

Strategic Chapter Planning

Region 7 Summit 2018

Honolulu, Hawaii

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Name
Chapter
Strategic plan?

Football Strategy and Game Plan



What would you think of a football coach who said the game plan was “to pass and run well, score lots of points, and offer a strong defense.”

You would expect the game plan to reflect

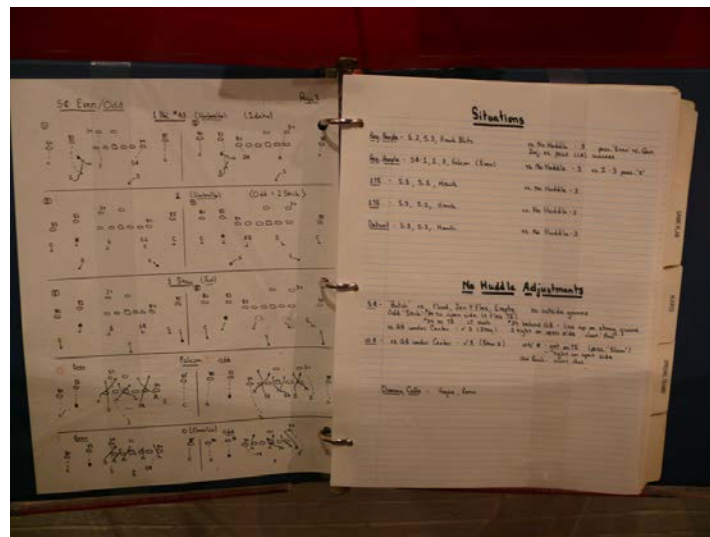
- Opposing team’s strengths and weaknesses
- Coach’s own team’s special capabilities and vulnerabilities

Football Strategy and Game Plan

Head Football Coach's strategy is a 'System' of

- Offense: passing and running strategies
- Defensive: passing and running strategies
- Special teams strategies

They use their system to create a game plan for each game they play



Chapter's Plans

- Operations Plan
- Strategic Plan



Strategic Planning Vision



Guide strategic team members to envision chapter's future

Develop necessary activities to achieve that future

Vision is an intangible structure that surrounds

- Chapter board members
- Volunteers
- Members
- Guides chapter operations and activities

Mission, Objectives, Goals and Action Plans

- Mission Statement
 - Explains reason for strategic plan
- Objectives
 - Areas of emphasis for chapter
- Goals
 - For the upcoming year that should include current year's goals
- Action Plans
 - Attain mission and objectives
 - Designed after the main goals have been determine



Operations Planning – Ops Plan

Describes milestones, conditions for success

Contains annual operating budget

Operations plans should contain:

- Goals and action plans
- Activities to be delivered (Project charter developed)
- Desired outcomes
- Volunteers and resource requirements
- Implementation timetables
- Process for monitoring progress

Activity	Responsible person	Tool / form	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Identify groups and farmers; inform about ICS	Extension officer	Meetings and group discussions, preliminary assessment													
Risk assessment	Head of extension	Risk assessment checklist													
Application of individual members to primary cooperative	Primary Coop	Farmer's application with signature													
Contracting farmers	ICS manager	Farmer agreement, internal regulations													
Training of ICS technicians	ICS manager	Training reference materials													
Training farmers on ICS and organic production	Extension officer	Farmer diary, ICS formats, list of participants													
Document profile data of farms, draw maps	Facilitator	Farmer diary, base line information questionnaire, farmer register													
Internal inspection of nursery	Internal inspector	Inspection report nursery													
Monitoring and technical advice visit to farms	Facilitator	Farmer diary, farmer register (enter visits)													
Internal inspection of farm	Internal inspector	Inspection report farm													
Internal inspection of pulping centre	Internal inspector	Inspection report pulping centre													
Supervise internal inspection activities	ICS manager	Register of re-inspected farms / pulping centres / nurseries													
Approval decisions for farms, pulping centres and nurseries	Approval committee / ICS manager	Inspection report, approved list of farmers													
Fresh cherry delivery to pulping centre	Pulper operator	Register of fresh cherry delivery with harvest estimate													
Delivery of parchment to processing centre	Marketing manager	Register of dry parchment delivery													
Hulling of dry parchment, grading/sorting	Marketing manager	Register of hulling activities													
External inspection	Certification body / ICS manager	List of approved farms / pulping centres / nurseries													
Selling of green beans	Marketing manager	Register of sales													

Strategic Planning Questions

- Where are we now? (Chapter's Position)
- How did we get here? (Chapter's Momentum)
- Where are we going? (Chapter's Direction)
- Where should we be going? (Desired Direction)
- How will we get there? (Strategic Plan)



Strategic Planning

- Building a Vision for future – Need conversations around what we seek to create together
- Define strategy or direction, and making decisions on allocating resources
- Led by senior chapter leadership who have knowledge and experience of PMI
- Executed by strategic planners or strategists
- Sets objectives and goals to determine actions
- Developed during current year for next year's operations plan
- Migrates strategic objectives and goals and into tactical objectives and goals
- Extends control mechanisms for guiding implementation of strategy

Strategic Planning Relationship



Strategic Planning Team

Past presidents

Past VP Finance

Past VP Operations

Past or current VPs

Anyone else who would like to volunteer

Facilitator: President-elect



Strategic Planning Activities - Review

- Review most recent operations plan – What worked and what didn't
- Review most recent strategic plan, if available
- Review a summary of chapter member surveys – What do they want and not want
- Review chapter member retention rates
 - Goal should be higher than PMI's retention rate
 - New members join PMI and chapter for discounts
 - New members not aware of what value the chapter can provide
 - PMI members but not chapter member (Prospects) in many cases double
 - Business: Easier to keep a customer than to get a new customer
- Review chapter member certifications: PMP, PMI-ACP, PMI-PBA, PMI-RM others
- Review budget, funds, future projections



Strategic Planning Activities - Execute

- Address review findings
- Brainstorm new ideas
- Develop initial strategic plan
- Formulate strategy
 - How to achieve the goals and objectives? (Who will do what and when?)
- Finalize strategic plan for the next year's operations plan



Strategic Plan Development Activities

- Determine where your chapter is
- Identify what's important
 - Focus on where you want to take your chapter
 - Determine the priority issues
- Define what you must achieve
 - Develop a schedule of strategic team meetings (Online or face-to-face)
 - Define objectives stating clearly what chapter should achieve
 - Prioritize and rank activities
 - Do a risk assessment
- Determine who should be accountable
 - Ensures that activities are executed
 - Identifies allocation of time, volunteers, and money to address the priority issues and achieve the defined objectives



Strategic Development Activities – (cont.)

- Finalize agreement between Strategic Planning Team and new chapter board on the plan
 - Make sure everyone understands it,
 - Knows where their individual and collective work fits in
- Create Operations Plan
 - President-elect or new chapter president
- Review. Review. Review.
 - It's not over. It's never over.
 - To ensure the strategic plan performs as designed
 - Hold regularly scheduled formal reviews of the process
 - Refine as necessary

Strategic Planning Considerations



- Is there a understanding of what is strategic planning?
- Is there an understanding of difference between goals, objectives, strategies and tactics?
- Is time set aside throughout the year to review and discuss strategy?
- Does your group have an effective strategy development process?
- Does the strategic team have two-way communication channel in place to receive insights from board or chapter members?
- Good strategy says
 - Yes to some possible actions
 - No to others

Pitfalls



- Strategic plan “gathers dust”, instead of serving as “living” blue-print for chapter success
- Trying to do too much
- Not connected to operations plan actions
- Vague action steps in operation's plan
- New chapter board members don't buy into strategy
- High turnover of strategic team members – no continuity

Summary

- Review your Chapter's Strategic Plan process
- If you don't have one, then consider it
- How did the Strategic Plan influence the Chapter's Ops Plan?
- How can it be improved?

