
ASQ Charleston January 26 2016



Agenda

- Welcome – Chapter Business
 - 2016 Budget and Business Plan
 - 2015 Financial Results
 - Section Leadership Openings
 - Lowcountry Quality Conference
 - Education Opportunities
 - Upcoming Events
 - Stay in Touch!
- Speaker – Jim Thompson



2016 Budget - Revenue

Account #	Account Name	Annual Budget
	REVENUE	
4000	MEMBER DUES	\$3,000.00
4100	RETAIL SALES	\$0.00
4200	ADVERTISING	\$0.00
4300	REGISTRATIONS	\$8,000.00
4320	DINNER MEETINGS	\$0.00
4360	EXHIBITS	\$5,000.00
4480	RECERTIFICATION	\$150.00
4521	EDUCATION/COURSES	\$0.00
4600	CONTRIBUTONS/SPONSORSHPS	\$0.00
4871	INTEREST	\$0.60
4898	RESERVE FUND DISTRIUBUTED	\$0.00
4899	RESERVE FUND MARKET VALUE CHANGE	\$0.00
[4920,4930]	ROYALTIES	\$0.00
[4990,4995]	MISCELLANEOUS	\$0.00
	TOTAL REVENUE	\$16,150.60

- Revenue generating ideas
 - Increase membership numbers
 - Lowcountry Quality Conference
 - Education Partnerships
- More ideas are welcome!

2016 Budget and Business Plan can be found on www.ASQCharleston.org on the “Key Links & Docs” page



2016 Budget - Expenses

EXPENSES		
Account #	Account Name	Annual Budget
5000	TEMPORARY HELP	
5100	PRINTING	\$500.00
5200	COST OF SALES	\$0.00
5280	PROMOTIONAL GIVE AWAYS	\$1,000.00
5300	COMMITTEE EXPENSE -SECTION ONLY	\$0.00
5400	POSTAGE	\$200.00
5500	CONTRACT & PROFESSIONAL	\$50.00
5504	MANAGEMENT OR CUSTODIAL FEE	\$0.00
5512	CREDIT CARD/BANK SERVICE FEES	\$50.00
5573	ADVERTISING	\$100.00
5576	EXPOSITION SERVICES	\$0.00
5630	EQUIPMENT DEPRECIATION	\$0.00
5650	EQUIPMENT PURCHASES<\$500	\$0.00
5675	EQUIPMENT RENTALS	\$0.00
5704	EXHIBIT BOOTH RENT	\$0.00
5800	MEETINGS & MEALS	\$7,300.00
5900	TRAVEL	\$4,000.00
6000	SUPPLIES	\$200.00
6100	TELEPHONE	\$0.00
6100	WEBSITE HOSTING/INTERNET FEES	\$100.00
6200	JOINT VENTURES/PARTNER PAYMENT	\$700.00
6310	AWARDS AND MEDALS	\$0.00
6328	SCHOLARSHIPS	\$1,200.00
6371	RETAIL ORDERS	\$0.00
6393	DONATION/SPONSORSHIP	\$500.00
6390	OTHER	\$0.00
	FUTURE EVENT RESERVE	\$0.00
	TOTAL EXPENSES	\$15,900.00
	SURPLUS (DEFICIT)	\$250.60

- We are balancing expenses while continuing to find ways to add value for our members
- We will continue to maintain partnerships with other local professional organizations to increase the networking and educational opportunities for our members



2016 Business Plan

		2016 Business Plan for:		Section 1122 - Charleston						Review Date:	
										Form Revision Date:	
		ASQ Strategic Objectives:		1. Accelerate Growth		2. Increase Impact		3. Achieve Operational Excellence			
ASQ Strategies	ID	2016 Objectives	Priority (L-M-H)	Action Descriptions	Action Plans	Owner (or Role)	Due Dates	Status (G-Y-R)	Progress/ Comments	Measures	
<i>What ASQ must do to achieve growth, impact & operational excellence.</i>	<i>ID</i>	<i>Enter the Member Unit (MU) objective for 2016.</i>	<i>Enter a priority (L-M-H)</i>	<i>Describe the key actions to be taken to achieve the objective.</i>	<i>Describe in details the specific action plans to carry out the key actions.</i>	<i>Identify the action owner (or the role if not known).</i>	<i>Enter the due dates for the actions.</i>	<i>Enter status for the action.</i>	<i>Enter the progress, concerns or road blocks or actions are completed.</i>	<i>What are the measures for this action? Use SMART.</i>	
1	1a	Lowcountry Quality Conference (LQC)	High	Increase awareness of event	Reach out through ASQ Global marketing channels, regional ASQ membership within 100 miles & student participation	Conference Chair	Quarterly	Red	-44%	1. Attendance ↑ 5% from previous year (paying attendees)	
			Low	Fill position for Student Branch Counselor	Focus on the recruitment of LQC attendees and student members in general (\$30/year)	Student Branch Counselor	4/30/2016	Green	Planning for 20	2. Minimum of 10 student scholarships awarded to LQC (no charge)	
3	2a	Member Meetings	High	Baseline needed from 2015	Need to analyze to get variable data from 2015. Jerry to follow-up with data at end of 2015.	Chair	Monthly	Green	>= 10%	1. Rolling 6-month average of 10% or more of membership attending meetings	
4			Medium	Need to communicate events with more time for members to plan & schedule	Need to schedule 2016 calendar of events. Jim & Jennifer to work together.	Chair	Monthly	Green	>=1	2. Minimum of 1 program option per month (includes participation in another association's event on behalf of ASQ)	
5			Low	Need to communicate events with more time for members to plan & schedule	[Same as above]	Programming Chair & Arrangements Chair	6/15/16 & 12/15/16	Green	>=3	3. Minimum of 3 social events per year (1 per 6 months)	
6			Low	Need to communicate events with more time for members to plan & schedule	[Same as above]	Programming Chair & Arrangements Chair	6/15/16 & 12/15/16	Green	>=2	4. Minimum of 2 tours per year (1 per 6 months)	
7	2b	Member Growth	Medium	Approx 160 both 2014 and 2015, but need monthly data	Need to analyze to get variable data. Ashley to follow-up	Membership Chair	2/15/2016	Yellow	>Last Year (M-over-M) 12/31/15 Growth: 103.14%	5. Increase membership numbers year over year	
8	2c	Member Retention	Medium	Need to compare with other sections our size	Work with Membership Chairs in region to benchmark. Also increase the # of enterprise member employees who upgrade to individual membership	Membership Chair	2/15/2016	Red	12/31/15 Retention: 75%	6. Increase retention numbers year over year >Last Year (M-over-M) & No less than 90%	

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9	3a	ASQ Certification	High	Baseline needed from 2015	Need to analyze to get variable data from 2015. Jennifer to follow-up with data at end of 2015.	Education Chair & Certification Chair	Monthly	Yellow	>/=1 per Mo	1. Increase awareness of certifications available (i.e., exam dates and times, resources for exam preparation, etc.) by including in monthly updates	
			Medium	Plan for collaboration in 2016 and get on the calendar asap	Continue with events that worked well in 2015 while maintaining good collaboration with CEJC, SME and PMI	Chair	Quarterly	Green	Q1 = 2 Q2 = 3 Q3 = 3 Q4 = 1	2. Collaborate with other professional organizations / associations on a regular basis at least 1/Qtr	
10	3b	Networking	Medium	Plan for collaboration in 2016 and get on the calendar asap	Continue with events that worked well in 2015 while maintaining good collaboration with CEJC, SME and PMI	Chair	Quarterly	Green	Q1 = 2 Q2 = 3 Q3 = 3 Q4 = 1	2. Collaborate with other professional organizations / associations on a regular basis at least 1/Qtr	
11	4a	Lowcountry Quality Conference (LQC)	High	Continue as planned	2016 Planned for April 21-22	Chair	5/1/2016	Green	1/Year	1. Hold the LQC	
12			High	Budgeted = (\$633) Actual = (\$4024) Total revenue down by approximately 50% due to lack of ticket sales & lower sponsorship.	2016 to focus on sponsorship, recruitment of student participation through sponsored (paid) tickets vs. free and better involvement of Sponsor Sub-Committee	Conference Chair	5/15/2016	Red	+/- 5%	2. LQC on budget	
13			Medium	Attendance down from 125 (2014) to 83 (2015)	Focus on dynamis speakers, pre-conference workshop and better advertising	Conference Chair	5/1/2016	Red	>Last Year	3. Increase LQC attendance year over year	
14			Low	Catch up on meetings	Missed meeting during the month of October. LQC committee to meet twice in November & December to change this to green. Also, must get out Call for Papers in November as this is late.	Conference Chair	Monthly	Yellow	>/= 1/Mo	4. Minimum of 1 monthly meeting held by LQC committee and reports to SLC (between Sep-Apr)	
15			4b	Regional Leadership Training (Section 1122)	High	First time with this metric, therefore yellow	Must schedule and conduct training with new SLC members by end of Q1 2016	Chair	3/31/2016	Yellow	On or before 31-Mar
16	4c	Regional Leadership Training (11B)	Low	None of the 4 SLC top leaders were in attendance at the summer 2015 regional training sessions, although 2 of the 4 have been in 2013 and 2014	Short-term: Review the PPT file sent by Luis (RD) on 10/29/15. Long-term: Need to work with Luis (RD) to ensure alignment with expectations.	Chair	8/31/2016	Yellow	>/=2	6. Send a minimum of 2 member leaders (recommend including someone in upcoming SLC rotation)	

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5. Operational Excellence: Empower employees, collaborate with member leaders and design and deploy reliable systems with technology that provide an exceptional customer experience.	5a	Information Communication	High	Continue to use these tools and train others	Continue to use each respective tool to improve communications. Need to train committee chairs and members on various tools to ensure continuity	Vice Chair	Quarterly	Green	Great improvement in management of key documented information and remote sharing. - Working files = Dropbox - Website = Approved documents - Remote = Join.Me - Updates = LinkedIn - Newsletter = MailChimp	1. Use of collaboration software (i.e., Dropbox, Website, Join.Me, etc.) for all section working documents and electronic records	
			Low	Great increase & tools for analysis in 2015	Continue to monitor visitors and overall engagement in 2016	Vice Chair	Monthly	Green	YTD = 142% 2013 = No tool 2014 = 1767 2015 = 4283	2. Increase 12-month rolling average of website views	
			Medium	Goal met with 3 each month	Need to continue to expand means of communication as email seems to be less effective each year. Consider increasing this to 4-6 means monthly, including other social media, text, etc.	Secretary	Monthly	Green	January 2016: Email, Website, LinkedIn	3. Use of a minimum of 3 forms of communication for each section 1122 event (i.e., email, newsletter, LinkedIn, printed flyers, etc.)	
	5b	Financial Reports	Medium	Great improvement, but needs to be better communicated online	Add these deadlines to the website, newsletter and calendar on website	Treasurer	Quarterly	Green	Submitted on time each quarter previous 7 quarters	4. Quarterly financial report submitted and approved on time	
	5c	SLC and LQC Committee Meetings	Medium	Get account for the section to use	Need to look at getting join.me account (or alternative) for the section so we can have a general account for use by any leader that needs to collaborate remotely	Secretary	Monthly	Green	Jan 2016: ASQ 1122 JoinMe account created along with ASQCharleston1122@gmail.com email address; JoinMe used for Jan 21 SLC meeting	5. Use of screen sharing / conference calls, as appropriate, to effectively plan and improve communication	
6. Gift of Quality: Enhance the ASQ brand by supporting the use of quality to make the world a better place.	6a	Community Service	Low	Special event needed for 2016	Create a community project in 2016 in order to give back using tools and resources available from ASQ membership; Lowcountry Food Bank on a Saturday morning in Q1; Jerry proposed "sponsored"	Chair-Elect	11/1/2016	Green	Feb 20 2016: Lowcountry Food Bank	1. Increase awareness of ASQ by having a community service event	
	6b	World Quality Conference	Medium	Plan for WCQI in Milwaukee for 2016	Need to solicit request for interest in attending WCQI in 2016, including budget based on 2015. Look into the sponsorship of 1-3 students that could attend and represent ASQ Charleston	Chair & Treasurer	5/31/2016	Green	2 Members from SLC were in attendance as well as another member from ASQ not currently on SLC	2. Send a minimum of 2 member leaders (recommend including someone in upcoming SLC rotation)	

2015 Financial Results

- 2015 audit performed on January 23 2016 by the Audit Committee:
 - Dave Stamps
 - Pam Russell
 - Gary Wallace
 - Dawn Caullwine – Section Treasurer
 - Jennifer Leak – Section Chair
- Final Report will be ready in February and briefed at the General Membership Meeting on February 23rd.



Section Leadership Opportunities

- **ASQ Charleston Vice Chair**

Description: The vice chair is second in command after the chair. If there are multiple vice chairs, their responsibilities and succession order shall be established by the SLC and documented in section policy and position descriptions. The Vice Chair(s) will be considered for the Chair position in 2017 pending the vote in the fall of 2016.

Expected Time Commitment: 6-8 Hours per month

Term: January 1 – December 31 2016

- **ASQ Charleston Placement Chair**

Description: Coordinate the section's job placement program to facilitate access to professional opportunities for your section members and assist area companies with recruiting quality professionals.

Expected Time Commitment: 2-3 Hours per month

Term: January 1 – December 31 2016



Section Leadership Opportunities

- **ASQ Charleston Historian**

Description: Maintain membership and activity information for the section for historical purposes.

Expected Time Commitment: 2-3 Hours per month

Term: January 1 – December 31 2016

- **ASQ Charleston Programs Chair**

Description: Determine focus of section events and programs. Solicit speakers to match topics. Work with arrangements chair, if applicable, to coordinate speaker needs.

Expected Time Commitment: 2-3 Hours per month

Term: January 1 – December 31 2016

- **ASQ Charleston Arrangements Chair**

Description: Oversee arrangements for all regular meetings of the section and other special programs and conferences as assigned by the Section Leadership Committee (SLC) or other committee chairs.

Expected Time Commitment: 2-3 Hours per month

Term: January 1 – December 31 2016



Lowcountry Quality Conference

- **Lowcountry Quality Conference Chair**
Description: Lead the LQC Committee to ensure all preparations for the the conference are complete. Ensure all tasks during the conference are covered and executed. This includes securing sponsorships, finalizing speakers, coordinating logistics, and leading the communications and advertising.
- **Lowcountry Quality Conference Committee Volunteers**
Description: Volunteer to support the LQC Chair – tasks may include securing speakers, soliciting sponsors, coordinating communications and advertising, and being available on-site during the conference to assist with registrations, room monitoring, and other activities as needed.
- April 21-22 2016
- Tanger Crowne Plaza



Education Opportunities

- Concentric – Special Offering for ASQ Charleston Members
 - ISO 9001:2015 Internal Auditor Training
 - February 23-25 2016
 - Trident Tech
 - Special Promo Code for ASQ Members only:
 - TBD
- Look for more opportunities to be announced throughout the year!



Upcoming Events

Date	Event	Info
February 6	Charleston STEM Fest	Location: Brittlebank Park Time: 10:00am – 3:00pm Volunteers are organized into shifts – see the January 2016 page on ASQCharleston.org for more details
February 16	CEJC Annual Engineer's Week Banquet	Location: Citadel-Holliday Alumni Hall Time: 5:30pm – 8:00pm Tickets for ASQ members available at a discount
February 20	Lowcountry Food Bank Community Service event	Time: 9:00am – 12:00pm RSVP by February 13 th
February 23	ASQ 1122 General Membership Meeting	Location: TBD Time: 5:30pm-7:00pm Speaker: John Surak, Food Quality and Safety

Suggestions for speakers, meeting locations, or other events for our Section are welcome!



Stay In touch!

- www.ASQCharleston.org
- LinkedIn Group:
 - ASQ Charleston | Section 1122
- Emails
 - If you're not receiving emails from ASQ Charleston, please send an email to ASQCharleston1122@gmail.com and ask to be added to the list.

