

STRATEGIC PLAN

APICS BOSTON CHAPTER #10

Passport Program Electronic Form

APICS Strategic Plan (1.5)

APICS Organization Name: **APICS BOSTON CHAPTER #10**

Plan Year(s): **JUL 07 to JUL 08**

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Strategies and Goals: The chapter expands its membership base primarily by selling APICS and Project Management certification and general Operations Management education courses to Massachusetts companies as well as to individuals. The chapter recruits new members through its certification courses, through member companies, and through direct individual enrollment. The chapter's professional development meetings and education programs improve the effectiveness and marketability of its members. Our Strategic Plan is focused on five (5) objectives:

1. Continuing the professional development of its members.
2. Becoming an effective resource to area businesses as they seek to improve their operating efficiencies.
3. Selling resource management educational programs and courses.
4. Maintaining the Boston Chapter net worth at approximately \$40K which enables us to:
 - Subsidize the BOD PDM attendance
 - Contribute to the Headquarters Supported Educational and Research Foundation
 - Subsidize memberships for qualified Academics
 - Contribute APICS textbooks, journals and so on to Qualified libraries
 - Advertise our services to non member organizations
5. Increasing the Boston Chapter membership from approximately 260 to 300 by year end 2007.

We continue to evaluate ways to increase the value of APICS Boston Chapter membership.

The chapter retains its members by encouraging the members to pursue lifelong learning and networking opportunities. The chapter seeks to maintain a current pulse of relevant topics to present at Professional Development Meetings and Seminars. The chapter offers certification review and other resource management courses, monthly professional development meetings, seminars, plant tours, and networking events. The chapter reinforces the benefits of APICS membership to the management of area businesses.

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Executive Summary of the Plan: Our most important product is an APICS-certified and professionally active member. To this end, we provide APICS and Project Management certification courses. We sell the value of these courses through our monthly professional development meetings, and the APICS Boston web site at www.bostonapics.org. Additionally, we occasionally pursue advertising through local newspapers and collaboration with other professional associations (i.e. the multi organization event NECON). Our monthly professional development meetings help to keep our members up to date, obtain networking opportunities, and maintain their effectiveness and marketability. We will target senior level managers who have strong business knowledge and budget responsibilities to communicate our benefits. The chapter will also target non member companies via our new “Small Company” initiative and those companies outside the traditional manufacturing sector.

Boston APICS Vision, Mission, Goals and Strategic Objectives Statement

A. Vision

Vision: The Boston Chapter of APICS is committed to fostering and improving regional industrial and service competitiveness and prosperity, in partnership and collaboration with other APICS chapters and professional associations.

B. Mission

The mission of the Boston Chapter of APICS is to be the premier provider of quality education that promotes the effective use of resources and the achievement of operational excellence by companies and organizations in the manufacturing, service and public sectors, within both our immediate and extended reach.

C. Goals

- I. Boston APICS will provide educational offerings, products and services that enhance our customers' productivity, profitability and competitiveness.
- II. Boston APICS will be the recognized source for innovative resource management and project management information (body of knowledge).
- III. Boston APICS will be recognized as a provider of value-added services and benefits to support the growth and continued professional development of members and potential members.

D. Strategic Objectives

In order to further understand and provide guidance on achieving the goals the following strategic objectives have been defined. The goal each supports is noted in parenthesis after the objective. These linkages are essential to understand the overall direction of this strategy and the reinforcements found within the strategy.

1. Customers will value Boston APICS education and participate in appropriate learning. (Goal I, II)
2. Boston APICS educational offerings, products and services will be validated as the benchmark by members and other customers, instructors, and academia. (Goal I, II, III)
3. Customers will perceive Boston APICS educational offerings as differentiated among fundamentals, tool application, and integration. (Goal I, II)
4. Boston APICS will focus on the timely development of educational offerings, products and services utilizing the body of knowledge. (Goal I, II)
5. Boston APICS will align with other organizations where appropriate to achieve APICS mission. (Goal I, II)

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6. Boston APICS will utilize a variety of delivery channels to ensure its competitive advantage including chapters, strategic partners and appropriate technologies, and will encourage the development of chapters to enable delivery of consistent quality for educational offerings, products and services. (Goal I, III)
7. Boston APICS will provide security, consistency, and accessibility in certification testing. (Goal I)
8. Boston APICS will develop a non member mailing list to communicate our services to the “small companies” in our geographical area.
9. Boston APICS will become a training provider within the Massachusetts State program: Workforce Training
10. Boston APICS will develop a support service that provides assistance to member companies to fund education via the Massachusetts State Workforce Training Program.

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Critical issues:

1. Maintaining membership.
2. Executing our “small company” plan to recruit new corporate members.
3. Executing our plan to become a qualified provider of training within the Massachusetts State Workforce Training Program
4. Devising and implementing an effective plan to involve Academics
5. Revitalize student chapter support and participation.

Goals and objectives:

1. Develop and implement an effective pro-growth plan for the chapter that will achieve the following goals:
 - Maintaining membership at approximately 300..
 - Executing our “small company” plan to recruit new corporate members.
 - Executing our plan to become a qualified provider of training within the Massachusetts State Workforce Training Program
 - Devising and implementing an effective plan to involve Academics
 - Revitalize student chapter support and participation development and implement an updated Multi-Year Marketing Plan.
2. Recruit 2 new BOD members in 2007-2008.
3. To support and establish a successor program for the current BOD members.
4. Maintain our award winning web presence which is an easy to use customer friendly APICS interface for:
 - i. Boston Chapter news, events and educational offerings.
 - ii. Regional news and events.
 - iii. International Society Headquarters news and events.
5. To establish a Company Coordinator program.
6. Maintain our and expand our currently cost efficient e-mail system.
7. Actively support chapter, regional and HQ sponsored programs and events by:
 - a. Maintaining a strong BOD presence at all chapter sponsored events.
 - b. Maintaining and sponsoring official chapter representation at regional and society sponsored events.
 - c. Providing financial assistance to support regional and society sponsored events and programs when requested and financially able.
 - d. Working with and supporting other chapters in achieving their missions.
8. Establish and maintain an effective Boston Chapter sustainment program by:
 - a. Maintaining an effective PDM program.
 - b. Maintaining effective educational offerings.
 - c. Implement measures to assure a minimum net worth of \$10,000 is continually maintained.
 - d. Ensuring that neighboring chapters do not encroach upon traditional chapter territories/companies.

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- e. Ensuring that an effective leadership development program is maintained within the chapter administration.
- f. Ensuring that effective BOD development and team building activities are conducting on an ongoing basis.
- g. Ensuring that a strong financial accountability program is maintained and that all disbursements are properly accounted for.

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Implementation/revision of plan:

Trends: Manufacturing in the Boston area and the region has declined substantially over the last ten years. Total membership in APICS Boston has recently experienced a dramatic decrease, and interest in our Certification courses has also slowed. Membership now averages below 300 members continuing a trend recognized nationally. Local chapters are supported by a National organization of 55,000+ members. Our focus has been on the quality of membership rather than the quantity. Providing educational programs to resource management and project management professional and Boston area businesses is a requirement for continued growth and prosperity.

Review process: This plan was developed from the template of prior plans and is designed to be a living document that changes with time. We have stated goals with measurable standards to gauge progress. We continue to review the overall effectiveness of the Plan and update/revise the plan on an on-going basis. We accomplish this by reviewing major components of the plan at our monthly BOD meetings in the form of functional VP activity reports. Upon completion of the VP reporting process, the President along with several other officer inputs will review and update the plan, if required. During the course of the July 06 thru Jun 07 program year we accomplished much. Some significant accomplishments during the plan year are as follows:

1. Update of the Chapter Strategic and Marketing Plans.
2. Major upgrades to our web site including on line Pay Pal payment processes.
3. Continued support of regional and national/society sponsored programs:
 - a. Strong attendance at regional meetings.
 - b. President attended the Annual Society Conference.
4. Increased our net worth and closed the year ahead of our budget plan.
5. Added three new BOD members and have several other individuals planning to join the BOD during the 2007-08 program years.
6. One of the *first in the world* to introduce a successful CSCP program in partnership with a top ranked Private University: Northeastern University Boston MA
7. Held one in house CPIM review class.
8. Held two very successful Project Management Review classes based on the PMP Certification program from PMI.

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APICS Boston Chapter Strategic Plan Revision History:

Version 1 11/25/95
Version 2 03/15/97
Version 3 03/05/98
Version 4 05/27/99
Version 5 03/15/00
Version 6 02/12/01
Version 7 08/01/02
Version 8 03/01/03
Version 9 06/01/03
Version 10 06/25/07