



Achieving Sustainable Productivity
Meeting Customer Demand in an Unpredictable World

Volunteer Leadership
Workshop at
2011 APICS International
Conference & Expo




APICS Volunteers:
BUILDING PILLARS OF SUCCESS
CONTENT • AFFILIATION • CERTIFICATION




Growing Your Chapter Through Strategic Planning

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APICS Volunteers:
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Set the Stage




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The Way We Were: Pre-2006

- No chapter infrastructure
- Active participants came mostly from one company
- Lackadaisical approach to board management
- No company coordinators
- Offering only CPIM review courses
- PDM attendance was poor
- One newsletter (if that) per year
- Decent bank account balance and controls



What Happened?

- New board membership
 - Experience in chapter management
 - Desire to formalize structure
 - Wanted to follow best practices
- Introduction of CMS/CBAR
- Developed strategic plan and marketing plan and followed it
- Continuous improvement



Timeline

Plan Year	Activity
2005 – 2006	First pass strategic plan—Jan 2006
	First CMS/CBAR submission—for June 2006
2006 – 2007	First membership survey—Nov 2006
2007 – 2008	Developed budget worksheet—Aug 2007
	Developed financial metrics worksheet—Aug 2007
	First marketing plan developed—Sept 2007
	Completed job descriptions for board positions—Feb 2008
	Completed chapter SOPs—Nov 2007–Feb 2008
	Members survey—May 2008



Timeline (cont.)

Plan Year	Activity
2008 – 2009	Revised strategic plan (4 years)—Aug 2008
	Updated financial metrics and budget—Aug 2008
	Members survey—Dec 2008
2009 – 2010	Updated financial metrics and budget—Aug 2009
	Members survey—April 2010
2010 – 2011	Revised strategic plan—Aug 2010
	Revised financial metrics template to support CBAR and strategic plan—Aug 2010
	Updated budget—Aug 2010



The Result



The Way We Are—2011

- Simple but comprehensive infrastructure
- Cross-section of companies represented
- Formal board management
- Company coordinator program
- Lucrative education programs
- Nearly 20% member attendance at PDMs
- Six newsletters this year
- **Great** bank balance

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The Way We Are—2011

- Gold Chapter for 5th year.....



PLATINUM CHAPTER THIS YEAR!



Strategic Planning in a Nutshell



The 5 Steps of Strategic Planning



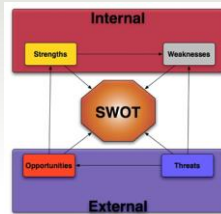
Step 1: Get Organized

- Identify benefits and concerns
- Mitigate concerns
- Get commitment
- Determine if outside help is needed
- Outline a planning process that fits
- Form a planning team



Step 2: Take Stock of:

- History and present situation
- Vision, mission, goals
- Opportunities and threats
- Strengths and weaknesses
- Critical issues for the future



Step 3: Develop a Strategy

- Set goals and objectives for each area
- Identify possible major strategic initiatives (MSI's) to reach each objective
- Evaluate and select the best strategies
- Outline specific action plans and assignments to execute each MSI



Step 4: Draft and Refine the Plan

- Develop Gantt chart to avoid conflicts
- Agree on a format
- Develop a first draft
- Refine the plan
- Adopt the plan



Our Plan

- 3 years
- Included the following:
 - Vision and mission
 - For each area we established the following:
 - Goals and objectives
 - Critical success factors
 - Performance measurements
 - Education, programs, membership, finance, marketing, and website.



Our Plan—cont.

- All-day off-site budgeting meeting
 - Tied budget to strategic plan
- Metrics spreadsheet
 - Review monthly at board meetings
 - Tied to CBAR



Let's Share!



Best Practices



What practices bring significant results?

- Produce a document
 - Whether an abbreviated or extensive strategic plan, a document is needed
 - It can be a symbol of accomplishment, a guide for operations, and a marketing tool for
 - future leadership



A useful strategic plan can be only a few pages long.

Source: Allison, M., Kaye, J. (2005). *Strategic planning for nonprofit organizations: 2nd ed.* Hoboken, New Jersey: John Wiley & Sons, Inc.



What practices bring significant results?

- Translate into an annual operating plan for at least the first year
 - A good test is if the operating implications are clear
 - Operating plan should articulate short-term priorities and clearly identify who is responsible



A good plan today is better than a perfect plan tomorrow.

Source: Allison, M., Kaye, J. (2005). *Strategic planning for nonprofit organizations*. 2nd ed. Hoboken, New Jersey: John Wiley & Sons, Inc.



Resources

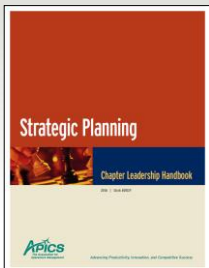


What resources are available?

- Strategic planning handbook
 - The majority of what you need is right here
- District staff
- Other chapters who have succeeded
- Your chapter?
- Other great resources for non-profits available

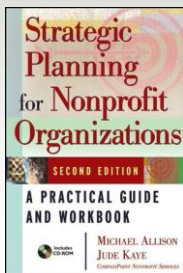


Resources



Another resource

- \$29.70 at Amazon.com
- Comes with CD-ROM of strategic planning forms
- Wealth of information and sample questions in appendices
- Another excellent tool, but this one costs you!



Conclusion

- Just Do It
- Special thanks to Mark Hardison (Director of Strategic Planning SE District)



More Information

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