the State Administrator’s responsibilities.**

- By the end of the 1<sup>st</sup> quarter 2016, the Training & Succession Planning Committee will develop a process to gather successful methods and guidelines.
- By the end of the 1<sup>st</sup> quarter 2017, the Executive Committee will determine a process to vet gathered successful methods and guidelines.
- By the 2<sup>nd</sup> quarter 2017, the Training & Succession Planning Committee will determine the process to communicate these successful methods and guidelines.

- By the 4<sup>th</sup> quarter 2017, the Training & Succession Planning Committee will determine the process of receiving feedback/modifying the successful methods and guidelines.

**Vision Statement: Expanding professional and personal growth opportunities available within NCSSSA.**

- By 6/30/16, each “Chair” will develop a leadership training/development program.
- By 12/31/17, the Training and Succession Planning Committee will modify online training courses covering the 218 basics to include a quiz at the end of each section before the user can move on.
- By 12/31/16, the Executive Committee will build and implement a mentorship program.
- By 9/30/16, the Training and Succession Planning Committee will determine viability of SSSA Certification
- By 9/30/16, the Program Committee, in cooperation with the Training and Succession Planning Committee, will develop a template to acquire continuing education credits.
  - CPAs, CLE’s, etc.
- By 1/1/17, the Program Committee will use templates to acquire *continuing education credits (CEC’s)* for the initiatives scheduled in 2017.
- By 12/31/16, the Training and Succession Planning Committee will develop prerequisites and standards of performance for each leadership position.
- By 12/31/17, the Membership Committee will develop narrative on how each leadership position benefits the individual and the NCSSSA.

**CONCLUSION**

The strategic planning process provides for a clear path to achieve organization vision(s), but requires a great deal of discipline. The measurability and time sensitivity of objectives fit in a discipline performance model, but has proven time and time again to be an effective way to optimize organization effectiveness.

It has been my pleasure to work closely with this committed group of colleagues not only on this important task, but also to get to each one a little better. I believe that each team member grew in their understanding of this common “management by objective” style. Further, I saw great leadership being displayed as each team member thoughtfully defended their positions by articulating their commitment for the greater good of the NCSSSA.

I thank President Motza for her confidence in my ability to facilitate, and look forward to working with her and my other NCSSSA colleagues in the near future.

**NEXT STEPS**

Once the objectives are decided upon each one should be given to an Executive Sponsor, hereafter, Sponsor.

The Sponsor has several responsibilities:

1. Build a Tactical Planning Team
2. Brainstorm possible solutions (“How”)
3. Determine resources
4. Delegate tasks
5. Follow-up to ensure that critical dates are met
6. Present recommendations/programs
7. Report progress as directed

# Proposed NCSSSA Mission/Vision/Core Values Statements

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## Who We Are

Founded in 1952, the National Conference of State Social Security Administrators (NCSSSA) is the organization of federally mandated State Social Security Administrators (State Administrators) who inform governors, legislatures, retirement system administrators, employers, and employees on issues regarding voluntary Social Security participation for state and local government positions. State Administrators monitor state and federal regulations to ensure proposals are not in conflict with existing law and inform state and local employers of changes affecting Social Security withholding.

## What We Do

NCSSSA is responsible for:

- Serving as liaison between State Administrators and federal agencies.
- Monitoring federal legislation for changes affecting Social Security, Public Retirement Systems, and withholding requirements.
- Providing education, training, and communication to stakeholders regarding the complexities of Section 218.

## Who We Serve

- Governors, legislators, retirement system administrators
- State Administrators
- State and local government employers and employees
- Federal officials – SSA and IRS (NCSSSA's partners in ensuring proper coverage and compliance with federal and state laws regarding Section 218 and mandatory Social Security and Medicare coverage)

## **Mission**

The National Conference of State Social Security Administrators is a community of State Social Security Administrators and designees throughout the United States, Puerto Rico, and the U.S. Virgin Islands. We work cooperatively with the Federal government, primarily the Social Security Administration and the Internal Revenue Service personnel, to serve our members, states, territories, and governmental employers/employees by providing education, training, and communication; and supporting state sovereignty;

## **Vision**

Carry forward the traditions of our organization while creating a valuable community of professional colleagues that maximizes participation by:

- Actively promoting NCSSSA to all governors and state administrators
- Speaking with a common voice on national policy
- Sharing successful methods and guidelines to achieve the State Administrator's responsibilities
- Supporting the principles of sovereignty
- Expanding professional and personal growth opportunities available within NCSSSA

## **Core Values**

### **Our Beliefs**

- Integrity and respect through action and interaction
- Professional and ethical representation of our organization
- Cooperation between and among members and our federal partners
- Accept and value individuals for their unique talents and contributions
- Accountability and responsibility for individual and collective actions
- Diligence in understanding and strengthening the individual and the organization
- Service to each other, the organization, and our constituents
- Continuity by seeking knowledge from a variety of sources to ensure leadership succession
- Maintaining state sovereignty

### **Our guiding principles**

- Establishing appropriate coverage for governmental employees
- Working as a team
- Exceeding expectations in all areas of responsibilities
- Addressing relevant issues within all levels of government
- Adapting to the changing environment in which we operate
- Sharing our knowledge and experience with all colleagues and associates