

Strategic Plan



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Business Forms Management Association, Inc.

Members of the Business Forms Management Association are responsible for the capture and distribution of critical information for their employers. They may be engaged in the analysis, design or procurement of the form through which the information is captured. Or they may be involved in the analysis, understanding, or management of the workflow processes through which this information is communicated. They may be involved in the assessment, procurement, sale or management of the documents or other media which captures, retains or transmits this critical information during its active worklife in the organization.

CULTURE, CHANGE, STRATEGY

Philosophy of Association's Activities

Our Association and our profession are on the verge of an exciting new era in how we think, act and deal with one another, with related professionals, and with our future. During the past few years, we have seen dramatic change in who we are and how we function. We have transformed and challenged ourselves as never before. As an Association, we set out to provide the best and most current form systems education possible and found new technologies, new tools, and new methods to challenge forms professionals.

BFMA Transition: Paper to Electronic

Since our founding in 1958, BFMA has been committed to the improvement of productivity in the workplace. Through an understanding of the workflow of our businesses, and analysis of the systems through which critical information is transferred, we've met that commitment. First, by the sound management of paper-work and business forms; and now, with the increasing automation of the workplace, by the management of all information systems, both paper and electronic.

Technology Drives Innovation

Our industry is in a whirlwind of evolution and change. Daily, we discover new technology being implemented to enhance business operations. Organizations are reengineering workflow processes to streamline business applications. These organizations will look to technology and automation, not additional employees, to operate effectively. The objective will be to increase the quality of service while improving economic success.

Areas Impacting the Form Systems Profession

The business form is the source document used to capture and communicate information within the workflow processes of any business application. This primary function of a form is not changing — but *how* it is designed, *where* it captures information, and *how* it distributes that information will change with each new technological advance. These new tools will not only improve the quality of information processing and enhance the efficiency of an organization's operations; their proper application will directly impact the bottom line. Form systems professionals must become more knowledgeable, skilled and aware. BFMA has the challenge of delivering the appropriate education and information base to enable our members to develop these necessary skills.

CORE VALUES

Members

Our members are the single most important element of our success. It is through their dedication, commitment, talent, creativity, pride, and personal responsibility that the Association's mission is accomplished. BFMA is structured to help coordinate and direct activities of common interest to all individuals and chapters, as well as to organize and promote the development and growth of new chapters.

Integrity

BFMA encourages the highest ethical standards by its members in the conduct of their business. The organization will not participate in or give consideration to any activity, plan, understanding, or arrangement which would restrict or interfere with the exercise of free and independent judgment by the members in the management or operation of their respective organizations.

Education

BFMA provides educational seminars and symposia for the dissemination of ideas regarding forms and information systems, sponsors training courses, and supports the research and development of materials that enhance these educational efforts.

Professionalism

BFMA will increase the professional competence of its members by providing them with the skills and strategies necessary to be identified as an essential form systems consulting source. We promote the use of forms management practices in all organizations.

Communication

We will publish valued technical information, news articles, and ideas. We provide materials to facilitate the use, development, and growth of the communication network of our members.

Public Image

We will continue our efforts to be the preferred source of educational programs and consultative services in the application and integration of the form systems discipline and to earn recognition as quality form systems educators.

Environment

We will demonstrate environmental leadership through the proper use and management of products under our control. We support the reuse and recycling of materials.

VISION 21

BFMA – Establish the vital role that the effective capture and process flow of information plays in a successful business enterprise.

As we enter the 21st Century, we will:

- Be the voice of the forms profession.
- Be the Association of members armed with the skills to reengineer processes, implementing the best practices for their organizations.
- Be the Association of ideas, earning recognition for the vital role of form professionals in making their organizations more competitive, functional, and economically successful.
- Enhance the public perception of form and form systems professionals.
- Be known internationally as an essential communication network for form systems professionals.
- Expand our network of organized chapters.

The areas of strategic emphasis are:

1997-1998

- Expand recognition of BFMA in the form systems community.
- Provide increased educational opportunities.
- Utilize all available media to enhance communication.
- Develop professional recognition and membership growth.

1999-2000

- Expand global recognition.
- Demonstrate marketplace leadership.
- Enhance public image.
- Increase management's understanding of the critical role of the form system.

MISSION

We will provide essential education, develop communication networks, and work to establish an understanding of, and recognition for, the vital role of form systems professionals in the business enterprise.

SLOGAN

We capture the information that makes business run.

FUTURE FOCUS

- We will deliver superior value to members.
- We will provide leading edge education.
- We will maintain an educational focus emphasizing the essential fields of knowledge for form systems.
- We will provide a superior networking structure for our members.
- We will form strategic alliances with form systems industry leaders.
- We will be committed to improving the competency of our members and enhancing our profession.

LEADERSHIP PRINCIPLES

Leadership must be concerned about what we will need in the future combined with an intense focus on high-level performance.

Our leadership is committed to the following principles:

- Communicate, clarify, support and reinforce our mission;
- Spend more time with Association members, focusing on their needs;
- Empower members to act within the framework of our vision and targets;
- Make strategic decisions quickly and openly, based on our values, mission, critical success indicators (CSIs) and strategic priorities;
- Acknowledge mistakes and make the necessary adjustments;
- Demand results from themselves and assist and encourage others to high achievement;
- Perform with a high level of business competency;
- Embrace and relish the concept of continuous strategic change;
- Our future will be determined by our sustained vision, adherence to our mission, our principles, and our will to apply them.

WINNING PRINCIPLES FOR PROGRESS

Members understand that the accomplishment of project goals must not be at the expense of BFMA's mission, core values, and strategies.

- All decisions are consistently driven by the mission, values, and critical success indicators (CSIs).
- Task forces form quickly to meet a goal, transform as the need arises, and disappear when the challenge has been met.
- Goals and targets are seen as starting points. We will always strive to exceed these by as much as possible.
- There is a sense of flexibility, energy, and trust in the way members work with each other.
- People are committed to each other, willing to pitch in, assist one another, and do whatever tasks are necessary to get the job done.
- We are unafraid to speak openly and give candid and constructive feedback to all levels in a way that is both helpful and motivating.
- Organizational structure and personal agendas should not interfere with the consideration of new ideas.
- Initiatives for change and continuous improvements emerge from all parts of the organization.
- We strive to bring all discussions to resolution and decision.
- Projects are completed in a timely manner.

BASIC FUNCTIONS

It is understood that these basic functions must be maintained and improved on an annual basis. The following operational and management structure, programs and services are necessary to meet our basic obligations to our membership:

- Maintain sound financial management and reporting practices.
- Identify and develop effective BFMA leadership.
- Provide opportunities for members input and feedback.
- Support and promote programs and services offered by other industry-related organizations.
- Provide quality professional developmental programs.
- Assess member needs and expectations.
- Recruit and retain membership.
- Provide networking opportunities.
- Ensure adequate financial and human resources to achieve basic functions.
- Provide programs and information which enhance the public's image and understanding of the form systems discipline.
- Maintain an effective communications system between the Association and its members.
- Recognize and reward individual involvement and achievement.
- Update the long range plan at least every two years. Maintain an effective internal support system for volunteer activities.

STRATEGIC AREAS

There are many areas in which we need to excel. Strategic areas have the highest potential for propelling our Association to realize our vision. Our members will be the dominate force within each of these strategic areas and are the foundation of our success.

Symposium

We will make Symposium our premier educational and networking program for form systems professionals.

Members

We will continue to increase our membership base.
We will enhance individual competency and professionalism.

Education

We will provide education for our members, enabling them to achieve the knowledge and ability to help their organizations become more competitive, functional and economically successful. We will develop and identify resources to help members enhance their skills in the Fields of Knowledge defined by the certification program (CFSP).

Fiscal Fitness

We will continue to improve our fiscal fitness.
We will establish an Education Foundation.

Public Image

We will raise awareness and recognition of the form systems profession. We will promote the Certified Form Systems Professional program. We will develop our Internet home page as a valuable form systems information resource.

STRATEGIES

Symposium

Goal 1: To make Symposium our premier educational and networking program for form systems professionals.

- A. Increase attendance and public recognition.
- B. Improve program content and structure.
- C. Ensure a broad-based curriculum that reflects current technologies and basic form systems knowledge.
- D. Improve and enhance vendor relations and involvement.
- E. Provide maximum opportunity for members to exchange ideas, issues, and solutions.

Members

Goal 2: To increase our membership base.

- A. Conduct an annual membership drive.
- B. Implement an ongoing membership recruitment and retention program.
- C. Encourage formation of Chapters.
- D. Identify target markets and methods to reach those markets.
- E. Educate management about the benefits derived from BFMA membership.

Goal 3: To enhance individual member competency and professionalism.

- A. Continue to market the Certified Form Systems Professional program.
- B. Continue to provide valued member services; i.e. Membership Directory, publications, etc.
- C. Identify new methods or programs to meet member needs.
- D. Provide training in business management techniques via BFMA leadership roles.
- E. Encourage greater member involvement in Association leadership positions.

Education

Goal 4: To provide education for our members, enabling them to achieve the knowledge and ability to help their organizations become more competitive, functional, and economically successful.

- A. Utilize Symposium to provide leading-edge training and education.
- B. Provide an ongoing series of regional educational seminars.
- C. Identify and utilize alternative training methods such as audio/video tapes and local study groups.
- D. Review and evaluate educational offerings and materials.
- E. Provide Chapters with assistance in developing local educational programs.

Public Image

Goal 5: To raise awareness and recognition of the form systems profession.

- A. Use the Internet to expand awareness of BFMA and its activities.
- B. Develop external marketing/media plan.
- C. Encourage members to become identified in their communities as a knowledgeable information resource; e.g. college instructor, speakers bureau, volunteer groups, etc.

Fiscal Fitness

Goal 6: To improve our fiscal fitness.

- A. Research and evaluate new sources of revenue; e.g. grants, trade shows, advertising revenues, vendor partnerships.
- B. Build an operating reserve of at least 50 percent of our annual operating budget.
- C. Establish an Education Foundation to promote form systems knowledge.

CRITICAL SUCCESS INDICATORS

Critical Success Indicators (CSIs) are measures of performance toward achieving our Mission and Vision, and are a means of measuring our progress. They help us evaluate where we are and help us change our activities incrementally. The achievement of our Mission will be judged on an overall basis.

Symposium

- Numbers in attendance
- Full paid and total number
- Total revenue and profit margin
- Session evaluations
- Total number of sponsors and revenue generated
- Number of attendees at Special Interest Groups
- Number of media publishers covering event

Members

- Total number of members
- New members and renewals
- Compare membership drive totals to previous years
- Track total number of Chapters and Members-at-Large
- New, lost and renewals
- Monitor gain/loss of prospects on non-member address (NAD) list
- Member satisfaction survey results
- Number of candidates competing for office
- Total number of votes cast
- Total number of certified members
- Total number of applications each year

Education

- Number of educational opportunities offered
- Regional, Chapter and International courses
- Total number of attendees
- Member and non-member
- Numbers of alternative training methods
- Total number and number purchased
- Session evaluations and education surveys to determine satisfaction levels

Public image

- Number of contacts for industry information
- Number of news articles provided to media sources
- Improved graphic appearance of all documents
- Number of marketing materials distributed
- Number of replies to materials on the Internet

Fiscal fitness

- Annual profit margin comparisons
- Growth of reserve fund
- Establishment of Education Foundation
- Contributions received

GLOSSARY OF IMPORTANT TERMS

Basic Functions:	Fundamental capacities that BFMA must have in order to provide for and respond to basic member and Association needs.
Core Values:	Values shape the way we live our lives, perform our work and the way we are viewed by other people. Our values are acquired at home, at church, at school, at work, and on the street from all our life experiences. We live, act and make decisions in accordance with our values.
Critical Success Indicators:	Critical Success Indicators are measures of performance toward our mission. Indicators are a means of measuring our progress. They help us evaluate our status and assist us in changing Association policies and processes so that our mission is accomplished through a series of small, incremental steps.
Culture:	Culture is the way we perform our assigned duties, and the way we interact with each other.
Mission:	Our Mission is a short description of who we are, what we do, and what we intend to do to realize our vision. BFMA's mission statement is: "We will provide essential education, develop communication networks, and work to establish an understanding of, and recognition for, the vital role of form systems professionals in the business enterprise."
Slogan:	The slogan of BFMA is: "We capture the information that makes business run."
Strategic Areas:	Strategic areas further define the components of our mission.
Strategies:	Strategies are the approaches we take in accomplishing our mission. They explain what we are going to do and how we are going to do it through annual operational programs. Strategies indicate what

Vision:

needs to be done that is not already being done in the Basic Functions.

Vision is a clear conceptual picture of a desired future state. Our vision is “Establish the vital role that the effective capture and process flow of information plays in a successful business enterprise.”

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