

Chapter Minimum Standards And Chapter Benchmarking and Reporting

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Terra Grande District Meeting

Houston, TX

March 4, 2011





Agenda

- Why are standards required
- How will standards benefit chapters, districts, and APICS
- What are the revised standards
- Categories
 - CMS
 - C-Bar
- What if your chapter doesn't make the standards
- Demo of Workbook
- Timeline
- Contacts
- Questions



Why require standards?

- A minimum level of customer service expectation
- Ensures consistency across all chapters
- Provides information supporting long range planning for Chapter Development Committee

How do standards benefit Chapters?



- Develop a better understanding of customer needs locally
- Identifies chapters which require additional support and resources
- Information used for new training initiatives
- Information used for developing educational materials for new target markets

How do standards benefit APICS?



- Customers receive a standard level of service across APICS
- Stronger branded image (consistency)
- Improved application of resources
- Closed loop process – increases communication between chapters, districts, and corporate



Submitting the standards data

- **Chapter Minimum Standards (CMS)** for Chapter Maintenance Tool
 - Chapters are **REQUIRED** to use the guidelines outlined in Section 1 of the C-Bar Handbook and C-Bar Excel workbook
 - Report annual compliance with CMS to District Manager/Staff for evaluation



Chapter Minimum Standards: *Categories*

1. Customer Expectations
2. Communications
3. Professional Development Events
4. Education
5. APICS Participation
6. Financial Responsibility



1. Customer Expectations

Annually provides data and information relating to customer expectations and feedback.

- Chapter membership 'needs' survey every 3 years
- 3 Professional Development event evaluations



2. Communications

Chartered chapters will communicate with chapter customers in the following manner:

- Communicate a minimum of 8 times throughout the year



CMS/Cbar Committee

Approved Changes to CMS

- Section B – Communications
 - 2. Did the chapter communicate with members or customers via newsletter hard or electronic copy at least 8 times?
 - Approved Change: 6 times



2. Communications (continued)

- Maintain a current website with:
 - APICS trademark logo on homepage
 - Chapter's name
 - Link to www.apics.org

OR

- Provide/maintain key chapter information/services/activities via Online Chapter Locator

3. Professional Development Events



- Hold a minimum of 3 Professional Development events per year



4. Education

Education in various formats:

- Offer at least 3 APICS Body of Knowledge related educational offerings per year
- Hold a minimum of 2 APICS Body of Knowledge related educational offerings per year



5. APICS Participation

Chartered chapters will provide the following annually:

- A listing of chapter officers for the year will be:
 - Submitted within 60 days of election of chapter officers via MyChapter
- A chapter will review Chapter bylaws and submit changes to APICS Corporate (if required) annually
- Minimum of 4 Board members



CMS/Cbar Committee

Approved Changes to CMS

- Section E – Participation
 - 3. Did the BOD have a minimum of four (4) board members serving?
 - Approved Change: Did the chapter's BOD consist of a minimum of four (4) board members?
 - The members are listed on chapter roster in MyChapter



5. APICS Participation (Continued)

- Hold a minimum of 4 chapter board of director meetings per year including 1 Transition and / or Orientation meeting
- Officer Training attendance
- A chapter will have a minimum of 1 or more officers on the Officer List serve



6. Financial Responsibility

Financial Responsibility will be provided annually:

- Provide APICS with a letter of assertion from the chapter board of directors that the chapter financial records fairly state the assets, liabilities, revenues, and expenditures of the chapter and that all required regulatory filings have been made in a timely manner.



What if your chapter does not meet the standards?

- Your chapter will not lose its charter on day one
 - 3 years to show compliance working with District and Corporate
- Once notified, get started
- Improving your chapter is the objective
- The purpose is to make stronger chapters, not to disband chapters



Submitting the benchmarking data

■ **Chapter Benchmarking and Reporting** (C-Bar) Tool

- Chapters **MUST BE compliant** with CMS
- Chapters **MAY ELECT** to participate in C-Bar
- Complete the guidelines outlined in Section 1 and Section 2 of the C-Bar Handbook and C-Bar Excel workbook
- Submit to District Manager/Staff for evaluation

C-Bar:

Categories

1. Customer Expectations and Marketing
2. Communications
3. Professional Development Events
4. Education
5. APICS Participation and External Support
6. Financial Responsibility
7. Membership
8. Chapter Management
9. Student Chapter/Other Educational Organizations
10. Narrative and Innovations



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Chapter Benchmarking and Reporting (C-BAR) Program

In addition to the original versions of the C-BAR Excel Workbook and C-BAR Handbook, updated versions are also available. The actual program criteria and supporting documentation requirements are the same in both versions; however, significant enhancements to facilitate automatic summary calculations at the chapter, district, and APICS corporate levels and a more intuitive and user friendly interface have been incorporated into the newer version. All chapter submissions for the 2007-2008 program year for the CMS and C-BAR should be reported electronically using either version.

The C-BAR program is divided into two sections:

Section 1: Chapter Minimum Standards (CMS) for Chapter Maintenance Tool

Chapters are required to use the guidelines outlined in Section 1 of the C-BAR Handbook and the C-BAR Excel Workbook to report their annual compliance with CMS to their district manager/district staff for evaluation by July 31 of each year.

Section 2: Chapter Benchmarking and Reporting (C-BAR) Tool

Chapters electing to participate in C-BAR must be in compliance with the CMS and complete Sections 1 and 2 of the C-BAR Excel Workbook and submit to their district manager/district staff for evaluation by July 31 of each year.

Supporting Documents and Tools

- [Enhanced C-BAR Handbook](#)
- [Enhanced C-BAR Workbook](#)
- [Original C-BAR Handbook](#)
- [Original C-BAR Workbook](#)
- [CMS Frequently Asked Questions](#)
- [Sample Letter of Assertion](#)
- [Chapter Audit Criteria and Checklist Region 2](#)
- [CMS Timeline](#)

Chapter Minimum Standards:

Timeline

Chapter:

Begin preparation for compliance immediately

- July 31 –
 - Complete section 1 (CMS) of the Excel workbook
 - Send submission to District representative

District Liaison/Evaluator:

- August 3 – Confirmation submission is received
- August 7 – Assign submission to District evaluators



Chapter Minimum Standards: *Timeline* (Continued)

District Liaison/Evaluator: (Continued)

- August 8 to 29 – Evaluate submissions against CMS
- August 30 - Send copies of entries and required documentation to District Manager for review



Chapter Minimum Standards: *Timeline (Continued)*

District Liaison:

- September 1 – Notify chapters of status including evaluator responses and comments
- **District Manager:**
- September 1 – Notify APICS Chapter Relations on each chapter's status



Chapter Benchmarking and Reporting: *Timeline*

Chapter:

Begin preparation for compliance immediately

- July 31–
 - Section 2 (C-Bar) of the Excel workbook
 - Send submission to District representative

District Liaison/Evaluator:

- August 3 – Confirmation submission is received



C-Bar: *Timeline* (Continued)

District Liaison/Evaluator:

- August 7 – Assign submission to District evaluators
- August 8 to 29 – Evaluate submissions
- August 30 – Return entries to Chapter with responses, comments and award level designated
- August 30 - Send copies of entries and documentation to District Manager for review



C-Bar: *Timeline* (Continued)

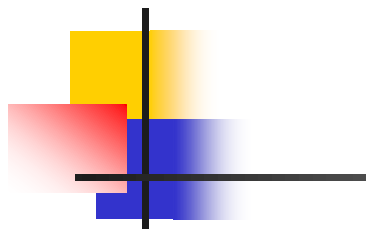
District Manager:

- September 1 – Forward Best Practices and Innovations to the Chapter Development Committee via APICS Chapter Relations
- September 1 – Forward award results to APICS Chapter Relations



Terra Grande 2010 Results

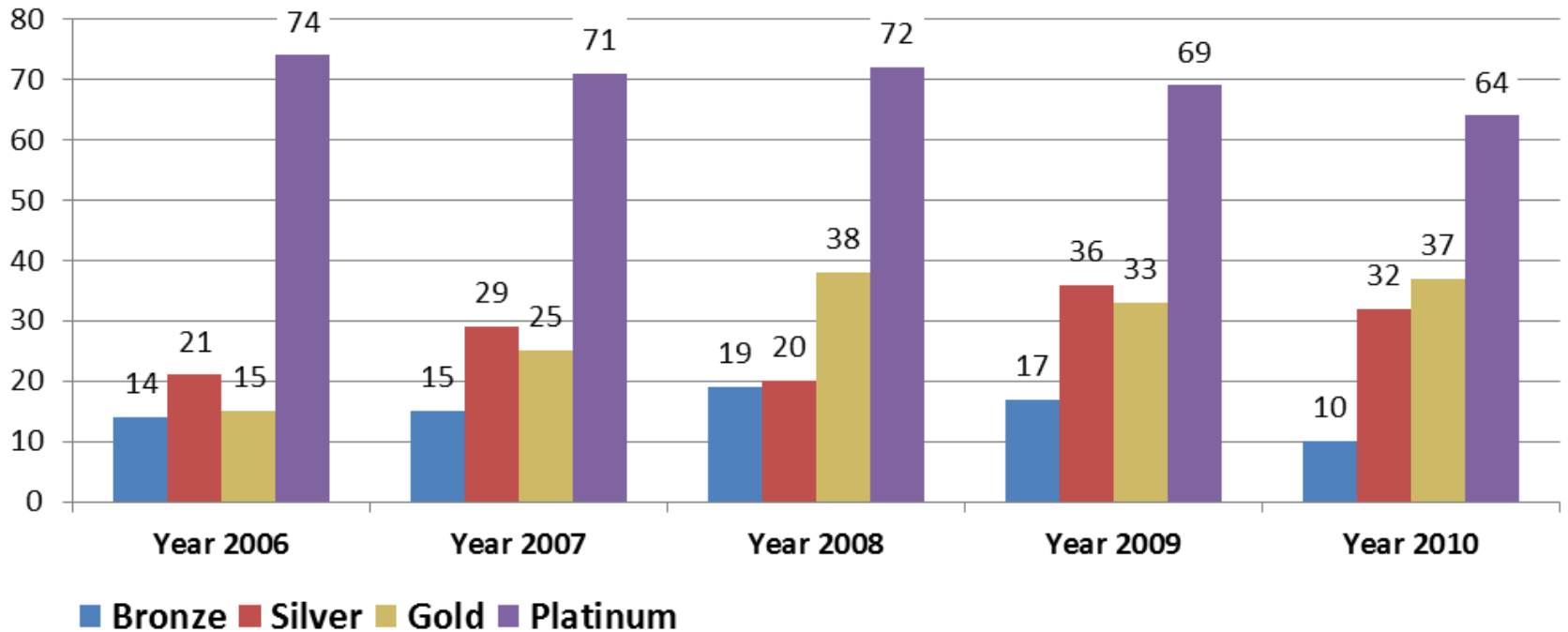
- CMS submissions
 - 96% TG Chapter Participation



Chapter	Not Submitted	Submitted	Min Stds	Bronze	Silver	Gold
Albuquerque						1
Austin						2
Ark-LA-Tex		1				
El Paso/Juárez						3
Chihuahua					1	
Guadalajara						4
Mexico City						5
Querétaro						6
Puebla					2	
Colorado	1					
East Texas					3	
First Arkansas						7
Monterrey					4	
Fort Smith		2				
Greater Fort Worth						8
Heart of Texas		3				
Houston						9
Lubbock Chapter		4				
Northeast Arkansas		5				
Northwest Arkansas					5	
North Texas						10
Northern Colorado					6	
Oklahoma City					7	
Pike's Peak Chapter		6				
Rio Grande Valley	2					
South Central Texas		7				
Tulsa		8				

All Districts

C-BAR





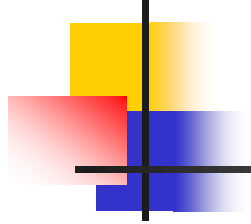
District Contacts

- District Manager: Luis Barcon
- District Staff :
 - Roger Harris
 - Charles Busby
 - Bruno Acosta
 - Chet Frame
 - Chuck Connelly
 - Vern Teichroeb
 - Honey Johnson
- District Director: Joe Schriever

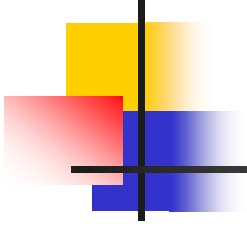


For More Information.....

- Contact your Terra Grande District Staff Representative
- Visit Volunteer section of APICS website
- Contact the Chapter Development Committee



Demo of Workbook





Thank You!

Honey Johnson, CFPIM, CIRM, C.P.M., CSCP
Terra Grande Staff

