

ISM-San Diego Business Plan

VISION STATEMENT:

To enhance local supply management organizations, by enabling their professionals to attain their true potential.

MISSION STATEMENT:

To deliver high quality educational products and services making ISM-SD a respected resource and forum for learning and professional growth within San Diego's supply management community.

ORGANIZATIONAL ALIGNMENT:

ISM-San Diego is an affiliate of the Institute for Supply Management and as such shall align our commitment to serve the needs of our members and local constituents with adherence to supporting the guiding principles, ethics and strategic priorities of ISM.

STRATEGIC PLAN:

The organization has identified several strategic imperatives deemed essential for the continued survival of the organization and for its ability to continue to fulfill its mission to its constituents and stakeholders. They are:

1. Financial Viability
 - a. Maintain financial solvency to ensure business continuity.
 - b. Actively manage to maximize return on current assets, scale expenditures to match forecasted revenue, ensure accurate fiscal management and drive planning processes.
 - c. Adapts to changing conditions such as economy, employment, revenue generation, sponsorship level or other financial variables that affect association finances.
2. Membership Diversity
 - a. Incorporates evolving workforce needs and expectations into membership recruitment and retention processes.
 - b. Champions inclusive approach to provide opportunities to all members.
 - c. Practices innovative approach to identify and market meaningful benefits to all association members.
3. Programs Relevance
 - a. Offer timely topics that reach current interests, development needs and requisite skills of the supply management industry.
 - b. Continued support for professional supply management fundamentals.
 - c. Value-based pricing when possible to reach the largest number of constituents.
4. Outreach Effectiveness
 - a. Outreach plans will drive priorities, actions and key metrics.
 - b. Establish essential relationships, nurture affiliations and advisory or enabling networks.

5. Membership Engagement
 - a. Flexible opportunities for membership involvement.
 - b. Leadership succession planning.
6. Alignment with ISM
 - a. Leverages educational and other affiliate support resources.
 - b. Actively support groups and affiliated industry resources.
 - c. Provides advocacy for ISM brand at local and regional level.

MEMBERSHIP & MARKETING PLAN:

Executive Summary – Statement of our goals and objectives

- Increase total membership level to at least 325 and 275 dues paying members
- Limit the loss of current members to no more than 5%
- Encourage members to obtain professional certification – 50% of voting membership
- Promote attendance Satellite Seminars – increase attendance by 20%
- Provide speakers of interest to promote attendance at monthly membership meetings –
- 25% of members to attend at least one event a year.
- Grow support for and outreach to U.C. San Diego and California State University – San Marcos – target 200% increase in Student Membership
- Improve visibility of ISM-San Diego brand as the “best value” professional development career enhancement resource in San Diego area
- Support ISM direct and group activities provide additional opportunities for our members
- Support ISM and encourage members to use resources on the ISM website

History:

Originally founded as the Purchasing Management Association of San Diego in 1931, NAPM-San Diego has served the purchasing and materials management professionals of San Diego County for over 79 years. The local association is a not-for-profit professional educational association, offering seminars, workshops, and meeting programs specifically geared for the ever-changing environment of the procurement, materials management, and planning professional.

NAPM-San Diego is an Affiliate of the Institute for Supply Management™ (ISM) formerly known as National Association of Purchasing Management, a network of over 40,000 professionals in 150 affiliates nationwide. Through this network of professionals and affiliates, members of NAPM-San Diego can obtain the latest in professional development, literature and references, benchmarking studies (conducted by the Center for Advanced Purchasing Studies), and special interest groups.

ISM-SD has gone through a period of membership decline during the last two years. Once, at a peak of over 500 members, the membership level in 2009 declined to about 200. The late 2008 severe and prolonged downturn in the general U.S. economy, as well as declines in the local economy within San Diego County were identified as key factors. Another reason cited by many members who decided to let their membership expire during that period was the withdrawal of financial support from their employers to support membership or training support since they were broadly cutting back on all company discretionary expenses.

During 2010, the membership level increased again to almost 275 due to promotional efforts by the Board of Directors and several joint events between NAPM-SD and APICS-SD that generated new member interest. Also, collegiate outreach efforts resulted in sizable growth in the student member population, primarily from the University of San Diego, but also from CSU-San Marcos.

Membership declined again however during the membership renewal campaign in late 2010. Despite numerous push communication efforts, the membership level dropped by 25% during the renewal cycle. The general consensus was that two predominant factors were at fault; 1) the continued lack of support by area companies to provide financial reimbursement, and 2) the shift to ISM administering the renewal process. Informal discussions with members later indicated that people were unfamiliar with the new process, they delayed taking action after receiving the ISM invoices, the ISM payment deadline on December 17th just prior to the Christmas holidays caused people to forget and many employers were very slow in determining whether they would reimburse membership.

Actions must be taken in the future to mitigate this loss of members during the annual renewal cycle and ISM administration that is now in place. In addition, new sources of revenue should be pursued to reduce the reliance on membership fee to fund operations.

MEMBERSHIP:

Tactics for Growth:

The primary purpose of the 2011-2014 marketing plan is to grow membership by achieving increased visibility across target populations. Specifically, we need to tap those with an interest in supply management who may not have historically joined the organization either because they weren't permitted to join due their profession or because chose not to join because they didn't perceive sufficient benefit. With a membership target of 325 total members with at least 275 of those being dues paying members the goal is achievable. Solid program content, desirable guest speakers, opportunities for involvement, linkage to ISMs programs are all benefits that can be used to promote membership growth. An additional target group is people who were members in the past and let their membership lapse for some reason.

Tactics for Retention:

Additionally, we plan to retain current members by taking actions to ensure their membership expectations are being met. We plan to lose no more than 5% of members during the membership renewal process. Actions identified to accomplish this include proactive communication of key upcoming actions and deadline, possibly even an early renewal option if that can be facilitated with ISM to avoid the conflict with the holiday confusion. Another retention strategy is to survey members for feedback on program offerings and for ideas on how to better meet their professional development needs.

MARKETING:

Brand Awareness:

- Web site links – links to affiliated organization, sponsors to build visibility of the NAPM-SD and ISM San Diego brand.
- Linked-in group site – Ability to push communications, discussion, announcements, job posting to interested parties with a lowered risk of being perceived as spam.
- Outreach efforts – continued involvement with educational institutions where the association can market itself to those who are early in their careers.
- Community events – job fairs and other community events where the organization can provide a presence and distribute information to those who may take an interest in participation and/or membership.

Promotions:

- Refer-a-friend – promotions to encourage extended existing relationship to use influencers to grow members in a cost effective manner.
- Email – ability to get the word out about special events, pricing, limited time offerings, etc. to drive interest, and call to action.
- Linked-In – cost effective channel to disseminate information to interested parties.
- Bundled learning – strategy to obtain a commitment of involvement beyond a single event over time and to leverage the word-of-mouth benefits that can be achieved to co-workers who may no currently be actively involved with the association.
- Customized corporate sponsorships – ability to tailor a program based on the unique needs of a specific supply management organization, whether it be access to qualified professionals looking for employment, value-priced training offerings, match-making between employers and educational institutions or possibly access to ISM industry research or training materials.

Pricing:

- Bundled learning – targeted at cost effective continued education for those seeking new or re-certification, folks with interest in specific topics and cost sensitive firms who are looking for extra value for their training expenditures.

Event Venue:

- Member surveys results indicate that events should be offered both in north and central San Diego County and at inland and coastal locations. The board has identified several venues that may allow location to be varied while still trying to maintain an affordable option to keep event overhead costs manageable.

Summary:

This marketing plan has been developed for the years 2011-2012. This is a working document and intended to be reviewed and updated annually. The purpose is to generate ideas in an effort to increase new membership and retain current membership. It is our belief that to increase the goal more attention needs to be focused on certification of members, not only recertification or the C.P.M and new certifications of CPSMs and CPSDs, but also ancillary professional certifications that will be of benefit to the entire supply management population.

BUDGET & FINANCES

IRS Form 990 – please see attached

3 year budget – please see attached

Funding Plan – sources and target percentages

- Membership – 95%
- Seminars - 1%
- Courses – 2%
- Sponsorships – 1%
- Donations & raffles – 1%

Dues Structure:

Dues Paying

- Associate 2
- Regular 191
- Lifetime 16
- Volume Discount 20

Due Free

- Non-student regular 10
- Student 44

LEADERSHIP:

Organizational Chart – see attached org chart.

Job Description – see attached operating manual.

Policy & Operating Manual – see attached operating manual.

Leadership Training Workshop Attendance – 75% of Board Officers have participated at the ISM affiliate leadership training. The President, Vice President and Treasurer have all attended ISM leadership training. As revenue allows, other board members will be encouraged to also attend future annual conference leadership training workshops.

Continuing Leadership Plan – continuing leadership plan consists of the following elements:

- Leadership Recruitment, Development and Mentors
 - Identify members who are active in the association and may be seeking leadership opportunities
 - Provide board orientation or training sessions to ease integration into the role
 - Promote participation as ISM affiliate leadership training workshop
 - As possible, assign each new board member a board member who has been in the role for at least one year as a support resource.

- Volunteer Recruitment, Training and mentoring
 - Clearly define the association's needs for volunteers and committee members
 - Identify and utilize proven tactics for the recruitment of volunteers including:
 - Outreach to student members to participate in committee activities and events facilitation.
 - Engagement and recruitment of interested members at monthly meetings and educational events.
 - Proactive outreach to mid-career professionals who may be ready to step up involvement to the next level.
 - Offer flexible time requirements to appeal to broadest group possible.
 - Leverage benefit of peer word-of mouth and intra company relationships.
 - Tie opportunities to individual's career advancement objectives.
 - Solicit feedback on the experience and use to tailor recruitment message.
 - Understand and articulate the benefits based on individual needs
 - Define a clear scope in terms of time requirements and deadlines for completion
 - Provide the training needed to enable a successful experience

EDUCATION:

Educational Calendar – see attached

Education Plan – see attached

Support of ISM Certification & Qualification Program

- Piloted CPSD program, 2 board members certified.
- Three Board members with T3 certification – the association goal to begin offering CPSM review courses in San Diego area in late 2011.
- 40% of current membership hold some type of professional certification – the association goal is to grow that percentage to 50% in three years