

Model of a Strategic Issue

In order to present an Issue to the board, prepare an issues paper following this guide.

Author: _____

1. Define the Issue

In a couple of sentences, raise the concern, outline the challenge, present an opportunity, or question needing an answer? A strategic issue is a major affair for the organization as a whole, and has long-range implications.

2. Why is it Significant?

What may be the impact on dollars, people, products/services, customers ...

3. An Ideal Outcome Would Be -

What is the desirable outcome?

4. Relevant Background Information

You will write the most here, but put it in bullet point format, not an essay. What gave rise to this Issue — how/why/when/where? What players are involved? What forces (e.g. competition, technology ...) are impacting or will impact the organization? What is the situation now? What future changes may be caused by this Issue if left unresolved?

5. What Have You Done So Far?

What actions have you taken, if any? What actions have you considered?

6. What Do You Want from the Discussion?

What help do you want from the directors and managers present for the discussion? For example, one or more of the following:

- to be sure you are considering the right question,
- to challenge your analysis,
- to offer possible solutions,
- to give you confidence that you've on the right track,
- to identify inputs or alternative actions that haven't occurred to you,
- to enhance the identification of possible consequences,
- to critique your current plan/your answer questioned,
- to suggest sources of additional needed information ... ?

Strategic Issue

Author: _____

1. **Define the Issue**
How can we stimulate membership growth?
2. **Why is it Significant?**
The future viability of the credit union depends on new generations of members or, as member pass on, we will wither and die.
3. **An Ideal Outcome Would Be -**
A diverse and steady growth of members will keep us vital.
4. **Relevant Background Information**
 - Over the last ten years, we saw 70% of our net membership growth in the first three years. Since then, the growth rate has steadily declined from 4 – 5% annually, to a recent year at negative growth.
 - Population growth in our market areas has been slow, but steady.
 - No other financial depository institution seems to be gaining more growth than we are.
 - The growth strategies of the competition are not evident.
5. **What Have You Done So Far?**
 - We have continued to advertise and promote services using billboards, newsletters, and direct mail to well-chosen community lists. While we should continue these efforts for awareness, management does not believe that increasing the budgets of these channels is in order.
 - Under consideration are: Member and community events that draw crowds; financial literacy seminars; strategic partnerships with organizations
6. **What Do You Want from the Discussion?**
I would like to hear an open discussion and brainstorming. All ideas in marketing, advertising, and public relations are welcome—no judgments made. Management is open to all product and service enhancements, additions and deletions. We will feed these ideas into our ongoing marketing discussions.

Note: actual issues papers may not need the headings. Use your creativity and imagination.