

## PY2018 Chapter Executive Summary

For the Year July 1, 2017 to June 30, 2018

**DUE AUGUST 31, 2018**

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The Executive Summary is a requirement of Chapter Annual Reporting. The Executive Summary provides an overview of your chapter. It is also designed to help chapters assess where they are and provide a guideline for future initiatives and goals in the coming program year. It may also serve as a communications document to help transition leadership from year to year.

In the space below, please provide a brief general overview of the chapter's program year. Use the second page to comment on specific accomplishments and challenges of the chapter's performance. The Chapter Excellence Application is included in this document, following the required Executive Summary. The Chapter Excellence Award Application is optional, but these first two pages are required. If you have any questions, email [chapterrelations@ncmahq.org](mailto:chapterrelations@ncmahq.org).

## Summary Statement

Program Year (PY) 2018 was a year of continued success for the NCMA of East Tennessee (NCMA-ET). In October 2017, the chapter received the Gold Chapter Excellence Award for Medium 152-227 the FY2017 Program year. Continuing on positive momentum established in PY 2017, the Chapter saw continued growth in membership after several years of decline membership due to local economic factors. Chapter financial performance was also strong (for the third consecutive year after multiple year of declining resources) as evidenced by a \$3,650 increase in the Chapter's financial balances. These funds are now available to be utilized in PY 2019 to enhance the value that NCMA-ET can offer to its membership. The Chapter continues to proactively address long-term needs during PY 2018 in accordance with the NCMA-ET Strategic Plan and Membership Recruitment and Retention Plan. Elections were held in May 2018, resulting in the selection of qualified and well-respected professionals to lead the Chapter in PY 2019. Additionally, there are a minimal number of Committee Chair positions that will need to be filled which facilitates continuity of chapter operations. A PY 2018 Kickoff and Orientation meeting was conducted for all elected positions and committee chairs in August 2017, a formal Board/Committee Chair meeting was conducted each month from August 2017 through May 2018, and General Membership Meetings were conducted each month from September 2017 through June 2018. Particular emphasis was placed on providing relevant and informative topical information at each General Meeting and these efforts were successful based on increased attendance and positive feedback received from the membership. The NCMA-ET also provided an NCMA Webinar at no cost to the membership and we offered an all-day seminar for the membership presented by the Executive Director of the Anderson Center for Entrepreneurship & Innovation at the University of Tennessee, Haslam School of Business. Finally, the Chapter continued to foster a strong relationship with the University of Tennessee, Haslam College of Business by hosting an outreach event utilizing the grant received from NCMA. The Chapter intends to leverage this relationship to attract and retain new members and to enhance our ability to provide diverse programs and educational opportunities to our membership. The Chapter's Leadership Team efforts in PY 2018 provided significant value to the membership of NCMA-ET and the results of these efforts have positioned the chapter for continued success in PY 2019 and beyond.

Writers' block? Draw inspiration from the Foundational Four. Include elements from all four elements for a comprehensive report.

## Major Accomplishments

### Chapter Leadership:

- A PY 2018 Chapter Leader Kickoff and Orientation Meeting was held in August 2017 to establish and agree upon Focus Areas and Strategic Goals for the upcoming PY. These focus areas and goals were subsequently published to all elected officers and committee chairs in the form of a PY 2018 Strategic Plan.
- Monthly Chapter Leadership meetings were conducted from September 2017 through May 2018.
- Established a Chapter Budget and Activity Calendar for the PY 2018.
- Applied for and received an NCMA Grant to support a new member outreach event with the University of Tennessee.
- Chapter member Heidi Timmerman was elected to the NCMA National Board of Directors
- Two Chapter leaders made formal presentations at NCMA World Congress in July 2017 (Landon Hill and Heidi Timmerman).
- Successful elections for PY 2019 were conducted and completed in May 2018 resulting in the placement of qualified and respected professionals to continue the efforts of the Chapter into PY 2019.

### Chapter Operations:

- Financial performance was exceptionally strong in PY 2018 resulting in a net surplus of \$3,650. A significant portion of this surplus was generated through the conduct of all-day educational events in April 2017 and April 2018.
- The NCMA-ET Sponsorship Program, which was initiated in PY 2016 continues to mature and provide funding to the Chapter. As of the end of PY 2018 eight local businesses and one university have been enrolled as Chapter Sponsors.
- The chapter continued to communicate effectively with the membership and local stakeholders through the issuance of a monthly NCMA-ET Newsletter (from September 2017 through June 2018) and using the Chapter Facebook and LinkedIn pages.
- The Chapter received \$225.00 from NCMA-HQ Chapter Relations from the New Member Initiative Program.

### Member Involvement:

- The Chapter had an increase in membership during this PY and significant emphasis was placed on membership retention.
- The NCMA-ET was effective in recruiting qualified volunteers to support the Chapters efforts as evidenced by the fact that twenty-six different individuals served as either an elected officer, a committee chair, or a co-chair during PY 2018.
- From a community services perspective, the Chapter organized and conducted a fundraising event (i.e., a Bowling Challenge) in May 2018 raising \$2000.00 for two local charities - double the amount from the previous year.
- The chapter continued its strong scholarship programs. During PY 2018, the Chapter presented two local students pursuing degrees in the business and/or supply chain management field with scholarships in the name of two past NCMA-ET Presidents.
- Several members participated in the 2018 East Tennessee Business Growth Conference with presentations and staffing the NCMA-ET booth.
- Several members participated in the student outreach event at the University of Tennessee to encourage students to consider careers in contracting and supply chain.
- Organized an after work hours social networking event at a local restaurant for members and non-members. This provided a more casual networking setting for members and non-members.

### Member Services:

- To enhance membership participation in Chapter meetings and events, and provide the membership with additional convenience, the Chapter continued the Pay-Pal capability during the PY and offered this convenience for all Chapter events.
- To facilitate membership engagement and ensure that all current and planned Chapter activities are effectively communicated, the Chapter published a monthly Newsletter and maintained the Chapter's Facebook page on an ongoing basis. The Chapter Newsletter also provided the membership with an updated list of current job openings in the East Tennessee area.
- The Chapter Education Committee conducted a CFCM study group throughout the PY. Up to 12 members participated in the group.
- The Chapter Program and Education Committees were very successful in providing topics and speakers for the monthly membership meetings and the annual education seminar in the 2018 program year.

# Program Year Challenges

## **Chapter Leadership:**

- Several Committee Chair positions vacated at the conclusion of PY 2017, which required timely replacement. Efforts to identify and recruit qualified replacements were successful and all positions were filled by September 2017.

## **Chapter Operations:**

- At the end of the PY2018, turnover was experienced in some of committee chair positions. This at the beginning of the 2019 PY, may challenge continuity of operations. The Chapter expects to minimize the impact to operations or the membership as formal documentation the duties of all elected and committee chair positions created in PY17 for each elected official and committee chair position.
- As part of a new member recruitment initiative, a \$25 discount was offered on the education seminar fee if the attendee joined the NCMA. A total of 11 new and reinstated members joined in February 2018. For reasons still unknown, the membership package and check were lost in the mail to NCMA-HQ. This resulted in a delay in these memberships of several months. With the assistance of NCMA-HQ, a new package and check was re-sent and the memberships were established in June. The process used by the Chapter for this initiative will be reviewed in the PY19 for improvements.
- The Chapter had to locate audio-visual equipment at the last minute for a couple of the membership meetings. The Chapter relies on a single person to provide the equipment and if that person is unable to attend, then a backup solution needs to be found.

## **Member Involvement:**

- Engaging more of the membership to actively participate in chapter volunteerism is becoming more of a challenge as many of the current committee chairs and volunteers are the same year over year. The Chapter will have to determine a way to encourage more of the membership to become involved in the chapter planning and events.

## **Member Services:**

- Since the Chapter's financial position at the end of PY18 is sound with a net surplus of \$3,650 for the third year in a row, consideration of adding a second educational seminar has been discussed at the Chapter Leadership meetings. However, adding a second seminar does create additional complexities in scheduling, logistics, and coordination. The benefit to the Chapter membership may be worth it and will be considered going into PY19.

The Executive Summary and other year-end forms must be submitted to [chapterrelations@ncmahq.org](mailto:chapterrelations@ncmahq.org) by August 31, 2018.