

Mid-Florida Chapter # 208
Strategic Plan or years 2010 – 2013
Approved Aug 24, 2010

The Mid-Florida Chapter of APICS will continue to utilize a “Continuous Improvement” concept, along with the “CBAR” as tools to better manage the chapter.

Vision: Mid-Florida Chapter of APICS will be recognized as the foremost professional provider of knowledge and education for individuals in the Operations Management field. The Chapter’s area of influence encompasses both its internal (members) and external (manufacturing and service industry) customers by enhancing their lifelong learning options.

Mission: The Mid-Florida Chapter of APICS will strive to:

- Provide educational and networking opportunities to improve member competitive advantage through empowering members with skills and tools in the field of Operations Management.
- Provide vehicles to increase awareness of the national and local capabilities of APICS as a global educational leader across the Mid-Florida Chapter area of influence.
- Provide synergistic support for the Mid-Florida APICS Chapter’s vision by creating alliances between the Chapter and community leadership and other professional Organizations.
- Ensure that Chapter member volunteers are recognized, appreciated, and rewarded for efforts in support of meeting Chapter objectives.

This year the Mid-Florida Chapter of APICS will utilize a method of strategic planning which employs the following method of building on the successes of the past:

Year 1: The current President implements the new initiatives developed during their term.

Year 2: The incoming President-Elect is given an opportunity to develop his/her direction for their upcoming term.

Year 3: As a Past President, a year is spent in an advisory role, maintaining continuity to the planning cycle.

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CHAPTER GOALS/OBJECTIVES

1. Develop and implement a strategic plan to keep the Chapter focused on the objectives.
2. Develop and implement a marketing plan that will aggressively search for new companies and new members; communicate APICS benefits and events through multiple media avenues; grow and engage the Company Coordinators; and to assist other areas, such as membership and education with communication and advertisements.
3. Provide Professional Development Events (PDE's) that will build members' skill sets for a competitive advantage in the field of operations management.
4. Maintain a minimum of \$10,000 in the Chapter's bank account.
5. Continue to be an innovative as well as model chapter by maintaining our Gold Status in the CBAR program.
6. Utilize the C-Bar program as a management tool.
7. Promote APICS membership to Students with the goal of increasing student membership to 10.
8. Offer special discounts for students, and academia attending Chapter events.
9. Implement an educational program for CSCP, CPIM, along with other APICS courses to support the Chapter's revenue.
10. Provide quality educational courses throughout each fiscal year.
11. Support the C-Bar by:
 - a) publishing the master schedule of classes minimum of 6 months in advance
 - b) by class evaluations being completed by each student after each course.

EDUCATION

GOALS / OBJECTIVES

1. Provide quality instructional assistance to candidates for certification courses, including new educational opportunities developed by APICS.
2. Facilitate continuous improvement of courses through participation in the Instructor Development Program.
3. Provide compensation for instructors based on the Chapter's Education SOP.
4. Provide recognition to participants completing classes with a certificate of completion.
5. Maintain an Instructor pool and succession plan to support the classes offered by the Chapter.
6. Ensure students complete evaluation forms at the end of each course to provide feedback.
7. Recognize members that have earned a certification in the prior program year.
8. Recognize Instructors for the prior program year.
9. Contact members whose certification will expire to assist with certification maintenance.

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10. Provide either a Learning Dynamics for Instructors or Train the Trainer course yearly.

Critical Success Factors:

- Develop action plans and form committees to achieve objectives.
- Developing a strong pool of Instructors.
- Develop an Education budget and submit it to the BOD for approval.
- Plan APICS courses to meet the demand of the members and the community through the Chapter.
- Work with Marketing & Membership for communication, advertisement, and to increase course attendance.
- Generate a minimum income to offset cost / expenses of operations
- Actions taken after course evaluations are completed

Performance Measurements:

- Quantity of Cert and non- cert courses
- Total webinars/webcasts offered.

PROGRAMS

GOALS / OBJECTIVES

1. Provide Professional Development Events (PDE's) to support the C-Bar Program.
 - One for "Top Management".
 - Conduct a member/volunteer recognition event.
 - Providing evaluation forms for each PDE and communicate speaker rating back to each speaker.
 - Conduct a minimum of three joint PDE's.
 - Publish the PDE schedule at least three months in advance.
2. Maintain a rated speaker's list, attendance report, and PDE evaluation report.
3. Conduct a minimum of one plant tour per year.
4. Provide Recognition as identified in the C-Bar program.

Critical Success Factors:

- Develop a Programs budget and submit it to the BOD for approval.
- Provide networking / social time as an integral part of the PDE's.
- Schedule six PDE's 6 to 12 months prior to upcoming program year.
- Schedule at least one plant tour for each program year.
- Maintain an on-going relationship with IMA, MACF, ISM, or other professional organizations related to operations management.
- Select facilities that provide the best accommodations, location, best value and service.

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- Select subjects and speakers that are of value to the strategies of the chapter for each program year and based on the membership needs survey, the APICS body of knowledge, and prior PDE evaluations.
- Maintenance and posting of the attendance file
- Gather evaluations at PDE's, report on the results, and create corrective action when needed.
- Compare PDE topics to strategy of chapter and to membership needs survey and the PDE evaluation forms to determine if they match.

Performance Measurements:

- Grow additional attendance at PDE's.
- Number of PDE's conducted and the evaluation of the event.
- Scheduling a minimal of two plant tours each program year.
- Scheduling a minimal of two joint meetings each program year.
- Complete recognitions at each PDE

MEMBERSHIP

GOALS/OBJECTIVES

1. Continue to improve responsiveness to inquiries
2. Make contact with new members on a monthly basis.
3. Make contact with potential and existing members as required.
4. Support effort to maintain accurate membership database
5. Coordinate the membership recognition event each program year.
6. Increase membership 10% each program year.
7. Continue to explore the development of a local student Chapter

Critical Success Factors:

- Comprehensive understanding of various membership offerings provided by APICS.
- On-going efforts with Marketing and Education to support membership initiatives.
- Complete a monthly review of the membership roster, new members, and suspended members.
- Complete of the member needs survey.
- Timely update to APICS headquarters for record changes.
- Membership information provided within timely manner within inquiry.
- New members and suspended members contacted within 30 days.
- Completion of membership recognition. (Partner with Programs)

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Performance Measurements:

- Membership increase by 10% each year
- Membership retention of a minimum of 90%
- New members added (Total member goal minus retention member goal)
- Grow Companies associated with Chapter by 10%

FINANCE

GOALS/OBJECTIVES

1. Develop & maintain functional operating budgets
2. Provide monthly report of financial activities as compared with budget.
3. Coordinate an external audit review of the financial records within two weeks of the close of the program year.
4. Develop a plan to meet all audit recommendations.
5. Review and update all procedures for compliance and control of Chapter funds.
6. Document and review at each BOD meeting monthly performance metrics.
7. Timely filing of required government documents.
8. Support C-Bar with timely completion of :
 - a. Audit report
 - b. Letter of assertion at fiscal year end
 - c. Actual vs. Budget monthly reports
 - d. Appropriate filing of the 990EZ tax filing
 - e. Purchase liability insurance

Critical Success Factors:

- Budget development and management.
- Monthly Metrics reports.
- On time filing of the Florida Uniform Annual Report
- Submittal of final year end report which includes the financial audit and letter of assertion.

Performance Measurements:

- Development of an annual budget
- Submission of monthly Actual vs. Planned Financial reports

PRESIDENT AND PRESIDENT-ELECT

GOALS/OBJECTIVES

1. Initiate the nominating committee for each program year.
2. Support the C-Bar by:
 - a. Provide a transition plan for the officers.
 - b. Modify and manage the strategic and marketing plans.
 - c. Review the Bylaws and submit to APICS national office each year.
3. Establish a BOD succession plan in compliance with chapter bylaws.
4. Support the C-Bar program by
 - a. Reviewing the C-Bar status at a minimum a quarterly basis.
 - b. Writing the narrative that meets the criteria.

Critical Success Factors:

- Full board involvement and commitment.
- Strategic planning with continuity from year to year and an organized transition meeting to provide a smooth transition of officers.
- Provide Chapter recognition
 - Chapter Member as volunteer of the year from prior program year.
 - Chapter Company of the year from prior program year.
- Use of APICS Chapter management and marketing tools.
- Oversee a smooth transition into the next year's officers

Performance Measurements:

- Oversee the development and management of the monthly balanced scorecard.

MARKETING (Communications)

GOALS/OBJECTIVES

- Assist APICS Mid-Florida Chapter membership, educational and program goals through promotion of membership, Professional Development Event's, certification classes, and special events such as Top Management night, seminars, and plant tours.
- Increase membership through marketing to past members and non-members who have attended Chapter functions;
- Increase education participation through targeted campaigns for each education offering;
- Increase PDM participation through establishing new media communications (i.e. social network sites, radio, TV) as well as standard email communications.
- Support APICS Mid-Florida Chapter C-Bar Program:
 - Expand Company Coordinator program

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- Conduct annual analysis of Orlando area companies needs for programs and education offerings based on the Orlando market, industries, and diversity of business;
- Identify and prepare marketing material (i.e. brochures, flyers, info packs) to deliver to member and non-member individuals and companies in the Orlando area;
- Promote APICS Mid-Florida Chapter through use of local media.
- Marketing communications - newsletters

Critical Success Factors:

- Increased new memberships.
- Additional attendance at educational offerings and PDE's.
- Support Programs, Membership and Education in meeting established goals
- Completion of a survey of company needs for programs and education

Performance Measurements:

- Minimum of 4 Newsletters per year
- Communication through newsletters, formal company contact letters and advertising.

WEBSITE

GOALS/OBJECTIVES

1. Advertise events on the website at least four weeks prior to the event.
2. Make the Chapter web-site the primary data repository
3. Maintain the website to match the APICS national site.
4. Support C-Bar by:
 - a. Provide website updates within 48 hours of request
 - b. Posting and removing of employment opportunities available to our members.

Critical Success Factors:

- Support Marketing plans with links to social and professional networking sites
- Events advertised three months in advance or more if available.

Performance Measurements:

- Current information is maintained on the website