

# FAPPO Strategic Plan 2009



42nd Annual Conference  
April 5 – 8, 2009 - Orlando, Florida

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## Outline

- Background
- Where are we now?
- Where do we want to be?
- How do we get there?
- How do we track our progress?



## Outline

- ✓ **Background**
  - **Where are we now?**
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## Background

- **Strategic Plan Discussed by Board Over Several Years**
- **Consultant Facilitated Initial Plan Development**
- **Strategic Planning Session: Orlando March 10, 2007**

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## Outline

- Background
- ✓ Where are we now?
  - *Strengths*
  - *Weaknesses*
  - *Opportunities*
  - *Threats*
- Where do we want to be?
- How do we get there?
- How do we track our progress?

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## Strengths

- Over 1,100 members with 40 year history
- Many talented & dedicated people
- Great value for the money
  - Membership fees
  - Conference registration
- Trade show/vendor relationships
- Professional development & educational programs
- Networking
- Board members, committees, and many members are committed to FAPPO's success

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## **Weaknesses**



- **Lack of member involvement on committees and as officers**
- **Learning curve with annual change in leadership**
- **Limited resources and part-time volunteers**
- **No mentoring program**
- **Minimal conference locations**
- **Recognition of members**
- **Lack of member input**

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## **Opportunities**



- **Executive Director**
- **Encourage member involvement**
- **Mentor & educate**
- **E-business opportunities**
- **Increase M/WBE networking**
- **Strengthen relationships between agencies**
- **Increase credibility/professionalism**
- **Evaluate organizational structure**

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## Threats

- Budget constraints/budget outlook
- Members' work schedules
- Dependence on trade shows
- Dependence on volunteers
- Competition from NIGP & its chapters
- Conference locations & adequate facilities
- Frequent changes in FAPPO leadership

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## Outline

- Background
- *Where are we now?*
- ✓ *Where do we want to be?*
  - Core Values
  - Mission Statement
  - Vision Statement
  - Priorities
  - Intended Outcomes
- How do we get there?
- How do we track our progress?

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## **Core Values**

- **Commitment to Ethics**
- **Commitment to Integrity**
- **Commitment to Professionalism**
- **Commitment to Diversity**
- **Commitment to Education and Professional Growth**
- **Commitment to Members: Customer Service Driven**

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## **Mission**

**FAPPO exists to promote the achievement of excellence in public procurement through education, certification, professional development and networking of its membership.**

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## **Vision**

**To be the leading professional association promoting the best practices of public procurement.**

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## **Priorities**

- **Customer Focus**
- **Professional Development and Education**
- **Fiscal Management**
- **Member Participation**

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## Customer Focus Team

- ★ Team Leader...Denise Schneider
- ★ Sally Bergman
- ★ Steve Carnell
- ★ Patty Hobbs
- ★ Nora Laudermilk
- ★ Mark Raiford
- ★ Elia Zayas
- ★ Liaison...Rhonda Scott

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## Intended Outcomes

- Customer Focus
  - Members
    - Recognition
    - Legislative Updates
    - Credit Card Payment
    - Enhance Web Site
  - Vendors
    - Trade Show Booths
    - Advertisers
    - M/WBE firms
    - Sponsorships
  - Other Organizations
    - NIGP, NPI, NAEP, NASPO, ISM, NCMA
    - State DMS
    - Government Agencies

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## Customer Focus Team Recommendations

- Create a Public Relations Committee
- Update the Website
- Promote State Certifications Classes
- Scholarships and Awards
- Legislation
- Partner on Classes with NIGP Chapters
- Create a Fundraising Committee
- Fall Conference
- Spring Conference

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## Customer Focus Team Recommendations and Results (8/15/08)

Recommendation	Advantages	Cost	Results
Public Relations Committee	Promotes FAPPO to Others	Video \$10K, PP: \$100	N. Laudermilk did PP-ED; working on it
Update Website	Keep site current	\$5,000	Completed Aug. 2008
State Certification	More classes	Staff Time	Pro-D working w/State & Chapters
Scholarships/Awards	Encourages participation	10 x \$300 = \$3,000	FAPPO Bucks implemented
Hire Lobbyist - Legislation	Change laws	\$5,500+	Too costly; could change tax status
Partner with NIGP Chapters	More classes at lower cost	Staff Time (Pro-D)	Pro-D implemented statewide schedule
Create Fundraising Committee	Additional revenues	Staff Time	Exec. Dir. handling these duties
Fall Conference	Regional Workshops	Minimal	2-day NIGP class being subsidized
Spring Conference	Various Recommendations	\$3,820 - \$13,310	State class during conf. / shorten conf.



## Fiscal Management Team

- ★ Team Leader...David Bennett
- ★ Conrad Ailstock
- ★ Rebecca Begley
- ★ Barb Conboy
- ★ John Klatt
- ★ Rey Palma
- ★ Liaison...Russ Wetherington

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## Intended Outcomes

- Fiscal Management
  - Matching the Budget with the Strategic Plan*
  - Revenue Generation
    - Annual Dues
    - Fee Structures
    - Investments
    - Advertising
    - Conference Location
    - Trade Show Facilities

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## Intended Outcomes

- **Fiscal Management**  
*Matching the Budget with the Strategic Plan*
  - **Expenses**
    - Guest Speakers
    - Food and Drink
    - Operating Expenses
  - **Executive Director**
    - Marketing
    - Vendor Guidelines - Sponsorship, Advertising, and Participating Roles
    - Trade Shows
    - Permanent Association Mailing Address
    - Registration

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## Fiscal Management Team Recommendations

- **Generate Revenue**
  - Sell FAPPO membership list
  - Sell advertising within the directory
  - Obtain vendor sponsorships
  - Sell vendor access to FAPPO information
  - Sell vendor advertising on FAPPO website
  - Sell FAPPO promotional items

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## Fiscal Management Team Recommendations (Continued)

- Accept Credit Cards for Payment
- Analyze Membership Dues Structure
- Budget Methodology and Controls
- Analyze Current Investment Options
- Analyze the Process for Determining the Annual Conference Location
- Develop a Long-range Financial Plan
- Analyze the Price Elasticity of Vendor Trade Show Booths
- Analyze the Price Elasticity of Conference Registration Fees

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## Fiscal Management Team Recommendations and Results (8/15/08)

Recommendations	Advantages	Cost	Results
Generate Revenue	\$	Minimal	Exec. Dir. handling
Accept Credit Cards	Ease of Payment	Minimal	Quickbooks
Analyze Dues Structure	Cost/Benefit	Staff Time	Future analysis
Budget Controls	Cost Containment	Staff Time	No update
Analyze Current Investment Options	More Investment Revenue	Staff Time	Investments unchanged
Analyze Process for Annual Conference Location	Maximum Benefit to Members	Staff Time	Orlando chosen for 3 years
Develop Long-range Financial Plan	Planning of Budgetary Items	Staff Time	No update
Analyze the Price Elasticity of Vendor Trade Show Booths	Maximize Revenues	Staff Time	Will analyze after Spring conference
Analyze the Price Elasticity of Conference Registration Fees	Maximize Revenues	Staff Time	No update

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## Pro D and Education Team

- ★ Team Leader...Cheryl Olson
- ★ Barbara Kuhl
- ★ Bobbye Marsala
- ★ Pam Thompson
- ★ Karen Walbridge
- ★ Liaison...Carrie Woodell

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## Intended Outcomes

- Professional Development and Education
  - Process Improvement
    - Education Classes
    - Conference Attendance
    - Certification
  - Internal Leadership Development
    - Annual Conference Sessions on Leadership
    - Special Courses on Leadership
    - Mentoring

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## Pro D and Education Team Recommendations

- Improve Communication Between FAPPO and Other Organizations RE: Class Offerings
- Streamline the Class Registration Payment Process
- Improve Communications RE: Programs Offered
- Increase Conference Attendance
- Training Focus: Offer Specialized Purchasing Classes Not Offered by NIGP or the State RE: Florida Local Government Issues (CCNA, Risk Mgt., Emer. Mgt., etc.)
- Increase Pool of FAPPO Instructors
- Include Leadership Sessions at Conferences
- Provide Special Courses on Leadership
- Encourage Mentoring
- Increase Number of Certified Members

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## Pro D & Education Team Recommendations

Recommendations	Advantages	Cost	Results
Improve Communications RE: Class Offerings	Avoid Event Conflicts	Staff Time	Pro-D Com. completed schedule matrix
Streamline Class Registration Payment	Faster Turnaround; Up-to-date Data	Trans. Fee	Pcard accepted for payment
Improve Communications RE: Programs Offered	Increases Member Awareness	Staff Time	Website postings implemented
Increase Conference Attendance	Networking opportunities	Staff Time	FAPPO Bucks implemented
Offer Specialized Purchasing Classes	Focus on purchasing in Florida	Staff Time	Pending
Include Leadership Sessions at Conferences	Leadership development	Staff Time	Included in latest conference
Provide Special Courses on Leadership	Leadership development	TBD	Pending
Encourage Mentoring	Professional growth	Staff Time	Pending
Increase Pool of Instructors	Train the trainer	\$525 / student	Pending

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## Member Participation Team

- ★ Team Leader...Cindy Talamantez
- ★ Dora Allison
- ★ Sheila Faircloth
- ★ Gloria Garcia
- ★ Angela Goldwire
- ★ Liaison...Janet Sheehan

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## Intended Outcomes

- **Member Participation**
  - **Committee Involvement**
    - Selection Process
    - Chairperson Qualifications
    - Rewards
    - Span of Control
  - **Networking**
    - Conference Roundtables
    - Web Site Discussion Sections
  - **Event Attendance**
    - Benefits of Each Event
    - Length and Time of Year for Events
    - Coordination with Other Organizations

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## Member Participation Team Recommendations

- Incentives for Participation
- Increase Communication with All Members
- Newsletter Dissemination
- Invitations to All Government Entities
- New Member Mentor and Orientation
- Speak at Other Organization Meetings

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## Member Participation Team Recommendations

Recommendation	Advantages	Cost	Results
Form Committee to Implement Incentives for Participation (Prizes/Awards)	Increased response to surveys or requests	Approx. \$1,000	Reduced fees for training or merchandise credit can be offered for bringing in new members, surveys, etc.
Increase Communication to All Members	Blast e-mails: details/reminders of events	Staff Time	Improved website and new Executive Director should improve communication
Newsletter Dissemination	Increased knowledge and participation	Staff Time and software	Improved website and new Executive Director should improve communication
Target all entities to be members, using FAC and other organizations to collect address/phone info.	Increased channels of communication	Approx. \$2,000	Committee or Executive Director can mail postcards or flyers to promote a State of Florida Challenge
New Member Mentor & Orientation Committee by Regions of Florida	Strengthens new member commitment	Travel & Meals	A member from their region can welcome and assist new members on behalf of FAPPO
Speaking Engagements by Officers and the Exec. Dir. at Other Organizations	Extols the advantages of FAPPO and Increased Membership	Approx. \$750	No update

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- Background
- Where are we now?
- Where do we want to be?
- ✓ **How do we get there?**
  - Overall Plan of Action
  - Criteria for Action Plans
- How do we track our progress?

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## Overall Plan of Action

1. Develop ideas to attain Strategic Outcomes for each Priority - *What things might we implement to reach our goals?*
2. Develop Performance Measures to assure progress and attainment of goals for each Priority
  - A. Compare two or more workload indicators (ratios)
  - B. *Who, what, where, when, why, how?*
3. Develop a method and process to review, assess, and report the status of each measure.
4. PDSA: Plan, Do, Study, Act

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## Criteria for Action Plans

- **Responsive** - reflects changes in operations and levels of performance
- **Valid** - captures the information intended
- **Cost-effective** - justifies the cost for collecting/retaining data and making changes
- **Relevant** - directly relates to mission, goals and objectives
- **Comprehensive** - incorporates significant aspects of operations

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- **Background**
- **Where are we now?**
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- ***How do we get there?***
- ***✓ How do we track our progress?***
  - ***Action Plans - Examples***
  - ***Performance Measures - Examples***

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## **Action Plan - Example #1**



### **Strategic Priority: Customer Focus**

- **Category: Members**
  - **GOAL: Improve Website Information and Usage**
    - **Performance Measures:**
      - Total number of hits on web site
      - Number of hits within each area of the site
      - Satisfaction survey to members
      - Allow advertising on web site?

Ref. Slide 17 37

## **Action Plan - Example #2**



### **Strategic Priority: Pro D and Education**

- **Category: Leadership Development**
  - **GOAL: Increase Number of Certified Members**
    - **Performance Measures:**
      - # of certification review courses held
      - # of NIGP classes held
      - % of members certified

Ref. Slide 27 38



## **Action Plan - Example #3**

### **Strategic Priority: Fiscal Management**

- **Category: Revenue Generation**
  - **GOAL: Identify Optimum Conference Location(s)**
    - **Performance Measures:**
      - **Number of attendees**
      - **Hotel accommodations at each location**
      - **Trade show facilities at each location**
      - **Short-term contracts vs. long-term contracts**

Ref. Slide 22 39



## **Action Plan - Example #4**

### **Strategic Priority: Member Participation**

- **Category: Event Attendance**
  - **GOAL: Improve Spring Conference Attendance**
    - **Performance Measures:**
      - **# of attendees annually**
      - **Before-event surveys**
      - **After-event surveys**
      - **Gather list of most popular topics**
      - **Gather list of most popular speakers**

Ref. Slide 31 40