

ID	2017 Business Plan and Budget Template
1	Purpose:
2	Scope: This standardized Business Plan and Budget template applies to:
3	Compliance:
4	Instructions: The instructions to complete the columns of the Business Planning Worksheet are provided in the Blue Text Row #6 of the Business Planning worksheet. The column headings in the sections include comments that offer
5	ASQ Strategic Plan: This template is intended as a tool to align to the ASQ Strategic Plan, which sets the direction that will allow our society to successfully carry out our mission and move us closer to reaching our vision. Our vision is that ASQ is recognized as the preeminent society in the world for leadership in advancing quality philosophy and practices
6	2020 Goals: By 2020 ASQ is recognized as the preeminent society in the world for leadership in advancing quality philosophy and practices: <ul style="list-style-type: none"> • Within 5 years, 50% of earned revenue will derive from non-North American sources. • Growth to 150,000 individual members with a member retention of at least 76%
7	Planning Guidance: To effectively focus and align resources, it's recommended that: <ul style="list-style-type: none"> - It's NOT required to align resources to ALL 6 strategies. Recommend to focus 3 to 4 Objectives Total. - Limit to 2 Objectives per Strategy. It's okay to have 1 Objective for a Strategy. - Limit to 2 Key Actions per Objectives
8	Excel Help: <ul style="list-style-type: none"> - Default paper size for the Business Planning worksheet is 8.5" x 11". It can be printed on other sizes. - The Priority and Status columns use the drop-down menus - Hit <i>Alt-Enter</i> to start a new line within a cell - Columns O, P are hidden and contains inputs for the drop-down list
9	Budget Worksheet: Two Budget Worksheets are provided - please use the correct one for your member unit or role. The Budget Worksheet tab is used to enter your revenue & expenses for the upcoming year. For divisions and sections, this information is calculated into the Member Value vs. General & Administrative split. The PAR Metric for 2016 is to spend a minimum of 70% of total annual revenues on activities identified as adding value to
10	Submit Templates: Send 2017 Business Planning and Budget to Community Development (communitydevelopment@asq.org) by the dates indicated below:
11	Preliminary Due Dates: Division Preliminary Business Plan: November 1, 2016 Section Preliminary Business Plan: November 1, 2016 LMCs & CCs Preliminary Business Plan & Budget: November 1, 2016
12	Final Due Dates: Division Final Business Plan & Budget: December 15, 2016 Section Final Business Plan & Budget: December 15, 2016 LMCs & CC Final Business Plan & Budget: December 15, 2016
13	Questions: If you have any questions concerning use of this worksheet, please contact Community Development at CommunityDevelopment@asq.org or Ha.Dao@Emerson.com or dani_socal@yahoo.com

		2017 Business Plan for:		ASQ Sction 0511 - Northern Virginia					Business Plan Owner:		Chair (G. Monaco)	
		Template Rev Date:	07 07 16							Owner e-mail:	GreggMo@yahoo.com	
ASQ Strategic Objectives:		1. Accelerate Growth			2. Increase Impact		3. Achieve Operational Excellence					
ASQ Strategies	ID	2017 Objectives	Priority (L-M-H)	Action Descriptions	Action Plans	Owner (or Role)	Due Dates	Status (G-Y-R)	Progress/ Comments	Measures	Targets	
<i>What ASQ must do to achieve growth, impact & operational excellence.</i>	<i>ID</i>	<i>Enter the Member Unit (MU) objective for 2017.</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>	<i>What are the targets for this action? Use SMART criteria.</i>	
1. Global Expansion: Leverage the ASQ brand to increase market share worldwide, emphasizing growth in current and new ASQ markets.	1	University interaction (our future for growth and influence)	High	Establish and create relationship with Professors, and Placement offices	Guest instruct on Quality topics Display booth at 'Job Fairs'; Coord with HQ for ASQ trinkets Partner with ASQ Divisions	Membership Chair Chair-Elect Educ Chair - ctcs All Members	On-going Quarterly	Red	Ask ASQ for help; Cold-call; Find university sponsors; Work with Mgt Division	Gaining student mbrs Sudents attend meetings	Yes/No response to goals Report status	
	2	Interact at High Schools	Medium	Make students Aware that there are careers in Quality and their forms	Make direct contact with Pincipals Be an Assembly speaker Develop a school channel for capitalization	Membership Chair Chair-Elect Educ Chair - ctcs All Members	On-going Quarterly	Red	Ask ASQ for help	Students applying for "Larry Wilkins Scholarship"		
2. Membership Transformation: Serve the needs of individuals around the world to ensure their professional success through membership, products, and services.	3	Provide actionable information for jobs	High	Professional networking opportunities for career development		Board	On-going	Yellow				
				Job hunt and resume posting		Board		Red				
	4	Develop a "bucket list" of meeting speakers	High		Member analytics, trends, etc tha can be assessed and addressed	Board	On-going	Red		Participation		
					Better promote networking, e.g., "speed dating"	Board	On-going	Red				
3. Growing Organizations: Serve the needs of organizations around the world providing quality solutions to increase impact through membership, products, and services.	5	Data mine and prospect for corporate members	Medium			Board	On-going	Red				
6	Create web video outreach from QR Code business cards	Medium		Leverage Division Leaders	Board	On-going	Red					
4. OBOK	7	Member Certification	Medium		Coordinate and Cooperate with Section 0509 since we serve same demographics and profiles	Education Chair		Yellow	Expand courses and content	Cert taker candidates 1st Time 'Pass' Number of course offerings		

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Leadership: Design and develop relevant, innovative offerings that directly influence how our customers practice quality.	7	Certification preparation courses	Medium		Make all 18 certificaitions available	Education Chair		Yellow				
	8	ASQ website "walk-through"	Medium			Education Chair		Yellow				
5. Operational Excellence: Empower employees, collaborate with member leaders and design and deploy reliable systems with technology that provide an exceptional customer experience.	9	Guest Speaker availability to members - Live and Recorded	Medium	Live broadcast main meeting to satellite venues				Yellow				
				Make recorded presentations available for on-demand viewing								
	10	Promote the ASQ Monthly Membership Gift	Medium	Emphasize ASQ web availability			Monthly	Red				
				Order HQ ASQ publications and make available as part of Meeting Drawing			Monthly	Red				
6. Gift of Quality: Enhance the ASQ brand by supporting the use of quality to make the world a better place.	11	Reduce individual member costs of meeting and event staging	Medium	Increase membership attendance to defray costs								
	12	Support other professional organizations relative to 'Quality'	Medium	Provide speakers on the subject and topic of quality			On-going	Red		Number of speaking engagements requested and delivered	One per month	
				Offer "quality support" consultants to select not-for-profit organizations			On-going	Red		Number of quality change agent engagements	One per quarter	

2017 Budget Worksheet

Account #	Account Name	Classification	G&A	Member Value	Annual Budget	Definitions
REVENUE						REVENUE
4000	MEMBER DUES	G&A				Tracks revenue associated with the rebated portion of members overall dues Based on the board prescribed amount
4100	RETAIL SALES	MV				Tracks revenue associated with the sale of items not provided with registration or materials for division/section programs, conferences, or courses. Includes revenue for memorabilia, such as mugs, t-shirt, etc.
4200	ADVERTISING	MV				Tracks revenue associated with the sale of advertising in publications, including newsletters, brochures, website pages, etc.
4300	REGISTRATIONS	MV				Tracks revenue associated with registration for conference participants.
4320	DINNER MEETINGS	MV				Tracks revenue associated with fees related to dinner meetings.
4360	EXHIBITS	MV				Tracks revenue associated with the rental of exhibit space at conferences, courses, meeting, or other events.
4480	RECERTIFICATION	MV				Tracks revenue associated with rebated portion of members recertification fees.
4521	EDUCATION/COURSES	MV				Tracks revenue associated with registration for courses.
4600	CONTRIBUTNS/SPONSORSHPS	MV				Tracks revenue from sponsorships/contributions.
4871	INTEREST	G&A				Tracks income earned from investments
4898	RESERVE FUND DISTRIUBUTED	G&A				Tracks "realized" gain/loss associated with ASQ reserve fund.
4899	RESERVE FUND MARKET VALUE CHANGE	G&A				Tracks "Unrealized" gain/loss associated with ASQ reserve fund.
[4920,4930]	ROYALTIES	G&A				Tracks revenue associated with royalties for Quality Press publications.
[4990,4995]	MISCELLANEOUS	G&A				Tracks all other revenue.
	TOTAL REVENUE				\$0.00	
EXPENSES						EXPENSES
5000	TEMPORARY HELP	MV				Tracks expenses per conference agreement/contract between ASQ and Division/Section
5100	PRINTING	G&A & MV				Tracks expenses associated with publishing documents, forms, illustrations, etc. G&A) This expense is tied to leadership business cards, stationary, and general & administrative. MV) This expense is tied to conferences, training, or member value events.
5200	COST OF SALES	MV				Expenses related to the cost of books.
5280	PROMOTIONAL GIVE AWAYS	G&A & MV				Tracks expenses associated with items provided to members, guests, etc. to encourage participation in activities. G&A) This includes general section/division promotions. MV) Items included in this classification are associated with conferences, courses, and member value events.
5300	COMMITTEE EXPENSE -SECTION ONLY	G&A				Expenses related to section committee expense
5400	POSTAGE	G&A				G&A) Includes general postage (ex. Expense checks) MV) Includes postage related to conferences, courses, and member value events
5500	CONTRACT & PROFESSIONAL	G&A & MV				Tracks expenses associated with services provided by independent contractors. G&A) This includes CPA and webmaster fees MV) This includes Subject matter experts, Instructor fees, Member value events
5504	MANAGEMENT OR CUSTODIAL FEE	G&A				Tracks fees charged in association with the ASQ Reserve Fund and ASQ Education/Scholarship accounts.
5512	CREDIT CARD/BANK SERVICE FEES	G&A				Tracks expenses associated with credit card and bank fees.
5573	ADVERTISING	G&A & MV				G&A) Tracks advertising expenses associated with general advertising MV) Tracks advertising expenses associated with conferences, courses, and member value events.
5576	EXPOSITION SERVICES	MV				Track expenses related to exposition services
5630	EQUIPMENT DEPRECIATION	G&A				Tracks expenses associated with monthly depreciation of high value equipment. Must correspond to depreciation accumulated in account 1880
5650	EQUIPMENT PURCHASES<\$500	G&A				Tracks expenses associated with low value equipment and should not be depreciated
5675	EQUIPMENT RENTALS	MV				Tracks expenses related to equipment rentals for conferences, courses, and member value events.
5704	EXHIBIT BOOTH RENT	MV				Expenses related to exhibit booth rental.
5800	MEETINGS & MEALS	G&A & MV				G&A) Meetings and meals for strategic planning, leadership team meetings, general & administrative MV) Meetings and meals for conferences, events, and member value activities.
5900	TRAVEL	G&A & MV				G&A) Includes travel, lodging, and transportation for strategic planning and leadership team meetings. MV) Includes travel, lodging, and transportation for expert/speaker/instructor travel to events.
6000	SUPPLIES	G&A & MV				G&A) Tracks expenses associated with office supplies and other general supplies. MV) Tracks supplies expenses associated with conferences, training, and member value events.
6100	TELEPHONE	G&A				Tracks expenses associated with telephone and conference calls.
6100	WEBSITE HOSTING/INTERNET FEES	G&A				Tracks expenses associated with website hosting (server) and internet fees.
6200	JOINT VENTURES/PARTNER PAYMENT	MV				Tracks expenses associated with payments to partners, including other divisions or sections, of joint conferences, courses, or other events.
6310	AWARDS AND MEDALS	G&A				Tracks expenses associated with monetary recognition awards.
6328	SCHOLARSHIPS	MV				Tracks expenses associated with distribution of scholarships/grants.
6371	RETAIL ORDERS	MV				Expenses related to book orders.
6393	DONATION/SPONSORSHIP	MV				Tracks expenses associated with donations made to other organizations or sponsorship of other organizations programs/events.
6390	OTHER	G&A				All other expenses
	FUTURE EVENT RESERVE	MV				Reserve for future events (ex. Conferences that take place every other year)

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Account #	Account Name	Classification	G&A	Member Value	Annual Budget	Definitions
	TOTAL EXPENSES		\$0.00	\$0.00	\$0.00	
	SURPLUS (DEFICIT)				\$0.00	
	PAR Ratio*					*PAR Ratio = Total Member Value Expenses / Total Revenue

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	REVENUE		REVENUE
4300	REGISTRATIONS		Tracks revenue associated with registration for conference participants.
4320	DINNER MEETINGS		Tracks revenue associated with fees related to dinner meetings.
4360	EXHIBITS		Tracks revenue associated with the rental of exhibit space at conferences, courses, meeting, or other events.
4521	EDUCATION/COURSES		Tracks revenue associated with registration for courses.
4600	CONTRIBUTNS/SPONSORSHPS		Tracks revenue from sponsorships/contributions.
[4990,4995]	MISCELLANEOUS		Tracks all other revenue.
	TOTAL REVENUE	\$0.00	
	EXPENSES		EXPENSES
5100	PRINTING		Tracks expenses associated with publishing documents, forms, illustrations, etc. G&A) This expense is tied to leadership business cards, stationary, and general & administrative. MV) This expense is tied to conferences, training, or member value events.
5280	PROMOTIONAL GIVE AWAYS		Tracks expenses associated with items provided to members, guests, etc. to encourage participation in activities. G&A) This includes general section/division promotions. MV) Items included in this classification are associated with conferences, courses, and member value events.
5400	POSTAGE		G&A) Includes general postage (ex. Expense checks) MV) Includes postage related to conferences, courses, and member value events
5704	EXHIBIT BOOTH RENT		Expenses related to exhibit booth rental.
5800	MEETINGS & MEALS		G&A) Meetings and meals for strategic planning, leadership team meetings, general & administrative MV) Meetings and meals for conferences, events, and member value activities.
6000	SUPPLIES		G&A) Tracks expenses associated with office supplies and other general supplies. MV) Tracks supplies expenses associated with conferences, training, and member value events.
6100	TELEPHONE		Tracks expenses associated with telephone and conference calls.
6310	AWARDS AND MEDALS		Tracks expenses associated with monetary recognition awards.
6390	OTHER		All other expenses
	FUTURE EVENT RESERVE		Reserve for future events (ex. Conferences that take place every other year)
	TOTAL EXPENSES	\$0.00	
	SURPLUS (DEFICIT)	\$0.00	