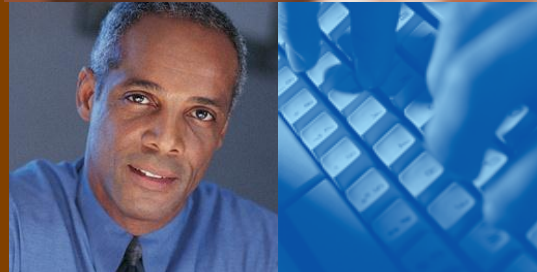


**Strong Chapters,
Strong Association.**



Districts Update

Ing. Luis Barcón

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

APICS Terra Grande

District Manager



2010 KPI's

- **Approximately 50%-60% of APICS Revenue came from Chapter Related Activities**
- **Districts Budget is About 3% of APICS Expense Budget**

2011 Key Activities

- **Houston District Meeting and Six Packed**
 - **District Meeting**
 - Around 40 attendees
 - 71% of Chapters attended
 - Overall Evaluation 4.3 (Speakers, Food, etc.)
 - ***Six Packed***
 - More than 300 attendees
 - More than 40 speakers
 - We presented 42 technical presentations, seven workshops, and two keynote speakers
 - We offered hotel accommodations for less than \$100 per night in a very nice Marriott
 - The ratings for all speakers averaged above 4.5 on a scale of 1 to 5
 - The rating for the conference was 4.7 on a scale of 1 to 5
- **Chapters Disbandment**
 - **Amistad in 2010**
 - **Heart of Texas in 2011**



DMC Strategic and Tactical Plans

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

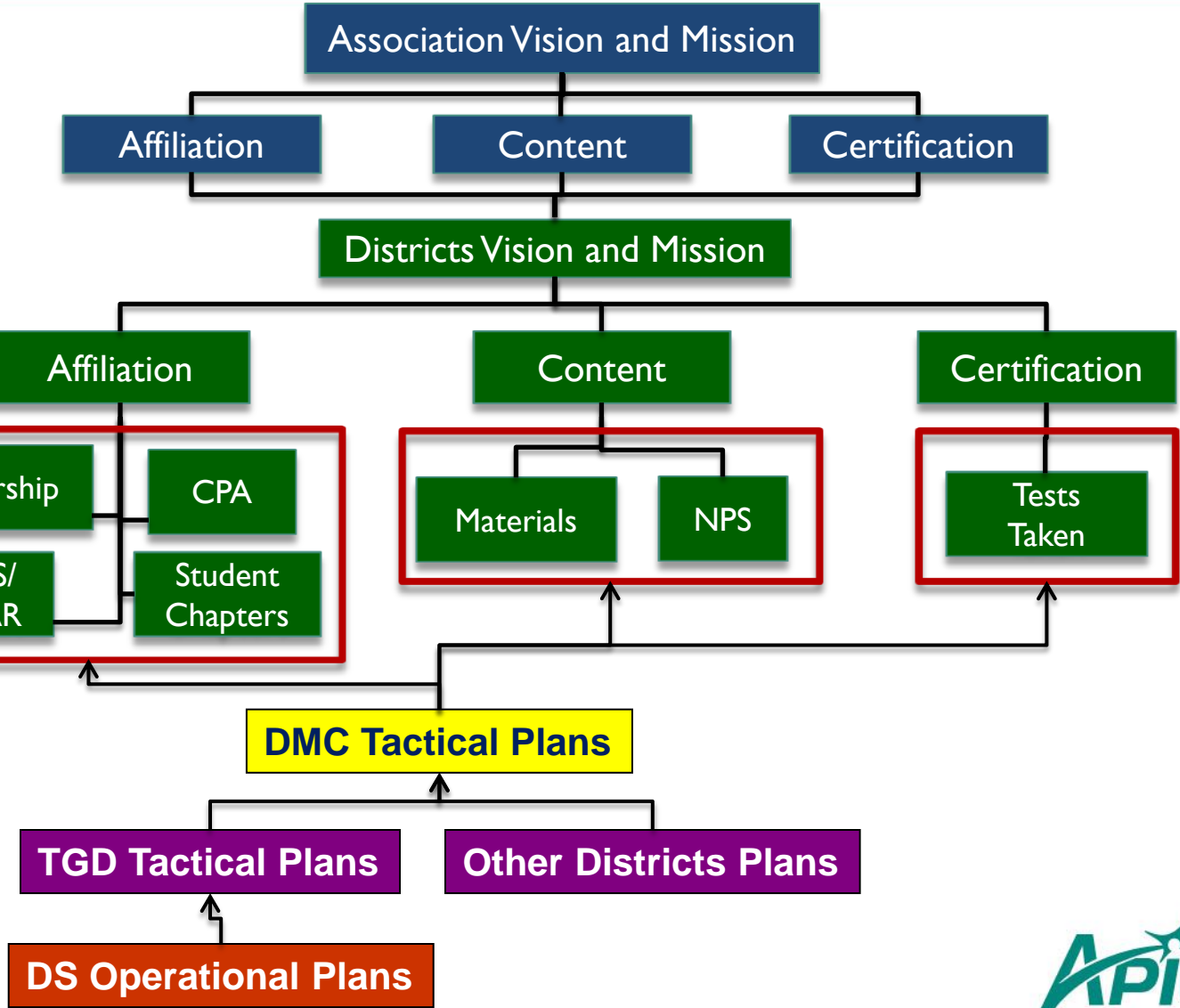
APICS Strategic Priorities

DMC Strategic Priorities

DMC Strategic Objectives

DMC Tactical Plans

Districts Individual Plans





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	High Impact	Moderate Impact	Moderate Impact	Moderate Impact	Moderate Impact
CMS/CBAR (Program)	High Impact	High Impact	High 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

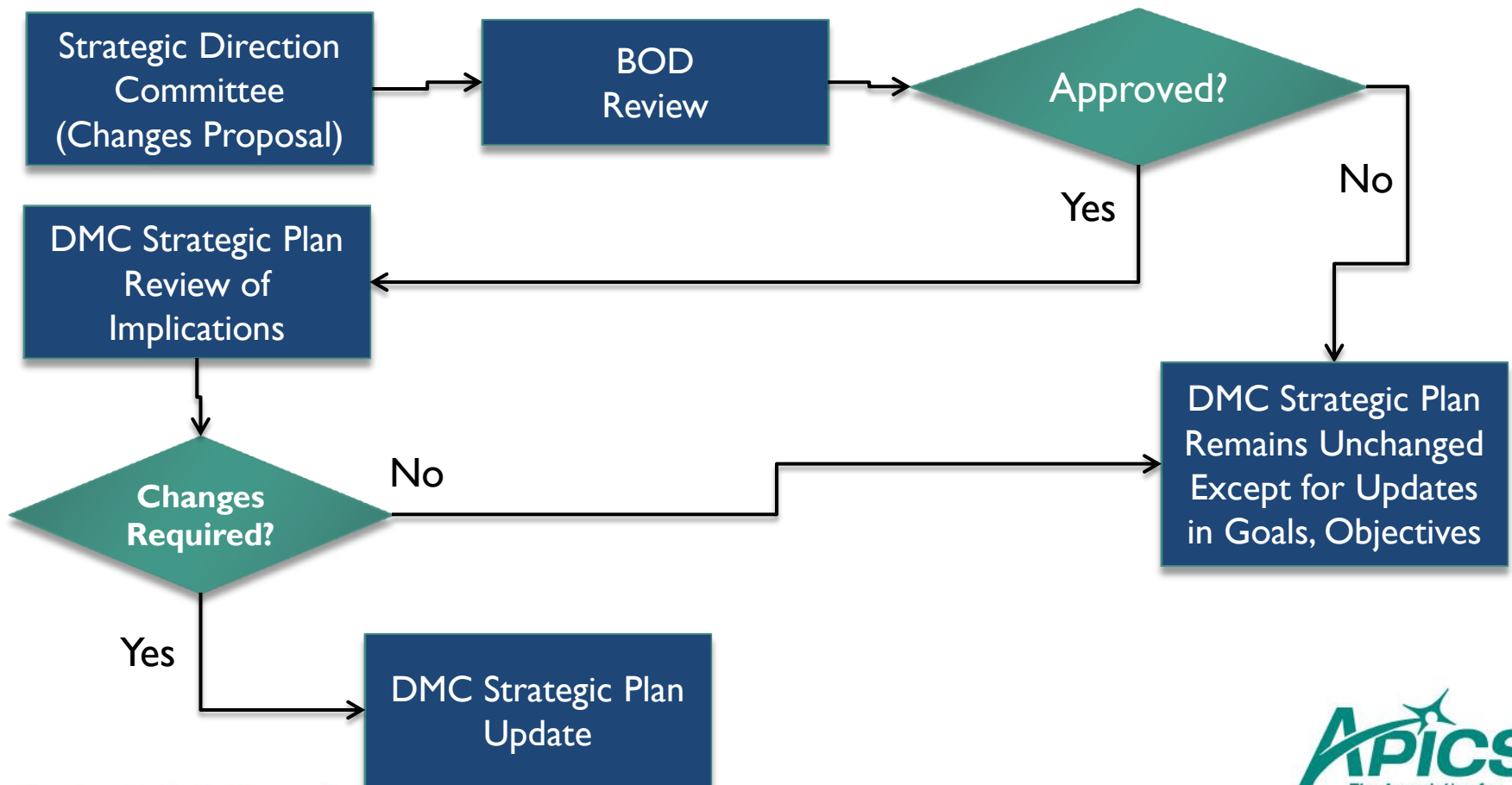
■ High Impact
 ■ Moderate Impact
 ■ Low Impact
 ■ No Impact





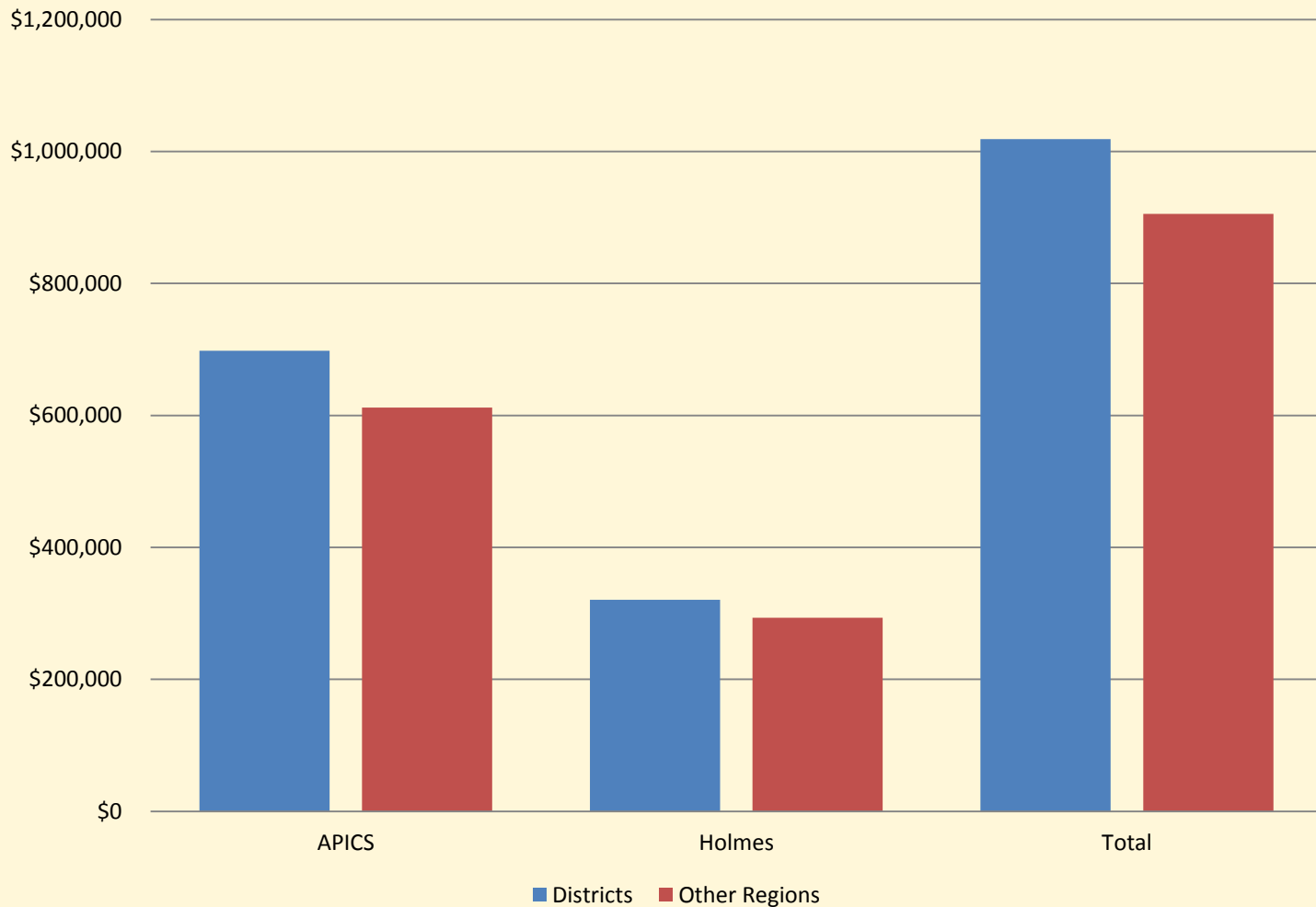
DMC Strategic Plan Update Process

1) Three Year Rolling Update



2011 KPI's

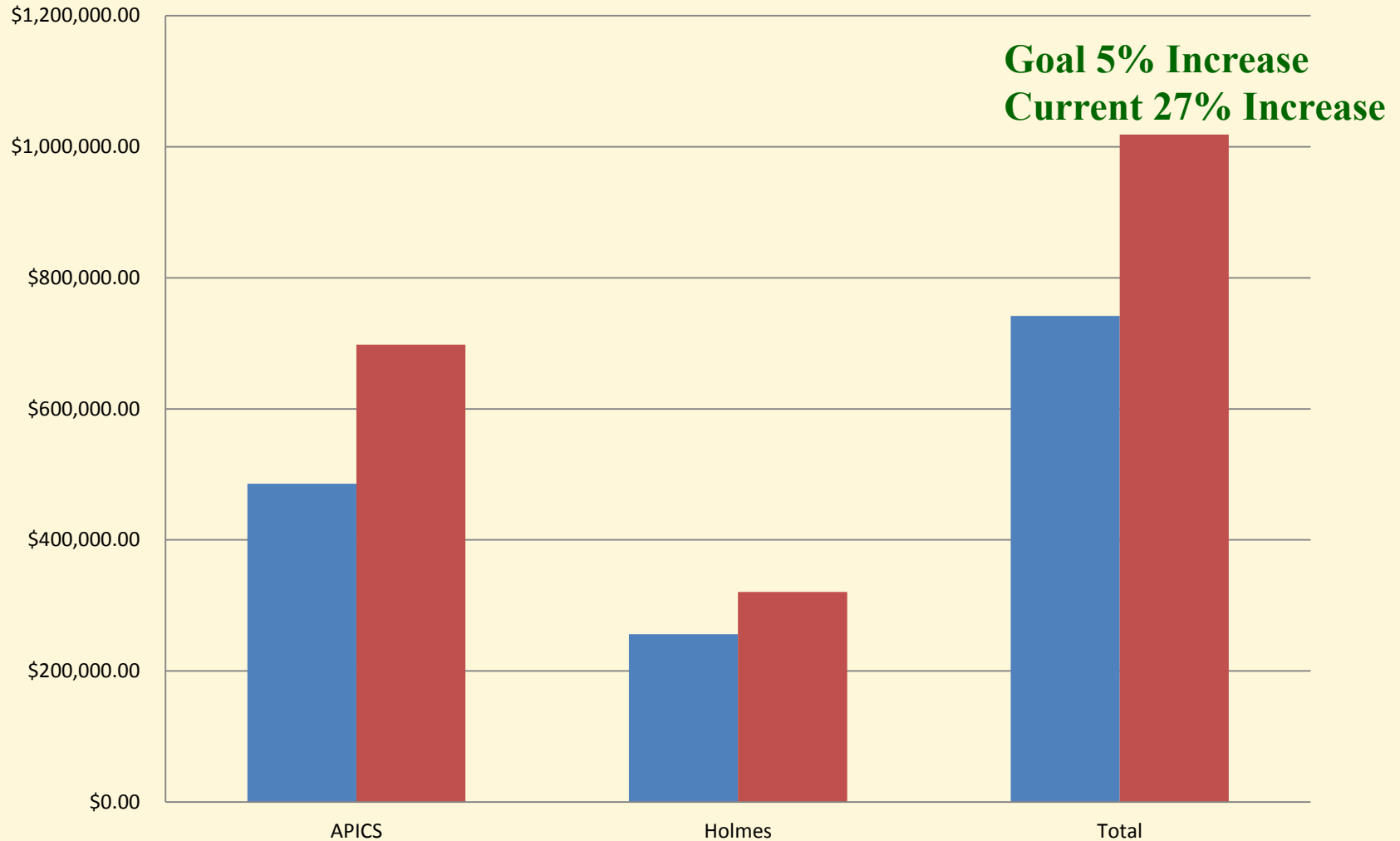
Materials Bought 1Q 2011



2011 KPI's

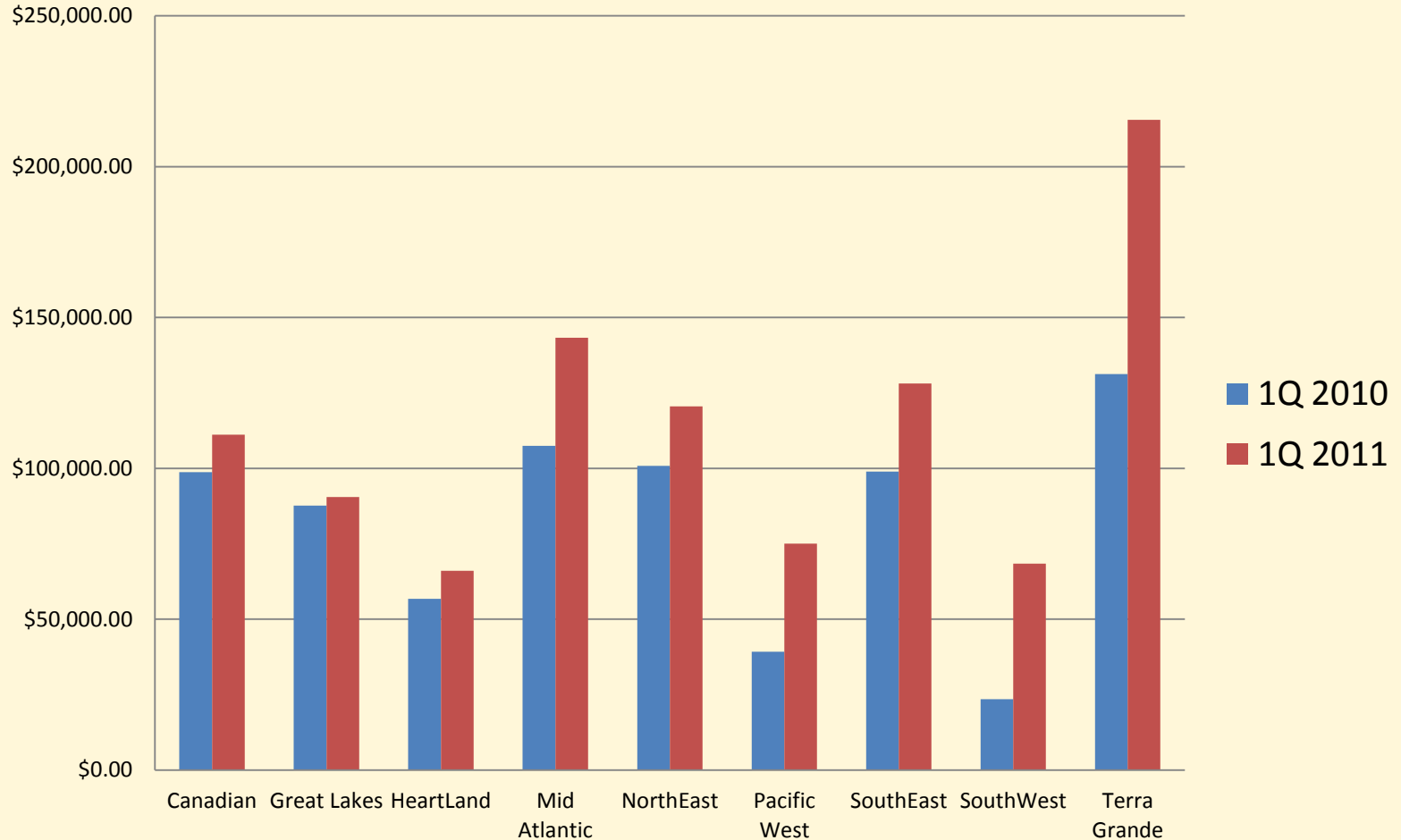
■ 2010
■ 2011

Materials Bought By Districts from APICS First Quarter



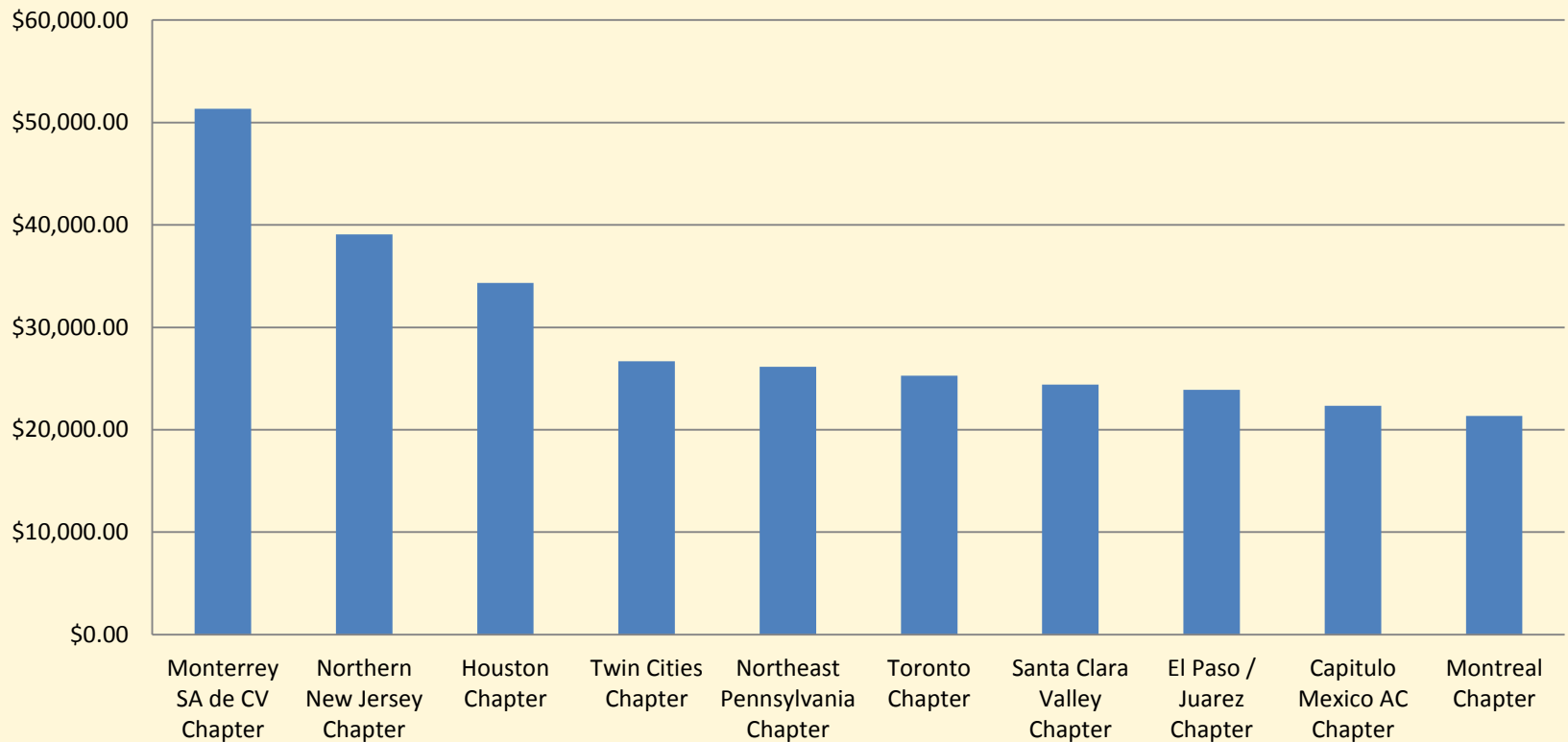
2011 KPI's

Materials Bought by District



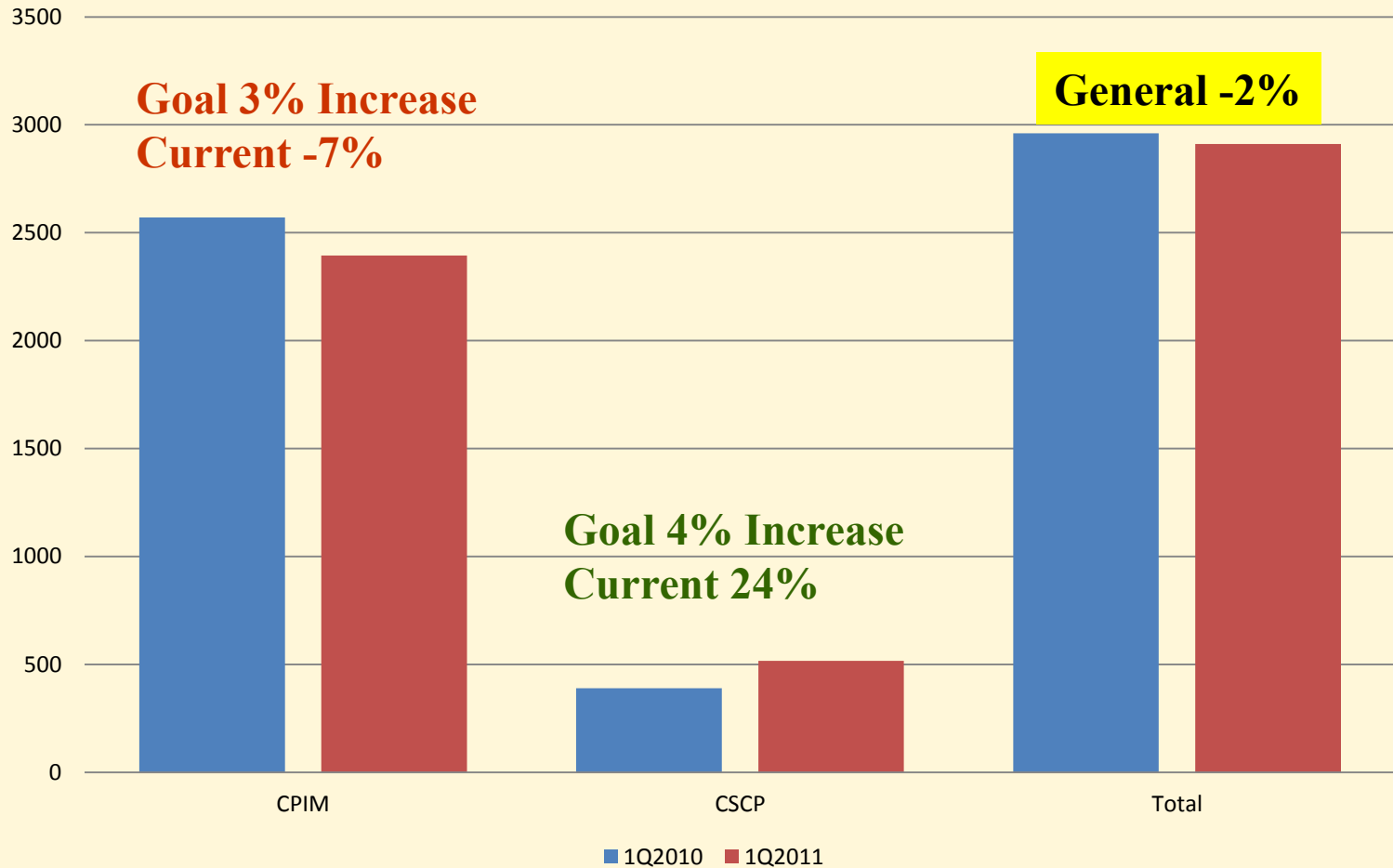
2011 KPI's

10 Biggest Chapters (Material Buyers 1Q 2011)



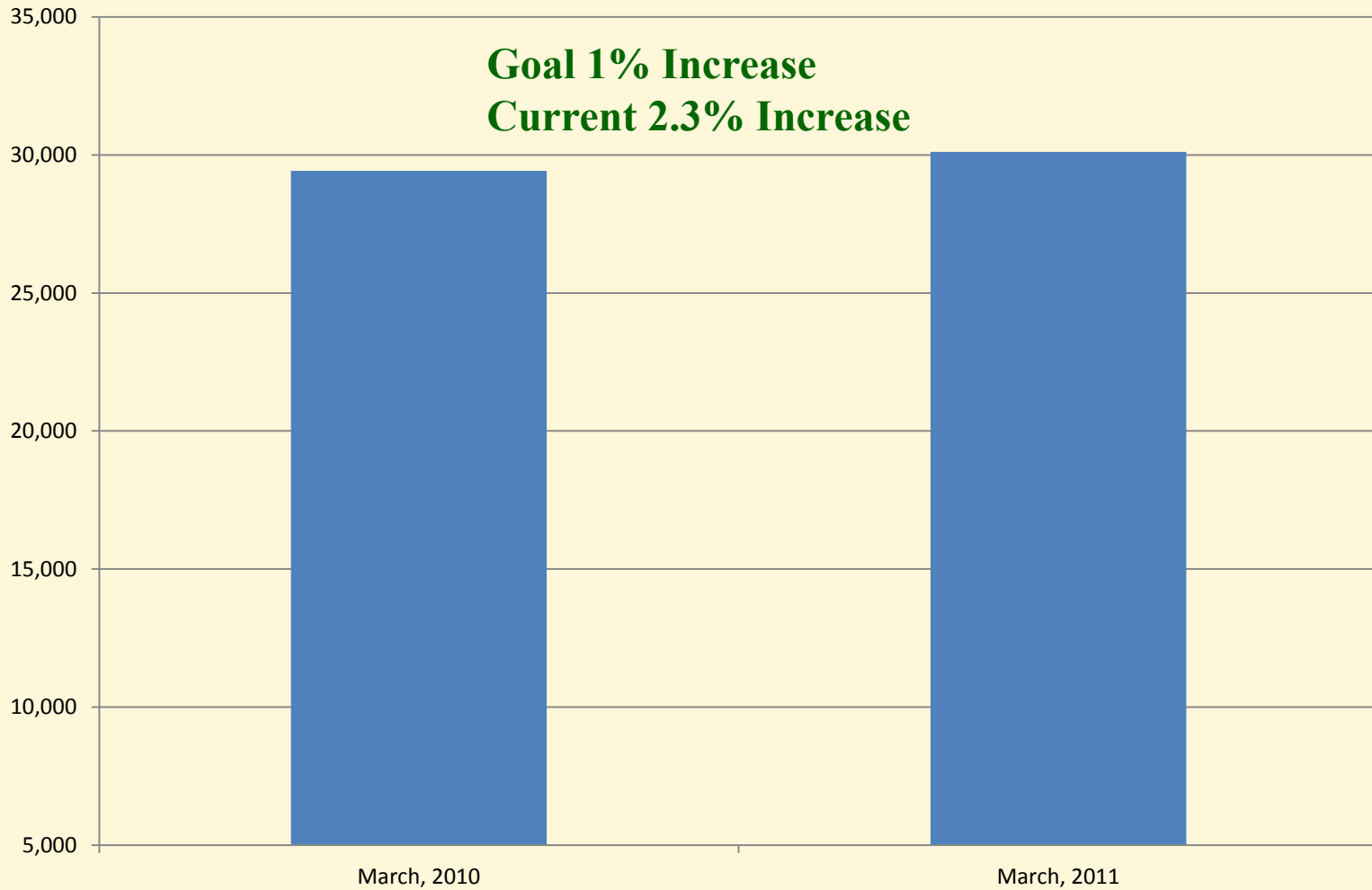
2011 KPI's

Test Taken in Districts



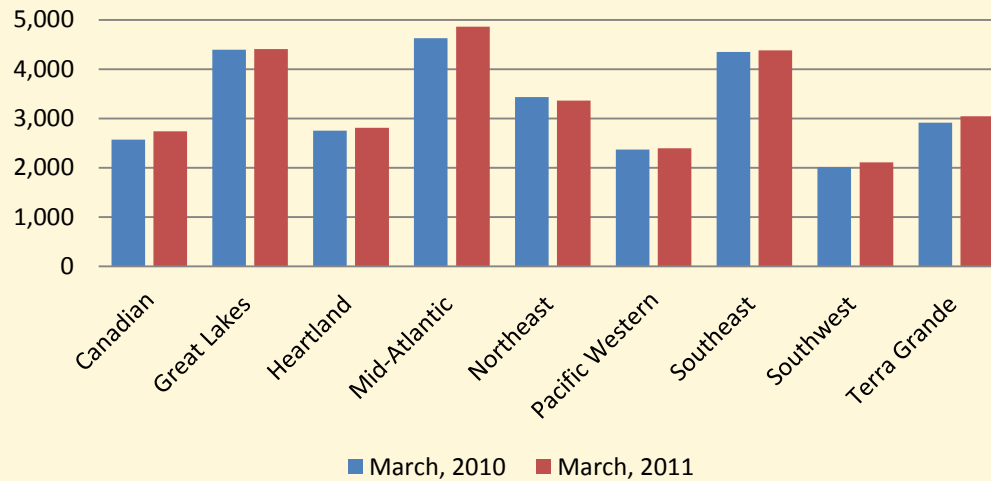
2011 KPI's

Membership Total Districts



2011 KPI's

Membership by District



	% Increase/Decrease
Canadian District	6.02%
Great Lakes District	0.25%
Heartland District	2.03%
Mid-Atlantic District	4.83%
Northeast District	-2.05%
Pacific Western District	1.04%
Southeast District	0.73%
Southwest District	4.51%
Terra Grande District	4.27%

1Q 2011 APICS



Key Service Indicator	Metric	Status
<p>Customer Service Call center wait time</p>	<p>Average 30 seconds or less</p>	<p>First Quarter: Average: 55 Seconds</p> <p>January Avg. Wait Time - :69 February Avg. Wait Time - :55 March Avg. Wait Time - :41</p> <p>Longer wait times due to increase in volume and staff turnover. New staff are being trained and wait times are decreasing.</p>
<p>Order fulfillment</p> <p>Probability of Delivering Perfect Orders = 78%</p>	<p>95% or more of all orders will be fulfilled accurately</p>	<p>First Quarter:</p> <ul style="list-style-type: none"> - 95% of the respondents indicated that their order arrived in the estimated time. - 96% indicated their order was complete - 97% indicated the appearance of their order was acceptable - 96% indicated their order was free of shipping/handling damage - 92% were satisfied with their order <p>The lower satisfaction score is due to negative responses to the dictionary reprint.</p>

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)

DMC Chair

- Eric Somers

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

It was changed to September 2011

DMC Meeting

Chicago, June 18



- **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 **(2 current)**
 - 5% increase per year on chapter participation **(Goal Achieved in Houston)**
 - 4.0 minimum evaluation on district meetings. **(Goal Achieved in Houston)**
- 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 **(Need to work on this, It also might be part of the CPA)**
 - 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 **(Current 4 Visits)**
 - 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 **(Need to work on this, 0 current)**
 - 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 (**On target**)
 - 2 newsletters per year. (**1 sent**)
- 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**





- **Terra Grande**
 - **NPS (Net Promoter Score) Program Tactical Plan Objectives and Goals**

- Objectives:
 - Validate Chapter Customers' Perception and Loyalty
 - Generate special development plans for chapters
- Goals
 - 45% Program Participation in 2011 (**Not Started Yet**)