



**Strategic Plan**

**2016-2018**

## Chapter Operations

### Officer Transition Meeting

Set aside additional time at the final meeting of the year (or another distinct time) to have a comprehensive discussion of the Strategic Plan and Chapter Operations Manual. This meeting shall be available to all new officers as well as members interested in future leadership roles within the Chapter.

Provide training for the Chapter's management system to Board members for use with communications, forms, survey, and meeting modules.

### Formal Marketing Plan

#### Executive Summary

The South Carolina Association of Governmental Purchasing Officials is a chapter of the National Institute of Governmental Purchasing, Incorporated (NIGP). The Association is a nonprofit organization providing a wealth of support to purchasing agencies throughout South Carolina. Through its programs, purchasing officials learn the finer points of source selection, competitive bidding, negotiation, transportation, quality assurance, contract administration, tracking, inventory management, and specification writing.

#### Target Customers

The membership of SCAGPO shall be limited to persons who are employed by a State, County, City, Town, Municipality, School District, or other Governmental Agency or Subdivision unless otherwise approved for membership by a majority vote of the Board of Directors. The classes of membership are:

- **Regular Members:** Restricted to persons who are actively engaged in governmental purchasing activities of any state, county, municipal, educational agency or special purpose political subdivisions. May also be extended to anyone interested in the profession, vendors excluded, and sponsored by a regular member.
- **Lifetime Members:** May be conferred upon active members upon retirement and written request for such membership.
- **Honorary Members:** May be bestowed upon individuals who have made distinguished contributions to the purchasing profession, or to the Association, upon recommendation and majority vote by the Executive Board.
- **Agency Members:** Up to 15 members may have membership in the name of any state, county, municipal, educational agency, or special purpose political subdivision which is actively engaged in governmental purchasing activities.

Agency members are considered regular members.

### Unique Selling Position

The association sponsors multiple professional development seminars per year for a minimal cost and an annual conference with purchasing seminars. These have proven invaluable for those professionals in governmental purchasing who want to improve or update purchasing techniques and skills, improve purchasing power, and increase overall knowledge of purchasing. Additionally, SCAGPO offers member scholarships and other assistance to further support member achievement of professional development goals.

### Pricing & Position

The cost for individual membership is \$40.00 annually. Agencies may purchase membership in the amount of \$450.00 for a maximum of 15 people and \$20.00 for each additional member. Annual dues shall be established by the Board of Directors prior to April 1 of each year otherwise, the annual dues will remain unchanged. Dues shall be due on the first (1st) day of each year, or, in the case of new members, payable immediately upon enrollment as a member of SCAGPO. New members joining SCAGPO between the months of January and June shall pay full membership dues. Members joining between the months of July and December shall pay decreased membership dues.

### Promotional Plan

The Leadership shall take appropriate measures to promote the Chapter internally as well as externally. The Chapter shall do so by utilizing its Management Tool, Star Chapter, as follows:

- Manage the website, keeping it updated, useful, and relevant
- Publish and store issues of newsletter, Buyways
- Announce and manage meetings, trainings, and other events
- Manage member data and publish member directory

The Leadership shall also advocate for Chapter and individual members:

- Sharing member (individual & agency) successes among membership
- Sharing Chapter and member (individual & agency) successes as appropriate in news media outlets and on behalf of the member within the individual members' entities.
- Establishing and building appropriate relationships with other Professional organizations and non-profits.
- Establishing and completing Charitable Projects through-out the year, which will

impact SC Citizens or could share information, notoriety, and good-will on behalf of the Chapter in other places.

- Purchasing ads in local journals to promote membership recruitment efforts

The Chapter shall maintain a consistent level of professionalism by:

- Maintaining brand consistency through the use of the logo and letterhead in all correspondence released inside and outside of the membership.
- Using the official chapter powerpoint template for all presentations made to the membership or on behalf of the membership. With the exception of Forum, in which the Program Committee Chairperson may choose to use a different theme specific template for that event.
- As much as possible (and appropriate) choosing flyers and signage for events, which has the appearance of professional, polished, and finished.

#### Additional Minimum Requirements

The Chapter shall meet the following recommendations as strongly suggested by NIGP:

- Complete Leadership Reporting Form – Required. Due to NIGP by January 31
- Complete Chapter Member Data Form – Required. To NIGP by January 31
- Complete Chapter Seminar Agreement – Required. Due to NIGP by January 31
- Complete Chapter Financial Form – Required. Due to NIGP by March 1
- Complete Group Exemption Update Form – Required. Due to NIGP March 1
- Filled required IRS documents (990 or 990N) – Required. Due by May 1.
- Establish a Record retention schedule
- Internal financial controls
- Establish written job description for Board and Committee positions
- Conduct a minimum of four Board and Committee meetings throughout the year
- Identify opportunities and capture occurrences of Chapter members serving on NIGP councils, committees or task forces

## II. Membership Recruitment, Retention, and Engagement

### Membership recruitment activities and programs:

- Developed a brochure for marketing; this will also be sent to new members.
- Advertise in local business magazines/journals
- Registration Event at Forum
- SC GFOA Recruitment
- Local Government/K-12 Targets
- Housing Authority Target – Currently 0 Members from this category

### Membership retention activities and programs:

- Contact members two months before membership lapses to prompt renewal and, in some cases, help the member renew.
- Contact lapsed members one month after membership is lapsed. Final follow-up to encourage renewal.
- Focus on retention of second year introductory members. Reduce drop-off rate after second year of membership by calling these people first.
- Assess Member Viability and Retention: Did you know that even if our membership numbers are constant from year to year, we could still have a retention problem? When we continually gain and lose members, the resulting revolving-door effect makes it difficult for us to operate effectively, carry out successful projects, and attract potential members. To get a true picture of our membership, it would be helpful to look at information from the past three to five years. Looking at this data would create a more realistic membership pattern. We could obtain more details which would help identify any significant turnover.
- Token Incentive for Member Renewal at Forum: Ribbon/small promotional item
- Identify a way to capture member retirement and celebrate that achievement

### Conduct Member engagement activities and programs:

(i.e. Newsletters, surveys, awards, membership meetings).

- Reach out to Agency Procurement directors to encourage certification & recruitment
- Send handwritten welcome notes to each new member.
- Call or e-mail new members on a monthly basis and invite them to sit with a Membership Committee member or Board member at the next training
- Every six months, invite a new member to join the Membership Committee.
- Demonstrate value including:
  1. Being a source of current and relevant information sharing;
  2. Working with other NIGP Chapters to maximize our resources;
  3. Providing quality and cost effective professional development opportunities that will not only improve members' career performance, but will also help members attain and maintain professional certifications;

4. Seeking to understand the needs of our members and actively pursuing solutions to those needs.
- Encourage committee recruitment – Make it easy to say yes with face to face opportunities at the forum and all trainings. Possibly include blurbs about what each committee has done during 2016 on the website. Instead of “What does that committee do?” We might get; “I can do that!”
    1. “Token” Incentive for Volunteer Sign-Up at Forum

“Volunteering is the perfect vehicle to discover something you are really good at and develop new skills. SCAGPO can use your talents, skills, time, and energy...Did you know that employers would recruit a candidate with volunteer experience over one without?”

#### **Membership enhancements through technology (i.e. Resource Library/research tools, job posting, online member directory, online payments, and calendar of events).**

- Utilizing technology to connect with members without requiring extensive travel or time commitments; and
- Encourage participation either via personal attendance or telephonically. Free conference calling is available to all; and in the future we hope to add live web based meetings as well. We know that many of our members may have to travel long distances, or simply cannot afford to take time away from their many responsibilities to physically attend in person.
- Digital communications are messages delivered through electronic media. Promote the website, Facebook page and ensure they are regularly updated?  
TWITTER: Are we tweeting about SCAGPO and special events?
- Have we joined conversations on LinkedIn?

#### **Mentor program: (young professionals, career development, chapter leadership or certification.**

#### **Extra Services:**

- Ask for membership input on the website, etc., to find out how well we are serving our customers/members. Generate a Report Card to see how we are doing and where we can improve.

### III. Education & Professional Development

#### NIGP Educational Opportunities

- Continue to provide 1-2 NIGP training opportunities per month
- Freshen offerings to add at least 2 new courses to appeal to seasoned/certified members

#### Conferences, Trade Shows, Reverse Trade Shows

- Continue Forum Trade Show. Identify any opportunities to create diversity
- Grow Reverse Trade Shows to appeal to a broader range of disadvantaged businesses

#### Support Certification

- Identify a few current members who may serve as a certification or recertification counselors/SME
- Continue low cost study sessions
- Establish virtual study groups

#### Provide Speakers, Facilitators, or moderators at procurement related educational events, including NIGP

- Provide related trainings for speaking (i.e. Toastmasters) to provide tools for those who would serve or speak, but aren't comfortable doing so
- Develop a system of capturing member speaking activities
- Provide SCAGPO members first opportunity to provide relevant, timely, and quality training at quarterly events as well as in NIGP courses
- Seek Opportunities to provide a "Speaker Exchange" with North Carolina & Georgia Chapters
- Seek opportunities to provide speakers to other organization training such as GFOA, SC Association of School Administrators, SC Association of Counties, SC School Board Association, SC IT Directors Association

#### Chapter Professional Development Opportunities

- Develop a low cost Basic Procurement Series catering to unseasoned members
- Provide a series of webinars to members
- Build resource directory on website for members to use as needed to enhance daily operations
- Utilize webinars produced and provided by other professional organizations
- Research to possibility of implementing a point system for members. Members accrue points for chapter involvement. Points can be redeemed to offset the Pro D and NIGP trainings, Forum expenses, and certification application.
- Fund the ProD quarterly trainings so that the cost does not exceed \$30 per member. The rising cost has reduced attendance by members who were paying for their own registration.

## IV. Advocacy for Members & The Profession

### Legislative updates and had a positive influence

- Targeted Greeting to Legislatures (Christmas & Procurement Month)

### Community service or grassroots effort that significantly increase the visibility of the procurement profession.

- Participate in Career day at High School & College level – promote procurement as a profession
- Seek Charitable Projects that provide the opportunity for volunteerism (walks, literacy days, food kitchens, etc)
- 

### Chapter sponsored Procurement Month activity or event.

- Encourage agencies to provide training and promote procurement as a profession.
- SCAGPO members could provide some small trainings (sponsored by SCAGPO) to educate our customers on procurement.
- 

### Forge partnership with a non-traditional partner (i.e. Other Professional Associations, Municipal Associations, Non-Profit organizations, etc.).

- Provide a “Training” exchange for members in similar organizations
- Seek opportunities to provide columns to local news outlets on Procurement Topics

### Collaborate with another NIGP Chapter or other procurement association.

- Hold NIGP trainings near NC & GA borders to increase collaboration w/ other NIGP chapters
- Develop a “Training Exchange” for 1-2 Board members with these other states so that we may get ideas from one another

### Additional

- Seek Opportunities to nominate or support members for awards/recognition in other organizations (work, professional, volunteer)
- Celebrate members achievement in local newspapers

## V. INSPIRING PROCUREMENT FOR THE FUTURE

### Goal 1:

Creating and establishing a formal engagement/partnerships with Higher-Education program

- Establish a relationship with the Technical Schools, Claflin University and Coastal Carolina College
  - This should allow the organization to gain student memberships

### Goal 2:

Creating and establishing an internship

- Establish an internship through organization (this has been discussed previously through Board, but was not implemented)
  - A starting point for the internship program would be through the higher education partnership
  - Research the possible types of internship that would be available

### Goal 3:

Scholarship Program

- Currently, scholarships are offered through Professional Development and Certification
- Implement student scholarship(s), between \$500.00- \$600.00 or as budget allows.
  - Suggest starting out with the scholarships to be issued to the higher education entities that we partner

### Goal 4:

Chapter presence at Career Fairs

- Attend at least 3-5 career fairs at educational institutions
- Attend Job Fairs
- Invite students to our annual forum
- Invite students to quarterly trainings
  - No cost to the student
  - The number of students to attend the training would be limited

### Goal 5:

Utilizing social media

- Establish Linked In and Instagram accounts in addition to Facebook and Twitter
- Make sure all marketing of events are posted to social media
  - This year's forum will be marketed through social media
- Video message from the President, possibly on a quarterly basis, to the members
- Establishing a discussion posting board (similar to NSite)

## Additional

- Strategically Address Diversity: Increasing the number of younger professionals, members of various ethnic groups as well as the different public agencies represented should be our goal. Diversity also allows for a wider range of skills, increased volunteer resources, expanded leadership prospects, and enhanced productivity.