

Appendix C: Strategic Planning Worksheets

Worksheet 1—Benefits and Concerns

Instructions

- 1) List the benefits you expect from strategic planning as well as any concerns.
- 2) Note possible ways to overcome each concern. Circle the best ideas.
- 3) Decide how you will proceed.

Benefits Expected	Concerns	Ways to overcome concerns
Utilize APICS CMS/CBar to manage chapter	None	N/A

Decide how you will proceed

- Full steam ahead
- With caution, addressing the concerns
- Wait until a better time
- Stop—don't proceed

Worksheet 2—Organize the Planning Effort

Instructions

- 1) **Indicate how you will handle each of the following issues.**
 - 2) **Outline the steps, responsibilities, and time lines for developing your strategic plan.**
1. You are developing a strategic plan for:
 - Your entire chapter
 - Only part of your chapter (for example, programs or membership)
 - Total chapter and each major program or area
 - Other
 2. For what period of time are you planning?
 - Next 2 years
 - Next 3 years
 - Next 4 years
 - Other
 3. What critical planning issues do you hope to address?
Decision to continue CBar or disband.
 4. Amount of time for planning: which do you prefer?
 - Time is limited: less than 10 hours of planning meetings
 - Compact approach: 10-20 hours of planning meetings
 - Extended approach: 21-40 hours of planning meetings
 - More than 40 hours of planning meetings
 5. Are you going to use other resource persons to develop the plan?
 - Yes No Unsure
 - If Yes, what kind of staff do you need? (region staff, volunteers with strategic planning expertise, APICS professional staff, etc.) BOD will continually assist and change as needed.
 6. Will you use a planning team?
 - Yes No Unsure
 - If Yes, who will be on it? (Check as many as apply)
 - Board members Committee members Region staff
 - Chapter members Consultant Other _____
 7. Are there other people you want to involve? No
 8. Who within your chapter will manage the overall planning effort?
Chapter President with BOD
 9. Who will lead or chair the actual planning meeting?
Chapter President
 10. By what date do you want to have the plan approved?
Approved
 11. Outline the steps you will use to develop the plan. After outlining the process, review it with the persons involved, then make any needed changes.

Worksheet 3—History and Present Situation

Instructions

- 1) **Review the chapter's history and present situation.**
See marketing plan.

Tri-State has used CMS/CBar since the program was introduced as the basis of the chapter's strategic plan. We felt this followed the APICS BOK regarding managing the minimum amount of key performance indicators (KPI) to be effective.

- 2) **Note possible ways to overcome each concern. Circle the best ideas.**
N/A

Worksheet 4—Questions about Mission

Instructions

1) Describe what you understand your chapter’s mission or purpose to be.

“The Tri-State chapter mission statement is dedicated to enhancing individual and organizational success by providing learning and networking opportunities in operations management while encouraging chapter participation.” This is posted on our website at www.tri-stateapics.org

2) List any questions, ideas, or concerns you have about your present mission.

None – the mission statement is broad enough without being confining.

3) Consider what might be the best mission for your organization in the future. Describe what your chapter might accomplish in the coming years and who will be served.

OK as is

4) Discuss your responses with the planning team and note areas of agreement and disagreement.

Mission statement discussed in previous years.

Present mission or purpose:

“The Tri-State chapter mission statement is dedicated to enhancing individual and organizational success by providing learning and networking opportunities in operations management while encouraging chapter participation.” This has been posted on our website at www.tri-stateapics.org for the last 5 – 6 years.

Questions about current mission:

Possible changes in mission for the future—what we want to accomplish:

Who will be served?

Target group(s):

See marketing plan.

Worksheet 5—Opportunities and Threats

Instructions

- 1) List the major opportunities (O) and threats (T) that you believe your chapter will face in the next 2-5 years that will determine whether it succeeds or fails.
- 2) Combine your response with those of other planning team members, and then identify the 4-8 opportunities or threats that are most critical to your chapter's future success.

Clients, customers, stakeholders	Competitors and allies	Social, cultural, economic, political, or technological forces
Potential BOD burnout (T)	ISM, PMI, ASQ, Local schools (O)	Distance based attendance (O/T)

Worksheet 5a—Clients’, Customers’, and Stakeholders’ Needs

Instructions

- 1) List the needs of present or potential customers that your chapter might address. Note ideas for how your organization might meet those needs.
See marketing plan.
- 2) List the significant groups who have a stake in what you do (for example, manufacturing companies, practitioners, current members). Note how you might meet their needs.

Clients, Customers and Stakeholders

Describe existing or possible new target groups	Their needs	Ways to meet those needs
Current certified members	Maintenance points	Alternate professional development meetings (PDM) between face to face meetings plant tours and webinars.
Current members	Learning best practices	Offer “sneak peak” to APICS materials to possibly encourage interest.
Previous members		Offer meetings during lunch and possibly breakfast as alternative to traditional after business hours meetings.
Potential members		

Worksheet 5b—Competitors and Allies

Instructions

- 1) List present and possible new competitors and what you compete for, then note your chapter's relative advantages or disadvantages (prices, image, quality, etc.).
- 2) List possible allies and how you might team up with each organization, person, or group (such as joint programs, speaker opportunities, or threats) in the competitors and allies column.

See marketing plan

Competitors	Compete for	Your relative advantages	Your relative disadvantages
<p style="text-align: center;">Allies</p> <p>ISM ASQ PMI</p>		<p style="text-align: center;">How might you team up?</p> <p>Have joint meetings and plant tours. Offer membership pricing to participate.</p>	

Worksheet 6—Strengths and Weaknesses

Instructions

- 1) List major strengths and weaknesses of your chapter as it faces the future.
- 2) Combine your responses with those of other planning team members. Note which strengths and weaknesses will be most critical to your chapter's future success.

Strengths and assets	Weaknesses and liabilities
See marketing plan	

Worksheet 7—Critical Issues for the Future

Instructions

- 1) Review worksheets 4, 5, and 6; then list critical issues or choices that your chapter faces over the next 2-5 years.**
Compete for time with busy professionals. We need to reach out and offer alternatives to standard offerings and venues.

- 2) Combine your responses with those of other planning team members; then identify the 4-8 most critical issues.**

Worksheet 8—Planning for Area Objectives

Part A

Objectives: Maintain CBar status

Date: July 1, 2009

1. Chapter Functional Area: BOD
2. Goal #: Meet CBar gold to maintain platinum status achieved 2008-2009
3. Objective (something aimed at or striven for). Stated Objective:
4. Which goal does this objective support? Goal # Stated Goal:
5. Is this objective a critical issue for the chapter in the next year? yes no

Part B

1. Strategies (Specific methods one employs to achieve the objectives). Entire BOD is responsible for reviewing their section of CBar and developing plans accordingly.

List the alternate strategies (different options or specific methods) that could accomplish the above objective:

Alternate A:

Alternate B:

Alternate C:

1. Select the best strategy of the alternate strategies above:

Does this objective relate to the mission statement? yes no

Does this objective fulfill one or more of the chapter's broad, general goals? yes no

3. What resources (in aggregate) will be required to implement this objective?

People: BOD

Equipment:

Materials/Supplies:

Finances:

Other:

Do we have the resources to implement this strategy? yes no

4. Action options

Include this strategy in our strategic plan? yes no

If yes, complete Worksheet # 9 —Action Plan

If no, should we postpone consideration of this strategy and reconsider on: _____(date)

Worksheet 9—Action Plan

Date: _____

Chapter Area:

Objective:

Strategy: Meet Gold for CBar

Description:

Indicators of Accomplishment: Meet Gold for CBar

Key Events	Responsibility	Target Date	Comments	Completed (X)

Worksheet 10—Two-Year Planning Calendar

Year _____

See CBar

JUL	AUG	SEP	OCT	NOV	DEC
JAN	FEB	MAR	APR	MAY	JUN

Year _____

JUL	AUG	SEP	OCT	NOV	DEC
JAN	FEB	MAR	APR	MAY	JUN