

Instructions for Executing the SAR 2030 5-year Operational Plan

The SAR operates on a recurring 10-year Strategic Plan cycle setting goals and objectives for the organization per our Bylaws. The Strategic Plan addresses the question, ‘where and what do we want the SAR to be in 10 years?’ We employ a 5-year Operational Plan to provide organizational flexibility in adjusting those goals and objectives to account for changes in the environment, to take advantage of opportunities, or otherwise adjust to challenges encountered in the execution of the 10-year Strategic Plan.

With one-year General Officer terms, and one- to two-year terms for the elected officers in the states, the SAR incurs a corporate institutional instability that introduces a natural challenge in keeping the organization focused on the near and far term goals and objectives established in the Strategic and Operational Plans. One way to tackle this issue is to use the SAR 2030 5-year Operational Plan as a framework or roadmap for the state societies, committees, and national leadership implement programs that will accomplish stated goals and objectives.

A Status Report has also been developed to track the execution of the goals and objectives approved by the ExCom and Trustees. The purpose of the Status Report is to provide a visual tracking tool that shows SAR leaders, the ExCom, committee chairmen, and state presidents where we are in the execution of those Goals and Objectives. The Status Report is not the Plan. The Status Report is a reader’s digest version of the Plan designed to fit into two pages for ease of discussion during ExCom meetings. For more details on the Goals, Objectives, and Responsible Agents, refer to the SAR 2030 5-year Operational Plan or the individual progress reports from the Responsible Agents.

Funding Designations: F = Fully Funded; P = Partially Funded; N = Funding needed but not provided; NR = Funding Not Required.

On Track: YES = Your program/project is on schedule to complete the objective per the Operational Plan. NO = Your program/project is behind schedule and will not complete the objective on time.

Overall Color Ratings: The intent of the Status Report is to show SAR Leadership using a simple visual format where the program/project is in the execution of the Operational Plan.

If your program/project is on track and on task with sufficient funding to complete the Objective, and you do not need any further assistance, then the rating is GREEN.

If your project is falling behind or lacks funding, direction from Leadership, or assistance from another committee or agency, but with help could get back on track, then the rating is AMBER.

If the Objective is not on track and in danger of failing to miss the due date of the objective/task per the Operational Plan, it is rated RED. A RED rating is a cry for help from the Responsible Agent/committee responsible for the execution of that objective and requires the immediate attention and involvement of the ExCom.

If no report is received, then the area will be colored WHITE.

Responsible Agents:

The role of the Goal-level Responsible Agent for Goals 1-6 is typically a General Officer who:

1. Oversees the Lead Committee(s) for the associated Objective-level tasks and to assist in soliciting help from other committees and to organize them into a joint working group.
2. Oversee the joint working group progress on the Objective-level project plan.
3. As necessary, make suggestions on overcoming (real or perceived) barriers, seeking resources/funding, and ways to return or stay on schedule.
4. Every two months, collect and review for accuracy the status reports from your Objective-level Responsible Agents. Provide the reviewed/corrected reports to the ExCom via the Strategic Planning Committee Vice Chair Jim Kuykendall at jimkuy55@gmail.com.
5. Be prepared to answer the ExCom's questions at the next ExCom meeting.

The role of the Objective-level Responsible Agent (Objective A, B, C, etc.) is to:

1. Act as the Lead Committee for the Objective-level tasks.
2. Solicit assistance/commitments from other committees for participating in a joint working group.
3. Organize and lead the joint working group in the development and execution of an integrated project plan.
4. Consult with the Goal-level Responsible Agent on the viability of the integrated project plan and seek help overcome (real or perceived) barriers, request for resources/funding, and ways to get back or stay on schedule.
5. Every two months, provide accurate and timely status reports to the Goal-level Responsible Agent using the Committee Progress Report form.

	Status Report Due Date	ExCom Date
1	September 14, 2025	September 28, 2025
2	November 9, 2025	November 23, 2025
3	January 11, 2026	January 25, 2026
4	March 8, 2026	March 22, 2026
5	May 10, 2026	May 24, 2026
6	July 1, 2026	July 10, 2026