

Strategic by design: Board plans for future


For those who are familiar with Stephen R. Covey's classic *The Seven Habits of Highly Effective People*, you may remember that the second habit is Begin with the End in Mind. This is the habit of envisioning the future—where you want to go—before setting out the plans to get there. It also involves examining what you're about and setting priorities about what is most important. (The first habit, Be Proactive, empowers you to take control of your future.)

The spirit of these two habits will be in full force in the coming months as the PCI Board of Directors embarks on a strategic planning process, the first since 2013. At the June 2017 summer meeting in Denver, Colo., the board participated in a workshop designed to reorient board activities on a more strategic level, rather than focusing solely on operations. As part of that discussion, the board unanimously agreed that it should set out to develop strategic plans for the institute for the next three to five years or, in some cases (such as codes and standards), perhaps even a longer period of time.

The plan is to meet November 29 and 30 in Chicago to further define PCI's mission, identify functions that are member priorities, and set goals that address those priorities. In December, the PCI staff will identify costs and personnel necessary to meet those goals. The Task Group on Funding and Reform will meet in January 2018 to make recommendations to the board on options for resources necessary for the plan. The goal is for the board to adopt a strategic plan that can begin to be implemented with the 2018–2019 budget.

You, the members, are PCI, so part of the process will include member surveys and feedback about what PCI needs to be to advance all our members' interests. Look for opportunities to weigh in at both the national and local levels. We are asking the reorganized board's producer-member representatives from each local chapter and area to consider this question as it relates to our plan: What can PCI do to help achieve our goals in our local area?

It's going to be an exciting journey. I hope you'll help us design PCI's future.

I am also excited to welcome some new staff to PCI and announce staff changes to better add value to PCI membership, all took effect in July. PCI welcomes Beth Taylor, CPA, as our new chief financial officer. She comes to PCI with an abundance of accounting, human resources, and information technology experience in the not-for-profit sector. Arelys Schaedler is our new executive assistant, and Marianne Meyer joins the staff as membership coordinator. Also in the membership department, Jean Furlan, who joined PCI in February, is now senior manager for membership and development; Trice Turner is sales specialist; Megan Lanning is senior manager for events; and Cindi Ward will handle data support and reception. Please welcome our new team members as we continue to provide value to all PCI members. 

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