



WUSATA 2019 Strategic Plan

BACKGROUND and PURPOSE

WUSATA is a not-for-profit export association whose primary function is to develop export markets for Western U.S. producers and processors of value-added food and agricultural products. The Association provides and facilitates international marketing services and financial assistance through its member states to producers and exporters through established programs, export assistance and educational resources.

WUSATA's last strategic plan was conducted in 2007, and with the 2018 Farm Bill, as well as increased competition for MAP funding by FAS cooperators, the Association saw a need to evaluate its current programs and how it works with its state partners in order to better understand where and how it might improve performance and focus future resources for maximum benefit.

Contracting with World Perspectives, Inc. (WPI), WUSATA conducted the (June 2018) research study, "Strategic Evaluation and Opportunity Assessment". The study provided several opportunity areas for improvement and also, some strategic recommendations. On November 14, 2018 the Association held a day-long strategic planning session in Denver. WUSATA staff and Directors, SMOs and PMs from the 13 western states and American Samoa attended. The purpose of the meeting, facilitated by Brandwerks, was to discuss collaboratively key issues and opportunity areas for improvement in order to help provide direction for the Strategic Plan. Much of that discussion and consensus is incorporated within the 2019 Strategic Plan that follows.

At the November 14 meeting, it was agreed to assign strategic planning to the Policy Advisory Committee (PAC).

The 2019 Strategic Plan addresses key improvement areas that may be realistically executed in 2019. The planning process and resulting performance improvement will take time to bear fruit, particularly as the states and WUSATA improve how they work together and accelerate the planning calendar to meet company customer needs. As such, 2019 should be considered "work in progress".

The 2019 Strategic Plan provides Vision, Mission and Core Value statements – a first for the WUSATA. This gives the Association and its state partners a clear understanding of mutual purpose and what they believe in, and what they will strive to achieve. For 2019, three major Strategic Objectives are identified, along with coinciding Initiatives. Performance metrics for the goals are required in order to evaluate performance, and will be provided by the 2019 Policy Advisory Committee as it finalizes the Strategic Plan.



VISION	Our vision is to become agriculture’s leading export resource and connect our customers to a world of opportunities.
MISSION	Our mission is to collectively offer a range of export education, market opportunities and funding programs to western agricultural companies we serve to help them grow and succeed globally.
CORE VALUES	<ol style="list-style-type: none">1. We are one team and only together we succeed2. We strive to be your export experts3. It’s our nature to serve4. The customer always decides5. We’d rather listen than talk6. For us, great just isn’t good enough7. We deliver WOW through exceptional service8. We hold ourselves accountable for your success9. We welcome and leverage collective genius10. We are open-minded, innovative and adventurous



STRATEGIC OBJECTIVES AND INITIATIVES

Strategic Objective #1

To develop and foster a more effective relationship with our state partners resulting in our mutual success.

Initiative 1

Policy Advisory Committee (PAC). Retool the PAC and its role and responsibilities to provide greater strategic direction and oversight.

1. Establish the committee and its “charter”, e.g., purpose, scope/responsibilities, how/when it reports to BOD, meeting frequency, current members, etc. PAC to meet, discuss and output white paper PAC Charter document.

Goal
By WUSATA BOD meeting at 2019 NASDA Winter Policy

Results
PAC resolution ratified by WUSATA BOD 2/24/19

Initiative 2

Organization/Operations. Identify and execute any needed organization, operation, program and process improvements to meet state partner and market needs.

1. **Roles, Responsibilities, Policy and Process.** PAC works with WUSATA staff and states to review operational roles and responsibilities, best practices, policy issues and recommend any needed changes to the Board for approval.
 - a. **Operational roles** for WUSATA staff, SMOs and PMs
 - b. **Best practices** (e.g., inbound and outbound trade missions)
 - c. **Policy issues** (e.g., subsidization and participation fees)
 - d. **White papers** (e.g., cooperator overlap, etc.)
 - e. Once finalized by PAC and approved by Board, WUSATA staff creates and maintains **Policy Manual**
2. **Ad Hoc Work Group.** Create an integrated, ad hoc small working group to (holistically) review and recommend any potential improvements to process, policies, training needs and (GC, FM and EE) program effectiveness.
 - a. **Members.** Comprised of 3-4 state SMOs/PMs and WUSATA program managers. State member volunteers will be selected by the PAC and will serve on a rotating basis based on policy need and member expertise.
 - b. **Meeting Frequency.** TBD, consider one per quarter

Goal
1. WUSATA to send out documents, and PAC to review and approve current operational and best practices and present to the BOD for approval at the July 23 meeting

Results



Initiative 3

Communication. Improve communication and transparency with our state partners.

1. Improve communication between WUSATA staff and states to ensure greater transparency and outreach continuity (e.g. “FM Tip of the Month”) and other updates that include requested and desired information.
2. Consider a Denver-like check-in session at the (July 22) 2019 summer meeting to keep open dialogue between states and WUSATA (*Note: PM participation TBD. PAC to discuss with BOD given budget and Hawaii optics*).
3. PAC updates to all state partners. Minutes, when approved by PAC to be sent directly to all BOD and SMOs and also posted online via WUSATA website.

Goal

Results

Initiative 4

Training. Enhance our internal and state project manager training.

1. Ad Hoc Work Group and PAC to review specific WPI recommendations. (*see Appendix 1, page 9, below*). Fine-tune and implement with extensive input from state partners.
2. Interviews with select (JR/SR) PMs and SMOs to identify learning objectives for (a potential) survey of PMs/SMOs for their recommended training needs (TBD).
3. With survey results, identify and prioritize specific training modules, e.g., “MAP 101 and several others (TBD).
4. Fine-tune training modules and content with JR/SR PMs, and gain agreement.
5. Assign development and execute.
6. On-going process. WUSATA/states to evaluate, collaborate and share ideas.

Goal

Results



Strategic Objective #2

To increase program effectiveness and utilization by improving our planning/evaluation processes and executional performance.

Initiative 1 Planning. Improve and accelerate the planning process and timeline to coincide with our customers' planning/budget cycles.

<ol style="list-style-type: none"> 1. Create and implement the annual planning calendar for Global Connect activities. Also, review the WPI planning matrix. Finalize and announce by August 1 of the preceding year. 2. PAC to review, seek input where needed (e.g., Ad Hoc Work Group), finetune and present to BOD for approval. 3. Start with draft calendar (<i>see Appendix 2, page 12 below</i>). 	<u>Goal</u>	<u>Results</u>
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Initiative 2 Program Improvement and Evaluation. Review and measure WUSATA programs effectiveness annually; identify areas for improvement and innovation; establish goals and performance metrics.

<ol style="list-style-type: none"> 1. Separate Global Connect and FundMatch (FAS) performance measures. 2. Create baseline average of all FAS performance metrics based on 5-year averages. 3. Work with PMs and SMOs to identify additional (WUSATA-specific) goals and metrics. <ol style="list-style-type: none"> a. Utilize the integrated Ad Hoc Work Group to provide ideas for process and market improvement (<i>see Strategic Objective #3, below</i>). b. Consider an “annual review” process leading up to the Winter Meeting or included within the meeting schedule. Also consider update/check-in at summer meeting to review progress. 4. Establish 5-year goals for all metric areas and monitor performance (<i>see below</i>). 	<u>Goal</u>	<u>Results</u>
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Metrics & Goals

FAS Performance Metrics		Actual		Goals				
		5-yr Avg	2018*	2019	2020	2021	2023	2024
1.	Actual sales during a MAP funded activity (\$M)							
	Global Connect	90.7	151.2					
	FundMatch	586.4	330.3					
2.	No. of companies making export sales	176	114					
	Global Connect	122	131					
	FundMatch							
3.	No. of companies making first-time export sales							
	Global Connect	29	23					
	FundMatch	54	57					
4.	No. of U.S. companies receiving communication about WUSATA's programs							
	Global Connect							
	FundMatch							
5.	No. of unique companies participating in all WUSATA's activities							
	Global Connect							
	FundMatch							
6.	Average customer service rating, on a scale of 1-5 (1-low, 5-high)							
	Global Connect	4.6	4.8					
	FundMatch	4.6	4.7					
7.	No. of unique companies participating in a FundMatch or Global Connect activity							
	Global Connect	450	358					
	FundMatch	209	244					
Additional WUSATA Performance Metrics (TBD)								
1.	MAP Allocation Utilization Rates							
	Global Connect							
	FundMatch							
2.	No. of FM companies participating in GC activities							
		<i>* figures not yet final</i>						



Objective #3

To better understand and meet the needs of our customers, and to increase their export opportunities and sales by becoming more company-focused and market-driven.

Initiative 1 **Market-Driven Culture.** Help foster a *market-driven culture* by adopting a team-driven, integrated holistic approach to market planning, goal setting and execution for the three program areas (GC, FM and EE).

	<u>Goal</u>	<u>Results</u>
<p>State PMs (and SMOs) are closest to exporting companies. Enhance WUSATA Global Connect, FundMatch and Export Education effectiveness by implementing an integrated holistic process to planning.</p> <ol style="list-style-type: none"> 1. Ad Hoc Work Group <i>(also see Strategic Objective #1, 2-2, above)</i> <ol style="list-style-type: none"> a. Form the integrated, state/WUSATA Ad Hoc Work Group. Assign volunteer members and determine roles/responsibilities based on specific marketing needs and member expertise. 2. Global Connect Development Goals/Strategies <ol style="list-style-type: none"> a. Ensure alignment between state priorities and WUSATA programs, as identified by need, available data and analysis. b. Improve WUSATA's program performance in relation to key FAS/WUSATA metrics. c. Ensure better PM representation/participation in Global Connect program development and gain (PM) input in creating an annual marketing strategy/plan for the organization to enhance the Country Work Groups. d. Ad Hoc Work Group(s) to review planning matrix and recommend country targets to the PAC for the Country Work Groups. e. Country Work Groups and Ad Hoc Work Group to review and implement PAC-approved strategies/programs. f. PMs within the Country Work Groups work with companies to suggest ideas for FM participation. 		



	<p>3. FundMatch Development Goals/Strategies</p> <ul style="list-style-type: none"> a. Fund Match works to implement Ad Hoc Work Group and PAC-approved strategies and plans. b. Foster better linkages between Global Connect and FundMatch. c. Ongoing review and recommend changes for process improvement. d. Develop training and increase participation for state partners (<i>see Objective #1, Initiative 4 "Training", above</i>) <p>4. Export Education Development Goals/Strategies</p> <ul style="list-style-type: none"> a. Increase awareness of WUSATA and its programs in order to improve trial/participation rates and customer acquisition. b. WUSATA staff and states to collaborate and share ideas and best practices with states and companies. Ad Hoc Work Group to aid in this process, as well as other avenues (e.g., Winter/Summer meeting roundtable discussions, etc.). c. Solicit recommendations from companies with a lot of participation, e.g., what would they have liked to have known up front. d. Establish goals for marketing outreach. Potential focus areas: increase customer acquisition (increasing customer contacts, sharing customer contact information; improving messaging where needed; improve training modules; revamp Global Positioning Service (GPS) e. Improve marketing Communications e.g., database development, e-newsletter, social media, direct marketing, etc. 			
<p>Initiative 2</p>	<p>Research. Bring WUSATA and its state partners closer to the companies through better understanding of company and consumer needs/wants.</p> <p>Market and Consumer Research</p> <ul style="list-style-type: none"> 1. Define research needs/goals and needs of companies with input from the state PMs/SMOs. Assign to the Ad Hoc Work Group. 2. Conduct an in-depth evaluation of Global Connect companies every three years with phone surveys as well as a desk audit of on-line feedback. 3. Conduct an in-depth evaluation of FundMatch every three years with both on-line surveys and phone interviews. 4. Programs need to be supported through research/trends. Ad Hoc Work Group to share research findings, implications and recommendations with the states. 	<p><u>Goal</u></p>	<p><u>Results</u></p>	



APPENDIX 1

1. TRAINING. New, comprehensive project manager training program (WPI Recommendations)

In its current state, WUSATA's training program takes advantage of limited opportunities to train project managers and provides a high-level, one-day program that seeks, at a minimum, to provide a base of knowledge for its key collaborators. However, WPI's evaluation findings point to continued misperceptions regarding MAP regulations, program areas, roles and responsibilities, etc. Much could be gained by a more comprehensive training approach for state project managers that adhered to a structured, step-by-step timeline.

Ultimately, the goal of any training regime that WUSATA operates should be to improve the shared base of organization-stakeholder knowledge, thereby increasing efficiency and effectiveness of WUSATA's programming and services to its constituents. In keeping with WUSATA's expressed goal of setting a new standard for program accomplishment, WPI recommends that a new training program be rolled out as follows.

Note that the proposed training program should be *mandatory*, to the extent possible, for all new WUSATA state project managers. Further, WUSATA should seek maximum inclusion and leveraging of the technology resources at the organization's disposal. Webinars and e-resources could be effectively employed in all the following training program phases – ultimately, a guidebook outlining the training process should be posted on and accessible via WUSATA's web platform. Finally, this program emphasizes inclusivity, drawing on the shared knowledge of WUSATA staff *and* veteran state project managers to provide comprehensive training.

- ✓ **Phase 1:** WUSATA staff introduces new project managers to the MAP program, providing a clear, concise overview of the holistic mission of the program, how SRTGs compare with product-specific cooperators, as well as the rules and regulations that govern WUSATA's efforts. This would be an appropriate place for WUSATA to provide an overview of fraud prevention practices that are necessitated by MAP regulation.
 - Duration: approximately 2-4 hours.
 - Focus: addressing what can and can't be done under the MAP program, heading off any future confusion regarding issues such as cooperator overlap. This is essentially FAS 101.

- ✓ **Phase 2:** WUSATA staff provide an overview of WUSATA's operations and programs. Included in this session is a snapshot of WUSATA's strategic vision, as well as presentations by program-area directors (marketing and outreach, Global Connect and FundMatch) with emphasis placed on how WUSATA's program areas can work together in serving participant companies.
 - Duration: approximately 4 hours.
 - Focus: ensuring that a baseline understanding is provided and familiarizing trainees with key WUSATA staff.



- ✓ **Phase 3:** WUSATA marketing and outreach staff, in collaboration with a veteran project manager,¹ outline the roles and responsibilities of state-based staff in their collaboration with WUSATA, specifically the process of *marketing and outreach* to prospective companies. This session includes examples of successful WUSATA companies, success stories in marketing and outreach delivered by the veteran project manager, and further discussion on how Global Connect and FundMatch programs are key points in a company's progression through WUSATA's services.
 - Duration: approximately 4 hours.
 - Focus: leveraging both the WUSATA staff and veteran project managers' expertise in how WUSATA's programs should be effectively marketed in a given state, with emphasis on the fact that successful program outcomes naturally begin with effective, targeted company recruitment.
 - Note: How can we define the "right" type of FundMatch company? A few thoughts below:
 - The "right" company has a clear understanding of WUSATA's Global Connect program, and ideally has some experience with Global Connect activities.
 - Broadly, WUSATA serves small- and medium-size enterprises. What does that mean? For the purposes of relation to the FundMatch program, one way to measure size is in staff resources. Ideally, a company has at least some focused staff time it can devote to the administrative requirements inherent in the FundMatch program.
 - The company has a documented interest in exporting their product(s) to international markets. This does not necessarily mean the company has a start-to-finish export promotion plan (WUSATA can assist with this refinement) but evident must be the a) interest, and b) concept of an approach.

- ✓ **Phase 4:** WUSATA staff, in collaboration with a veteran project manager, outline the roles and responsibilities of state-based staff in their collaboration with WUSATA, specifically the process of *strategic development of Global Connect activities*. This should emphasize the activity planning process and WUSATA's holistic view of company progression through the association's programs.
 - Duration: approximately 2 hours.
 - Focus: emphasis is placed on the rigor that is necessary to strategically plan activities, using a refined activity planning tool that considers a series of key metrics.

- ✓ **Phase 5:** the trainee participates in the Mentor Program, whereby they attend a Global Connect activity (inbound mission, outbound mission, or trade show) with a veteran project manager to observe firsthand how up-front recruitment and strategic planning come together to result in an effective activity that results in success for participant companies.
 - Duration: dependent on activity.
 - Focus: this phase is the first taste of in-the-job training for a new project manager. Note the opportunity for consistency and phase-to-phase linkages here: the veteran project manager that participated in Phase 4 could also function as the mentor during Phase 5.

¹ Defining "veteran project manager" is an exercise that might best be undertaken by the Policy Advisory Committee. However, WPI suggests that a minimum requirement be a certain number of years working in collaboration with WUSATA (e.g. 3-4) and experience directly managing a minimum number of WUSATA activities.



- ✓ **Phase 6:** the trainee engages with WUSATA staff in a follow-up session to pose any additional questions regarding the roles and responsibilities of state staff in their work with WUSATA.
 - Duration: approximately two hours.
 - Focus: provides another opportunity for trainees to ask questions and clarify roles/responsibilities following an intensive training program. Further, this session ensures that WUSATA can gather feedback regarding the effectiveness of their training programs and adjust accordingly going forward (via a brief questionnaire completed by the trainee). WUSATA may also want to consider a final questionnaire that reviews the program's key learnings, thereby ensuring that the trainee has retained critical information.

Aside from Phase 5, all phases of this training program can be conducted via interactive webinar – again, an excellent opportunity for WUSATA to leverage its extensive technology resources and further generate returns on an already proven investment of MAP funds. Phases should be broken up into manageable sessions so that trainees can focus on a smaller basket of subjects, which should assist in information retention. Note the key themes that weave throughout every phase of this proposed training program:

1. All efforts are driven by WUSATA's overall strategic vision and bound by key MAP regulations.
2. Collaboration between WUSATA staff and state project managers is crucial – this is an inclusive program.
3. Effective marketing and outreach coupled with a strategic activity planning process heightens chances for company success in export markets.
4. Successful companies likely proceed through the Global Connect program into the FundMatch program, where they can utilize larger amounts of MAP funds.
5. Process is key. This training program is designed as a start-to-finish process, which will ensure that new project managers understand the importance of processes in effectively tackling their responsibilities. Further, an evaluation component is built in to the program, ensuring that the program's effectiveness can be measured.



APPENDIX 2

DRAFT CONCEPT/UES MODEL

Proposed Timeline:

UES Process - Draft	Timeline
Ad Hoc Work Group - Evaluates past year activities	July/August
Ad Hoc Work Group - Provides metric targets/guidance to Market Groups	September/October
States submit activity concepts to Work Groups	November/December
(Winter Meeting) - Work Groups meet and finalize projects	January
UES Write-ups due	February - April
PMs work to finalize project dates for upcoming year	February - June
Final Activity Dates submitted to WUSATA	July
Activity Dates Publicly Announced/FundMatch	August
Activity Year Begins	January
Ad Hoc Work Group - Provides metric targets/guidance to Market Groups	September/October

Definitions:

Ad Hoc Work Group: Integrated team consisting of WUSATA Global Connect Manager and 2-3 state representatives (SMO/PM).

Country Work Group: Traditional WUSATA Country Work Groups consisting of States PMs.

Key Goals:

- Make PMs part of Global Connect management and participate in creating an annual marketing strategy for the organization
- Ensure alignment between state products and WUSATA programs, as driven by available data and analysis (WPI)
- Provide success in improving WUSATA’s program performance in relation to key FAS/WUSATA metrics.



Draft Model Work Flow:

1. States participate in monthly country workgroup calls – project updates, budgets, etc. (MONTHLY)
2. The Ad Hoc Work Group would evaluate past year activities/metrics and provide guidance to Market Groups. This guidance would consist of, but not limited to: (SEPTEMBER/OCTOBER)
 - a. Evaluation of past year projects in relation to key FAS metrics
 - b. Providing Market Target/Goals for key FAS Metrics
 - i. Country Workgroup target for actual company sales
 - ii. Country Work group target for # of participating companies
 - iii. Country Work group target for first time export sales
 - iv. Other potential targets – # of fund match companies, # of distributorships, etc.
 - c. Estimate MAP Budget for Market (Guidance) – based on Matrix/past performance
3. States would submit UES concepts to Country Work Group for discussion/consideration (NOVEMBER/DECEMBER). Work group would need to evaluate activities based on Global Connect Guidance/Ad Hoc Work Group and propose activities best positioned to meet Work Group targets/goals. Historic performance and market data is evaluated by Work Group (WINTER MEETING)
 - a. Potential for activity matrix evaluation
4. Work Groups present market strategy, activity goals to WUSATA Group for overall consideration and activity discussions (budgets, partner, etc.) The WUSATA Group finalizes UES activity plans (WINTER MEETING)
5. PMs work to submit activity write-ups (FEBRUARY-APRIL) and finalize activity dates (FEBRUARY-JUNE)
6. PMs submit activity dates to WUSATA (JULY), WUSATA publishes dates (AUGUST)