



UNCLAIMED PROPERTY
PROFESSIONALS ORGANIZATION

STRATEGIC PLAN

FY2015/2016 – FY2018/2019

Mission & Vision Statement

UPPO is the leading community and resource for unclaimed property compliance, education, networking, advocacy and reform.

Leadership Values

The UPPO Board of Directors and staff, guided by their codes of conduct and ethics, embrace the following principles:

Member Focus
Integrity
Respect
Transparency

Three Pillars & Goals

1. Member Value
 - a. Maximize the value of membership through service and engagement.
 - i. Create a written strategic growth and marketing plan with staff expectations and board support/outreach as ambassadors.
 - ii. Define the membership value proposition, and promote the benefits, successes and goals to members and prospects.
 - iii. Develop an international approach for growth.
 - iv. Implement a dynamic method to evaluate, modify and develop the benefits and services available to members.
 - v. Review relationships with allied associations to create potential partnerships.

2. Government Relations & Advocacy

- a. Advance reasonable, fair and consistent unclaimed property law and regulation.
 - i. Revisit and revise strategic government relations and advocacy plan.¹
 - ii. Develop position statements for policymakers and drive awareness to members and industry.
 - iii. Develop coalition relationships with other organizations and policymakers.
 - iv. Explore the feasibility of a professional lobbying strategy.²

3. Education & Professional Development

- a. Provide information, resources and knowledge.
 - i. Develop and move forward the certificate program implementation plan.
 - ii. Evaluate the current Holders Seminar for value and return on investment, and revise as needed.
 - iii. Explore regional lunch and learns to make them more accessible and place them in strategic markets.
 - iv. Ensure integrity of the highest level for education and resources, guidelines and policies.
 - v. Review and expand upon delivery mode of content to maximize use and access to the UPPO unique body of knowledge.³

Appendix & Internal Goals

1. Public Awareness
 - a. Industry, consumer and media outreach to champion unclaimed property issues and increase awareness of UPPO.
 - b. Rebrand UPPO's visual identity.
 - c. Create a written plan on integration of all forms of communication.
 - d. Celebrate the 20th year with a 2020 vision.
2. Association Leadership, Governance & Resources
 - a. Have the bylaws committee review the bylaws to accommodate international and/or affiliate members, and allow the board of directors to make bylaws changes without the approval of the general membership.
 - b. Ensure the leadership development committee focuses on creating a pipeline of volunteers.
 - c. Explore the board meeting schedule with possible in-person retreat.
 - d. Maximize the use of committees and task forces.⁴
 - e. Diversify revenue.⁵

¹ Promote unclaimed property uniformity; create relationships and dialogs with policymakers; grassroots member involvement providing the direction, messages and tools to involve their companies in government relations.

² Consider continuum.

³ Ask Education Council to review pricing structure of paid/free webinars. Q&A database.

⁴ Ensure the committees are making more dynamic use of their timeline and task lists.

⁵ Current benchmark is 75% non-dues and 25% membership revenue. Goal would be a 60/40 split.