Writing Your Strategic Plan
Agenda

- IIE info for managing your chapter
- Strategic Plan elements
  - Minimum requirements
  - Additional “High Quality” elements
  - Scoring
- Establishing minimum requirements
- Developing advanced elements
- Review
Manage Your Chapter

- From IIE website, highlight Community then click on Chapters
- Click on ‘Manage Your Chapter’
- Click on ‘Professional chapters’
  - Bookmark this page! Direct link is:
- Under ‘Chapter operations’ there is the link to ‘Strategic plan guidelines and templates’

Note: for 2009 the Strategic Plan deadline has been extended to January 31st
What’s in a Strategic Plan?

- Minimum Requirements:
  - Calendar of key dates
  - Chapter program schedule
  - Chapter calendar of key dates and program schedule for the year
  - List of all officers and contact information
  - An assessment of chapter performance relative to the previous year’s plan
What’s in a Strategic Plan?

- “High Quality” elements
  - Strategic objectives and related action plans (long range plan)
  - Tactical objectives and related action plans (short range plan)
  - Chapter web site
What’s it worth?

- Your RVP will score the Strategic Plan according to this format:
  - 1.5 points – Calendar of key dates (local and national) and program schedule
  - 1.5 points – Assessment of chapter’s performance relative to the previous year’s plan
  - 1.0 points – List of all officers and contact info
  - 0.5 points – Financial projections (budget) – Note that this isn’t technically listed in the requirements!
  - 0.5 points – Overall format and quality
- “Extra” points can be awarded for including high quality elements.
- Total score is not to exceed 5 points
Fulfilling the Minimum Requirements

- **Calendar - Key dates and program schedule**
  - Key dates – the list is available on the Manage Your Chapter page (‘3rd option under Chapter operations’)
    - Most dates typically don’t change year-to-year, so you can generally keep them the same
  - Program schedule – Chapters should hold some version of a planning session to plan the upcoming program year. A rough outline should be developed for the year’s events.
    - You don’t need exact dates for all events. A general statement will suffice (March 2009 – Tour of Frito Lay production facility).
### Calendar of Key Dates (Jan 07 - Feb 08)
- January 2007 - Develop 2007 Budget
- January 15, 2007 - Submit Strategic Plan to RVP
- January 15, 2007 - Submit new officers slate to HQ and RVP
- February 15 2007 - Submit CAR
- June 1 2007 - Submit Tax Filing
- December 2007 - Submit entry for Newsletter Competition
- December 2007 - Elect new officers
- January 2008 - Submit Strategic Plan to RVP; submit Officer Slate to HQ.
- February 2008 - Submit CAR

### Program Schedule (Jan 07 - Jan 08)
- January 24, 2007 - Joint Meeting with ASQ: Facility Tour of American Airlines Maintenance and Engineering Base
- February 2007 - Facility Tour: Hallmark Distribution, Liberty, MO
- March 2007 - Dinner Meeting: Career Discussion
- April 2007 - Facility Tour: Lawrence Memorial Hospital (proposed), Lawrence, KS
- May 2007 - Community Service Event, Union Hill Cemetery
- August 2007 - Networking Event
- September 2007 - Facility Tour: JCPenney Distribution (proposed), Lenexa, KS
- October 2007 - Student Mentor Day - Facility Tour: GM Production, Kansas City, KS
- November 2007 - KC Chapter Local Conference
- December 2007 - Elections and Officer Planning Meeting
- January 2008 - Joint Meeting with ASQ (ASQ plans)
Fulfilling the Minimum Requirements

- List of officers – you should have already completed and submitted the officer slate. Copy and paste!
- Assessment of previous year’s plan
  - Acquire a copy if you don’t already have one (if you can’t get a copy, your RVP should be able to assist)
  - 2 primary options for evaluation (not the only ones):
    - List each goal from the previous year and discuss what you did to achieve, results, hits and misses, etc.
    - Break down performance Areas of Positive Performance and Areas Needing Improvement
Assessment of 2006 (Aug – Dec) Program Year

Areas of Positive Performance
- Mentor Day in October had 38 students from Kansas State University and the University of Missouri participate. The morning tour was of Arrowhead Stadium.
- November conference raised approximately $2500, providing scholarship funds for K-State and Missouri and support for the Region 5 Paper Conference to be held at Wichita State in March 2007.
- Newsletter scheduled to receive Platinum Award again.
- Conducted membership survey online and received responses from one-third of membership.
- Completed alignment of program year with calendar year.

Areas Needing Improvement
- Membership has decreased seriously, despite networking/recruitment event held in August. Dues discount was given to six potential members but only one redeemed. Overall membership decreased by thirteen people (11% decline); fifteen new members joined IIE in 2006, which translates to a loss of 28 previous members.
- Made progress on gaining CAR points in previously untapped categories, but membership decline will prevent the chapter from receiving the Gold Award.
- Attendance at December planning session was low and only one member expressed interest in becoming an officer (another was recruited after the meeting). We need to get more members interested and involved in leadership roles in the chapter.
High Quality Elements

- Financial Projection (budget) is not listed as a requirement, but is still worth $\frac{1}{2}$ a point!
- Listed in guidelines
  - Tactical objectives and plans – upcoming year
  - Strategic objectives and plans – long range
  - Chapter website
- Other ideas
  - Mission/Vision statements (if not already on the plan)
  - Officer goals to meet tactical/strategic objectives
2007 Chapter Objectives

1. Increase membership
   - Goal of total membership growth of 15% - use remaining Chapter Development funds to hold smaller, personal, more aggressive recruiting events.
   - Aggressively recruit graduating seniors from the University of Missouri and Kansas State University who will be located in the Kansas City area after graduation.

2. Provide improved services to our members
   - Communication of chapter activities – 9 newsletters per year, email reminders.
   - Career enhancing meetings/tours/conferences - mix of interesting topics and programs, located throughout our membership area, joint meetings with other engineering and engineering related societies
   - Community service opportunities – continue to work with Union Hill Cemetery but investigate options to increase participation.

3. Increase meeting attendance
   - Goal of 50% member participation in at least one program year event.

4. Measure our performance

5. Maintain financial stability and growth

6. Meet IIE National requirement of senior chapters
Example – Strategic Objectives

Long Term Objectives

- Steadily increase membership.
- Improve program attendance with improved programs and communications.
- Continue financial stability and a balanced budget.
- Provide the services desired by our membership.
- Increase local visibility of the Industrial Engineering profession.
- Support the local educational community.
- Maintain continuity with officers and advisors.
Example – Chapter website

- Chapter website: [http://www.iienet.org/kansascity](http://www.iienet.org/kansascity)
- Contact Pam Patterson to have IIE host your website
Review to Maximize Score

- Minimum requirements
  - Key dates available online
  - Program schedule and officers should be decided prior to developing plan
  - Develop analysis of previous plan

- Earn extra points
  - Include your budget
  - Develop your current and long range goals
  - Develop/list your chapter’s website
Questions?