

**Strong Chapters,  
Strong Association.**

# Districts Update

Ing. Luis Barcón

MBA, CPIM, CIRM, CQM, C.P.M., PMP, CSCP, CPF

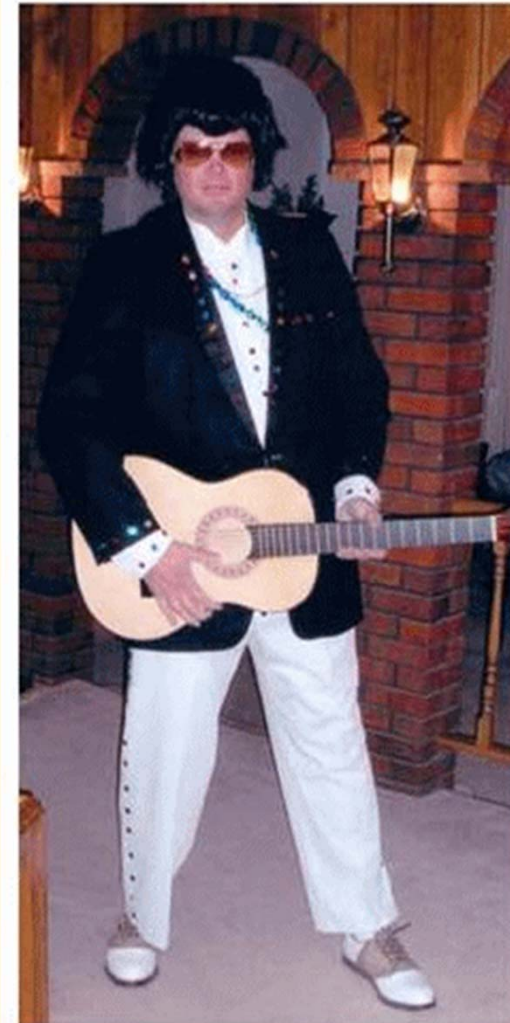
**APICS Terra Grande**

**District Manager**



# 2010 Events

- **Las Vegas, Joint District Meeting and VLW**
  - **Best Session VLW**
    - Roger
  - **Best Session JDM**
    - Honey
  - **Third Best at JDM**
    - Steve



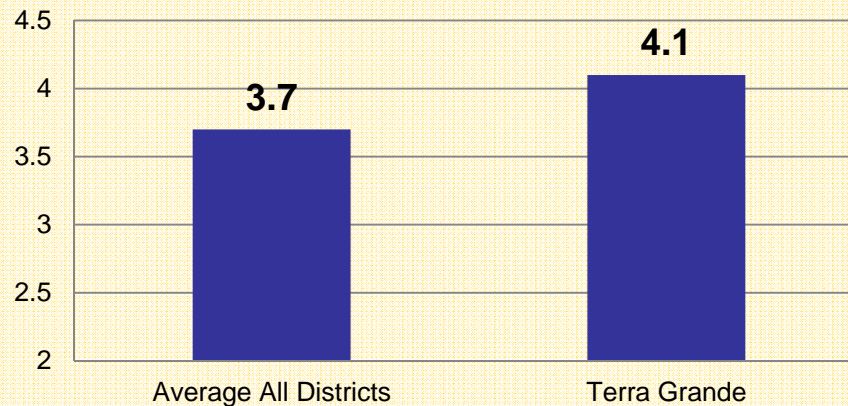
# 2010 Chapters Evaluations to Districts



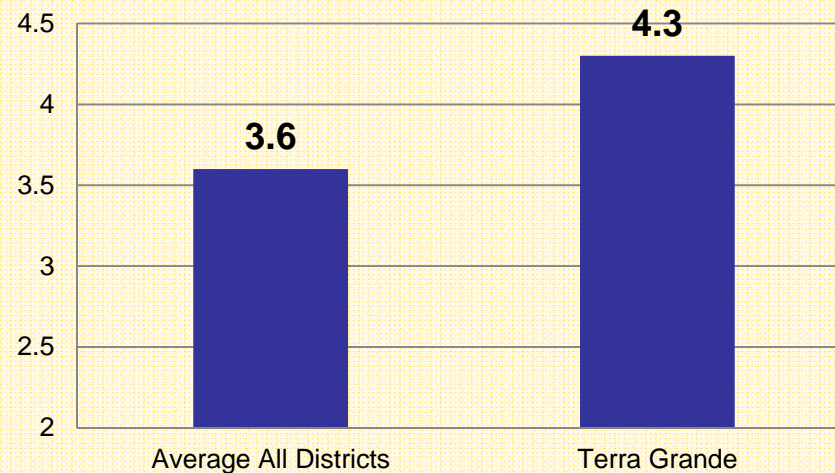
Thank you all.

*We still have a lot of work to do. (1 – 5 Evaluation)*

## District Staff Services



## District Manager Services

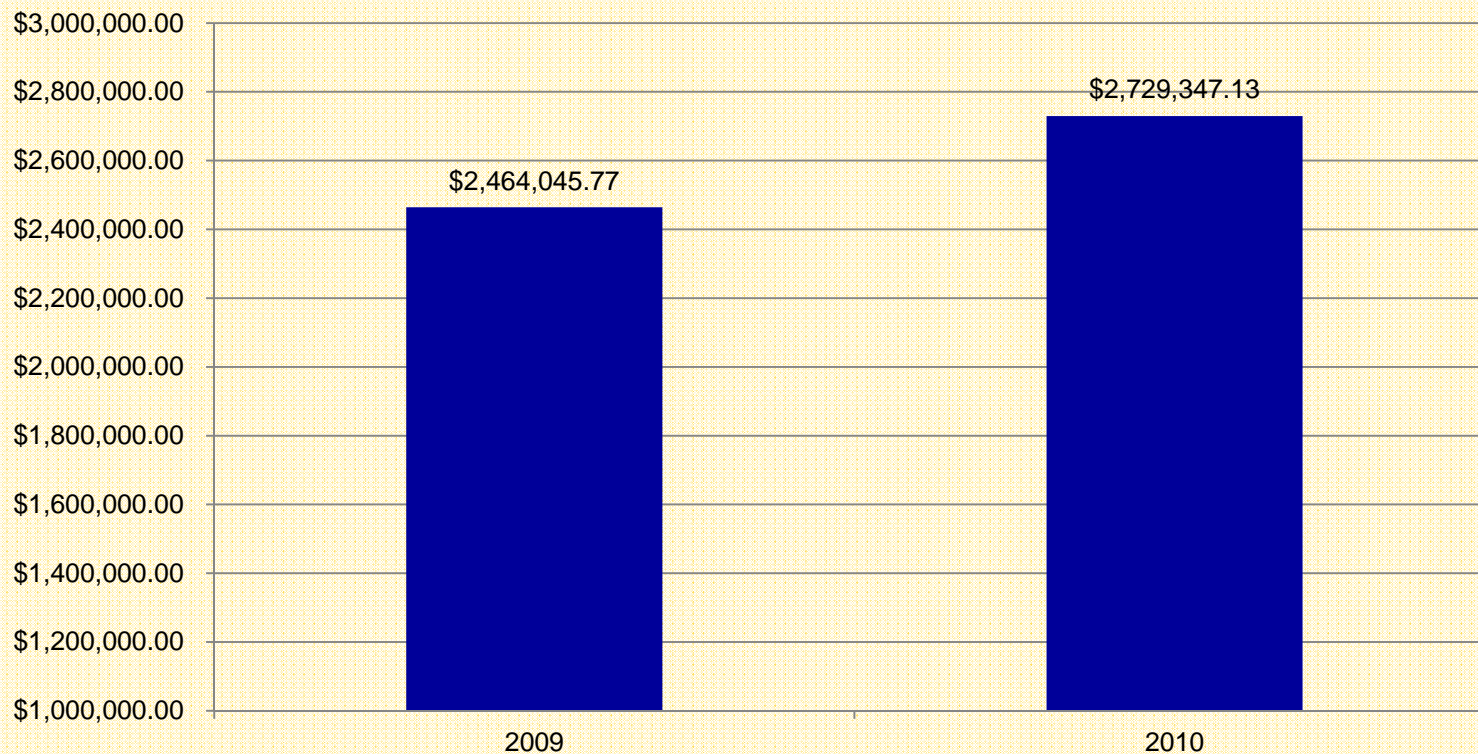


## 2010 KPI's

- **Approximately 60% of APICS Revenue came from Chapters**
- **Districts Budget is About 3% of APICS Expense Budget**

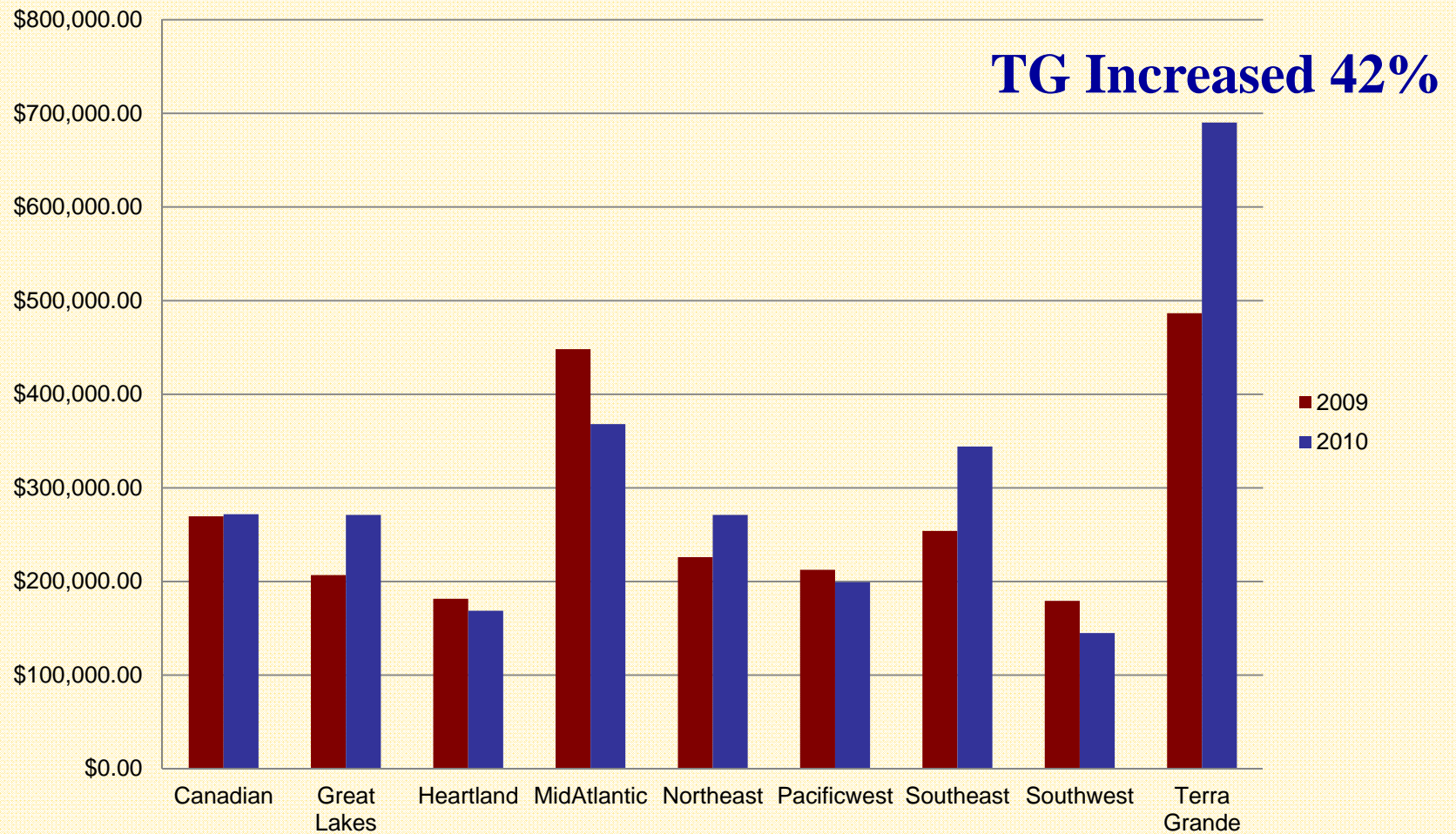
# 2010 KPI's

## Total Districts Materials Bought from HQ (10.7% Increase)



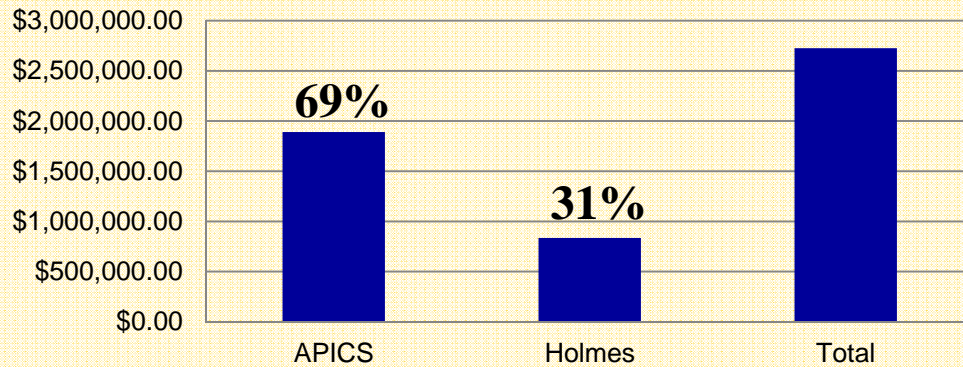
# 2010 KPI's

## 2009 VS 2010 Materials Bought by District

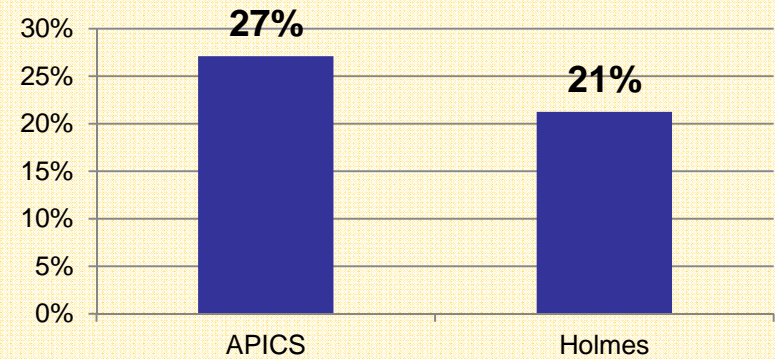


# 2010 KPI's

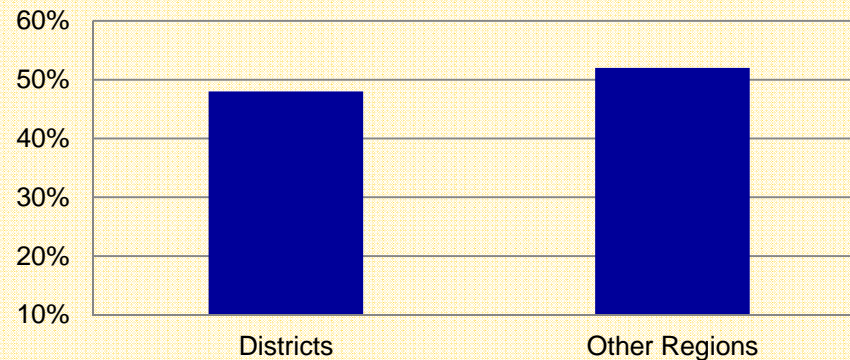
## Materials Bought by Districts 2010



## TGD % Materials Bought of the % by Districts



## % Bought by Regions 2010 (Other Regions Include NA not Bought by Chapters)

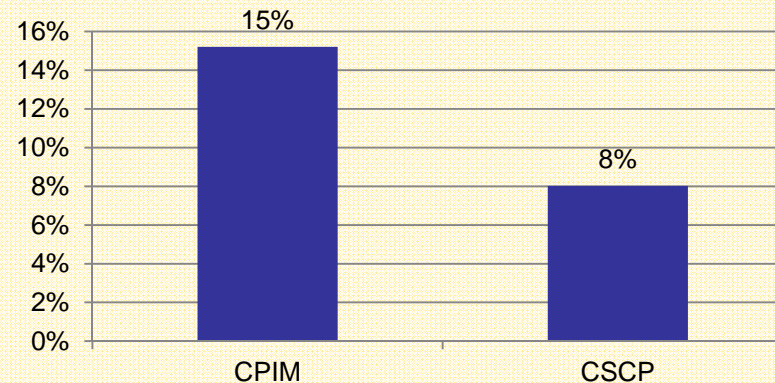


# 2010 KPI's

## Certification Tests Taken

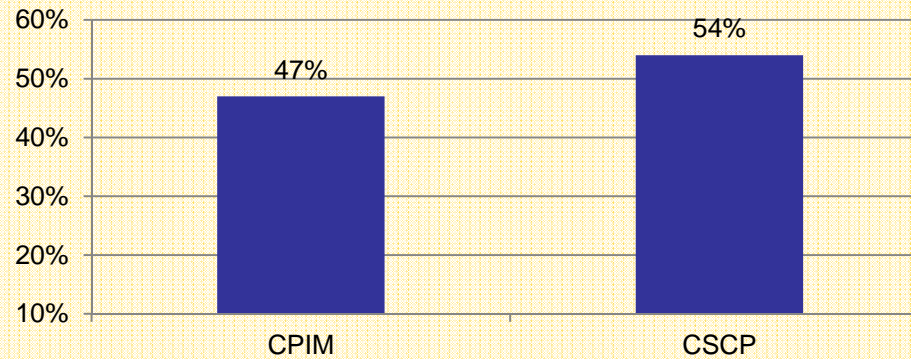
Other Regions	2008	2009	Growth%	2010	Growth%
CPIM	15,598	13,906	-12%	14,439	4%
CSCP	868	972	11%	1,108	12%
Total	16,466	14,878	-11%	15,547	4%
North America	2008	2,009	Growth%	2,010	Growth%
CPIM	14,143	11,998	-18%	10,284	-17%
CSCP	2,293	1,596	-44%	1,558	-2%
Total	16,436	13,594	-21%	11,842	-15%
<b>Grand Total</b>	<b>32902</b>	<b>28,472</b>	<b>-16%</b>	<b>27,389</b>	<b>-4%</b>

**% TGD Tests of NA**

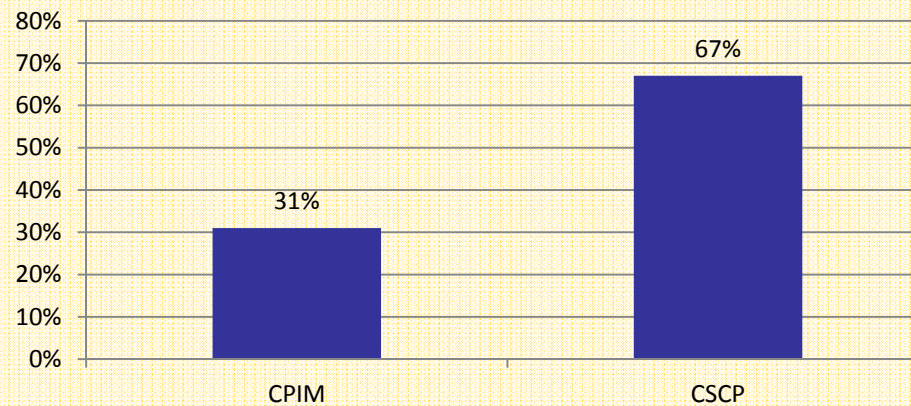


# 2010 KPI's

## Districts Approximate % of People Taking Test of Materials Bought



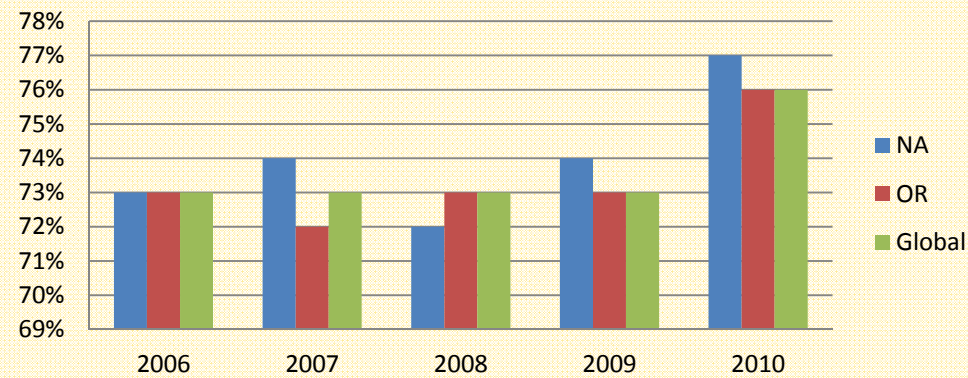
## TGD Approximate % People Taking Test of Materials Bought



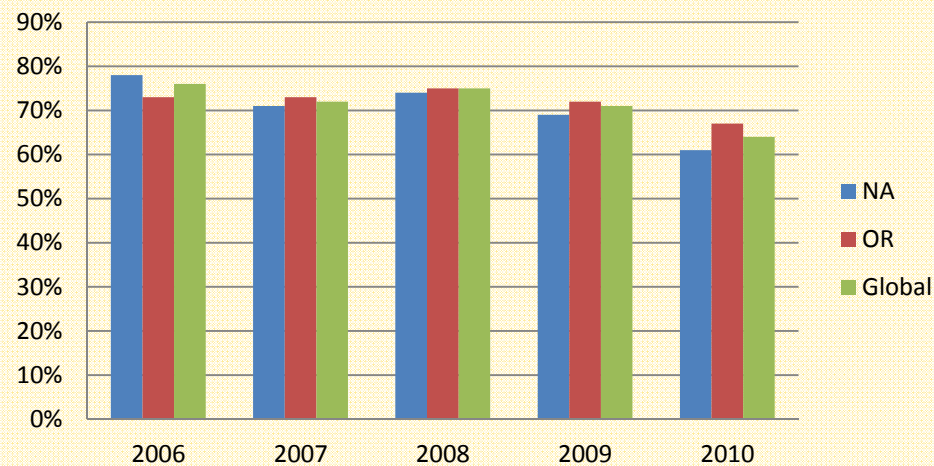
# 2010 KPI's

## Certification Passing Rate

### BSCM



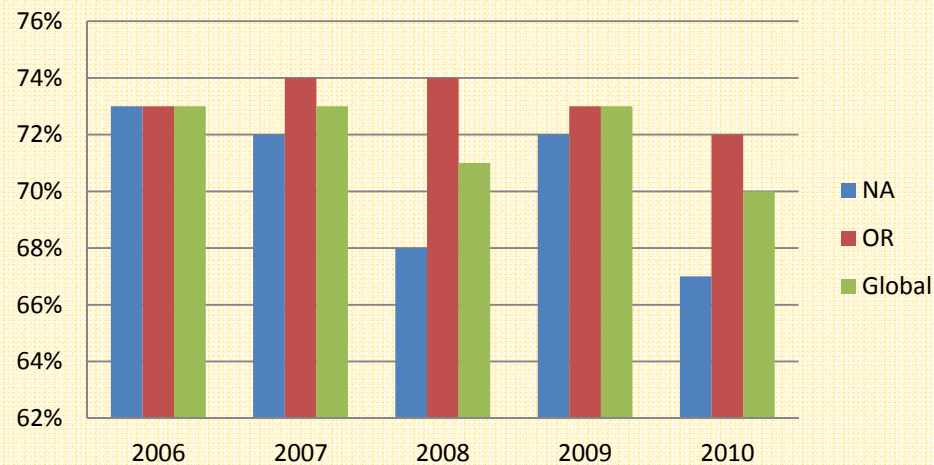
### DSP



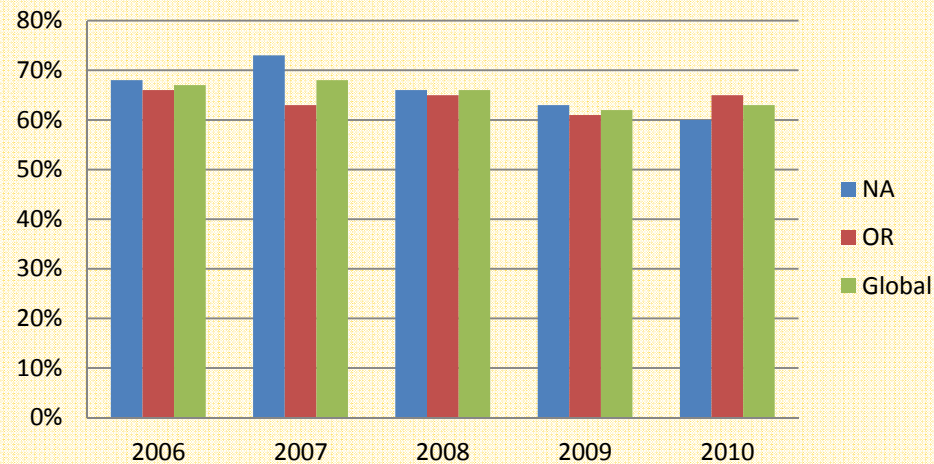
# 2010 KPI's

## Certification Passing Rate

### MPR



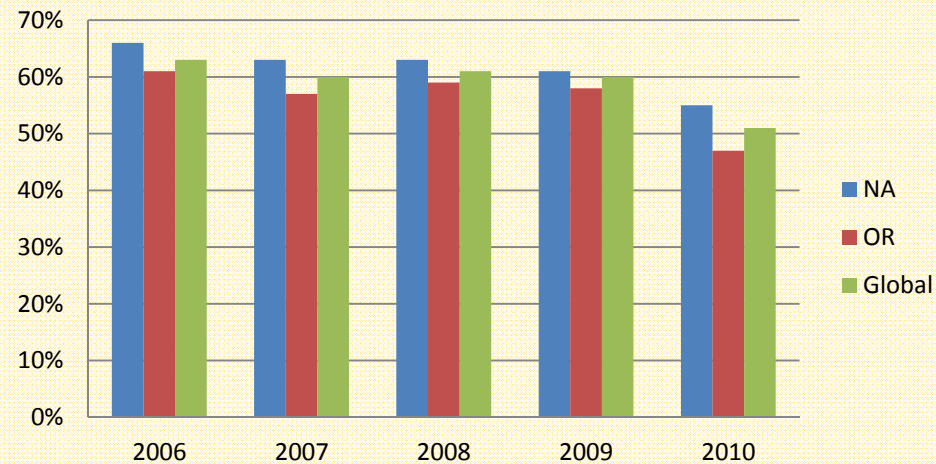
### ECO



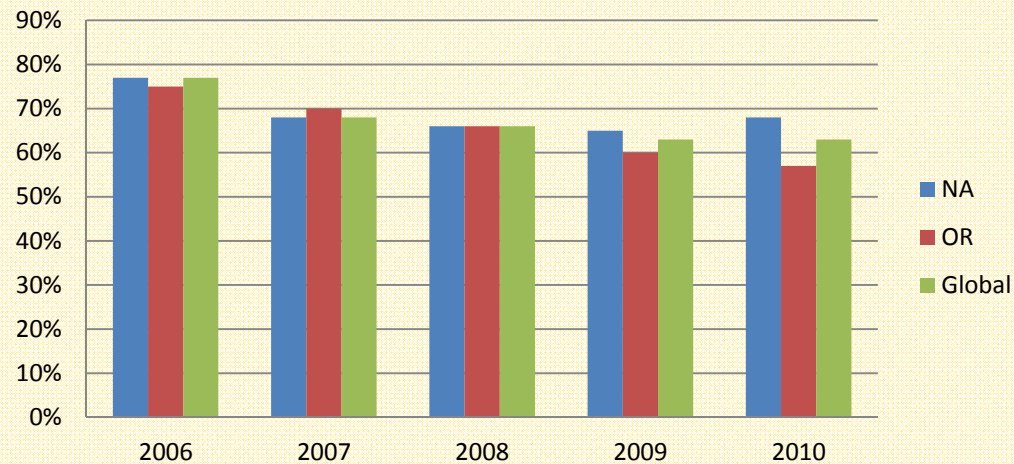
# 2010 KPI's

## Certification Passing Rate

### SMR

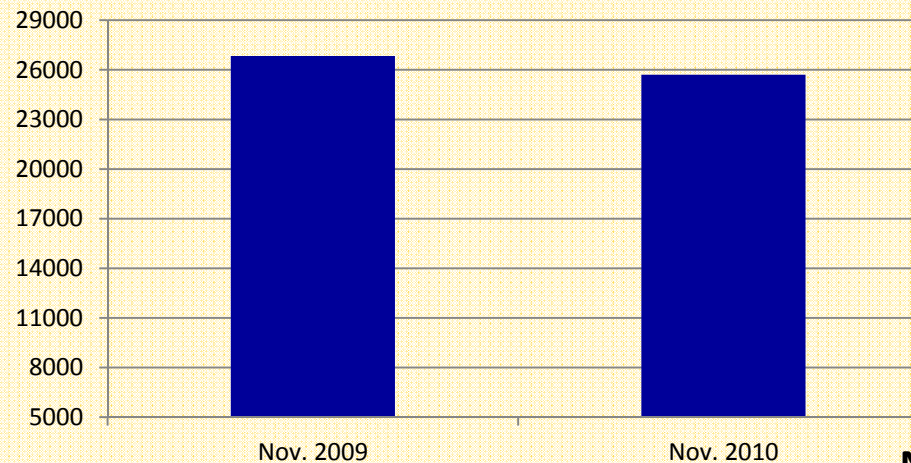


### CSCP



# 2010 KPI's

## Districts Membership

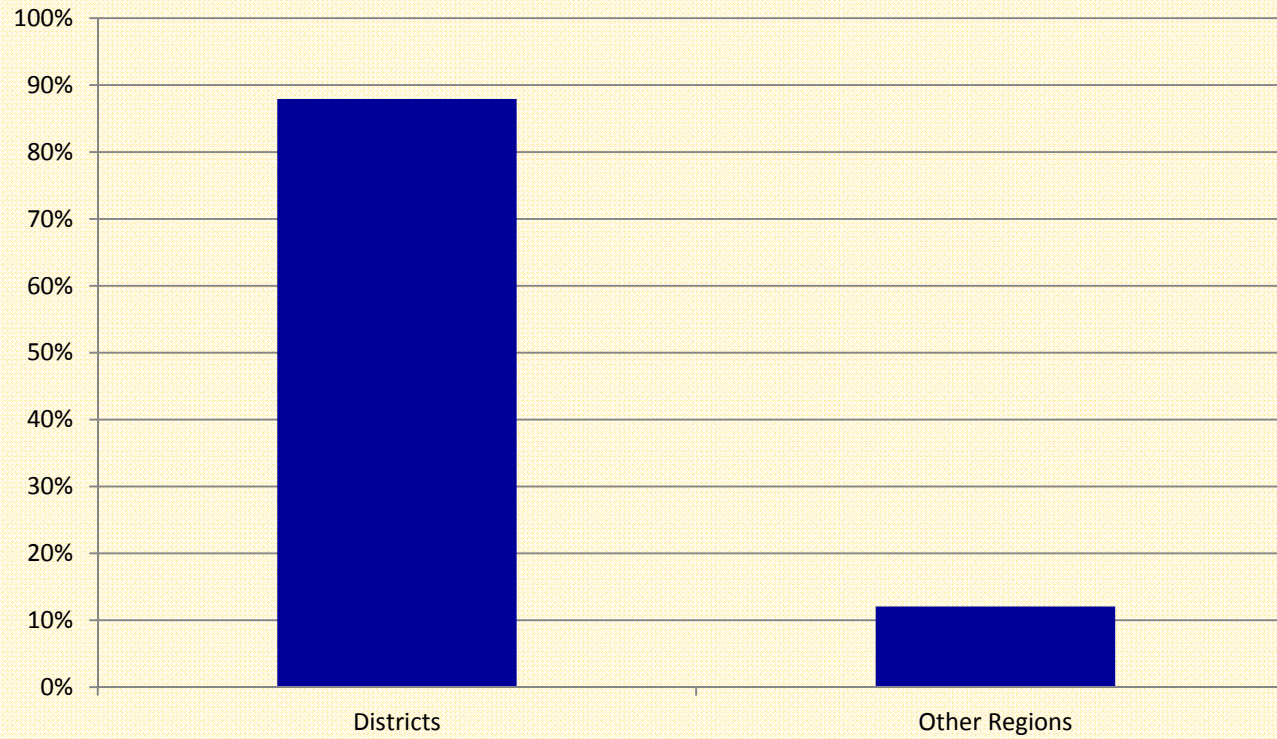


	Retention %	Suspend %	Growth %	New/Reinstated Members %
Total Canadian	62.24%	37.76%	-0.24%	37.52%
Total Great Lakes	63.86%	36.14%	-7.42%	28.71%
<b>Total Heartland</b>	<b>67.25%</b>	<b>32.75%</b>	<b>2.97%</b>	<b>35.71%</b>
Total Mid-Atlantic	64.36%	35.64%	-3.66%	31.98%
Total Northeast	62.53%	37.47%	-9.53%	27.93%
Total Pacific				
Western	56.16%	43.84%	-4.33%	39.51%
Total Southeast	60.84%	39.16%	-6.67%	32.49%
Total Southwest	58.48%	41.52%	-2.35%	39.17%
<b>Total Terra Grande</b>	<b>57.42%</b>	<b>42.58%</b>	<b>-1.23%</b>	<b>41.35%</b>
<b>Total Districts</b>	<b>61.87%</b>	<b>38.13%</b>	<b>-4.24%</b>	<b>33.89%</b>

# 2010 KPI's

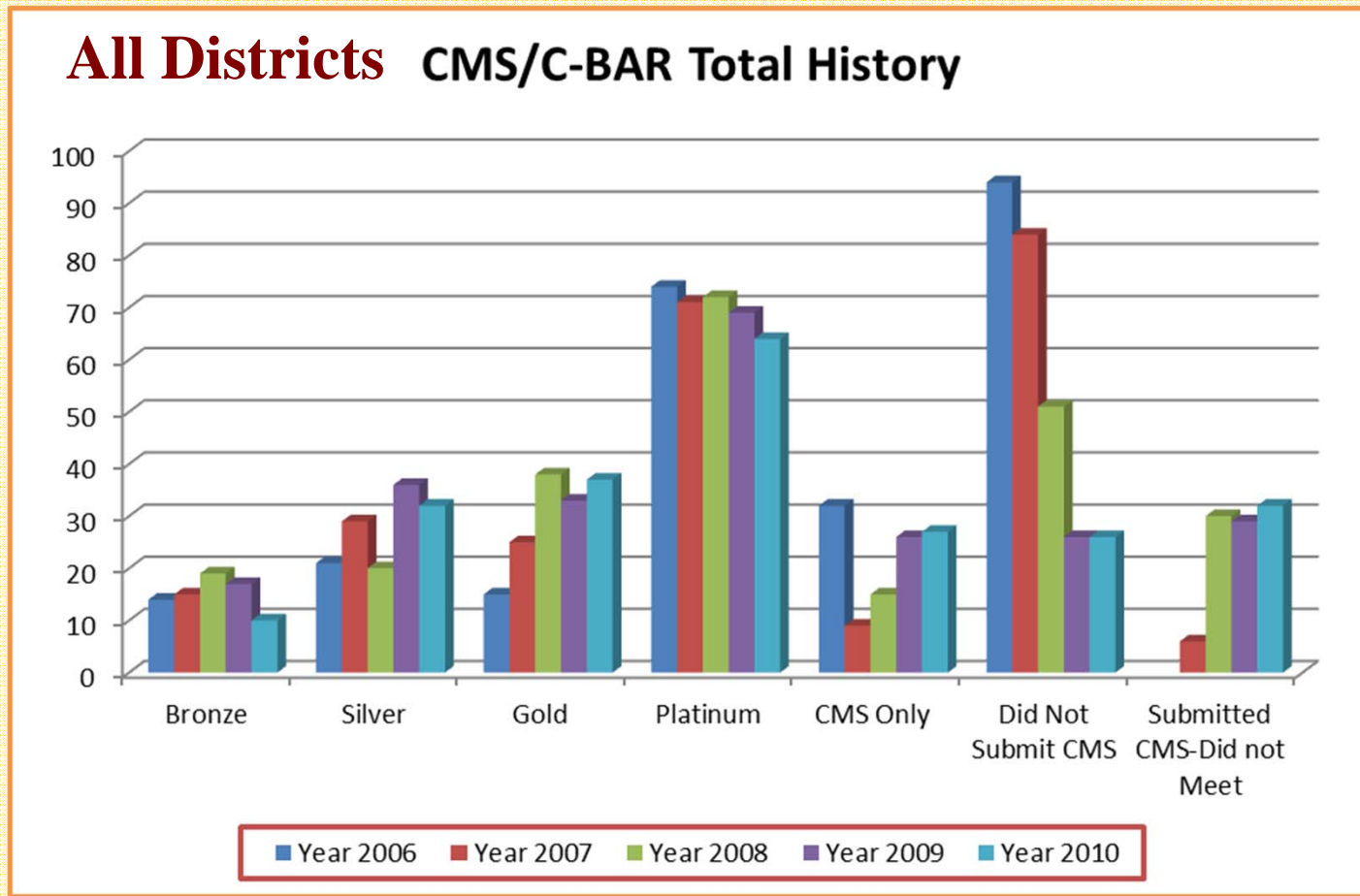


Membership %



# 2010 KPI's

*Honey talked about this. We Have Work to Do*



# 2011 Plans



## District Director Nomination

- **District Director Nominating Committee Composition and Terms**

1. District Nominating Committee will be comprised of five members: **two Chapter Presidents selected by Chapter Presidents, the outgoing District Director, plus 2 current Board members (excluding officers).**
2. All terms shall be for one year, and members may not exceed two consecutive terms.
3. If current District Director is running for 2nd term, a third Chapter President from that District shall be added.
4. **Require 4/5 vote to recommend to Chapter Presidents for a yes/no vote**
  - **Have the Chapter Representatives Ready by July**

## District Manager Nomination (By July)

- The district manager is nominated by the chapters of the district

# 2011 Plans

## (DM's Assignments to Committees)

### **Governance Committee**

Chair – Past Chair of the BOD

- Alma Ballard
- John Newlyn

### **Strategic Direction**

Chair – Chair Elect

- Eric Somers
- Tim Wilson
- *Steve Hasson (Houston)*

### **Voice of the Customer**

Chair – Chair VOC Committee

- Ione Dykstra
- Sue Thornton (VOC Subcommittees)

### **Chapter Standards (CMS/CBAR)**

- Jennifer Kevlin

### **Chapters and Districts SOP's**

- Luis Barcón (Chair)

### **DMC Strategic and Tactical Plans**

- Luis Barcón (Chair)

### **Volunteer Development (VLW, Etc)**

- Ione Dykstra

# 2011 Plans



## Item Writing Workshop (Sponsored by APICS Association)

**Mexico City – May 20 and 21**

# 2011 Plans

## We are Recruiting



**¡Les Salió la Bola Negra!**



# 2011-2013 District Managers Committee (DMC) Strategic and Tactical Plans

December, 2010





## Vision

“Strong Chapters, Strong Association”

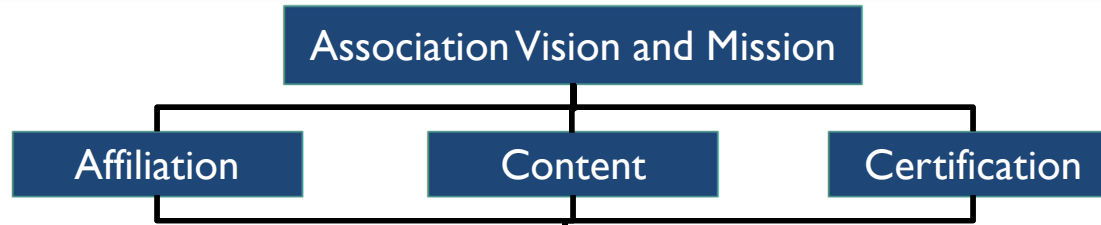
## Mission

Help Develop Chapters to ensure a consistent, high-quality experience, for our members and customers, in alignment with our Association Strategic Priorities.

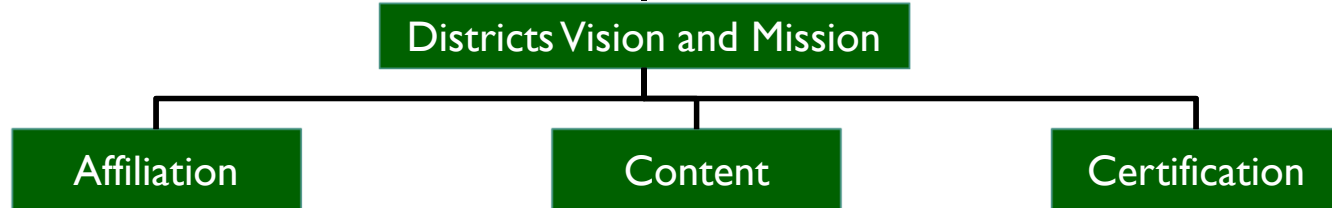


# Model

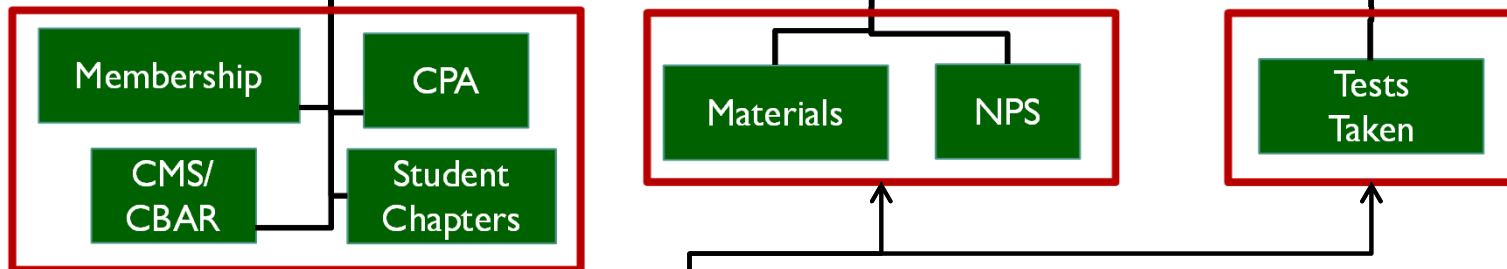
**APICS Strategic Priorities**



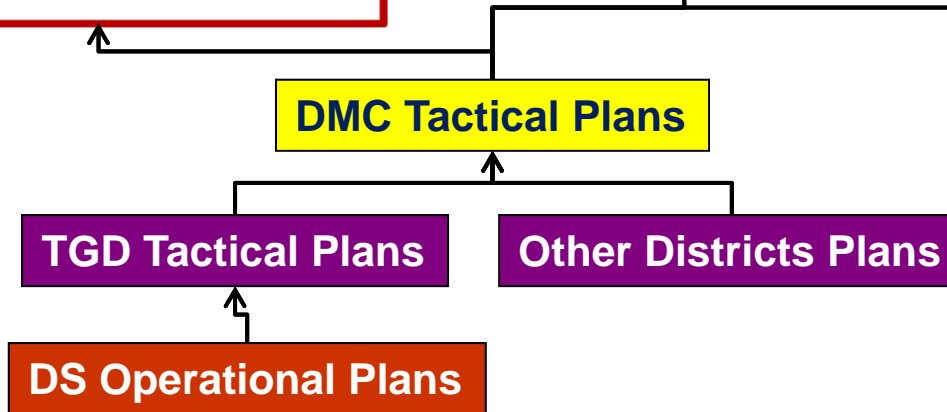
**DMC Strategic Priorities**



**DMC Strategic Objectives**



**DMC Tactical Plans**



**Districts Individual Plans**

*Advancing Productivity, Innovation, and Competitive Success*





## Districts Strategic Priorities

- **Affiliation with Chapters**
  - **Point of Arrival:**
    - Affiliation with APICS Chapters, as the most trusted supply chain and operations management organization, enhances individual and organizational effectiveness.
  - **Goal:**
    - Deliver compelling value by providing access to both the APICS community and related products and services.
  - **Affiliation Categories**
    - Individual (members or customers)
    - Corporations (transnational, enterprise, customers)
    - Student Chapters
    - Strategic Partners (Collaboration, Sponsorship,)
    - Academic Institutions
    - Other Associations



## Districts Affiliation Objectives

- **Membership**
  - Objectives – Be aligned with APICS Association Growth Objectives
    - Increase dues-based membership from 2010 baseline by 1% in 2011, 2% in 2012 and 3% in 2013
- **CMS/CBAR**
  - Current Submitted 88.60%
    - Proposed Increase 2011 – 90% 2012 – 92% 2013 – 95%
  - Current Chapters with CMS 74.6%
    - Proposed Increase 2011– 80% 2012 – 85% 2013 – 90%
  - Sharing of best practices across Districts
- **Chapters have agreements with APICS by the end of 2012.**
- **Work the VOC to develop a joint initiative for a new Student Model**



## District Strategic Priorities

- **Chapter Content**
  - **Point of Arrival:**
    - Chapters are regarded as the leading supplier for education and body of knowledge in the field of supply chain and operations management.
  - **Goal:**
    - Have a relevant, robust portfolio of products and services in supply chain and operations management recognized by members, and customers.



# 2011-2013 Chapter Content Categories

- Courseware and Educational Material
  - Certification Courseware
  - Non-certification courseware
- Reference Publications
- Research Reports
- Proceedings and Presentations (conferences, webinars, speeches)
- Members and Customers Communications (Newsletter, e-blast)
- Career Services (Competency Model, Job Board)



# 2011-2013 District Content Objectives

- Increase total amount of materials bought each year from our Association from a 2010 baseline by 5% in 2011, 2012, 2013
  - Current Baseline

	APICS	Holmes	Total
Dollars	\$1,891,117.63	\$835,764.50	\$2,726,882.13
%	69%	31%	

- Promote the use of [NPS](#) program in our CMS/C-BAR program.
  - 40% participation in 2011
  - 60% participation in 2012
  - 80% participation in 2013



## Strategic Priorities

- **Certification Program**
  - **Point of Arrival:**
    - APICS certifications are globally recognized and valued credentials in the field of supply chain and operations management.
  - **Goal:**
    - APICS certifications elevate individual and organizational performance.



# 2011-2013 Certification Categories

- Individual (CPIM, CSCP)

|



# 2011-2013 District Certification Objective

- Increase the number of certification exams in North America
  - Current baseline

Other Regions	2008	2009	Growth%	2010	Growth%
CPIM	15,598	13,906	-12%	14,439	4%
CSCP	868	972	11%	1,108	12%
Total	16,466	14,878	-11%	15,547	4%

North America	2008	2,009	Growth%	2010	Growth%
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- Objectives (2011 – 2013)
  - CPIM 3% each year
  - CSCP 4% each year



# **Tactical** Plans, Objectives, Goals and Requirements

- What do the Districts need to work on to be able to achieve our Strategic Objectives?
- Which are the resources needed to accomplish the plans?



# Tactical Plans Links to Strategic Objectives

## Strategic Objectives

Tactical Plans

	Membership	CMS/CBAR (Participation)	Chapter Agreements	Materials	Certification	NPS	SC
District Meetings	High Impact	High Impact	High Impact	High Impact	High Impact	High Impact	High Impact
IDP	Moderate Impact	Low Impact	No Impact	High Impact	High Impact	High Impact	Low Impact
Chapter Visits	High Impact	High Impact	High Impact	High Impact	High Impact	High Impact	High Impact
Districts Webinars	Moderate Impact	Low Impact	Low Impact	Low Impact	Low Impact	Low Impact	Low Impact
Communications	Moderate Impact	Moderate Impact	Moderate Impact	Moderate Impact	Moderate Impact	Moderate Impact	Moderate Impact
CMS/CBAR (Program)	High Impact	High Impact	Low Impact	High Impact	High Impact	High Impact	High Impact
Student Chapters New Model	High Impact	No Impact	No Impact	Moderate Impact	Low Impact	No Impact	High Impact

■ High Impact   
 ■ Moderate Impact   
 ■ Low Impact   
 ■ No Impact



- **Terra Grande District Meetings Tactical Plan**
  - **Objectives, Goals and Requirements**
- Objectives:
  - Develop Chapters to help the DMC obtain it's strategic goals
  - Generate Team Work
  - Overcome Change Resistance
- Goals
  - 3 meetings per year
  - 5% increase per year on chapter participation
  - 4.0 minimum evaluation on district meetings.
- Requirements:
  - **Increase budget 5% per year from current baseline**



- **Terra Grande District IDP Tactical Plan Objectives, Goals and Requirements**
- Objectives:
  - Develop Instructors to Enhance Customer Training Experience
- Goals
  - 33% of chapters with instructors with credentials 2010 baseline
    - 45% in 2011
    - 55% in 2012
    - 65% in 2013
- Requirements:
  - ***Implement IDP Communication and Program in Our District***
  - ***Increase budget 5% per year from current baseline***



- **Terra Grande Chapter Visits Tactical Plan Objectives, Goals and Requirements**

- Objectives:

- Develop Chapters

- Goals

- Number of Chapters Visited

- 6 in 2011
- 8 in 2012
- 10 in 2013

- Requirements:

- **Increase budget by 5% each year form current baseline**



- **Terra Grande District Webinars**
  - **Objectives, Goals and Requirements**
- Objectives:
  - Develop Chapters
- Goals
  - Number of webinars
    - 2 in 2011
    - 4 in 2012
    - 4 in 2013
- Requirements:
  - **Go to meeting tool from the Association**



- **Terra Grande Communications Tactical Plan Objectives, Goals and Requirements**

- Objectives:
  - Improve Communication
- Goals
  - web page updated,
  - 2 newsletters per year.
- Requirements:
  - ***Increase budget 5% per year from current baseline***



- **Terra Grande CMS/C-BAR Program Tactical Plan**  
**Objectives, Goals and Requirements**

- Objectives:
  - Validate chapter performance
  - Generate special development plans for chapters

- Goals

	2011	2012	2013
Submitted	92%	96%	96%
CMS	74%	85%	96%
Bronze	3%	7%	11%
Silver	25%	25%	25%
Gold	40%	44%	48%

- Requirements:
  - **Increase budget 5% per year from current baseline**