



marine technology

SOCIETY

Opportunity runs deep™

2011 STRATEGIC PLAN

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On February 7, 2010, a strategic planning group consisting of Board members and senior staff of the Marine Technology Society (MTS) met to update its long-range strategic direction. Bud Crouch, a principal partner of Tecker Consultants, LLC and president of Innovations Plus led the group through the planning process.

This planning document defines MTS's clear strategic direction. It is the planning group's consensus on what will constitute the Society's future success. It answers the following two fundamental strategic questions:

1. Why will MTS exist in the future? *Its reason being and core purpose.*
2. Where is MTS going? *Its future direction and goals.*

Planning Strategically:

The existence of this strategic direction and its successful implementation signals the leadership team's desire to lead MTS strategically. Developing a strategic direction is not a one-time event, but an ongoing commitment and process. The strategic direction represents a compass that will be used to guide and focus MTS's future strategic decision-making and ongoing operational work.

Strategic Focus:

Organizational strategic focus or intent is very important. One of the challenges that MTS faces is the fact that there is more it can do for members and key stakeholders than it has resources to accomplish. The temptation to do everything can often lead a not-for-profit organization to try to be all things to all people. Planning strategically is the counter to the all-things syndrome. It is about identifying a limited number of goals that MTS must undertake to move successfully into the future.

Strategic Approach/Philosophy:

The approach in defining the new strategic direction was not to identify what MTS wants to continue doing today (its current operational plan). Rather, the team determined what the Society is not doing today, but must engage in to be successful in the future.

This strategic direction is not about business as usual — ***it is about the change needed to stay relevant!*** This separates the strategic plan from the operational plan. Both are important. The strategic direction is a constant reminder, as the leadership team oversees the development of the annual operational plan, of what must be changed to stay relevant to what member are seeing in their real world.

Updating the Strategic Plan:

A strategic plan can only stay current and relevant if MTS insures that the plan is updated. It is the leadership team's *working document*. Therefore, the governing body has both the right and the responsibility to:

- 1) change the strategic plan anytime it needs to be changed based on sound reasoning and assessment; and
- 2) Update the plan regularly on an ongoing basis.

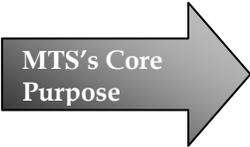
Long-Range Strategic Planning Horizon (10 to 30 Year Envisioned Future)



A 10 to 30 year planning horizon was developed, which consists of MTS's core ideology and 10 to 30 year envisioned future.

Core Ideology/Mission clarifies what must be preserved in an environment of increasing rapid and unpredictable change. Core ideology consists of MTS's core values and core purpose.

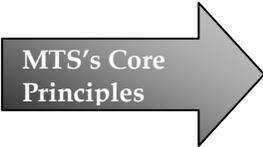
The **core purpose** describes MTS's very reason for being or existing — *why the organization will or should exist into the future* (10 to 30 years). What would be lost if it ceased to exist? What sense of purpose will motivate members to dedicate their creative energies to MTS and its efforts over a long period of time?



MTS's Core Purpose

To promote awareness, understanding, advancement and application of marine technology.

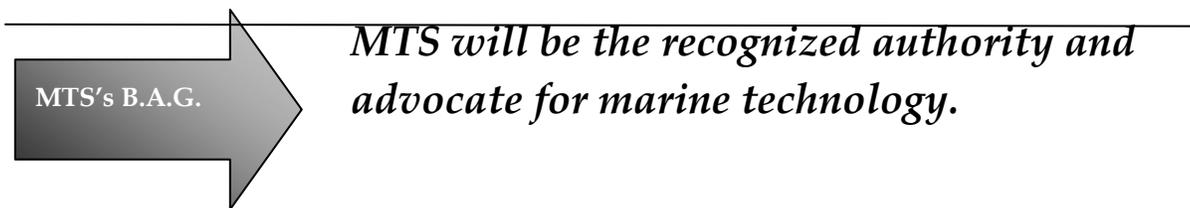
Our **Core Culture** includes a small set of timeless, guiding principles that do not require external justification. They only have intrinsic value and importance to MTS and its members. Core values are so fundamental that they seldom change — *if at all*. They define the behavior required in order for the organization to achieve its core purpose. Core values are so deep-seated and valid that MTS would preserve the core values even if it were admonished for having these values.



MTS's Core Principles

- ***Ethics***
- ***Integrity***
- ***Professionalism***
- ***Responsibility***
- ***Leadership***
- ***Innovation***
- ***Multi-Disciplinary Focus***
- ***Excellence***

The *10 to 15 year envisioned future* consists of a single, *big audacious goal (B.A.G.) or Vision*. The B.A.G/vision is a goal (that is MTS's vision statement) that stretches beyond MTS's current three to five year goals. Because it is "audacious" it represents a significant challenge and its achievement will require MTS to move outside of its comfort zone. It is clear and compelling to all members. It has a clear finish line which will take both time and a hard work to accomplish. The goal should stimulate leadership activity, commitment and participation beyond MTS's present leadership. It helps to set the direction for the succession of future three to five year strategic plans. MTS can only manage one B.A.G. at a time.



A vivid description shows what MTS and marine technology will look like when it successfully completes its Big Audacious Goal. The following description helps to clarify what is intended by the goal and provides measureable achievements (milestones).

MTS:

- Membership and membership retention is increasing.
- Membership is significantly more diverse (e.g. age, gender, race, language, etc.).
- Membership involvement and volunteerism in MTS is increasing at all levels
- MTS is recognized as the "go to organization" on all aspects of marine technology.
- The number of opportunities provided by MTS to impact significant issues in marine technology and policy is increasing.
- The Society has increased staff capacity and capability.
- The annual meeting is significantly growing with a more worldwide audience.
- The Society is more multi-disciplinary at all levels.
- MTS is financially secure and stable with a much more diversified revenue stream.

Strategic 3 to 5 Year Goals



The following represents MTS's goals that encompass its three- to five-year direction. These goals are outcome-oriented statements that lead MTS towards its envisioned future. These goals are not in any order of priority. All of the goals will need to be accomplished, if MTS is to fully achieve its three to five-year quest.

No later than 2015:

Goal A. *MTS will be members' preferred gateway for cross discipline networking and professional growth.*

Goal B. *MTS will be a powerful voice for marine technology.*

Goal C. *MTS will be a leading resource for the exchange of marine technology information, knowledge and opportunities.*

GOALS & STRATEGIES



Strategies indicate how MTS will organize, focus and expend its resources and actions to maximize its effectiveness and efficiency in achieving its three to five year goals. The strategies must be reviewed and updated on an annual basis.

The strategies were rated in importance of when they should be undertaken (implementation timing). The three ratings include:

- High:** *Work on this strategy must be undertaken in the next program/fiscal year.*
- Medium:** *Work on this strategy should be undertaken in the next program/fiscal year if at all possible.*
- Low:** *Work on this strategy can wait until a subsequent program/fiscal year if necessary.*

Milestones are used to determine the overall progress toward a goal. They indicate how close MTS is to achieving a goal as it executes the individual strategies for each goal.

The milestones measure goal achievement, not strategy achievement.

Goal A: *MTS will be members' preferred gateway for cross discipline networking and professional growth.*

Strategies:

- A1. **(High)** Improve and expand cyber tools for x-discipline networking and profit growth.
- A2. **(High/Medium)** Improve support for existing workshops.
- A3. **(Medium)** Seek opportunities to use MTS's voice
- A4. **(Medium)** Grow OCEANS and improve its relevance to stakeholders.

Milestones:

Improve the impact of professional growth opportunities by increasing:

- number of hits on MTS's website.
- membership.
- membership retention.
- diversified non-dues revenue.
- conference attendance.
- member participation (volunteers).
- impact of MTSJ
- favorable member feedback.

The existence of:

- cyber tools for networking.
- novel opportunities for professional growth.

Goal B: MTS will be a powerful voice for marine technology.

Strategies

- B1. **(High)** Promote internally and externally the *voice* of MTS (e.g., council, sections, publications, agencies, media).
- B2. **(High)** Develop the tools needed to respond to opportunities to use MTS's voice (e.g., staff, partners, experts (database), and media).
- B3. **(High)** Develop a leadership program to build MTS's powerful voice capacity.

Milestones:

An increase in:

- overall exposure, public awareness and brand.
- meaningful press releases from members.
- archived press releases on its website.
- requests for technical information by government officials and agencies at all levels.
- invitations to inform all stakeholders.
- more marketing activities.
- marketing tools.
- staff resources to support this goal.
- more favorable media coverage.

The existence of:

- a leadership program.

Goal C: MTS will be a leading resource for the exchange of marine technology information, knowledge and opportunities.

Strategies

- C1. **(High)** Create an infrastructure to respond to request for information that includes an experts database with filter and to clarify POC and mechanism.
- C2. **(High)** Improve access to MTS knowledge through:

- Wikipedia links,
- access to MTS publications (MTSJ past and present), Currents, Enews, website, conferences proceedings, and archives, and
- new publications and books (Amazon, JIT Publishing).

C3. **(Medium)** Expand MTS's marketing strategies to attract members and increase participation from a wider audience (e.g., government, members, potential members (students, corporate), industry, academics, the public, media and international audiences).

C4. **(Low)** Identify and disseminate information on new opportunities in:

- emerging technologies,
- emerging external funding,
- technical workshops, and
- industry days (focused workgroups and cross discipline workgroups).

Milestones:

An increase in:

- calls for information or requests for speakers.
- the worldwide use of MTS information and knowledge.
- the "easability" to quickly access MTS information and knowledge.
- marketing and two-way communication with broader audiences worldwide.
- topical workshops and conferences convened by MTS.

The existence of:

- a complete electronic archive of MTSJ.
- a posted MTS Wikipedia page.
- a fast response infrastructure to field requests for information and knowledge.
- resources allocated to this goal.

STRATEGIC ASSUMPTIONS



The respondents identified the following assumptions about the most significant, future (two to seven years) external conditions, trends and major forces, etc. that they believe will impact marine technology and the profession in the future

Financial:

1. The economy will continue to have a major role in dictating many related decisions and resulting tighter budgets.
2. There is less interest by the federal government in funding high risk technology development.
3. Defense budgets are unlikely to grow significantly and thus the economic drivers of marine technology may shift.
4. There is a gradual reduction of funding in the US education system, which is causing a reduced focus on science.

Governmental:

5. There will be far more government regulations and intervention into marine technology on a global basis.
6. There seems to be an increasing recognition of the importance of the oceans for commerce, environmental health and recreation.
7. The federal administration is working on an ocean agenda that might include “use zoning”. All this attention will increase the need for marine exploration, monitoring and management.
8. There will be increased political issues revolving around oceanic boundaries (e.g. ownership of the ocean and sea floor).

Environment:

9. The demand for alternative energy sources due to environmental and energy security concerns is gaining momentum and funding dollars.

10. Climate change, ocean acidification, and other major related issues will make use of technology for research, monitoring and solutions.
11. Increasing population and resulting impact on coastal and open ocean ecosystems require improved scientific and technical responses.

Marine Technology:

12. All the activities listed under “environment” above rely heavily on marine technology so this trend should present a major opportunity growth for marine technology.
13. New technologies will advance the growth of oceanic technology industries.
14. The proliferation of competing opportunities to acquire information and professional networking will challenge MTS to find ways to remain relevant.

Indirect Impacts on Marine Technology Issues:

15. There will be less ship time available.
16. There will be less willingness for U.S. crews to be at sea for long durations.
17. There will be less hands-on project based engineering exploration in schools.
18. The marine technology manufacturing base is moving overseas.
19. Evolution of existing and next generation energy sources.

Mega issues are overriding issues of strategic importance that cut across multiple goal or outcome areas. They address key strategic questions that MTS must answer, illuminating choices that the organization must make and challenges that need to be overcome to better serve its members, fulfill its purpose or mission and to successfully move into the future

Strategic:

1. How does MTS proceed to become a more global organization?
2. How does MTS identify opportunities for membership growth?
3. How does MTS ensure its financial stability?

Membership Benefits and ROI:

4. How can the Society best use utilize social media to provide effective networking opportunities for the current and new generation members and within the marine technology community?
5. How will MTS better compete with growing competition?
6. How does MTS ensure/increase membership value and satisfaction?
7. How MTS can put into place an ongoing internal scanning process to identify what motivates members, especially younger members? What will cause them to contribute, how do they like to communicate, and what interest areas do they have?

Member Groups:

8. How does MTS encourage stronger and more vibrant sections and committees?

Key stakeholder:

9. How can MTS increase the engagement and support of the profession's CEO's and senior management to strengthen the Society and its volunteer work force?
10. How can MTS improve its support of senior management through professional development opportunities for the industry work force?

Reputation, Image, Brand:

11. How does MTS increase its visibility as a relevant resource and proactive advocate for marine technology?
12. How does MTS improve its image and brand?

Volunteers:

13. How does MTS develop its volunteer and leadership succession planning?