
ASQ Charleston

March 29 2016



Agenda

- Welcome – Chapter Business
 - 2016 Business Plan Update
 - February 2016 Financial Report
 - Section Leadership Announcements and Openings
 - Lowcountry Quality Conference
 - Upcoming Events
 - Stay in Touch!
- Speaker – Steve Hodlin



2016 Business Plan

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. Global Expansion: Leverage the ASQ brand to increase market share worldwide, emphasizing growth in current and new ASQ markets.	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	10/30/2016	Green	Planning for 20	2. Minimum of 10 student scholarships awarded to LQC (no charge)
2. Membership Transformation: Serve the needs of individuals around the world to ensure their professional success through membership, products, and services.	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% Jan 16: 28/168=16.7% Feb 16: 23/168 = 13.7%	1. Rolling 6-month average of 10% or more of membership attending meetings
			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)
			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)
			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)
	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	4/15/2016	Yellow	>Last Year (M-over-M) 02/29/2016 Growth: 103.1%	5. Increase membership numbers year over year
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	4/15/2016	Red	01/31/2016: Retention: 74.7%	6. Increase retention numbers year over year >Last Year (M-over-M) & No less than 90%	

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3. Growing Organizations: Serve the needs of organizations around the world providing quality solutions to increase impact through membership, products, and services.	3a	ASQ Certification	High	Baseline needed from 2015	<i>Need to analyze to get variable data from 2015. Jennifer to follow-up with data at end of 2015.</i>	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
	3b	Networking	Medium	Plan for collaboration in 2016 and get on the calendar asap	<i>Continue with events that worked well in 2015 while maintaining good collaboration with CEJC, SME and PMI</i>	Chair	Quarterly	Green	Q1 = 2 - CEJC Banquet, LFB Q2 = 3 Q3 = 3 Q4 = 1	2. Collaborate with other professional organizations / associations on a regular basis at least 1/Qtr
4. QBOK Leadership: Design and develop relevant, innovative offerings that directly influence how our customers practice quality.	4a	Lowcountry Quality Conference (LQC)	High	Continue as planned	<i>2016 Planned for October 4-5 2016</i>	Chair	11/1/2016	Green	1/Year	1. Hold the LQC
			High	Budgeted = (\$633) Actual = (\$4024) Total revenue down by approximately 50% due to lack of ticket sales & lower sponsorship.	<i>2016 to focus on sponsorship, recruitment of student participation through sponsored (paid) tickets vs. free and better involvement of Sponsor Sub-Committee</i>	Conference Chair	11/1/2016	Red	+/- 5%	2. LQC on budget
			Medium	Attendance down from 125 (2014) to 83 (2015)	<i>Focus on dynamic speakers, pre-conference workshop and better advertising</i>	Conference Chair	11/1/2016	Red	>Last Year	3. Increase LQC attendance year over year
			Low	Catch up on meetings	<i>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.</i>	Conference Chair	Monthly	Yellow	>= 1/Mo 1st SME.ASQ CC Meeting held on 3/24/16	4. Minimum of 1 monthly meeting held by LQC committee and reports to SLC (between Sep-Apr)
	4b	Regional Leadership Training (Section 1122)	High	First time with this metric, therefore yellow	<i>Must schedule and conduct training with new SLC members by end of Q1 2016</i>	Chair	3/31/2016	Green	J Leak attended Member Leader Training on 2/19/16	5. SLC members fully trained and transitioned by end of Q1
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	<i>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.</i>	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	<i>Continue to use each respective tool to improve communications. Need to train committee chairs and members on various tools to ensure continuity</i>	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	<i>Continue to monitor visitors and overall engagement in 2016</i>	Vice Chair	Monthly	Yellow	Dec 15 Avg: 154.1 Jan 16 Avg: 147.7 Feb 16 Avg: 145.3	2. Increase 12-month rolling average of website views
			Medium	Goal met with 3 each month	<i>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.</i>	Secretary	Monthly	Green	February 2016: Email, Website, Meeting	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	<i>Add these deadlines to the website, newsletter and calendar on website</i>	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	<i>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</i>	Secretary	Monthly	Green	Jan 2016: ASQ 1122 JoinMe account created along with ASQCharleston1122@gmail.com email address; WebEx used for Feb and Mar SLC meetings	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	<i>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"</i>	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	<i>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</i>	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)

2016 Financial Report - February

Section Number & Name:		1122 ASQ Charleston Carolina Low Country				
Fund Balance-Period Ending December 31, 2014						*\$ 7,579.76
Add:		Monthly	Quarterly			
Total Revenues - Period Ending		2/28/2016	mm/dd/yy	+	\$	0.11
Subtract:						
Total Expenses - Period Ending		2/28/2016	mm/dd/yy	-	\$	2,295.27
Ending Fund Balance - For The Quarter Ending		2/28/2016	mm/dd/yy	=	\$	5,284.60



2016 Financial Report - February

SECTION REVENUE		Cost Center 001, 003, 004 Revenue	Cost Center 002 Newsletter Revenue	Total Revenue
4000	Membership Dues	-		\$ -
4100	Retail (Merchandise) Sales	-		\$ -
4270	Advertising - Newsletter / Website		-	\$ -
4290	Advertising	-		\$ -
4300	Conference Revenue	-		\$ -
4300	Education Course Revenue.	-		\$ -
4320	Dinner/Program Meeting Fees	-		\$ -
4480	Recertification Revenue	-		\$ -
4601	Donations/Sponsorships	-		\$ -
4871	Interest (i.e. savings, money market, CD's)	0.11		\$ 0.11
4892	Dividends & Mrkt Val Adjustments -Long Term Investment	-		\$ -
4920	Royalties	-	-	\$ -
4980	Exhibits	-		\$ -
4995	Miscellaneous	-		\$ -
TOTAL SECTION REVENUE		\$ -	\$ -	\$ 0.11

2016 Financial Report - February

SECTION EXPENSE		Genl & Adm Cost Center 001	Member Value Cost Center 02 Newsletter	Member Value Cost Center 03 Conference	Member Value Cost Center 04 Course	Total Expense
5100	Printing	-	-	-	-	\$ -
5200	Promotional Giveaways	-	-	-	-	\$ -
5300	Committee Expenses	-	*	*	*	\$ -
5400	Postage	-	-	-	-	\$ -
5500-5511	Contract and Professional (INCLUDE A/C 5511)	4.00	-	-	-	\$ 4.00
5573	Advertising	198.00	-	-	-	\$ 198.00
5600	Equipment	-	-	-	-	\$ -
5630	Equipment Depreciation	-	-	-	-	\$ -
5675	Equipment Rentals	**	-	-	-	\$ -
5800	Meetings and Meals	95.00	-	-	489.85	\$ 584.85
5900	Travel	-	-	-	753.22	\$ 753.22
6000	Supplies	-	-	-	-	\$ -
6100	Telephone/Communications	-	*	*	-	\$ -
6200	Joint Venture/Partner Payments	-	-	-	500.00	\$ 500.00
6310	Awards & Medals/Monetary Awards/Gifts	-	-	*	-	\$ -
6327	Scholarships	**	-	-	-	\$ -
6328	Donations/Sponsorships	-	-	-	250.00	\$ 250.00
6395	Other/Miscellaneous	5.20	-	-	-	\$ 5.20
TOTAL SECTION EXPENSES		\$ 302.20	\$ -	\$ -	\$ 1,993.07	\$ 2,295.27
Line 45 Total Adm Exp		302.20	Line 45 Total MV Exp		1,993.07	\$ 2,295.27



Section Leadership Announcements

- **Vice Chair Appointment**

- Karl Krull

- **Appointed by Section Chair with approval of Leadership Committee**

- **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



Section Leadership Opportunities

- **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

- **Postponed until October 2016**
 - Tentative dates: October 4-5 2016
 - Venue: Lowcountry Graduate Center
- **Partnering with SME**
- **Conference Committee Members**
 - **SME**
 - Dick Tiano
 - Kevin Beers
 - Nate Andrews
 - John Oldham
 - Chris Duchaine
 - **ASQ**
 - Jennifer Leak
 - Karl Krull
 - Blair Healey
 - Ashley O'Shea
 - Jackie Huffman
 - Sue Brinson



Lowcountry Quality Conference

- **Proposed Name:**
 - Lowcountry Manufacturing & Quality Expo
- **Committee Meetings**
 - April 7th
 - April 28th, and every other Thursday
- **If you are interested in serving on the committee, please email ASQCharleston1122@gmail.com**



Upcoming Events

Date	Event	Info
April 7 th	LM&QE Committee Meeting	Time: 5:30pm – 6:30pm
April 21 st	Partner Meeting with SME	TBD
May 7 th	Lowcountry Food Bank	Time: 9:00am – 12:00pm RSVP by April 30 th
May 14 th	SME Golf Outing (Team of 4 ASQ Members Needed!)	Wescott Golf Club Time: 9:00am
May 24 th	ASQ 1122 General Membership Meeting	Location: TBD Time: 5:30pm-7:00pm Speaker: TBD

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.

