

# 2021 Performance Report

This report covers results achieved by participants in the Strategy Markup Language (StratML) community during 2021. It is cumulative in the sense that it also documents results previously accomplished. There are now more than 5,200 files in the StratML collection.

Please let us know if you have proposed additions or corrections. Comments and suggestions with respect to prospective goals and objectives are also welcome, particularly if you would like to participate in developing StratML tools, applications, and services.

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## Strategy Markup Language Community (SMLC)

### Stakeholder(s):

#### AIIM

*Role:* Former SDO

ANSI-Accredited Standards Development Organization. AIIM abandoned its standards program, including the PDF standard, and is no longer serving this role.

*Role:* Best Practice Provider

AIIM continues to make StratML Part 3, Additional Elements, available as a best practice document (AIIM 24: 2014), at [https://www.aiim.org/Resources/Standards/AIIM\\_24](https://www.aiim.org/Resources/Standards/AIIM_24)

#### 3D PDF Consortium

*Role:* Prospective SDO

Prospective ANSI-Accredited Standards Development Organization. Since AIIM abandoned its standards program, including the PDF standard, the 3D PDF Consortium agreed to serve this role but has not yet received accreditation.

#### Owen Ambur

*Role:* Chair, StratML Working Group

Technically speaking, since AIIM has abandoned its standards program and the 3D PDF Consortium has not yet achieved ANSI accreditation to assume responsibility for the program, the StratML working group has not yet formally been reconstituted.

*Role:* AIIM Professional Member

*Role:* Member, 3D PDF Consortium Standards Board

#### Chet Ensign

*Role:* Chief Technical Community Steward, OASIS

Chet and Owen are exploring prospects for having OASIS assume stewardship of the StratML standard. The draft charter is available at <https://docs.google.com/document/d/1td2ch0PqiHUGE3tP4kvyY2wVQRWwjGUNjdArsO8zApU/edit>

#### Adam Schwartz

*Role:* Former StratML Committee Co-Chair

With the completion and approval of Part 2 as an ANSI/AIIM standard, Adam deemed his work on the committee to have been completed and resigned his role as co-chair in 2011.

#### Betsy Fanning

*Role:* Director of Standards, 3D PDF Consortium  
Formerly AIIM Director of Standards.

#### Sylvia Webb

*Role:* Member, StratML Committee

*Role:* Leader, NIEM Task Group

Sylvia is lead a task group to develop a NIEM implementation profile for StratML

#### Andre Cusson

*Role:* Member, StratML Committee

*Role:* StratML Portal Developer

Andre developed a StratML portal, including an XSLT form enabling the drafting and editing of StratML documents.

#### Allyson Ugarte

*Role:* Member, StratML Committee

*Role:* Member, NIEM Task Group

#### Art Colman :

*Unfortunately, it seems that Art may have passed away. We have been unable to contact him. His profile lives on in LinkedIn: <https://www.linkedin.com/in/artcolman/> However, his website has disappeared.*

*Role:* Schema Maintenance

Art formerly maintained the official copies of the schema while under development, prior to approval and publication of the standard.

*Role:* Data Dictionary Producer

Art also automatically generated user-friendly data dictionaries (in MS Word format) from the StratML schemas.

*Role:* Member, StratML Committee

#### Danny Dohrmann

*Role:* Member, StratML Committee

*Role:* Member, NIEM Task Group

#### William Glascoe

*Role:* Member, StratML Committee

*Role:* Member, NIEM Task Group

#### Russell Ruggiero

*Role:* Member, StratML Committee

#### Ranjeeth Thunga

*Role:* Member, StratML Committee

*Role:* StratML Query Service Developer

Together with Hari Sandeep Reddy, Ranjeeth plans to develop a StratML query service based upon IBM technology.

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*Stakeholders (continued)*

**Hari Sandeep Reddy :**

*Together with Ranjeeth Thunga, Hari plans to develop a StratML query service based upon IBM technology.*

*Role: StratML Query Service Developer*

*Together with Hari Sandeep Reddy, Ranjeeth plans to develop a StratML query service based upon IBM technology.*

**William Charlton**

*Role: Member, StratML Committee*

**Daniel Strongin**

*Role: Member, StratML Committee*

## Vision

A worldwide web of intentions, stakeholders, and results.

## Mission

To foster awareness and usage as well as updating and maintenance of Strategy Markup Language (StratML), an XML-based voluntary consensus standard for the information commonly contained in strategic and performance plans and reports.

## Values

**Openness**

**Standards**

**Machine Readability**

**Performance**

**Results**

## Part 1. Strategic Plans

*Specify and foster usage of an XML standard for the information commonly contained in strategic plans.*

### 1.1. ANSI/AIIM Publication

*Publish Part 1, Strategic Plans, as an American (ANSI/AIIM) national standard.*

#### Stakeholder(s):

**ANSI**

#### Performance Indicators

##### 1.1.1 Publication

Description	Type	Stage	Start Date	End Date
Publication of Part 1.	Target	Publication		
Part 1 was approved and published as ANSI/AIIM 21: 2009.	Actual	Published		2009-12-17

### 1.2. StratML Part 1 Files

*Convert strategic plans into StratML format to demonstrate and prove the elements of the standard.*

#### Performance Indicators

##### 1.2.1 Plans Converted

Description	Type	Start Date	End Date	Number
Unspecified	Target	2011-01-01	2011-12-31	
More than 800 plans were converted to StratML Part 1 format.	Actual	2011-01-01	2012-01-26	829
More than a thousand plans were converted to StratML Part 1 format, an increase of more than 230 during calendar year 2012.	Actual	2012-01-01	2012-12-18	829
Nearly 1,500 additional plans were converted to StratML format in 2013, bringing the total to more than 2,500.	Actual	2013-01-01	2014-03-01	2,562
During 2014, 545 more plans were converted to StratML format, bringing the total to 3,055.	Actual	2014-01-01	2014-12-24	3,055
During 2015, 350 more plans were converted to StratML format, bringing the total to 3,405.	Actual	2015-01-01	2015-12-31	3,055
More than 760 plans were converted.	Actual	2017-01-01	2018-07-19	4,168
Nearly 300 plans were added to the collection.	Actual	2018-07-20	2019-10-24	4,465
196 plans were added to the collection in the past 4 months.	Actual	2019-10-25	2020-01-21	4,661

Description	Type	Start Date	End Date	Number
161 plans were added during February through June 2020. For the most recently available number, see <a href="http://stratml.us/carmel/catalogsitemap.html">http://stratml.us/carmel/catalogsitemap.html</a>	Actual	2020-01-22	2020-07-04	4,822
During the latter half of 2020, about 186 more files were added to the StratML collection, bringing the total to more than 5,000. However, of that total, about 59 are Part 1 files. So the actual total number of Part 1 files is about 4,949.	Actual	2020-07-05	2021-01-02	5,008
During the first half of 2021, about 136 more files were added to the StratML collection, bringing the total to 5,144.	Actual	2021-01-03	2021-07-22	5,144

### 1.3. Tools, Applications & Services

*Foster the development of tools, applications, and services supporting and leveraging the StratML standard for the benefit of various communities of interest.*

#### Stakeholder(s):

##### Andre Cusson

*Role:* StratML Portal Developer  
<http://stratml.us#Cusson>

*Role:* XSLT Form Developer  
<http://stratml.us#Forms>

##### Sylvia Webb

*Role:* Schema Development Support  
Provided a schema development tools and expertise to support compilation of the schema for Part 1.

##### Joe Carmel

*Role:* XForms Form Developer  
<http://stratml.us#Forms>

*Role:* Atom Demonstration Developer  
<http://stratml.us#Carmel>

*Role:* AJAX Index Developer  
Joe's StratML cataloging tool using AJAX indexes files by Internet domain, provides a count of StratML files and identifies those lacking sources as well as those whose URLs are incorrectly listed.  
<http://stratml.us/carmel/catalogsitemap.html>

##### Art Colman

*Role:* StratML File Converter  
Converted hundreds of StratML files to conform to the final version of the schema for StratML Part 1.  
<http://stratml.us/drybridge/index.htm>

##### Ari Knausenberger

*Role:* StratML Tag Cloud Developer  
<http://stratml.us#Ari>

##### Keith Matthew

*Role:* StratML Editorial Portal Developer  
<http://stratml.us#XMLSimplicity>

##### Shashi Mudunuri

*Role:* StratML Search Service Developer  
<http://stratml.us#MarkLogic>

##### Pooyan Zamanian

*Role:* StratML Portal Developer  
Available in Farsi and English. <http://stratml.us#Pooyan>

##### Pradeep Jain

*Role:* MS Word Quick Start Guide Drafter  
<http://stratml.us#ICTect>

##### Vivian Dey

*Role:* MS Word Quick Start Guide Developer  
<http://stratml.us#ICTect>

##### Ken Holman

*Role:* StratML Stylesheet Developer  
<http://stratml.us#Crane>

##### Erick Mackay

*Role:* StratML Developer Support  
<http://stratml.us#LiquidTechnologies>

##### Priscilla Walmsley

*Role:* Schema Central Developer  
<http://stratml.us#Datypic>

##### Adam Schwartz

*Role:* Strategic Plan Converter  
Converted a number of strategic plans to StratML format for inclusion in the prototypical collection compiled to demonstrate and prove that the elements of the schema capture the types of information commonly occurring in strategic plans.

*Role:* Graphics Developer  
Compiled a graphical depiction of the schema for Part 1.

##### Owen Ambur

*Role:* InfoPath Form Developer

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## Stakeholders (continued)

- <http://stratml.us#Forms>  
**Role:** Strategic Plan Converter  
 Converting strategic plans from non-standard, non-machine-readable formats, like PDF, into open, standard, machine-readable StratML format.  
<http://stratml.us/drybridge/index.htm>
- Role:** StratML Search Service Provider  
 Maintaining a Google site-specific search capability for the StratML collection at <http://stratml.us#Google>
- Role:** Wikipedia Article Creator  
 Created an article on StratML in Wikipedia, at [http://en.wikipedia.org/wiki/Strategy\\_Markup\\_Language](http://en.wikipedia.org/wiki/Strategy_Markup_Language)
- Ken Sall**  
**Role:** Glossary Schema & Stylesheet Developer  
 Compiled a schema and stylesheet for the StratML glossary.
- Ronald Reck**  
**Role:** Glossary Schema & Stylesheet Developer  
 Compiled a schema and stylesheet for the StratML glossary.
- Betty Harvey**  
**Role:** Schema Development Support  
<http://stratml.us/history.htm#2008>
- Christopher Maden**  
**Role:** Stylesheet Developer  
<http://stratml.us/history.htm#2008>
- Jim Disbrow**  
**Role:** Award Nominator  
 Submitted StratML as a nominee for the President's Save Award program. <http://stratml.us/history.htm#2009>
- John Chickering**  
**Role:** Performance Plan/Report Task Group Member  
<http://stratml.us/history.htm#2008>
- Jim St. Clair**  
**Role:** Performance Plan/Report Task Group Member  
<http://stratml.us/history.htm#2008>
- Oliver Recklies**  
**Role:** Vocabulary & Schema Reviewer  
<http://stratml.us/references/20080312Recklies.pdf>
- Carl Frappaolo**  
**Role:** Article Publisher  
 Published an article referencing StratML in relation to the findability of information. See <http://stratml.us/history.htm#2008>

**Amin Hassam**

**Role:** Business Case Developer  
 Served a highly active and key role in helping to compile the business case for StratML.

**David Webber**

**Role:** CAM Interactive Developer  
 Developed a CAM interactive view of the schema for StratML Part 1. See <http://xml.govwebs.net/stratml/history.htm> and, more specifically, <http://xml.govwebs.net/stratml/references/StratML-interactive.html>

**Ed Chase**

**Role:** PDF Fillable Form Developer  
 Developed a PDF Fillable form for StratML Part 1. See <http://stratml.us#Forms> and, more specifically, <http://stratml.us/forms/StrategicPlan.pdf> (Requires Adobe Acrobat.)

**Laurens van den Oever**

**Role:** Xopus Forms Developer  
 Developed an Xopus form for StratML Part 1, in English and Spanish. See <http://stratml.us#Forms> (No longer available.)

**Allyson Ugarte**

**Role:** Spanish Translator  
 Provided assistance in translating to Spanish the English labels in Xopus' form.

**Role:** XBRL Liaison

Served as an expert liaison to the XBRL community.

**Alice Marshall**

**Role:** Article Publisher  
 Published an article on StratML. See <http://stratml.us#SeeAlso> Formerly available at <http://www.examiner.com/technology-culture-in-washington-dc/owen-ambur-talks-about-the-work-of-the-stratml-committee>

**KC Morris**

**Role:** Validation Service Provider  
 Provided a validation service for StratML Part 1 files. See <http://stratml.us#NIST>

**C. M. Sperberg-McQueen :**  
*Black Mesa Technologies LLC*

**Role:** URL Checker  
 Michael identified a group of URLs for StratML files that were generating 404 errors so that the broken links could be fixed.

**Role:** XForms Trainer

Michael used StratML files as real-world examples in XForm training that he conducted.

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*Stakeholders (continued)***Yuri E. Hohlov :**

*Chairman of the Board, Institute of the Information Society - Russia*

**Role:** Russian Translator

Translated the StratML Core from English to Russian and translated from Russian to English the Strategy for the Informational Society Development in the Russian Federation.

**Robin LaFontaine :**

*Robin is with DeltaXML and participated in the W3C's change tracking group.*

**Role:** Change Tracking Demonstrator

Robin provided change tracking renditions of the National Association of Government Communicators (NAGC) by-laws in StratML format.

**William Charlton****Role:** CMS Developer

William expressed interest in developing a CMS application with the capability to output data in StratML format.

**Frederic Chapus****Role:** XBRL Converter

Frederic supplied an Excel Data Point Model with the capability to generate an XBRL taxonomy for StratML.

**Alain Couthures****Role:** XSLTForms Developer

Alain maintains the XSLT code enabling the development of XForms which can be used to create StratML files. For more information on his efforts, see <http://www.agencexml.com/xsltforms.htm>

**George Bina****Role:** oXygen Developer

George incorporated support for the StratML standard into oXygen, including the ISO version of Part 1. He also provided a stylesheet to transform files from the ANSI version of Part 1 to the ISO version.

**Alejandro Revuelta****Role:** StratML Portal Developer

Alejandro and his colleagues at Ximdex have imported the StratML collection into Xcms and are demonstrating faceted query capabilities.

**Yuriy Chernyavskyy****Role:** StraML Application Developer

Yuriy plans to build support for the StratML standard into his Ripplio Assistant application.

**Chris Fox****Role:** StratML Application Developer

Chris is working to enable StratML output from his Strategic Learning application.

**Performance Indicators****1.3.1 Tools, Applications & Services**

Description	Type	Start Date	End Date	Number
Development of prototypical tools, applications, and services.	Target			
A couple dozen prototypical tools, applications, and services have been developed. They are documented and links are provided at <a href="http://stratml.us#Forms">http://stratml.us#Forms</a> & <a href="http://stratml.us#Services">http://stratml.us#Services</a> .	Actual		2012-01-26	



Description	Type	Start Date	End Date	Number
oXygen 17 became the first commercial release of a product supporting the ISO version of StratML Part 1 (ISO 17469-1).	Actual	2015-02-15	2015-05-15	

## 1.4. ISO Standard

*Obtain approval and publication of Part 1 as an international (ISO) voluntary consensus standard, for potential use by all organizations worldwide.*

### Stakeholder(s):

#### ISO

#### Betsy Fanning

*Role:* Technical Editor  
Betsy performed the final edits for publication of Part 1 as an ISO standard.

#### Sylvia Webb

*Role:* Technical Editor

Sylvia edited the graphical presentation of the schema and also provided the new namespace to replace stratml.net.

#### Richard Yawn

*Role:* Technical Editing Assistance  
Richard provided assistance in editing the graphical presentation of the schema.

## Performance Indicators

### 1.4.1 ISO Standard

Description	Type	Status	Start Date	End Date
Publication of Part 1 as an ISO standard.	Target	Publication		
StratML Part 1, the StratML Core, is up for 5-year review and renewal in the ISO process.	Target	Review & Renewal	2020-01-01	2020-12-31
StratML Part 1 was registered at ISO and assigned number ISO/NP 17469-1. Five nations -- Canada, South Africa, China, and Korea in addition to the U.S. -- agreed to work on the international standard.	Actual	Registered		
Responses to comments on StratML Part 1 posted to the ISO/TC 171/SC 2 eCommittee by Betsy Fanning, May 8, 2012.	Actual	Responses		2012-05-08
Part 1 was approved as an ISO standard in October 2013. Publication is anticipated in 2014, after a few editorial corrections are made.	Actual	Approved		2013-10-31
Part 1 was published as ISO 17469-1 on February 11, 2015, and may be purchased from ANSI at <a href="https://www.iso.org/standard/59859.html">https://www.iso.org/standard/59859.html</a> The schema is freely available on the Web for usage by anyone who chooses to do so, at <a href="http://stratml.us/references/">http://stratml.us/references/</a>	Actual	Published		2015-02-11

Description	Type	Status	Start Date	End Date
StrategicPlanISOVersion20140401.xsd				
Betsy Fanning E-mailed a ballot to the StratML Committee members to determine whether the standard is still valid. Responses are due by March 20. A committee meeting will be scheduled shortly after the ballot closes to review the voting results that will be sent to the US TAG to ISO TC171 SC2 for validation prior to being sent as the US vote.	Actual	Balloting	2020-01-21	2020-03-20
Betsy Fanning advised that the StratML Committee has voted to reaffirm Part 1 as an international standard. The next step is a 30-day review in the ANSI process.	Actual	Committee Approval	2020-01-21	2020-04-05
Betsy Fanning advised that Part 1 has been reaffirmed as an ISO standard (ISO 17469-1) for another five years.	Actual	ISO Renewal	2020-06-04	2025-06-04

## 1.5. Training

Provide training materials to assist developers and users of the StratML standard.

### Stakeholder(s):

#### Owen Ambur

Role: Tutorial Creator

Owen drafted a PowerPoint presentation with instructions on how to use Joe Carmel's XForms form to create StratML Part 1 (ISO 17469-1) files.

#### Betsy Fanning

Role: Tutorial Publisher

Betsy made the module available in the education and training section of AIIM's website.

#### William Glascoe III

Role: Narrator

William narrated the tutorial.

## Performance Indicators

### 1.5.1 Training Module

Description	Type	Status	Start Date	End Date
The training module is made available on AIIM's website.	Target			
As of February 3, 2016, the training module is available on AIIM's website for access by AIIM members.	Actual	Available		2016-02-03

### 1.5.2 Training Module Users

Description	Type	Start Date	End Date	Number
TBD	Target			
	Actual			

## Part 2. Performance Plans and Reports

*Specify and foster usage of an XML standard extending Part 1 to include the additional information commonly contained in performance plans and reports.*

### 2.1. ANSI/AIIM Publication

*Publish Part 2, Performance Plans and Reports, as an American (ANSI/AIIM) national standard.*

#### Stakeholder(s):

ANSI

#### Performance Indicators

##### 2.1.1 Approval

Description	Type	Status	Start Date	End Date
Publication of Part 2	Target			
Harmonization with ISO 17469-1.	Target	Harmonization	2015-07-17	2015-12-31
Since consideration of Part 2 has been delayed in the ISO process, both harmonization and enhancement will be initiated in the ANSI process.	Target	Harmonization & Enhancement	2016-03-04	2016-03-04
Part 2 was approved and published as ANSI/AIIM 22:2011.	Actual	Published	2011-01-01	2011-08-08
Part 2 was harmonized with minor changes made to Part 1 (ISO 17469-1) in the ISO process and republished as ANSI/AIIM 22:2017.	Actual	Republished	2016-03-04	2017-01-19
Since AIIM abandoned its standards program, ANSI no longer recognizes StratML as an American national standard. Efforts have been made to reconstitute AIIM's standards program under the auspices of another organization but thus far that has not occurred.	Actual	Rescinded	2019-11-29	2019-11-29

##### 2.1.2 Teleconferences

Description	Type	Start Date	End Date	Number
Conduct regular teleconferences to receive input and discuss the additional elements to be included in Part 2.	Target	2011-01-01	2011-12-31	
The StratML Committee conducted eight teleconferences on the following dates: January 5, March 22, August 24, September 22, October 6, October 20, November 3 and December 1.	Actual	2011-01-01	2011-12-31	8

## 2.2. StratML Part 2 Files

Convert performance plans and reports into StratML format to demonstrate and prove the elements of the standard.

### Stakeholder(s):

#### Andre Cusson

*Role:* StratML Portal Developer

Andre's StratML portal automatically transforms all of the Part 1 files into Part 2 format.

#### Gannon Dick

*Role:* Database Converter

Gannon transformed data from the Federal Advisory Committee Act (FACA) database into StratML

format. He is also working on converting IRS data for tax-exempt organizations to StratML format.

#### Owen Ambur

*Role:* StratML Part 2 File Creator

Owen has manually converted a number of performance reports into StratML Part 2 format.

## Performance Indicators

### 2.2.1 Plans & Reports Converted (StratML.us site)

Description	Type	Start Date	End Date	Number
Unspecified	Target	2011-01-01		
Thirteen performance plans and reports were converted to StratML Part 2 format.	Actual	2011-01-01	2012-01-26	13
Nineteen performance plans and reports were converted to StratML Part 2 format, an increase of 6 during 2012.	Actual	2012-01-26	2012-12-04	19
The total number of Part 2 files on the StratML.us site is now nearly 60. However, they are not well populated with performance indicators and stakeholder roles.	Actual	2012-12-05	2021-01-02	59

### 2.2.2 Plans & Reports Converted (other sites)

Description	Type	Start Date	End Date	Number
[Unspecified]	Target	2013-01-01	2013-11-20	
When importing them into his portal, Andre Cusson converted all StratML files into Part 2 format. As of November 20, 2013, his portal contained more than 2,400 files comprising more than 23,000 objectives, nearly 60,000 stakeholders, and more than 70,000 pages.	Actual	2013-01-01	2013-11-20	2,456

Description	Type	Start Date	End Date	Number
[Unspecified]	Target	2020-01-01	2020-12-31	
Chris Fox enables authoring/editing of StratML files in both Part 1 and Part 2 format in his StratNavApp. So, potentially speaking, any or all of the files in the collection could be imported into his app. However, relatively few have been. About 50 files are publicly available in his site, at <a href="https://www.stratnavapp.com/PublicProjects">https://www.stratnavapp.com/PublicProjects</a>	Actual	2020-01-01	2020-12-31	53

## 2.3. Tools, Applications & Services

*Foster the development of tools, applications, and services supporting and leveraging the StratML standard for the benefit of various communities of interest.*

### Stakeholder(s):

#### Andre Cusson

*Role:* Portal Developer

Andre has developed a StratML portal for both Part 1 & Part 2 files.

*Role:* XSLT Form Developer

Andre has developed an XSLT form for both Part 1 & Part 2.

#### Owen Ambur

*Role:* InfoPath Form Developer

Owen has created InfoPath forms for Part 1 & Part 2.

#### Carlos E. Jimenez :

*Eng., MSc.*

*Role:* Chair, IEEE Technology Management Council

*Role:* StratML Course Developer

Carlos is developing a training course for StratML.

#### Matt MacKenzie

*Role:* StratML Query Service Developer

Matt quickly developed and and briefly hosted JSON/MongoDB-based StratML indexing/browsing/query service. See <http://xml.govwebs.net/stratml/index.htm#Uberity>

#### Duane Nickull

*Role:* StratML Query Service Developer

Duane worked with Matt MacKenzie on a JSON/MongoDB-based StratML indexing/browsing/query service. See <http://xml.govwebs.net/stratml/index.htm#Uberity>

#### Ivan Pedruzzi

*Role:* Schema Development Tool Support

Ivan made available the enterprise edition of Stylus Studio to support development of the schema for StratML Part 3.

#### Jay Fohs

*Role:* Sr. Account Manager

Jay is a Sr. Account Manager at MarkLogic.

*Role:* StratML Search Service Developer

Jay is worked with Andy Obermayer to re-develop MarkLogic's StratML search service.

#### Andy Obermayer

*Role:* Technical Sales Engineer

Andy is a Technical Sales Engineer at MarkLogic

*Role:* StratML Search Service Developer

Andy Obermayer worked to re-develop MarkLogic's StratML search service.

#### Allyson Ugarte

*Role:* StratML Application Promoter

Allyson met with the Executive Director of the non-profit Ballston Improvement District (BID) to understand their priorities for the BID's published strategic plan. They are interested in being able to track their performance and showing the progress being made relative to their high-level objectives, especially to their main stakeholder and oversight authority, the Arlington County Board of Supervisors.

#### Geoffrey Morton-Haworth

*Role:* Yala Developer

Geoffrey is developing a service called The Yala, "a platform for collaboration, designed to aid the emergence of collective intelligence." <http://yalaworld.net/About/tabid/84/Default.aspx> He expressed intent to try to incorporate the StratML standard into his service.

#### Sylvia Webb

*Role:* Co-Founder of Chicdata

Chicdata's mission is provide software to create strategic plans and regulatory reports that can be shared, published, and accessed the across the globe.

*Role:* Co-Developer of StartML

StartML is an acronym for Strategy And Regulatory Tax Management Launchpad. It is a software platform based on the ANSI AIIM Strategy Markup Language (StratML) standard created to ensure that all non-profit and for-profit companies can easily create strategic plans, and government agencies can publish strategic plans for public consumption in compliance with recent government-published standards.

#### Portia Thurmond

*Role:* Co-Founder of Chicdata

*Role:* Co-Developer of StartML

#### Ranjeeth Thunga

*Role:* White Paper Drafter

Lead the drafting a white paper addressing the benefits of use of the StratML by the private sector.

#### Russell Ruggiero

*Role:* White Paper Drafter

Assist Ranjeeth in drafting a white paper addressing the benefits of use of the StratML by the private sector.

#### David Webber

*Role:* NIEM Comparison

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*Stakeholders (continued)*

David prepared spreadsheets comparing StratML Part 2 to NIEM: <http://xml.govwebs.net/stratml/references/NIEMComparison20100205.xlsx> & <http://xml.govwebs.net/stratml/references/NIEM-Comparison20100419.xls>

**George Bina**

*Role:* Software Developer  
Built support for StratML Part 2 into oXygen, including a form-based user interface.

**Pinhas Yehezkeally**

*Role:* Hebrew Translator  
Pini provided Hebrew translations for many of the elements of the StratML standard.

**Marten Hogeweg**

*Role:* StratML Catalog & Form Developer  
Marten has set up a publicly accessible catalog based on ESRI's open source Geoportal Server with the StratML Part 1 and Part 2 configured. Users can register and publish their own plans &/or the plans of organizations whose missions are of interest to them, either by uploading preexisting plans or by using the forms-based interface provided in the portal. Marten plans to maintain it to test ESRI's stratml implementation.

**Joe Carmel**

*Role:* XForms Developer  
Joe developed an XForms form for StratML Part 2.

**Ibrahim Shah**

*Role:* XForms Developer  
In 2018 Ibrahim updated Joe Carmel's Part 2 form for hosting on the stratml.us site at <http://stratml.us/forms/Part2Form.xml> to accommodate changes made in ANSI/AIIM 22:2017.

*Role:* Stylesheet Editor  
In the fall of 2018, Ibrahim updated the stylesheet to accommodate the new Descriptor element in the Performance Indicators table. He also provided an alternative version that inserts mailto links for comments on goals and objectives.

**Colin Mackenzie**

*Role:* Stylesheet Editor  
Colin edited the stylesheet to improve the presentation of the performance indicator tables.

**Marijan (Mario) Madunic**

*Role:* Stylesheet Editor  
Mario edited the stylesheet to further improve the presentation of the data.

**Detlef Heyn**

*Role:* Stylesheet Editor

Detlef edited the stylesheet to further improve the presentation of the data.

**John Barker**

*Role:* PDF & ePub Converter  
John provided the capability to transform and present StratML files in PDF and ePub format.

**Jorge Sanchez**

*Role:* Wizard Form Developer  
Jorge is developing a multi-stage wizard form to make it easier to create and edit StratML files.

*Role:* Spanish Label Provider

Jorge provided a rendition of the StratML Part 2 form with the capability to translate the field labels from English to Spanish.

**Alain Barbet**

*Role:* XForm Editor  
Alain has been making corrections and enhancements to the StratML Part 2 form. His version of the form at <http://waterland.freeboxos.fr:8009/Part2Form.xml> is being used to edit this plan/report.

**Adam Retter**

*Role:* StratML Database Provider  
On December 9, 2018, Adam put up an eXist database to host StratML files. However, it has apparently been taken down as his company pursues an alternative to eXist, called Granite.

**Peter Winstanley**

*Role:* StratML Database Instructor  
On March 20, 2019, Peter posted on GitHub basic instructions on how to build a StratML query service using BaseX. <https://github.com/pwin/StratML-Search/blob/master/README.md>

**Jeff Maynard**

*Role:* StratML-to-PDF Converter  
Jeff has used Turn-Key System's TopLeaf application to render StratML files in PDF.

**Chris Fox**

*Role:* StratML App Developer  
Chris' StratNavApp outputs files in both StratML Part 1 and 2 formats.

*Role:* Schema.org Integrator

Chris set up a Google custom query based on Schema.Org Person and Organization types. His StratNavApp generates Schema.org tagged files from the same data used to create StratML files. Doing so may improve discovery of those files by Google, based upon queries of those elements.

## Performance Indicators

### 2.3.1 Part 2 Forms

Description	Type	Start Date	End Date	Number Available
Forms are readily available online for the creation and editing of StratML Part 2 files.	Target			
An XSLT form and an InfoPath form are available.	Actual		2012-01-28	2
George Bina has added a form-based user interface to oXygen for StratML Part 2, bringing to three the total number of forms available for Part 2.	Actual		2013-11-08	3
Marten Hogeweg provided a forms-based authoring/editing interface in Geoportal Server, bringing to four the total number of forms available for Part 2.	Actual		2014-03-01	4
Joe Carmel developed an XForms form for Part 2, but Andre Cusson's form was disabled by a Java security update. So the number of forms supporting Part 2 remained at three.	Actual		2015-10-05	3
Joe Carmel's XForms for StratML Parts 1 & 2 have been rehosted on the StratML.us site. ESRI has apparently abandoned its StratML portal, and while Ximdex's StratML query prototype remains available, they apparently have disabled their StratML form. However, Jorge Sanchez is perfecting his wizard form. So while the number of forms available for the creation and editing of files in StratML Part 2 format has fallen to two, it may soon increase to three.	Actual		2019-11-29	2
Alain Barbet has posted an improved version of the Part 2 form at <a href="http://waterland.freeboxos.fr:8009/Part2Form.xml">http://waterland.freeboxos.fr:8009/Part2Form.xml</a> So there are now 3 instance of the form.	Actual		2020-12-21	3
Chris Fox provides a form-based interface to create and edit StratML files in his StratNavApp. It supports StratML Parts 1 & 2 as well as some elements of Part 3.	Actual		2021-07-31	4

### 2.3.2 Stylesheets

Description	Type	Start Date	End Date	Number
Although presentation is expressly not part of the StratML standard itself, a stylesheet(s) should be provided to attractively display files.	Target		2015-10-05	
Colin Mackenzie updated the stylesheet previously developed by Ken Holman, Joe Carmel, and Andre Cusson.	Actual		2015-10-05	2
During the month of April, Mario Madunic and Detlef Heyn further enhanced the presentation of StratML files by updating the stylesheet.	Actual		2016-04-30	2
John Baker enhanced his capability to render StratML files in PDF for more visually appealing presentation and printing.	Actual		2019-11-29	3
John Barker is retiring his StratML-to-PDF conversion service. However, Chris Fox offers styling of StratML files on his StratNavApp. So	Actual		2021-07-31	3

Description	Type	Start Date	End Date	Number
the number of available stylesheets remains at three.				
Turn-Key Systems picked up and maintaining John Barker's StratML-to-PDF conversion stylesheet.	Actual	2021-08-20		4

### 2.3.3 Applications/Services

Description	Type	Start Date	End Date
Help Charity Navigator address challenges to implementation of their 3.0 initiative, focusing on results.	Target	2016-01-06	2016-01-06
Gannon Dick plans to transform to StratML format the data that IRS holds for more than 800,000 tax-exempt organizations, for use with the template that Owen has drafted.	Target	2016-01-06	2016-01-06
On January 6, Owen Ambur, Gannon Dick, and Susan Smoter engaged in a teleconference with Michael Thatcher, president & CEO of Charity Navigator, to explore prospects for using StratML Part 2 to support their 3.0 initiative.	Actual	2016-01-06	2016-01-06
Using Joe Carmel's XForms form, Owen Ambur compiled a template in StratML Part 2 format that charities could use to publish their performance plans and reports.	Actual	2016-01-06	2016-01-08
John Barker provided the capability to render StratML files in PDF and ePub format.	Actual	2016-05-18	2016-05-18
John Barker is retiring his StratML-to-PDF conversion service. During the period it was available 595 StratML files were rendered in PDF, comprising about 60 megabytes.	Actual	2021-07-31	2021-07-31
Turn-Key Systems has picked up John Barker's stylesheet and used it to continue rendering StratML files in PDF. As of November 21, 2021, it has been used to render about five dozen plans and reports in PDF.	Actual	2021-08-20	2021-11-21

## 2.4. NIEM Implementation Profile

Create an implementation profile for inclusion of StratML into a new Planning and Accountability domain in the National Information Exchange Model (NIEM).

### Stakeholder(s):

#### Sylvia Webb

Role: Task Leader

#### Allson Ugarte

Role: Task Member

#### John Teeter

Role: Deputy CIO, Department of Health and Human Services

Role: Planning & Accountability Domain

Proponent

John proposed inclusion of a Planning and Accountability domain in NIEM.



## Performance Indicators

### 2.4.1 NIEM Implementation Profile

Description	Type	Creation	Start Date	End Date
Creation of an implementation profile to support incorporation of the StratML standard into NIEM.	Target	Creation		
On January 4, 2011, President Obama signed H.R. 2142, the GPRA Modernization Act of 2010 (GPRAMA), into law as P.L. 111-352. Section 2 requires agencies to publish their strategic plans on their websites and section 10 requires them to publish their strategic and performance plans and reports in searchable, machine-readable format. StratML is such a format.	Actual	Legal Mandate	2011-01-04	
Sylvia Webb is leading a task group developing the NIEM profile.	Actual	Tasked	2012-01-01	2012-12-31
Sylvia & Allyson created a spreadsheet tentatively mapping the elements of StratML to elements of NIEM. It is available at <a href="http://vision4standards.com/stratml-wip/">http://vision4standards.com/stratml-wip/</a>	Actual	Drafted	2012-01-01	2012-12-31
Due to lack of expression of interest from NIEM leaders, the StratML Committee has placed the NIEM profile on indefinite hold.	Actual	On Hold	2014-03-01	2014-03-01
In the June 28, 2019, issuance of Circular A-11, OMB indicated implementation of section of GPRAMA will be piloted with a few agencies during FY 2020. See <a href="http://stratml.us/carmel/iso/A11-240wStyle.xml#_aada4d70-a90a-11e9-a082-d69e4d1a686a">http://stratml.us/carmel/iso/A11-240wStyle.xml#_aada4d70-a90a-11e9-a082-d69e4d1a686a</a>	Actual	Piloting	2019-06-28	2020-09-30
In the Federal Data Strategy Action Plan for 2020, OMB has indicated that a data standards registry will leverage NIEM and other existing repositories, but it is unclear whether that means the schema for agency performance reports will be included. See <a href="http://stratml.us/carmel/iso/part2/2020APwStyle.xml#_b19de10e-2dd4-11ea-a6d4-d5cd0183ea00">http://stratml.us/carmel/iso/part2/2020APwStyle.xml#_b19de10e-2dd4-11ea-a6d4-d5cd0183ea00</a>	Actual	Schema	2020-01-01	2020-12-31

## 2.5. ISO Standard

*Obtain approval and publication of Part 2 as an international (ISO) voluntary consensus standard, for potential use by all organizations worldwide.*

### Owen Ambur

*Role:* Schema Editor

Owen edited the ANSI/AIIM 22:2011 version of the schema to incorporate the changes in ISO 17469-1.

### Gannon Dick

*Role:* Schema Editor

Gannon edited the schema for ISO 17469-2 to make technical corrections.

### Betsy Fanning

*Role:* ISO 17469-2 Editor

Betsy will put the standards document in final form for submission to ISO.

## Performance Indicators

### 2.5.1 Publication

Description	Type	Status	Start Date	End Date
Publication of Part 2 as an ISO standard.	Target	Publication	2015-01-01	
Revision of Part 2 in the ANSI process to accommodate changes to Part 1 made in the ISO process and to make additional, minor enhancements.	Target	Enhancement	2016-03-04	
The schema was put in near-final form for discussion on the StratML Committee's teleconference on June 19. The standards document itself (ISO 17469-2) has also been drafted but will need to be edited to include the latest revision of the schema documentation/data dictionary.	Actual	Near Final	2015-01-01	2015-06-19
An insufficient number of countries agreed to take up Part 2 in the ISO process. So enhancements will be pursued in the ANSI process instead.	Actual	Redirection	2015-01-01	2015-12-31

## Part 3. Additional Elements

*Specify and foster usage of an XML standard extending Parts 1 and 2 to include the additional information deemed to be worthy of consideration for inclusion in strategic and performance plans and reports.*

### Stakeholder(s)

#### Owen Ambur

*Role:* Chair, AIIM StratML Committee

*Role:* Schema Developer

Developed the schema for Part 3.

*Role:* InfoPath Developer

Developed an InfoPath form for StratML Part 3.

#### David Webber

*Role:* CAM Template Evaluator

Prepared a CAM template evaluation and PNG graphic for Part 3: <http://xml.govwebs.net/stratml/references/Webber/Strat3-NDR-tech-eval.html> & <http://xml.govwebs.net/stratml/references/Webber/STRAT3-model.png>

#### Art Colman

*Role:* Data Dictionary Developer

Prepared the data dictionary for Part 3.

### 3.1. GPRAMA

*Include additional elements required to more fully address data requirements implicit in the GPRAMA Modernization Act (GPRAMA).*

### Stakeholder(s):

#### U.S. Federal Agencies

*Role:* Implementation

U.S. federal agencies are required by section 10 of the GPRAMA to publish their strategic and per-

formance plans and reports in machine-readable format, like StratML.

### Performance Indicators

#### 3.1.1 Performance.gov

Description	Type	Usage	Start Date	End Date
Incorporation of StratML into the Performance.gov site.	Target	Usage	2012-01-01	2012-12-31
Elements of the StratML standard have been documented in an entity relationship diagram depicting the elements of the Performance.gov site, as shown at <a href="http://stratml.us/omb/PDSERD20111206.pdf">http://stratml.us/omb/PDSERD20111206.pdf</a>	Actual	Documentation		2011-12-06
The elements of StratML Part 3 have been mapped to the elements contained in OMB Circular A-11, which contains guidance to agencies on implementation of the Government Performance and Results Act (GPRAMA). That guidance notes that XML is a machine-readable format and, thus, may be used to comply with section 10 of GPRAMA. However, it also says that comma separated values	Actual	Mapping	2012-01-01	2012-12-31

Description	Type	Usage	Start Date	End Date
(CSV) are machine-readable and may also be used. So it remains to be seen whether agencies will use the open, machine-readable StratML standard.				
In the June 28, 2019, issuance of Circular A-11, OMB indicated implementation of section of GPRAMA will be piloted with a few agencies during FY 2020. However, it is unclear what schema will be used. See <a href="http://stratml.us/carmel/iso/A11-240wStyle.xml#aada4d70-a90a-11e9-a082-d69e4d1a686a">http://stratml.us/carmel/iso/A11-240wStyle.xml#aada4d70-a90a-11e9-a082-d69e4d1a686a</a>	Actual	Pilot	2019-06-28	2020-09-30

### 3.2. Other Elements

*Incorporate elements for geospatial referencing, strategic planning frameworks, categorizations, relationships, and/or other purposes.*

## Performance Indicators

### 3.2.1 Part 3 Schema

Description	Type	Approval	Start Date	End Date
Consensus on additional elements to be included, such as those listed at <a href="http://xml.govwebs.net/stratml/index.htm#Part3">http://xml.govwebs.net/stratml/index.htm#Part3</a> .	Target	Consensus	2012-01-01	2012-12-31
Nearly 40 additional elements and attributes have been included in the draft schema for Part 3, and an InfoPath form has been developed as a reference implementation. An updated data dictionary has been generated for review by the Committee. However, the Committee has not reviewed or commented on it. So whether consensus can be achieved remains to be seen.	Actual	Extension	2012-01-01	2012-12-31
During 2013 the Committee voted to approve publication of Part 3 as an AIIM best practice, prior to placing it on the ANSI/ISO standards track.	Actual	Approved	2013-01-01	2013-12-31

### 3.3. ANSI/AIIM Publication

*Publish Part 3, Additional Elements, as an American (ANSI/AIIM) national standard.*

#### Stakeholder(s):

##### Owen Ambur

Role: Document Drafter  
Drafted the best practice document for Part 3.

##### Betsy Fanning

Role: Document Editor  
Edited the best practice document for Part 3.

#### Performance Indicators

##### 3.3.1 Part 3 Standards Document

Description	Type	Approval	Start Date	End Date
Consensus on the standards document within the StratML Committee.	Target	Consensus		
A ballot was issued seeking consensus to publish Part 3 initially as an AIIM best practice, to be followed by publication as an ANSI/AIIM standard later. The results of the ballot have not yet been revealed, and based upon discussion on the Committee's November 16 teleconference, it is unclear whether consensus can be achieved on that point. Also, since AIIM failed to renew ownership of the stratml.net domain, it appears that it will be necessary to change the namespace for StratML Parts 1, 2 & 3. In any event, Part 3 cannot be finalized until that issue is resolved.	Actual	Ballot Issued		2012-11-16
On our February 7 teleconference, the Committee agreed to publish Part 3 as an AIIM best practice during 2013 and place it on the standards track at a later time, after Part 1 has been approved as an ISO standard.	Actual	Committee Agreement		2013-02-07
AIIM's Standards Board has approved Part 3 as a best practice, for publication as soon as editorial corrections can be made.	Actual	Approved		2013-11-20

##### 3.3.2 StratML Part 3 Best Practice Document

Description	Type	Publication	Start Date	End Date
Publish Part 3 as an AIIM best practice document	Target		2014-01-01	2014-06-01
On November 9, 2014, Part 3 was published as an AIIM best practice (AIIM 24: 2014) and	Actual	Published	2014-01-01	2014-11-09

Description	Type	Publication	Start Date	End Date
made available to AIIM members free of charge at <a href="https://www.aiim.org/Resources/Standards/AIIM_24">https://www.aiim.org/Resources/Standards/AIIM_24</a>				

### 3.3.3 Teleconferences

Description	Type	Start Date	End Date	Number
Regularly conduct teleconferences, as necessary, to receive input and feedback from Committee members on the elements and structure of StratML Part 3.	Target	2012-01-01	2012-12-31	
Nine Committee teleconferences were conducted in 2012, on January 12 & 26, February 9, March 1 & 15, May 10 & 31, August 9, and November 16.	Actual	2012-01-01	2012-12-31	9
Seven Committee teleconferences were conducted in 2013, on January 10, February 7, May 23, June 20, July 11, September 5, and November 21.	Actual	2013-01-01	2013-12-31	7
Two Committee teleconferences were conducted in 2014, on July 31 and November 20. Most of the year was consumed waiting for editorial corrections to be made to Part 1 and Part 3 by AIIM and ISO staff.	Actual	2014-01-01	2014-12-31	2

## Administrative Information

**Start Date:** 2021-01-01

**End Date:** 2021-12-31

**Publication Date:** 2021-11-21

**Source:** <http://stratml.us/SMLC2021.xml>

### Submitter:

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