

**Xerocraft Strategic**



**“To go Fast, Go Alone,  
To go Far, Go Together”**



# Xerocraft Operating Plan

- We have developed, reviewed and ratified an initial Operating Plan for Xerocraft
  - This plan encompasses all Xerocraft priorities
    - The plan integrates input from the leadership team
    - Review and feedback has been solicited from all leadership
    - Effective November 1, 2021



# Why a Plan

- Plan your work, work the plan. Planning is needed to build:
- Communication, Collaboration and Community
  - With no doubt, Xerocraft is a community of interested people (us) that enjoy and find value in our maker environment
  - XC is built on the idea that it's beneficial and fun to be with our maker community
  - We have been somewhat inconsistent in building a common understanding of priorities, issues and plans
- Sustainability: very important so we become proactive rather than reactive



# Development Process

- Initial Input:
    - leadership polled for their 'top 5 priorities' (verbatim in Appendix 2 - separate file)
  - Development
    - Those priorities imperative for XC as foundational are Phase 0. All other priorities were placed in the list for subsequent phases.
    - The plan was distributed, with the complete list of input, back to leadership, for comment.
    - Feedback, input, comments received, compiled and changes were made to the plan.
    - Rinse and repeat (i.e., we did the above twice) - no further input received.
  - Issues
    - Open issues (from feedback or in the plan itself) compiled into the issues management list (separate file) with proposed resolutions
    - Issues and the plan were re-distributed to the BoD (board needed to resolve the issues) - That's about it, bringing us to the BoD meeting yesterday.
  - Ratification - COMPLETE
- BoD meeting agreement to allow 1 week for review and ratification effective pending any adjustments needed



# Operating Plan Effectivity

- This IS the Operating Plan for Xerocraft
  - All ongoing, new or modified activities need to be addressed in the context of the operating plan
  - **Most important:** The plan includes Core Values for Xerocraft – these are our basic guidelines
- The plan IS a living document
  - Review and modification ongoing (perhaps 2x annually, or quarterly)
  - Issues need to be publicly raised, vetted and resolutions included in planning



# Some Key Elements

- Vision, Mission, and Core Values
  - Who we strive to be, how we will get there and how we collaborate
- Goals and Objectives: An ongoing, phased approach to priorities
  - Strategic goals well understood
  - Phase 0 is our active priorities
  - Phases 1 and beyond are needed and will be planned
- Community
  - Members needs are the top priority
  - Collaboration and communication
- Responsibilities and organization well understood



# Phase 0 – Building a foundation

- Timing
  - 2021
  - Re-assess at EOY
- Areas of Focus
  - 0.1 – Financial House in Order
  - 0.2 – Facility
  - 0.3 – Community
  - 0.4 - Organization



# 0.1 Financial

- Tasks
  - Tax filing
  - Identify, prioritize and resolve all outstanding financial liabilities
  - Establish a simple process for managing expenditures and income, collecting information and assembling such filings for the future
  - Assess other immediate, first order needs
- Leadership
  - Treasurer (tbd)





# 0.2 - Facility

- Tasks

- Inspection: Examine all areas of XC for safety, usability and general acceptability (cleanliness, reasonable organization, etc.) and compile a simple listing of an inspection and needed improvement – complete by 11/12/21

- Actions:

- Address all priority 1 issues (safety) immediately
- Address all priority 2 issues (first order cleanliness, efficacy and organization) on an ASAP basis – complete 12/30/21
- Establish a XC safety policy to ensure communications, monitoring and corrective actions for all safety issues.
- Schedule, prioritize and resource all remaining issues

- Leadership



- Adrian B

# 0.3 - Community

## Tasks

- Personal Safety:
  - Training, Establish policies
- Organize resources (shop managers, WT, volunteers, members):
  - Establish a 'version 0.1' approach (define, share, communicate, deploy) to benefit and help organize resources and identify gaps – shop managers, work trade members, volunteers, experts, etc.
- Communicate:
  - Conduct regular member meetings (perhaps extension of SC meetings). Do not over schedule meetings.
- Facility Access:
  - Establish simple rules for building access. Review and update access (fob, key, other?)
- Operational training:
  - Determine immediate areas needing operation training for safety, tool protection and efficacy
  - Deploy first order needs, schedule other needs, post and provision in phase 1
- Initial, trial member recruitment effort
  - Identify one or two opportunities believed to be 'low hanging fruit', create a plan and metrics, deploy to go after new members in these opportunities
- Organize and hold a Xerocraft member social event
  - Could include some socialization of planning, plus findings of finance, facility, community and organization initiatives
- Assess other immediate, first order needs

## Leadership



- Jeremy B, Terry N, Chuck W

# 0.4 - Organization

- Tasks
  - Policies and Procedures:
    - Compile all current, past, identify gaps and new needs, prioritize
  - Vision, Mission and Core Values
  - Organization and Responsibilities
    - Create a simple organization chart/description
    - For each major role, create and socialize responsibilities, etc.
  - Communication
    - Over communicate – create a culture
    - Repository for XC documents
  - Assess other needs
- Leadership
  - Terry G, David L, Mike R (Rodney K facilitate)



# Next Steps

- Please have a look at the plan
- Please be involved
  - Speak Up
  - Add value where you can
  - Have FUN!

