



**2008
STRATEGIC PLAN**

14 Jan 2008

**PITTSBURGH CHAPTER
OF THE
INSTITUTE OF INDUSTRIAL
ENGINEERS**

Region One
Chapter Three

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VISION

The Pittsburgh Chapter of the Institute of Industrial Engineers will be a strong, active, growing, inviting, goal-oriented and financially independent organization that will duly serve the needs and desires of the local industrial engineering community and profession.

MISSION

The Pittsburgh Chapter of the Institute of Industrial Engineers will strive to strengthen and maintain the industrial engineering profession in the greater Pittsburgh area. This mission will be accomplished by:

1. Promoting and supporting the application of industrial engineering principles and methods.
2. Providing educational, useful and practical information and knowledge to its members.
3. Being a technical, educational and professional interchange center for members and employers in the Pittsburgh area.
4. Providing a network for the industrial engineering community to develop and maintain professional and social relationships.
5. Initiating cross-functional exchange of knowledge, experience and ideas with corporations and other local professional organizations.
6. Promoting the image, concept and purpose of industrial engineering to increase the awareness and understanding of the profession to educational institutions, businesses, professional organizations and the community.
7. Supporting the local community through the application of industrial engineering skills and efforts.
8. Becoming the professional organization of choice for Industrial Engineers and related professionals in the greater Pittsburgh area.

STRATEGIC INITIATIVES

The Pittsburgh Chapter Board of Directors has put the following initiatives in place for 2008. The Board believes making progress in these areas will result in receiving Gold award status in 2008 (the Bronze award level was achieved in 2007).

The Pittsburgh Chapter will make progress in each of the initiatives mentioned on the following pages in 2008, however, the Board of Directors has decided to put particular strategic focus on the Membership initiative in 2008.

ORGANIZATION/LEADERSHIP

DEFINITION

- **Develop sound organization and leadership strategies to serve the needs of the members.**

STRATEGIC INITIATIVES (2-5 year time horizon)

- Identify a strong core team of people to lead the strategic initiatives.
(DEVELOPED VETERAN ROLE AS PART OF CONTINUUM TO LEAD SI's)
- Build a secondary team to support the development and evaluation of the strategic initiatives.
(UTILIZING CHAPTER PRESIDENT(S) IN THIS ROLE)
- Develop a pool of human resources to assist the standing committees in execution of annual and tactical plans.
- Mentor future leaders for the organization.
- Develop a formal succession planning process.
(DEVELOPED LEADERSHIP CONTINUUM FOR SUCCESSION PLANNING)
- Ensure the strategic initiatives are current.

TACTICAL OBJECTIVES (upcoming year)

- Define the team members and structure for the following initiatives:

MEMBERSHIP

- Survey the current members and gather interest levels regarding participation.
- Review and revise the tactical objectives for the upcoming year.
- Review the strategic initiatives and revise as necessary.

MEMBERSHIP

DEFINITION

- **Identify and recruit new members and retain existing members.**

STRATEGIC INITIATIVES (2-5 year time horizon)

- Define the value proposition for senior and student members to join, be active and belong.
- Define the needs of the membership.
- Develop mentor relationships.
- Execute the plan to reach under-represented markets in the Pittsburgh area
- Develop data collection mechanisms to identify/profile the I.E. population in the area.
- Execute the plan to identify/recruit new/recent grads from local colleges/universities

TACTICAL OBJECTIVES (upcoming year)

- Conduct a phone survey of current members to determine membership needs and expectations.
- Perform phone exit interviews with dropping members to determine reasons for leaving the chapter.
- Contact new members via the telephone and formally welcome them at chapter meetings. Create a buddy system for new members.
- Increase membership by 5% by the end of the program year.
- Conduct a membership discussion during at least one meeting, i.e., town hall meeting.
- Convert local student members that remain in the Pittsburgh area to senior chapter members. (Use of networking techniques and open invitations to senior chapter events may be a useful mechanism.)
- Validate strategic membership initiatives based on membership expectations.

FINANCIAL & FUNDRAISING

DEFINITION

- **Develop and maintain a fiscally sound financial plan to sustain the growth of the chapter.**

STRATEGIC INITIATIVES (2-5 year time horizon)

- Ensure that the chapter has a positive balance of income over expenses to remain financially independent.
- Maintain consistent oversight of financial well being of the chapter. Periodically review the Success Indicator Summary maintained by the chapter Vice President.
- Execute and build upon financial spending/saving plan developed in 2005 including the maintenance of the \$2000 “safety net”.
- Identify spending priorities based on prior year activities.

TACTICAL OBJECTIVES (upcoming year)

- Investigate options of fundraising (e.g. donations, corporate solicitations, federal/state/local grants, fee for programs, charge for ads in newsletter, etc.)
- Maintain a reasonable, customary, and consistent auditing/accounting practice.
- Assist in the update of the annual budget.

EDUCATIONAL/PROGRAMS

DEFINITION

- **Address professional development needs of the current and future members.**

STRATEGIC INITIATIVES (2-5 year time horizon)

- Provide Leadership development for chapter leaders.
- Provide scholarship programs for I.E. students.
- Provide awards and recognition for local students.
- Provide monetary assistance to increase student participation in senior activities and I.E. events (including conferences).
- Assist in providing a mechanism for the continued professional development and education of the membership.
- Continue to provide regular (monthly) programs available to all members of the Pittsburgh Chapter as well as the University of Pittsburgh student chapter
- Support (financial, if possible, as well as mentoring, judging paper contest, etc.) the Student Regional conference when it is at the University of Pittsburgh.

TACTICAL OBJECTIVES (upcoming year)

- Ensure discounts to senior chapter meetings and subsidies for trade shows, conferences, seminars, etc. are available to I.E. students.
- Assist in the evaluation of student performance for the University of Pittsburgh I.E. student of the year award.
- Survey members to determine topics of interest, validate strategic membership initiatives based on membership expectations and provide programs to satisfy those expectations.
- Encourage Senior Chapter member involvement in Region One Conference in March 2008.

PROMOTION

DEFINITION

- **Develop materials to promote awareness of IIE and the Pittsburgh Chapter as well as the “Practice of I.E.”.**

STRATEGIC INITIATIVES (2-5 year time horizon)

- Develop and maintain recruiting materials.
- Develop and maintain general public distributions.
- Ensure submissions of press releases / communications when warranted (to publicize success stories and recognize professional achievements of members).
- Increase awareness of the profession to companies via brochures, etc. (e.g. prepare glossies for area small business owners promoting the I.E. profession).
- Utilize the local media (print, radio, and television) to promote chapter activities.
- Establish a peer group network with other chapters to develop and share marketing literature.
- Assess results of promotional activities.
- Encourage a steady stream of students to pursue I.E. education (e.g. road show to high school students, participation in National Engineer’s Week at the Carnegie Science Center, IE in Motion – sponsoring students to shadow IEs at work).

TACTICAL OBJECTIVES (upcoming year)

- Continue high school road show to educate on the IE profession – Note: first high school presentation on “IE – the profession” is scheduled for 01/15/08 with more to follow in 2008.
- Define/revise and utilize chapter communication-marketing plan.
- Use local forums to advertise upcoming meetings (e.g. TechniCalendar, Pittsburgh High Tech Calendar, Pittsburgh Business Times, ESWP, TV, etc.).
- Communicate IIE Pittsburgh Chapter benefits to members and non-members (Univ. of Pittsburgh Seminars, IIE benefits bookmark handout).
- Raffle IIE-Logo merchandise at programs.
- Provide placement strategies, services, and skills to assist members in networking and obtaining employment and provide recruiting services for organizations looking for IEs.
- Investigate opportunities to participate in K-12 events to encourage students to pursue I.E. education

CHAPTER AND SUCCESSION PLANNING

DEFINITION

- **Define and provide the infrastructure to support the organization.**

STRATEGIC INITIATIVES (2-5 year time horizon)

- Maintain the infrastructure of a successful I.E. chapter (Board of Directors, Chapter Officers, Committee Chairs, Committee members).
- Maintain the technological infrastructure of a successful chapter (e.g. web server, voice mail, telecommunications, etc.).

TACTICAL OBJECTIVES (upcoming year)

- Continue yearly transition meetings in December to ensure succession of leadership from year to year.
- Be proactive with respect to recruitment of capable leadership and offer attendance to leadership training events offered by national
- Maintain succession planning model developed by the Organization and Leadership Strategic Initiative group in 2005-2006.

COMMUNITY

DEFINITION

- **Develop and maintain community awareness through the planning and implementation of I.E. projects to non-profit organizations and enterprises.**

STRATEGIC INITIATIVES (2-5 year time horizon)

- Use I.E.-based techniques and tools to benefit non-profit organizations.
- Sponsor and provide non-I.E. support to assist non-profit organizations. (e.g. day of caring, WQED/WDUQ, food bank contributions, etc.)
- Encourage a steady stream of students to pursue I.E. education (e.g. road show to high school students, participation in National Engineer's Week at the Carnegie Science Center, IE in Motion – sponsoring students to shadow I.E.s at work)

TACTICAL OBJECTIVES (upcoming year)

- Continue to build upon local relationships with schools.
- Build additional relationship for application of IE skills in non-profit organizations on a volunteer basis
- Make use of students in the IE program at the University of Pittsburgh to participate in volunteer opportunities at non-profits.
- Support Promotion committee in investigating opportunities to participate in K-12 events to encourage students to pursue I.E. education

2008 KEY DATES

Legend: C – All Chapters | HQ – Headquarters

Month	Date	Responsible	Action Item
January	15	C	Chapter strategic plans due
		HQ	Chapter dues checks issued to green and yellow chapters
		C	Offer assistance to university regional conference host
February	1	C	Grant proposal deadline
	15	C	Chapter Activity Reports (CAR) due
March	1	C	IIE officer visit requests due
	15	C	RVP evaluation due
	30	C	Phoenix Award nominations due
May	1	C	Grant proposal deadline
	16-21	C	IIE Annual Conference and Expo 2008, Vancouver, Canada <ul style="list-style-type: none"> ■ Networking Leadership Council Meeting ■ Volunteer Leadership Training (VoLT)
	31	HQ	
June	15		Annual IRS tax filing submission due (U.S. chapters only)
			Chapter bank statement due
August	1	C	Grant proposal deadline
September	30	HQ	Chapter dues checks issued to green and yellow chapters
October	18	HQ	Networking Leadership Council Meeting, Atlanta
November	1	C	Grant proposal deadline
	15	C	Hold elections for new officers
		C	Familiarize yourself with the reporting requirements and Chapter Activity Report (CAR)
		Plan for upcoming program year	
December	17	C	Newsletter competition entries due
		C	Submit new officer slate form to RVP/HQ with contact information

2008 TENTATIVE PROGRAM DATES

Date	Program
January 24, 2008	University of Pittsburgh Professor: Value Stream Mapping
February 21, 2008	IIE National Engineers Week Recap
March 20, 2008	Tour: Heinz Field
April 24, 2008	Tour: Bridges Tour
May 22, 2008	Tour: Kennywood Park
June 19, 2008	Annual Pirate Game!
July 24, 2008	No Program
August 21, 2008	No Program
September 25, 2008	Tour: American Eagle Distribution Center
October 23, 2008	Tour: Heinz Factory
November 13, 2008	Membership Outreach (location TBD)
December 18, 2008	Annual Transition Meeting

2008 BOARD OF DIRECTORS, LEADERSHIP TEAM, AND COMMITTEE MEMBER LISTING

A	B	C	D	E	F	G	
IIE Pittsburgh Chapter 2008 Board of Directors, Leadership Team, & Committee Member Contact List							
	POSITION	NAME	COMPANY	ADDRESS LINE1	PHONE		
BOARD OF DIRECTORS	Board Chair (2nd Year)	Jeff Arnold jeffrey.arnold@accenture.com	Accenture	Seven Parkway Center Pittsburgh, PA 15220	412.921.2400 x245 412.973.1748	w	
	Board (3rd Year)	Jay Rajgopal rajgopal@pitt.edu	University of Pittsburgh	1039 Benedum Hall, Dept. of E Pittsburgh, PA 15261	412.624.9840	w	
	Board (4th Year)	Mark Coffey mccoffey@ups.com	UPS	521 N. Center Ave. New Stanton, PA 15672	724-925-4771 724.622.5557	w c	
	Board (1st Year)	Zed Beru zewdu.beru@pnc.com	The PNC Financial Services Group	P1-POPP-23-1 Pittsburgh, PA 15222	412-762-7447	w	
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Communications Chair *							
Promotion*	Rusty Sechrist rusty.w.sechrist@accenture.com	Accenture	Seven Parkway Center Pittsburgh, PA 15220	412.921.2400 x323 412.337.8901	w c		
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2008 FINANCIAL BUDGET

The estimated financial budget is as follows:

Income

Annual Dues Collected \$2,775 (185 members x \$15 dues from National)
Monthly Meetings \$5,950 (based on (20 members * \$20) + (5 non members* \$25) + (7
students per meeting x \$10) x 10 program

(5 non-members x \$25 x 10 mtgs)

TOTAL \$8,725

Expenses

Monthly Meetings \$6,000 (based on \$5,908 from Fiscal 2007 + additional expenses)
Contributions \$ 600 (Student Chapter Conference, etc)
Miscellaneous \$ 700 (VoLT, etc)
TOTAL \$7,300

Net Income \$ 1,425

The chapter will strive to maintain earnings of 20%, allowing for re-investment, quality programs, and financial stability for the chapter.