

**Strategic Plan for years 2013 – 2016**  
**Updated - 8/9/14, 7-25-2015**  
**Reviewed & Updated 7/9/2016**

The Mid-Florida Chapter of APICS will continue to utilize a “Continuous Improvement” concept, along with the “C-BAR” 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 Supply Chain and Operations Management fields. 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 fields of supply Chain and 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.

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 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 innovative as well as model chapter by maintaining our C-BAR status.
6. Adhere to chapter requirements as outlined in the CPA.
7. Utilize the C-BAR program as a management tool.
8. Implement use of Net Promoter Score methodology
9. Promote APICS membership to Students with the goal of increasing participation.
10. Offer special discounts for students, and academia attending Chapter events.
11. Implement an educational program for CSCP, CPIM, along with other APICS courses to support the Chapter's revenue.
12. Provide quality educational courses throughout each fiscal year.

## **PRESIDENT AND PRESIDENT-ELECT OBJECTIVES**

1. Operate the chapter per CPA requirements
2. Initiate the nominating committee for each program year
3. 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 By-laws annually and submit to APICS national office as updated
  - d. Reviewing the C-BAR status at a minimum on a quarterly basis
  - e. Write the narrative that meets the criteria
4. Establish a BOD officer succession approach that is executed each year in support with chapter by-laws.

### **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.

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- 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.

**EDUCATION 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 certificate of recognition to participants completing classes.
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.
10. Host either a Learning Dynamics for Instructors or Train the Trainer course once every 3 years.

**Critical Success Factors:**

- Develop action plans and form committees to achieve objectives.
- Develop a strong pool of Instructors.
- Develop an Education budget and submit it to the BOD for approval.
- Plan chapter sponsored APICS offerings 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 chapter operations
- Actions taken after course evaluations are completed

**Performance Measurements:**

- Quantity and quality of Certification and non- certification courses
- Total webinars/webcasts offered.

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## **PROGRAMS OBJECTIVES**

1. Provide Professional Development Events (PDE's) to support the C-BAR Program.
  - a. One for Student & Management Networking Night
  - b. Conduct a member/volunteer recognition event.
  - c. Provide evaluation forms for each PDE and communicate speaker feedback.
  - d. Conduct a minimum of two joint PDE's.
  - e. Publish the PDE schedule at least three months in advance.
2. Maintain attendance report, and PDE evaluation report.
3. Conduct a minimum of two 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 two plant tours for each program year.
- Maintain an on-going relationship with IMA, MACF, ISM, or other professional organizations related to supply chain and operations management.
- Select facilities that provide the best accommodations, location, best value and service.
- 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.
- Maintain and post 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.
- Schedule a minimum of two plant tours each program year.
- Schedule a minimum of two joint meetings each program year.
- Complete recognitions at each PDE

## **MEMBERSHIP OBJECTIVES**

1. Continue to improve responsiveness to inquiries
2. Make timely contact with new members.
3. Make contact with potential and existing members as required.
4. Support effort to maintain accurate membership database

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5. Coordinate the membership recognition event each program year.
6. Support the development of student involvement

**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 a member needs survey.
- Timely update for record changes/updates as requested.
- Membership information provided within timely manner within inquiry.
- New members and suspended members contacted within 30 days.
- Completion of membership recognition. (Partner with Programs)

**Performance Measurements:**

- Membership increase by 10% each year
- Membership retention of a minimum of 70%
- Grow Companies associated with Chapter by 10%

**FINANCE 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.

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**Performance Measurements:**

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

**MARKETING OBJECTIVES**

1. Assist APICS Mid-Florida Chapter goals in membership, student affairs, education, and program goals.
  - a. Support increasing membership through marketing to past members, non-members, students and faculty.
  - b. Increase education offerings awareness and participation through targeted campaigns for each education offering.
  - c. Introduce new media communications (i.e. social network sites, radio, TV) as well as standard email communications.
  - d. Expand Company Coordinator program to strengthen corporate partnerships  
Support APICS Mid-Florida Chapter C-BAR Program:
  - e. Conduct annual analysis of Orlando area companies needs for programs and education offerings based on the Orlando market, industries, and diversity of business;
  - f. 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

**Critical Success Factors:**

- Increased new memberships.
- Additional attendance at educational offerings and PDE's.
- Completion of a survey of company needs for programs and education

**Performance Measurements:**

- Minimum of 2 Newsletters per year
- Communication through newsletters, formal company contact letters and advertising.

**COMMUNICATION TECHNOLOGY OBJECTIVES**

1. Advertise events on social media and website at least four weeks prior to the event.
2. Growing the number of followers on social media sites.
2. Make the Chapter web-site the primary data repository
3. Maintain the website to match the APICS national site.
4. Support CPA and C-BAR by:
  - a. Provide website updates within 48 hours of request
  - b. Post and remove employment opportunities available to our members.

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**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

**STUDENT AFFAIRS OBJECTIVES**

1. Develop and implement a plan to promote student involvement at the college and university level
2. Promote advantages for “life-long” APICS learning

**Critical Success Factors:**

- Drive student participation at PDE’s and Plant Tours
- Build relationships with local colleges (Seminole State, St. Leo University, etc.) and universities (UCF, U of F).

**Performance Measurements:**

- Student participation and involvement