



C-BAR

Minimum Standards for Chapter Maintenance Chapter Benchmarking and Reporting

Excellence in

Membership

Education

Programs

Finance

Marketing and Sales

Community

Recognition

INTRODUCTORY NOTE:

The C-BAR program is a Chapter Management Program, consisting of two sections:

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

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

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

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

This program was streamlined for ease of use by APICS chapters, so our organization's members and customers can experience consistency of APICS products and services.

By participating in C-BAR, chapters can expect the following benefits:

- To easily identify opportunities for growth
- To promote challenges
- To provide an administrative tool
- To demonstrate benefits of continuous improvement
- To help provide meaningful metrics and measurements
- To recognize and share achievements, accomplishments and innovations
- To share best practices
- To establish and raise the BAR!

Many people have spent countless hours in the development of this program. Their understanding of the elements that contribute to good chapter management, their appreciation of the details that differentiate acceptable member services from stellar performance, and the passion that they have lent to their years of APICS service have been reflected in the enthusiasm they have brought to this project.

The C-BAR Committee

A Sub-Committee of the Chapter Development Committee (CDC)

ACKNOWLEDGEMENTS AND APPRECIATION

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- Central Georgia
- Central Indiana
- Chicago
- Greater Fort Worth
- Hamilton
- Long Island
- Michiana
- Northern New Jersey
- Northern Sierra
- Pikes Peak
- Rock Valley
- San Diego
- San Fernando
- Southern New Hampshire
- Toledo
- Triangle
- Tri-City
- Ventura
- Windsor

The C-BAR committee included people who worked on segments of the program over more than eighteen months. The following individuals formed the core working group from the beginning of the revision process until the release of this version of the program:

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Special thanks to Jack A. Wetzel, CPIM, whose significant enhancements to the functionality of the C-BAR Excel Workbook, using poka-yoke principles, maximizes the ease of use of this tool, for both chapter and region reviewers.

Contents

SECTION 1: CHAPTER MINIMUM STANDARDS (CMS) FOR CHAPTER MAINTENANCE	1
PURPOSE.....	1
ORGANIZATION.....	1
TASKS.....	1
A. Customer Expectations.....	2
B. Communications.....	2
C. Professional Development Events.....	2
D. Education.....	3
E. APICS Participation.....	3
F. Financial Responsibility.....	3
DEVIATION FROM CHAPTER MINIMUM STANDARDS	4
EVALUATION	4
RECOGNITION	5
SECTION 2: CHAPTER BENCHMARKING AND REPORTING (C-BAR)	7
PURPOSE	7
ORGANIZATION	7
TASKS	10
OVERVIEW OF C-BAR EXCEL WORKSHEET TOOL	10
A. Customer Expectations/Marketing.....	10
B. Communications.....	12
C. Professional Development.....	13
D. Education.....	14
E. APICS Participation/External Support.....	15
F. Financials	16
G. Membership	17
H. Chapter Management.....	18
I. Student Chapter or Other Educational Organizations	18
J. Narrative and Innovations.....	19
EVALUATION	21
RECOGNITION.....	22
APPENDIX A: MINIMUM STANDARDS FOR MAINTAINING A CHAPTER CHARTER	23
APPENDIX B: EXCEL WORKBOOK TOOL.....	27
INSTRUCTIONS	29
MANDATORY INFORMATION	33
CHAPTER MINIMUM STANDARDS (CMS) FOR CHAPTER MAINTENANCE TOOL (REQUIRED).....	34
CHAPTER BENCHMARKING AND REPORTING (C-BAR) TOOL (OPTIONAL)	36
CHAPTER PLANNING TOOL.....	42

SECTION 1: Chapter Minimum Standards (CMS) for Chapter Maintenance

Purpose

One of the key initiatives of the new APICS strategy is to enhance and develop the association's delivery to better serve our members and end users. The primary purpose of the minimum standards is to enhance the growth, development, and value-added of APICS chapters by evaluating each chapter against a set of criteria that is felt to have a direct and positive impact on chapter performance.

The Chapter Development Committee (CDC) was given the charter to develop criteria for CMS and establish evaluations against those criteria for each and every chapter. This evaluation is to identify those areas upon which a chapter needs to achieve a level of performance to be minimally viable to meet market expectations on APICS Body of Knowledge (BOK) delivery and effectively participate in the delivery network.

Organization

It is mandatory for all chapters to complete this section. This section asks whether chapters have performed the minimum tasks to be considered viable chapters. Chartered chapters must maintain the following standards annually. The minimum standards fall into six categories: **Customer Expectations, Communications, Professional Development Events, Education, Society Participation, and Financial Responsibility.**

Tasks

The majority of the CMS tool is a series of questions requiring **yes** or **no** responses. The individual(s) responding to these questions should select the appropriate answer from the pull-down menu in the Response columns (C and E) and enter additional data as requested. Points (0 or 1) for each question are automatically calculated based on performance of minimum tasks. A chapter can only be awarded one series of points per question.

Input on this page is merely the appropriate response from the pull-down menus in columns C and E (click on the triangle). The points are filled in by formulas and cannot be directly inputted by users. The comments section in columns G and H could be used to communicate questions/answers between chapters and region reviewers or to document what was done.

Any documentation required is listed at the bottom of the worksheet and is based upon the chapter's claim for credit. If the chapter claims credit in an area that requires documentation, a "**Yes**" indicator will appear next to the documentation description. If the chapter does not claim credit in an area that requires documentation, then documentation is not expected and a "**No**" indicator will appear. A blank space next to the documentation description indicates that the question has not been answered. This provides a checklist for documentation with the intention to eliminate rework loops for missing documentation between chapters and region reviewers. Your point totals are calculated and shown at the top and bottom of the worksheet.

Overview of CMS Excel Worksheet Tool

A. Customer Expectations

Chartered chapters will provide the following documentation annually, which provides data and information relating to customer expectations and feedback.

1. Chapter completed or will complete a member needs survey or use another mechanism to collect member needs at least every three years and demonstrate action on those needs ongoing. (Attach a consolidated copy or an action plan if it will be completed in the future.)
2. Chapter performed at least three Professional Development event surveys either electronically or via hard copy.

B. Communications

Chartered chapters will communicate with chapter customers.

1. Chapter maintained a current Web site with APICS trademark logo on home page with chapter name and link to APICS (www.apics.org) or chapter provided and maintained key chapter contact information and an overview of chapter services and activities via the Online Chapter Locator (<http://www.apics.org/apics/chapters.aspx>)

Note: List chapter Web site URL- example: <http://www.apicsphoenix.org>

2. Chapter communicated with members or customers via newsletter hard or electronic copy at least eight times. Examples include: a) hard or soft copy newsletter; b) chapter event announcements via e-mail; c) partnering with local media (TV, Radio, newspapers, newsletters, and job fairs) to communicate chapter activities; d) company coordinator program; e) mass mailing to prospective members to introduce the chapter and its activities.

C. Professional Development Events

Chartered chapters will hold a minimum of three professional development events per year. Professional development events are defined as "...any activity where customers have an opportunity to meet (face-to-face or virtually) and present and discuss topics related to the APICS BOK."

1. Chapter held at least three professional development events. Examples may include Top Management events, plant tours, online chat room sessions, webinars, and joint meetings with other chapters or societies, independent workshops, conferences or seminars. (**Attach list of event speakers and subjects**).

D. Education

Chartered chapters will hold a minimum of two and offer at least three APICS body of knowledge-related educational offerings per year. These offerings may be offered in workshop, online, or part-time study course format.

1. Chapter offered at least three and held at least two APICS body of knowledge-related educational offerings during the year. They may be offered in workshop, online or part-time study course format. Examples may include: a) CPIM, CIRM, or CSCP certification courses; b) noncertification educational offerings (e.g., Fundamentals); c) noncertification educational workshop offerings (e.g., Lean Manufacturing); d) in-house education programs; e) independent topic workshops or seminars; f) educational offerings held in conjunction with other associations, universities or consulting companies.

E. APICS Participation

Chartered chapters will provide APICS Headquarters with or participate annually in the following activities.

1. Chapter submitted a listing of current officers to APICS Headquarters within 60 days of elections using the My Chapter area of the APICS.ORG Web site.
2. Chapter reviewed their bylaws and submitted changes to APICS and state agency (if applicable).
3. Chapter held at least four BOD meetings including one transition or orientation meeting for the BOD. (Attach BOD Meeting Minutes.)
4. BOD had a minimum of four (4) board members serving.
5. At least one BOD member attended one officer training session. Examples of officer training may include attendance at VLW (Volunteer Leadership Workshop), Leadership Institute Workshop, and/or region meetings, and/or officer training sessions.
6. Chapter had at least one BOD member participating in the officers electronic discussion list (i.e., listserv, APICS Learning Communities, etc.).

F. Financial Responsibility

Chartered chapters will provide APICS Headquarters with a letter of assertion from the chapter board of directors annually that attests to the financial health of the chapter and fiscal responsibility of the chapter board of directors.

1. Chapter provided APICS with a letter of assertion from the chapter board of directors stating 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. (Attach letter of assertion regarding finances.)

Deviation from Chapter Minimum Standards

If a chapter did not meet the approved standards, but it can provide supporting documentation for such variances (based on voice of the customer feedback), region vice president may exempt those variant standards. (Such variances must be reviewed each year without exemption.)

The region vice president may award the point for that area and will update information via an approved reporting method. APICS Headquarters and chapter will be notified.

An example would be a chapter's customer needs survey data that indicates the customers want only two professional development events annually. The chapter submits the CMS with request for variance and supporting documentation. The region vice president for that chapter may award the point for professional development and maintenance in this example.

Evaluation

1. Chapter may submit standards data throughout the year. If by July 31, standards are incomplete, chapter president will receive communication from the region vice president (or designated region evaluating officer) informing of incompleteness. The minimum standards portion is mandatory for all chapters.
2. Chapters that fail to submit their standards data will fall into revitalization status and may face other actions at the region vice president's discretion.
3. Once all standards (for a chapter) are entered complete, the chapter president will send the chapter's submission to the region vice president (or designated region evaluating officer) reporting submitted data and association approved standards. The submitting chapter president will receive a response stating that the standards have been received and are under review.
4. Region vice president or region evaluating officer will review submitted data against approved chapter standards. Region will have 30 days from the date of chapter submission to conduct the review.
5. If the chapter meets all approved standards, only the region vice president will approve retain status and update via the approved report method. APICS Headquarters and chapter will be notified of results. Annually, the Chapter Development Committee will receive a report of chapters' statuses and why chapters in revitalization status did not meet the approved standards for purpose of analysis.

Responsibility	Completion Date	Action
Chapter	Ongoing/Quarterly	Chapters and regions are encouraged to monitor progress on an ongoing basis throughout the year using the tools provided in the C-BAR Handbook and improved Excel Workbook.
Chapter	July 31	Send submissions to the region liaisons.
Region Liaison	August 3 August 7	Send chapter confirmation that its submission has been received. Assign submissions to region evaluators.
Region Evaluator	August 8-29 August 30	Review submitted data against CMS. Send copies of entries and required documentation to the region vice president for review.
Region Liaison	September 1	Notify respective chapters about status. Include evaluator responses and comments.
Region Vice President	September 1	Notify APICS Chapter Relations about each chapter's status.

Recognition

If the chapter meets all approved standards annually, the chapter has successfully performed the minimum tasks to be considered a viable chapter and maintain its chapter charter.

SECTION 2: Chapter Benchmarking and Reporting (C-BAR)

Purpose

The C-BAR program has three primary purposes:

1. Provide each chapter with a comprehensive set of activities recommended for a successful chapter.
2. Provide an objective process to recognize chapters that meet or exceed the accomplishment of recommended activities.
3. Provide regions, Chapter Development Committee (CDC), and association feedback on chapter strengths and weaknesses for the development and implementation of future programs and training to assist chapters to better support their customers.

Organization

C-BAR is organized into several areas reflective of a typical chapter. This is to assist the chapter president and the board of directors to plan activities, determine responsibilities, and prepare an evaluation of the chapter. The areas include the requirement that all participants in the C-BAR program must satisfy the requirements presented in Section 1 of this document.

The areas for C-BAR review are:

- A. Customer Expectations and Marketing
- B. Communications
- C. Professional Development Events
- D. Education
- E. APICS Participation and External Support
- F. Financial Responsibility
- G. Membership
- H. Chapter Management
- I. Student Chapter/Other Educational Organizations
- J. Narrative and Innovations

The C-BAR design is based on a series of questions. A chapter can answer the questions posed in C-BAR at the beginning of the year to determine if its strategy plan will fulfill the desired level of success. Based on the points per section, a chapter will be able to identify weak areas and take appropriate actions.

It is recommended that each chapter complete C-BAR as the year moves forward to avoid having to locate the information at the end of the year. Filling out the C-BAR worksheet during the year will also enable the chapter to determine if it is on track to achieve the level of success desired at the beginning of the year.

The chapter can also use the "Chapter Planning Tool" worksheet to track action items during the year and to forecast the chapter award level. At year-end chapters must fill out the Section 2: C-BAR Worksheet Tool for submittal to region for awards.

C-BAR represents those actions recommended by APICS to be accomplished by a chapter to be considered highly successful. There are some documents that must be included (attached) to be considered for any type of recognition.

The following documents are part of the evaluation program for chapters desiring recognition for the work completed during the year:

1. Strategic Plan
2. Chapter Metrics List
3. Budget (Planned to Actual)
4. Marketing Plan

There are two additional documents that can be evaluated for additional points. First is the **chapter president's narrative**. This 2- to 5-page document is the chapter president's evaluation of his/her chapter's actions. The discussion should include primary goals and objectives for the year and how well the chapter achieved those goals and objectives. For example, if the chapter established metrics for increasing membership, Professional Development Meeting (PDM) attendance and class attendance, the narrative is the chapter's tool to discuss the goals, how they were approached, and how well they were achieved.

The second document is the **chapter's narrative on any innovative tools, projects, or programs** initiated or accomplished in the past year. The innovation does not have to be new to APICS, rather it can be an old idea rejuvenated during the past year with narrative including how the need was determined; what the plan was; and assessing the success of the tool, project, or program. Those items found most successful or beneficial may be recommended and included in the "Best Practices" materials featured in the Volunteer Resources section of the Web site.

Though additional documents are not required for the purpose of recognition, **it is highly recommended that chapters save copies or attach documents to their chapter's historical edition (file copy) for future use and research. It is not necessary or advisable, however, to include such supporting documentation with the C-BAR submission.** This supporting documentation will be requested, in whole or in part, in the event the points awarded by the region evaluator are contested by the chapter. Examples of these documents include but are not limited to:

1. Newsletters
2. Copies of newspaper articles
3. PDM evaluations (consolidated)
4. Long-term PDM schedules
5. PDM/Top Management Night checklists
6. Instructor evaluations (consolidated)
7. Bylaws
8. SOPs (standard operating procedures)
9. Meeting or training agendas
10. Class enrollment
11. Long-term class schedules
12. Recognition criteria
13. Membership lists
14. Sample letters or e-mails for notifying members of membership changes
15. Survey information
16. Examples of flyers, letters, brochures, and announcements
17. Instructor wage scales
18. Speakers' evaluations and biographies
19. Company coordinator listings
20. Student paper competition documents
21. Scholarship documents
22. Region meeting minutes
23. Any other document that will assist future BOD members to determine what was done and measure success.

Tasks

The majority of the C-BAR tool is a series of questions and responses. The individual(s) responding to these questions should select the appropriate answer from the pull-down menu in the Response columns (C and E) and enter additional data as requested. Points (0, 1, 5, or 10) for each question are automatically calculated based on responses. A chapter can only be awarded one series of points per question. For example, if a chapter has a member that presents at another chapter, region, and the international conference, the maximum number of points awarded is 10.

Input on this page is similar to the "CMS" worksheet. Select the appropriate response from the pull-down menus in columns C and E (click on the triangle) and add comments to columns G and H. The only exception to the pull-down menu is the membership headcount in sub section G-1, which is computed based upon the beginning and ending membership numbers. The membership percentage change is rounded to three decimal places (0.1%).

Any documentation required is listed at the bottom of the worksheet and is based upon the chapter's claim for credit. If the chapter claims credit in an area that requires documentation, a "Yes" indicator will appear next to the documentation description. If the chapter does not claim credit in an area that requires documentation, then documentation is not expected and a "No" indicator will appear. A blank space next to the documentation description indicates that the question has not been answered. This provides a checklist for documentation with the intention to eliminate rework loops for missing documentation between chapters and region reviewers. The award level is calculated and shown at the top and bottom of the worksheet.

A chapter can use the Chapter Planning Tool to track status throughout the year and determine which areas must be improved upon to achieve the next higher-level recognition.

Overview of C-BAR Excel Worksheet Tool

The second section of the C-BAR is for those chapters that wish to be recognized for the hard work they have accomplished during the year or to maintain a historical document for future boards. To be recognized as Bronze, Silver, or Gold (with Platinum status awarded for Gold recognition for 5 years), a chapter must complete both sections I and 2:

A. Customer Expectations/Marketing

This section provides guidance and measures the effectiveness of the chapter's marketing tools.

1. Develop and implement a formal marketing plan to reach potential customers and advise them of the programs and educational programs offerings of the chapter. It is suggested chapters use resources identified in the Volunteer Resources section of the Web site for information, steps, recommendations, and concepts that should be included to be a viable tool. Chapter earns 0 points for a **no** response and 10 points for a **yes** response.

2. Conduct an analysis of companies in the local area to determine if chapter programs, educational programs, and other elements meet the needs of those local companies, based on local markets, industries, and diversity of business. Each community is unique in that industries can be service-, manufacturing-, distribution-, or government oriented, or a combination of many sectors. Based on the analysis, a chapter should be able to determine the how to, and what to, for the local area businesses. Chapter earns 0 points for a **no** response and 10 points for a **yes** response.
3. Mail or e-mail brochures, letters, or information packets to individuals and companies advising them of what the chapter offers is an aggressive step in advertising the local APICS chapter. Informing individuals and companies about the chapter and/or its offerings, and how customers can improve themselves individually or their company's bottom line across the enterprise will create customer interest in the local chapter. Chapter earns points for total individual pieces mailed as follows: **None**=0 points; **1-25**=1 point; **26-100**=5 points; **greater than 100**=10 points.
4. Formally recognize volunteer(s) who expend numerous hours planning, coordinating, writing, speaking, and organizing for the chapter. Formally recognizing these volunteers provides motivation for future volunteers through the appreciation of past efforts. Chapters should formally recognize at least one volunteer each year for these efforts. Chapter earns 0 points for a **no** response and 10 points for a **yes** response.
5. Formally recognize local executives of the companies who show their support of APICS by paying for membership; allow BOD members time to perform their APICS duties during working hours; encouraging student enrollment; and contributing classroom space, equipment, and use of their office equipment. Chapters should have a separate event to thank those executives who fund or support many of the chapter's events and programs. Chapter earns 0 points for a **no** response and 10 points for a **yes** response.
6. Use members (company coordinators) within a company to advertise classes, professional development events, seminars, and tours. This establishes an immediate point of contact for individuals who may be interested. The program must be formal in that it is managed, members are documented, and information is coordinated. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.

Select the appropriate answer from the pull-down menu in the Response columns (C and E) and enter additional data as requested. Use the comments columns (G and H) to document what was done or communicate between chapters and region reviewers. Points (0, 1, 5, or 10) for each question are automatically calculated based on the response.

Maximum points for this section is 55 points.

B. Communications

This section provides guidance and measures the effectiveness of the chapter's communication tools.

1. Submit the local chapter's newsletter to the Fit-to-Print (or equivalent) program to ensure newsletter is meeting criteria of best business practices for newsletters.

Note: (The Fit-to-Print program is on a temporary hiatus for the 2007/2008 program year. This break will be used to incorporate today's reality into the program and the evaluation criteria; more and more chapters have developed e-mail versions of their newsletters, converted to electronic distribution, or otherwise adopted communications methods that make the current criteria obsolete).

2. Announce classes, professional development events, tours, and seminars via mailings, flyers, and e-mail blitz (other than the chapter newsletter), to members and general public, in order to promote events. Chapter earns points as follows: **None**=0 points; **1 Time**=5 points; **2 or More Times**=10 points.
3. Utilize local media such as newspapers (including business papers, newsletters from other associations); local TV stations (including public access Web sites); and radio stations to announce events such as classes, professional development events, tours, and seminars. Chapter earns points as follows: **None**=0 points; **1 Time**=5 points; **2 or More Times**=10 points.
4. Having an article or interest story in local media such as newspapers (including business papers, newsletters from other associations), local TV stations (including public access Web sites); and radio stations about the local chapter or an individual member where APICS was prominently mentioned. Chapter earns points as follows: **None**=0 points; **1 Time**=5 points; **2 or More Times**=10 points.
5. Recognize members in the local chapter newsletter for their accomplishments, including completing classes, passing exams, and attaining or maintaining certification. Chapter earns points as follows: **None**=0 points; **1-7**=5 points; **8 or More Times**=10 points.

Select the appropriate answer from the pull-down menu in the Response columns (C and E) and enter additional data as requested. Use the comments columns (G and H) to document what was done or communicate between chapters and region reviewers. Points (0, 1, 5, or 10) for each question are automatically calculated based on the response.

Maximum points for this section is 40 points

C. Professional Development

This section provides guidance and tools to measure the chapter's continuing education program and maintenance.

1. A process is defined for evaluation of PDM speakers. The collected data should be shared with the speaker. Other collected data can be made available to chapters interested in contacting that speaker. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.
2. Meeting evaluations provide necessary feedback for chapters to determine PDM meeting success. Key information derived from these evaluations can assist in developing the next year's topic content. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.
3. For chapters to ensure that they are successful in providing professional development events for their customers, they should plan an attendance goal. The goal is an average attendance for the year's events. For chapters that do not have a goal or did not reach their goal, attach a corrective action plan to help chapters plan for the next year's events and establish a method to define an attendance goal. Should be included in Section 2: J. Narrative and Innovations. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.
4. Chapters have the opportunity to conduct joint meetings with other professional societies or organizations to enhance members' networking. Providing joint meetings enables cross-pollination of information and industry trends and gives additional marketing potential to new customers outside the traditional APICS target audience. Chapter earns points as follows: **None**=0 points; **1 Time**=5 points; **2 or More Times**=10 points.
5. For chapters to encourage advance planning, it is beneficial to publish a list of planned PDM meeting dates, locations, and times at least three months before the events. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.
6. Top Management or Executive Night at a PDM is an excellent way to recognize company participation and contributions to chapters. This is also an opportunity to provide a captive management audience with examples of APICS education offerings and the value APICS can bring to their organizations. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.

Select the appropriate answer from the pull-down menu in the Response columns (C and E) and enter additional data as requested. Use the comments columns (G and H) to document what was done or communicate between chapters and region reviewers. Points (0, 1, 5, or 10) for each question are automatically calculated based on the response.

Maximum points for this section is 35 points.

D. Education

This section provides guidance and measures the effectiveness of the chapter's education tools.

1. Publish a master calendar of classes listing the class and dates six months to one year in advance. Chapter earns points as follows: **0-5 Months**=0 Points; **6-11 Months**=5 Points; **12 Months or More**=10 Points.
2. Develop a formal compensation policy for chapter instructors. Chapters can develop compensation scales based on variables such as number of students, hours of instruction, qualifications, certifications, previous evaluations, or a combination of other factors. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.
3. Consider instructors who are CFPIM, CPIM, CIRM, or CSCP certified to best present the APICS body of knowledge. Chapter earns points as follows: **Less than 50%**=0 points; **50%-75%**=1 point; **76%-99%**=5 points; **100%**=10 points.
4. Develop instructors' abilities in accordance with the current APICS qualification standards. Chapter earns 0 points for a **no** response and 10 points for a **yes** response.
5. Measure instructors based on class evaluations to ensure the best instructors represent APICS in the classroom. Chapter earns 0 points for a **no** response and 10 points for a **yes** response.
6. Formally recognize chapter instructor(s). The most influential aspect of the chapter is its educational offerings. Instructors spend as much as three hours in preparation for each hour of instruction. They are the most visible members of a chapter and their professionalism, knowledge, and enthusiasm should provide motivation for future members. Formally recognizing instructors also motivates other instructors to enhance their capabilities in the future and provides recognition by appreciating their accomplishments in the past. Each chapter should develop metrics or criteria to identify and recognize at least one instructor for this contribution. Chapter earns 0 points for a **no** response and 10 points for a **yes** response.
7. Determine from My Chapter the number of members that are certified CFPIM, CPIM, CIRM, or CSCP and divide by the total number of members. Chapter earns points as follows: **0%-24%**=0 Points; **25%-30%**=5 Points; **31%-100%**=10 Points.

8. Consider CPIM, CIRM, and CSCP review courses and many other APICS educational offerings such as Lean (JIT), ERP, Fundamentals, Principles of Material Handling and Warehousing, and more. Offering these courses to meet the needs of the customer provides a service to the local community and enhances APICS' reputation. Chapter earns points as follows: **None**=0 Points; **1 or More**=5 Points; **2 or More**=10 Points.

Select the appropriate answer from the pull-down menu in the Response columns (C and E) and enter additional data as requested. Use the comments columns (G and H) to document what was done or communicate between chapters and region reviewers. Points (0, 1, 5, or 10) for each question are automatically calculated based on the response.

Maximum points for this section is 75 points.

E. APICS Participation/External Support

This section provides guidance and measures the effectiveness of the chapter's external support to other chapters, region, or association.

1. Send more than one BOD members to all region meetings for networking and educational purposes to encourage new ideas to manage the local chapter. Chapter earns points as follows: **Did not attend all**=0 points; **Minimum 1 member to all**=5 points; **Minimum 2 members to all**=10 points.
2. Provide support to another chapter, preferably one in distress, enabling it to become successful. Support can include financial; the loan of instructors; lending instructor kits; providing leads on speakers; suggestions for programs; samples of processes checklists and forms; or anything else that will assist another chapter to become successful. Chapter earns 0 points for a **no** response and 10 points for a **yes** response.
3. Contribute to local community, regions, or APICS to help elevate and market the APICS brand. Voluntary contributions could include financial contributions, voluntary services, and donation of time to promote the APICS brand. Chapter earns 0 points for a **no** response and 10 points for a **yes** response.
4. Give presentations made by chapter members at various levels of the APICS organization to enhance and elevate the brand. Chapter earns points as follows: **None**=0 points; **Chapter or Region**=5 points; **International Conference**=10 points.
5. Publish a book or an article in a formal magazine, newsletter, or journal promoting the APICS body of knowledge and operational concepts, or improving the individual's ability to perform duties in the operations field. Articles must be published in a recognized magazine or journal, such as the *APICS* magazine, but not in a local chapter newsletter. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.

- Acknowledge chapters whose volunteers go above and beyond local service by being members of additional groups such as region staff, APICS Board of Directors, or committee and/or council members (e.g., Chapter Development Committee, Voice of the Customer Council, Body of Knowledge Council, international conference, editorial review) will advance the effectiveness of the organization. Chapter earns points as follows: **None**=0 points; **Region**=5 points; **Association**=10 points.

Select the appropriate answer from the pull-down menu in the Response columns (C and E) and enter additional data as requested. Use the comments columns (G and H) to document what was done or communicate between chapters and region reviewers. Points (0, 1, 5, or 10) for each question are automatically calculated based on the response.

Maximum points for this section is 55 points,

F. Financials

This section reminds the chapter officers of their fiduciary responsibility to the chapter and their obligation to protect the chapter's assets.

- Formally develop an annual budget and contrasting planned to actual as a measure of the chapter's financial condition and strength. Chapter earns 0 points for a **no** response and 10 points for a **yes** response.
- Purchase General Liability and/or Directors and Officers Liability insurance to protect board members and the chapter from liability. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.
- Complete IRS or appropriate national tax forms each year. If no tax form is required, submit a signed statement to that effect. Chapter earns 0 points for a **no** response and 5 points for a **yes or not required** response.
- Select an audit committee to help review and assess the financial stability of the chapter. Develop a plan to take action on any findings that result from an audit. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.

Select the appropriate answer from the pull-down menu in the Response columns (C and E) and enter additional data as requested. Use the comments columns (G and H) to document what was done or communicate between chapters and region reviewers. Points (0, 1, 5, or 10) for each question are automatically calculated based on the response.

Maximum points for this section is 25 points

G. Membership

This section provides guidance and measures the effectiveness of the chapter's membership management.

1. The worksheet has built-in formulas that will automatically calculate the chapter's membership growth rate and points earned based upon the data entered for questions 1a and 1b.
 - a. Determine the number of members in the chapter as of July 1 and enter data. (Available from **My Chapter data provided monthly from headquarters.**)
 - b. Determine the number of members in the chapter as of the end of the program/fiscal year June 30 and enter data. (**Available from My Chapter data provided monthly from headquarters.**)
 - c. The chapter's membership growth rate is automatically calculated based on the date entered above.
 - d. The chapter's points earned are automatically calculated based on the chapter's membership growth rate. Chapter earns points as follows: **Negative growth**=0 points; **0%-4% growth**=5 points; greater than **5% growth**=10 points.
2. Contact members as their status changes (new members, suspended membership or expired membership). Maintain a record of the contacts and the results of the contact. Chapter earns points as follows: **Less than 50%**=0 points; **50%-74%**=5 points; **75% or More**=10 points.
3. Provide additional support to individual members and local companies by offering a site for job announcements in the newsletter or on the chapter's Web site. Chapter earns 0 points for a **no** response and 5 points for a **yes or not required** response.
4. Determine the percentage of chapter members who have renewed their membership over the last year. (Available from My Chapter data provided monthly from headquarters.) Chapter earns points as follows: **Less than 50%**=0 points; **50%-65%**=5 points; **At Least 66%**=10 points.

Select the appropriate answer from the pull-down menu in the Response columns (C and E) and enter additional data as requested. Use the comments columns (G and H) to document what was done or communicate between chapters and region reviewers. Points (0, 1, 5, or 10) for each question are automatically calculated based on the response.

Maximum points for this section is 35 points.

H. Chapter Management

This section provides guidance and measures the effectiveness of the chapter's management.

1. The strategic plan is a necessary document to establish the vision of the chapter and enable planning of future initiatives. Attach a hard or electronic copy of the file. Chapter earns points as follows: **No Strategic Plan**=0 points; **Yes Current Year**=5 points; **Yes Multiple Years**=10 points.
2. Determine the total number of board positions possible in your chapter. Divide by the number of positions filled. Chapter earns points as follows: **Less than 51%**=0 points; **51%-75%**=5 points; **76% or More**=10 points.
3. Provide each board member with a Standard Operating Procedures (SOP) document and/or job description that defines the specific roles and responsibilities of that position. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.
4. Metrics are measurements of key performance factors that are important to the chapter's strength. Define measurements that will support the chapter's strategic objectives. Attach a hard or electronic copy of the file. Chapter earns 0 points for a **no** response and 10 points for a **yes** response.
5. A transition plan supports the vision and strategic direction of the chapter and through review of the strategic plan ensures that deliverables are incorporated into the next year's plan. Chapter earns 0 points for a **no** response and 10 points for a **yes** response.
6. Determine the percentage of members that are certified CFPIM, CPIM, CIRM or CSCP. Chapter earns points as follows: **Less than 25%**=0 points; **25%-49%**=1 point; **50%-75%**=5 points; **76% or More**=10 points.

Select the appropriate answer from the pull-down menu in the Response columns (C and E) and enter additional data as requested. Use the comments columns (G and H) to document what was done or communicate between chapters and region reviewers. Points (0, 1, 5, or 10) for each question are automatically calculated based on the response.

Maximum points for this section is 55 points.

I. Student Chapter or Other Educational Organizations

This section provides guidance and measures the effectiveness of the chapter's student support tools. Students are critical to the future viability of the APICS organization.

1. Provide organizational, educational, or financial support for a student chapter involved in logistics/operational education programs to develop the APICS leaders of the future. Such support includes mentoring the student chapter; advising students; providing guidance and direction; contributing books, processes or procedures; and making financial contributions. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.

2. Provide for a student paper competition similar to or supporting the Donald W. Fogarty International Paper Competition to encourage students to become more involved in the logistics/operations environment, promotes new thinking and ideas, and motivates involvement of future leaders. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.
3. Develop a policy for providing student discounts to chapter classes, attendance at PDMs, seminars, and tours; mentoring students or providing memberships to professors; or sponsoring students to attend region meetings or international conferences, even if the student is not a logistics/operations student or there is no student chapter available continue to encourage student involvement and motivate future leaders. Chapter earns 0 points for a **no** response and 10 points for a **yes** response.
4. Encourage students in the local area to promote the future of APICS. If the chapter does not have a student chapter, it can encourage students to attend related educational offerings, courses, and seminars or provide a chapter environment to a student member-at-large. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.
5. Provide scholarships to students or grants to schools in general to enhance the reputation of APICS as an educational organization and to establish a community reputation of involvement while encouraging students who may evolve into future APICS leaders. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.

Select the appropriate answer from the pull-down menu in the Response columns (C and E) and enter additional data as requested. Use the comments columns (G and H) to document what was done or communicate between chapters and region reviewers. Points (0, 1, 5, or 10) for each question are automatically calculated based on the response.

Maximum points for this section is 30 points.

J. Narrative and Innovations

This section enables chapters to demonstrate their innovations and address them through the chapter narrative. Innovation is a recognized key to success in organizations. The C-BAR program recognizes the importance of innovation in the process of organization management and encourages chapters to be creative. The narrative should also address the chapter's performance to plan.

1. Narrative: The chapter president will submit a narrative describing how the chapter performed against specific goals and objectives related to the chapter strategic plan. The 2 to 5 page document will discuss the success factors of the strategic plan and established measures and accomplished according to the plan and evaluate the results to validate the plan or guide revisions for next year's plan.

2. Innovation: The chapter president will submit a 1 to 2 page document providing at least one innovative tool, project, or program initiated by the chapter during the past year. The innovation does not have to be new to APICS. It can be a program, project, or task that has been rejuvenated by the chapter or copied from another chapter. The goal is to enhance chapter management, provide professional offerings, reduce non-value-added processes, and to develop out of the box thinking, resulting in greater customer response and service. The innovation can be organizational, technological, or process-oriented. Best practices and innovations that could assist other chapters will be collected for cross-pollination among chapters. Regions are responsible for submitting Best Practices and Innovations to the Chapter Development Committee (CDC) via APICS Chapter Relations.

Narrative and Innovation Criteria

1. Chapter's narrative includes chapter performance to objectives as noted in the strategic plan for the past year. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.
2. Chapter's narrative highlights internal and external conditions that affected the organization both positively and negatively. Include those items not evident in the submitted documentation provided. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.
3. Chapter's narrative describes any planning/replanning efforts undertaken to meet your organizational challenges. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.
4. Chapter's narrative addresses chapter performance issues over the past year. Chapter earns 0 points for a **no** response and 5 points for a **yes** response.
5. Based on the innovations document, the chapter has demonstrated an innovative way to manage the chapter or improve services to its customers. If yes, please indicate whether the innovation can be used by only your chapter or by other chapters as well. Chapter earns points as follows: **No**=0 Points; **Yes, our chapter only**=5 Points; **Yes, all chapters**=10 Points.

The evaluator will review the narrative and innovation documents and select the appropriate answer from the pull-down menu in the Response columns (C and E). Use the comments columns (G and H) to document what was done or communicate between chapters and region reviewers. Points (0, 1, 5, or 10) for each question are automatically calculated based on the response.

Maximum points for this section is 30 points.

The total number of points is 435. Each subsection provides the number of points attained and percentage achieved. This enables a board to review its strengths and weaknesses as the year progresses.

Evaluation

As with the Minimum Standards for Chapter Maintenance, chapter will submit its C-BAR to the appropriate region evaluator. The region evaluator will advise the chapter that its submission has been received. The reviewing officer will assign points in the far right-hand column and, based on the totals, recommend the chapter for the appropriate recognition level. Comment areas for both chapter and region use are provided for each element of the C-BAR Tool. The evaluator should comment on areas that are extremely strong or weak and make suggestions for continued improvement.

The C-BAR submission will be forwarded to the appropriate region vice president for final review to ensure standardization of evaluation. The region vice president will contact the APICS Chapter Relations Department to report each chapter's score. Region vice presidents should use this review to identify trends and to make suggestions to the Voice of the Customer (VOC), Body of Knowledge (BOK), or Chapter Development Committee (CDC) groups for additional training/educational programs, management tools, or other areas that may ensure future chapter successes.

Evaluators and region vice president have 30 days from submission to complete the evaluations and forward the results to the APICS Chapter Relations Department.

Responsibility	Completion Date	Action
Chapter	Ongoing/ Quarterly	Chapters and regions are encouraged to monitor progress on an ongoing basis throughout the year using the tools provided in the C-BAR Handbook and improved Excel Workbook.
Chapter	July 15	Complete the C-BAR Chapter Planning Tool.
	July 31	Send submissions to the region liaisons.
Region Liaison	August 3	Send chapter confirmation that its submission has been received.
Region Liaison	August 7	Assign submissions to region evaluators.
Region Evaluator	August 8-29	Evaluate submissions.
	August 30	Return entries to the respective chapter and designate award level. Include evaluator responses and comments.
	August 30	Send copies of entries and required documentation to the region vice president for review.
Region Liaison	September 1	Forward Best Practices and Innovations to the Chapter Development Committee c/o APICS Chapter Relations.
Region Vice President	September 1	Forward award results to APICS Chapter Relations.

Recognition

C-BAR recognition levels are based on the accomplishments of the individual chapters.

Chapters that meet the minimum standards for chapter maintenance (section 1) are eligible to work toward the following recognition levels:

Bronze: Chapters that meet the minimum standards for chapter maintenance (section 1) and additional areas. **To qualify, a chapter must earn between 150-234 points.**

Silver: Chapters that meet the minimum standards for chapter maintenance (section 1) and demonstrate an ability to execute successful initiatives within additional areas. **To qualify, a chapter must earn between 235-314 points.**

Gold: Chapters that meet the minimum standards for chapter maintenance and perform several items listed at a level well beyond the minimum standards. **To qualify, chapters must earn between 315-435 points.**

Platinum: Chapters that achieve Gold status five years consecutively. If a chapter does not submit or does not achieve the gold level, it must again earn gold five years consecutively to regain the Platinum level.

APPENDIX A: Minimum Standards for Maintaining a Chapter Charter APICS Standard Operating Procedures (SOPs)

Purpose:

Because APICS wishes its chapters to be successful, it must measure how chapters are meeting expectations in terms of customer service throughout the Society. It is in the best interest of the Society to support and strengthen its chapters through a feedback mechanism which identifies struggling chapters, requiring both Society and Region assistance and resources.

Therefore, for APICS to achieve long term customer satisfaction, recognition, and branding consistency, the preferred feedback mechanism is minimum chapter standards.

Chartered chapters must maintain the following standards on an annual basis. The standards fall into 6 categories: Customer Expectations, Communications, Professional Development Events, Education, Society Participation, and Financial Responsibility.

1. **Customer Expectations.** Chartered chapters will provide the following documentation, which provides data and information relating to customer expectations and feedback.
 - a. A chapter must conduct a member needs survey or use other mechanisms to collect member needs at least every three years and demonstrate action on those needs ongoing.
 - b. **Three** professional development event evaluations annually
2. **Communications.** Chartered chapters will communicate with chapter customers in the following manner:
 - a. Maintain a Web site with up- to- date content and APICS trademark logo on home page (with accompanying chapter name) and a link to APICS, (www.apics.org) Web site or an officer contact reference through the APICS Web site with that Web site referenced on all other communication.
 - b. Communicate a minimum of **eight** times throughout the year. Examples of communication activities may include:
 - i. Hard copy or soft copy newsletter
 - ii. Upcoming chapter events announcements via e-mail
 - iii. Partner with local media (TV, newspapers, job fairs, etc.) to communicate chapter activities
 - iv. Company Coordinators Program
 - v. Mass mailing to prospective members introducing the chapter and its activities

3. **Professional Development Events.** Chartered chapters will hold a minimum of **three** Professional Development Events per year. Professional Development Events are defined as ...any activity where customers have an opportunity to meet (face to face or virtually) and present and discuss topics related to the APICS body of knowledge. Examples of such events may include
 - a. PDMs to include top management
 - b. Plant tours
 - c. Online chat room sessions
 - d. Webinars
 - e. Joint meetings with other chapters and societies

4. **Education.** Chartered chapters will hold a minimum of **two** educational offerings and offer at least three educational offerings per year. These offerings may be offered in workshop, online, or part-time study course formats. Examples of such offerings may include:
 - a. Certification (CPIM or CIRM) educational offerings
 - b. Non-certification educational offerings, e.g., Fundamentals
 - c. Non-certification educational workshop offerings e.g. Lean Manufacturing Workshop Series
 - d. In-house education programs as requested
 - e. Independent topic workshops or seminars
 - f. Educational offerings held in conjunction with other associations, universities, or consulting companies

5. **APICS Participation.** Chartered chapters will provide APICS Headquarters with or participate annually in the following:
 - a. A listing of chapter officers for the year, to be submitted as soon as possible but no later than 60 days of election of chapter officers via My Chapter
 - b. A chapter will review chapter bylaws and submit changes to APICS Headquarters (if required) annually
 - c. Hold a minimum of four chapter board of directors meetings per year including one transition and/or orientation meeting
 - d. Officer training attendance. Examples of officer training may include attendance at VLW (Volunteer Leadership Workshop) and/or region meetings and/or officer training sessions.
 - e. A chapter will have a minimum of one or more officers on the Officers Listserve.

6. **Financial Responsibility.** Chartered chapters will 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.

Monitoring Process and Schedule for Minimum Chapter Standards Review

1. Each year in July, the chapter president or officer submits minimum standards materials to region VP via approved reporting method.
2. A chapter may collect standards data throughout the year. If by July 31 standards are incomplete, RVP will inform the chapter president of incompleteness and the chapter will be considered in revitalization status.
3. Chapters that refuse to submit standards data will fall into revitalization status and may face other actions at the RVP's discretion.
4. RVP will review submitted data against approved chapter standards. RVP will have 30 days from the date of chapter submission to conduct the review.
5. If the chapter meets all approved standards, only RVP will approve compliance status** and update via the approved report method. Headquarters and chapter will be notified via e-mail. RVP will document chapters' status and why revitalized chapters did not make the approved standards.
6. Variant standards with supporting documentation. If a chapter did not meet the approved standards, however the chapter can provide supporting documentation for such variances (based on Voice of the Customer feedback), RVP may exempt those variant standards. (Such variances must be reviewed each year without exception.) RVP will update information via approved reporting method. Headquarters, CDC, and chapter will be notified no later than August 15 each year.
7. If the chapter does not meet minimum standards, RVP will invoke revitalization status. Headquarters, CDC, and chapter are notified. From this date forward, the chapter will have three years to meet the required standards and must show progress on an annual basis.
8. Region, CDL, and chapter board determine best course of action for revitalization.
9. If at year three, all avenues to revitalize the chapter are exhausted, standards cannot be met, and no demonstrated improvement is evident, RVP may approve the disbandment of the chapter. At any time during the revitalization process, chapters may voluntarily disband if improvement does not seem possible.

APPENDIX B: EXCEL WORKBOOK TOOL

Worksheets

- A. Instructions
- B. Mandatory Information
- C. Chapter Minimum Standards (CMS) for Chapter Maintenance Tool (Required)
- D. Chapter Benchmarking and Reporting (C-BAR) Tool (Optional)
- E. Chapter Planning Tool



Item	Instruction
1	If this is the first time you have used this workbook, it is suggested you print this worksheet for easy reference. Print areas and settings, including the APICS logo in the header, are already set up for each worksheet. However, due to differences in printers, you may have to change some print settings to avoid putting the rightmost column or two on a separate page. Once you have made these changes and saved the file you can simply click the Excel print button. You may have to do this each time you switch printers. Refer to Instruction #13 for the solution to this problem.
2	This workbook was created by Jack Wetzels using poka-yoke principles to maximize ease of use for both chapters and region reviewers. He can be reached at president@topviewconsulting.com for positive comments, problems, or recommendations for improved user functionality or improved instructions. He <u>cannot</u> make policy decisions or answer questions regarding the C-BAR program or provide help for using Microsoft® Excel.
3	This workbook was created using the Microsoft® XP (Service Pack 2) operating system and Microsoft® Excel 2002 (Service Pack 3). It may or may not operate properly on other versions of Microsoft® software or non-Microsoft® software, however it has been successfully tested using Microsoft® Excel 2003. If the user is experiencing problems using this workbook and it is suspected that it is due to different versions of software, then it is suggested that the worksheet be moved to a different computer. It is highly recommended that the user maintain Microsoft® XP and Microsoft® Office software with the latest updates available on the Microsoft® Corporation Web site.
4	This workbook contains simple macros to make the screen-zoom and full-screen buttons operate at the top of the page (inside the purple box). Therefore, you must enable macros in your Excel security settings to make them work. To change your macro security settings type "macro security" into Excel Help and follow the instructions. Since macros could be written to contain viruses and other malicious software, you should always protect yourself by using the most current antivirus and antispyware software. If you choose not to enable macros in Excel, you will <u>only</u> lose the ability to use these buttons. In that case, you will have to use the Excel menus (View-Zoom and View-Full Screen) to implement these settings. All other features of this workbook will operate properly without macros enabled.
5	The zoom buttons shrink the on-screen print so you can see more text. The full-screen-on button temporarily removes the display of Excel toolbars so you can see more of your worksheet in the vertical direction. These buttons are provided to make updating easier by reducing the amount of scrolling. The percentages shown on the zoom buttons were chosen because they will provide the ability to see the columns to the right. However, they will not work as intended on all systems because they depend on the capability of the graphics processor and screen resolution settings on your computer. It should work as intended on all systems displaying a resolution of 1024 x 768 pixels, which is very common for today's computers. For lower resolutions, such as 800 x 600 pixels, you will not get as much zoom, and for higher resolutions you will get excessive zoom. If the zoom is not working as intended on your system, you can either reset your display resolution to 1024 x 768 pixels (if possible), use the Excel menu (View-Zoom), or just forego the ability to see more on your screen. The full-screen-on button does not depend on screen resolution so it will work on all systems.

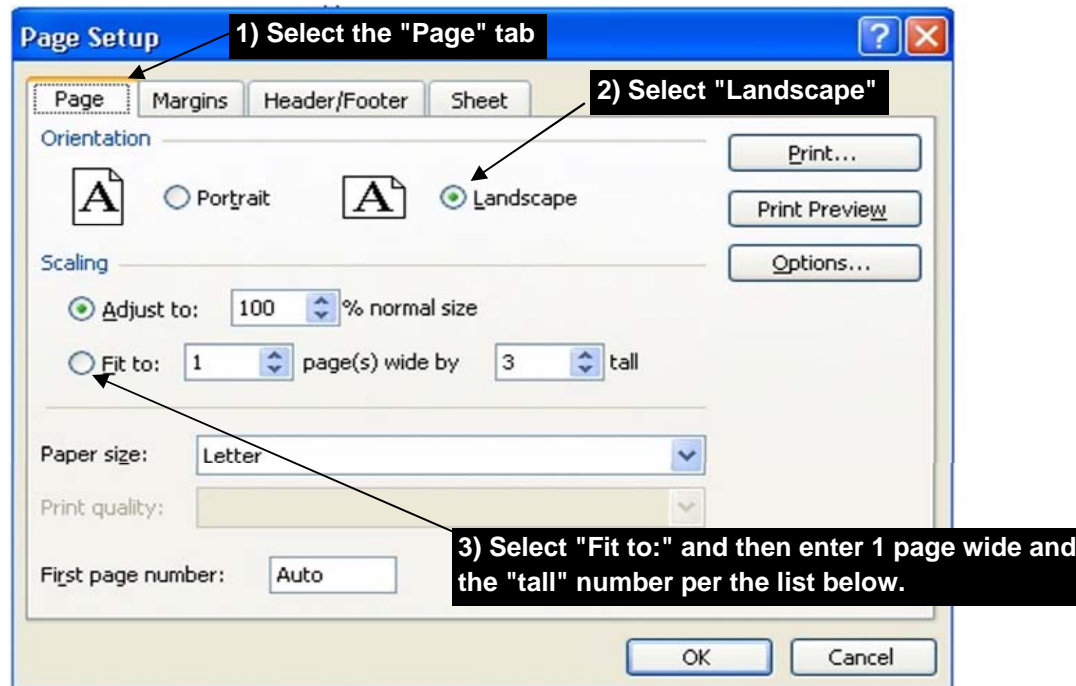


Item	Instruction
6	<p>Worksheet protection is enabled with a password to prevent accidental or unauthorized changes. It also maximizes ease of use for all levels of Microsoft® Excel expertise and users who are using this workbook for the first time (which are many in the APICS volunteer workforce). This workbook design maximizes ease of use, ensures the integrity of the C-BAR program, and ensures that all users have identical criteria. Requests for the passwords cannot be honored.</p>
7	<p>Areas are color-coded for easy identification as follows:</p> <p>Cyan is where chapters input data.</p> <p>Light gray is where region reviewers input data.</p> <p>Orange is a calculated field and not user selectable.</p> <p>Red with white text is not user changeable and is used to display reminders that additional input is required based upon the chapter's claim for credit. The reminder will disappear when text is entered into the proper field(s). This format is also used to indicate a loss in membership in Section 2-G.</p>
8	<p>Go to the "Mandatory Info" worksheet and input the required information. This page is designed so that input is only done once even though the data may appear on different worksheets. This improves consistency and ease of use. Both chapters and region reviewers must input information on this page.</p>
9	<p>Go to the "Sect 1 Minimum Stds - Required" worksheet. Input on this page is merely the appropriate response from the pull-down menus in columns C and E (click on the triangle). The points are filled in by formulas and cannot be directly input by users. The comments section in columns G and H could be used to easily communicate questions/answers between chapters and region reviewers or to simply document what was done. Any documentation required is listed at the bottom of the worksheet and is based upon the chapter's claim for credit. If the chapter claims credit in an area that requires documentation, a "Yes" indicator will appear next to the documentation description. If the chapter does not claim credit in an area that requires documentation, then documentation is not expected and a "No" indicator will appear. A blank space next to the documentation description indicates that the question has not been answered. This provides a checklist for documentation with the intention to eliminate rework loops for missing documentation between chapters and region reviewers. Your point totals are calculated and shown at the top and bottom of the worksheet.</p>



Item	Instruction
10	<p>Go to the "Section 2 C-BAR - Optional" worksheet. This is the page for chapters to use to officially submit to region. Input on this page is similar to the "Sect 1 Minimum Stds - Required" worksheet. Select the appropriate response from the pull-down menus in columns C and E (click on the triangle) and add comments to columns G and H. The only exception to the pull-down menu is the membership headcount in sub section G-1, which is computed based upon the beginning and ending membership numbers. The membership percentage change is rounded to three decimal places (0.1%). Any documentation required is listed at the bottom of the worksheet and is based upon the chapter's claim for credit. This feature operates the same as the documentation list for Section 1 - Minimum Standards. The indicator options next to the documentation description are described in Instruction #9. This provides a checklist for documentation with the intention to eliminate rework loops for missing documentation between chapters and region reviewers. The award level is calculated and shown at the top and bottom of the worksheet.</p>
11	<p>The "Chapter Planning Tool" worksheet is provided to track and status action items during the year and to forecast the chapter award level for Section 2 C-BAR. At year-end you must fill out the "Section 2 C-BAR - Optional" page for submittal to region for awards.</p> <hr/> <p>For the totals and the award level at the top of the page to calculate properly, you must select "Completed" or "Will complete" in the "Completion Status" field in column H.</p> <hr/> <p>Sorting and/or filtering may have been handy for some advanced Excel users on this worksheet but cannot be allowed due to the worksheet protection and the complexity of the point calculations (which are made inaccurate by sorting). Since there are only a total of 55 items this is a minimal annoyance. The entire list prints in only 3 pages.</p>
12	<p>The revision date of this workbook is 02/01/2007. Please check The Volunteer Resources area of APICS.ORG periodically to obtain The latest revision.</p>

Item Instruction



13

This instruction explains how to fix the problem you may have as explained in instruction #1 above. On the Excel menu at the top of the page, click "File", then click "Page Setup". It will show the dialog box shown above. Make the three selections according to the graphic above. Select the number for "tall" as noted below.

- "Instructions" page = 4 tall
- "Mandatory Info" page = 1 tall
- "Sect 1 Minimum Stds - Required" page = 2 tall
- "Section 2 C-BAR - Optional" page = 6 tall
- "Chapter Planning Tool" page = 3 tall
- "Section 2 Description List" page = 3 tall

Chapter Name:

Region Number:

BOD Year Started:

BOD Year Ended:

Chapter Evaluator:

Revision date of this workbook:
2/1/2007

The data below should only be input by the person indicated

Section 1 - Region Evaluator:

Section 1 - Date of Region Evaluation:

Section 2 - 1st Reviewer:

Section 2 - Date of 1st Review:

Section 2 - 2nd Reviewer:

Section 2 - Date of 2nd Review:

Region VP Approval (Name):

Region VP Approval Date:

Section 2 Award Thresholds		
	Minimum	Maximum
Gold	315	435
Silver	235	314
Bronze	150	234

Note: formulas on other worksheets are linked to these values so if the thresholds change in the future, maintaining this table is all that is needed.



Chapter Minimum Standards

Date Printed: 1/29/2007

Chapter:
Board Year:
Region:

	Chapter Eval	Region Eval
Total Points	0	0
Min Stds Met?		

Chapter Evaluator:
Region Evaluator:
Region Evaluation Date:

Section 1. Minimum Standards for Chapter Maintenance

A. Customer Expectations

1. Did or will the chapter complete a member needs survey or use another mechanism to collect member needs at least every three years and demonstrate action on those needs ongoing? **(Attach a consolidated copy or an action plan if it will be completed in the future.)**
2. Did the chapter perform at least three Professional Development event surveys either electronically or via hard copy?

Chapter Submittal		Region Evaluation		Chapter Comment	Evaluator Comment
Response	Points	Response	Points		
	0		0		
	0		0		

B. Communications

1. Did the chapter maintain a current Web site with APICS trademark logo on home page with chapter name and link to APICS (www.apics.org) or did the chapter provide and maintain key chapter contact information and an overview of chapter services and activities via the Online Chapter Locator (http://www.apics.org/apics/chapters.aspx)? (List chapter Web site URL- example: http://www.apicsphoenix.org.)

	0		0		
--	---	--	---	--	--

Web site URL:

<http://www.apics.org/apics/chapters.aspx>

2. Did the chapter communicate with members or customers via newsletter hard or electronic copy at least eight times? Examples include: a) hard or soft copy newsletter; b) chapter event announcements via e-mail; c) partnering with local media (TV, Radio, newspapers, newsletters, job fairs) to communicate chapter activities; d) company coordinator program; e) mass mailing to prospective members to introduce the chapter and its activities.

	0		0		
--	---	--	---	--	--

C. Professional Development Events

1. Did the chapter hold at least three professional development events? Examples may include Top Management events, plant tours, online chat room sessions, webinars, joint meetings with other chapters or societies, independent workshops, conferences or seminars. **(Attach list of event speakers and subjects).**

	0		0		
--	---	--	---	--	--

D. Education

1. Did the chapter offer at least three and hold at least two APICS body of knowledge-related educational offerings during the year? They may be offered in workshop, online, or part-time study course format. Examples may include: a) CPIM, CIRM, or CSCP certification courses; b) noncertification educational offerings (e.g., Fundamentals); c) noncertification educational workshop offerings (e.g., Lean Manufacturing); d) in-house education programs; e) independent topic workshops or seminars; f) educational offerings held in conjunction with other associations, universities or consulting companies.

	0		0		
--	---	--	---	--	--

E. APICS Participation

1. Did the chapter submit a listing of current officers to APICS Headquarters within 60 days of elections using the My Chapter area of the APICS.ORG Web site?
2. Did the chapter review their bylaws and submit changes to APICS and state agency (if applicable)?
3. Did the chapter hold at least four BOD meetings including one transition or orientation meeting for the BOD? **(Attach BOD Meeting Minutes.)**
4. Did the BOD have a minimum of four (4) board members serving?

	0		0		
	0		0		
	0		0		
	0		0		



Chapter Minimum Standards

Date Printed: 1/31/2007

Chapter:
Board Year:
Region:

	Chapter Eval	Region Eval
Total Points	0	0
Min Stds Met?		

Chapter Evaluator:
Region Evaluator:
Region Evaluation Date:

Section 1. Minimum Standards for Chapter Maintenance

5. Did at least one BOD member attend one officer training session? Examples of officer training may include attendance at VLW (Volunteer Leadership Workshop), Leadership Institute Workshop, and/or region meetings, and/or officer training sessions.

6. Does the chapter have at least one BOD member participating in the officers electronic discussion list (i.e., listserv, APICS Learning Communities, etc)?

F. Financial Responsibility

1. Has the chapter provided APICS with a letter of assertion from the chapter board of directors stating 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? (**Attach letter of assertion regarding finances.**)

Chapter Submittal		Region Evaluation		Chapter Comment	Evaluator Comment
Response	Points	Response	Points		
	0		0		
	0		0		

	0		0		
--	---	--	---	--	--

Total Points:	0	0
% of Points Earned:		

Documentation is required for certain items that the Chapter submitted for credit. Below is a list of all documentation and whether or not the Chapter is required to submit the documentation based upon the Chapter's claim for credit. If the chapter claims credit in an area that requires documentation, a "Yes" indicator will appear next to the documentation description. A "No" in the list below indicates that the chapter did not claim the points; therefore, documentation is not expected. A blank space indicates that the question has not been answered.

Required?	Documentation
	Member needs survey or equivalent (Sub Section A-1). Mutually exclusive with item below.
	Action Plan for member needs survey or equivalent (Sub Section A-1). Mutually exclusive with item above.
	List of event speakers and subjects (Sub Section C-1)
	BOD meeting minutes (Sub Section E-3)
	Letter of financial responsibility (Sub Section F-1)

Review by a second evaluator is suggested if the final award differs from chapter's expected award.

Region Evaluator:
Region Evaluation Date:



Chapter:
Board Year:
Region:

Chapter Evaluator:

	Chapter Eval	Region Eval
Total Points	0	0
Award Level		
Min Stds Met?		

All minimum standards must be met to be eligible for awards.

Section 2. Chapter Benchmarking & Reporting (C-BAR)

C. Professional Development Events

	Chapter Submittal		Region Evaluation		Chapter Comment	Evaluator Comment
	Response	Points	Response	Points		
1. Does the chapter follow a process for evaluating all professional development meeting (PDM) speakers and do you share that information with the speakers?		0		0		
2. Does the chapter evaluate the overall quality/venue of the PDMs for its members?		0		0		
3. Did attendance at the PDMs meet or exceed the chapter's goal? If not, include a corrective action plan, showing actions already taken in the chapter narrative - see Section 2-J.		0		0		
4. How many times did the chapter conduct a joint networking session (e.g., PDM, plant tour, seminar, etc.) with other professional organizations (e.g. ISM, ASQ, CSCMP, etc.)?		0		0		
5. Did the chapter schedule, plan, and publish its PDMs and plant tours at least three months in advance?		0		0		
6. Did the chapter conduct a specific PDM for Top Management or other executive event during the last year?		0		0		
Total points for this area		0		0		
Percentage of the total of 35 points possible for this area		0.0%		0.0%		

D. Education

1. Indicate how many months in advance the chapter published a master education plan listing classes and dates?		0		0		
2. Does the chapter have a formal instructor compensation policy?		0		0		
3. Indicate the percentage of chapter instructors who are either CFPIM, CPIM, CIRM, or CSCP certified?		0		0		
4. Are all the Chapter's instructors qualified per current APICS standards? (This includes instructors on loan from other chapters.)		0		0		
5. Does the chapter ask students to evaluate the instructors at the end of the course and communicate the evaluations to the instructors?		0		0		
6. Did the chapter formally recognize at least one instructor as an outstanding instructor during the past year?		0		0		
7. Indicate the percentage of chapter membership who are either CFPIM, CPIM, CIRM, or CSCP certified.		0		0		
8. Indicate the number of other APICS educational offerings other than CPIM, CIRM, and CSCP e.g., JIT (Lean), ERP, Fundamentals, Principles of Material Handling and Warehousing, etc.?		0		0		
Total points for this area		0		0		
Percentage of the total of 75 points possible for this area		0.0%		0.0%		



C-BAR Section 2

Chapter:
Board Year:
Region:

Chapter Evaluator:

	Chapter Eval	Region Eval
Total Points	0	0
Award Level		
Min Stds Met?		

All minimum standards must be met to be eligible for awards.

Section 2. Chapter Benchmarking & Reporting (C-BAR)

E. APICS Participation/External Support

	Chapter Submittal		Region Evaluation			
	Response	Points	Response	Points	Chapter Comment	Evaluator Comment
1. Indicate the number of chapter officers and/or BOD members who attended all region meetings/CDC officer training?		0		0		
2. Did the chapter provide support to another chapter in distress or with limited resources? Support includes financial, management or material support (e.g., advice, suggestions, loan instructors, names of speakers, instructor kits, samples of plans, procedures or forms).		0		0		
3. Did the chapter make a voluntary contribution of time or money to region, APICS association, or community programs to market the APICS brand?		0		0		
4. Indicate whether a member of the chapter served as a presenter at a chapter or a region event, or at the International Conference and Exposition? Indicate below the name of the speaker, organization, and the date.		0		0		
5. Did a member of the chapter publish a technical book or article in a formal magazine (APICS magazine, etc.) concerning any operations subject? Indicate below the name of the author and the title of the book or the name of the periodical.		0		0		
6. Did a member of your chapter serve as a member of a region or association committee or board (e.g., CDC, VOC, BOK, Fogarty Awards evaluator, International Conference Committee, editorial review board, etc.)? If so, indicate whether it was a region or association level assignment. Indicate below the name of the member and the name of the organization or committee.		0		0		
Total points for this area		0		0		
Percentage of the total of 55 points possible for this area		0.0%		0.0%		

F. Financial Responsibility

1. Did the chapter formally manage a budget of planned vs. actual? (Attach a copy of the chapter's year end report.)		0		0		
2. Did the chapter purchase general liability and/or directors and officers liability insurance?		0		0		
3. Did the chapter file IRS Form 990 (including checking box K if less than \$25K) or other applicable federal tax form for the past fiscal year? (If no tax form is required, submit a signed statement to that effect.)		0		0		
4. Did the chapter have an audit committee review the financial records for the year and did it develop a plan to meet all audit recommendations?		0		0		
Total points for this area		0		0		
Percentage of the total of 25 points possible for this area		0.0%		0.0%		



C-BAR Section 2

Date Printed: 1/29/2007

Chapter:
Board Year:
Region:

Chapter Evaluator:

	Chapter Eval	Region Eval
Total Points	0	0
Award Level		
Min Stds Met?		

All minimum standards must be met to be eligible for awards.

Section 2. Chapter Benchmarking & Reporting (C-BAR)

Chapter Submittal		Region Evaluation		Chapter Comment	Evaluator Comment
Response	Points	Response	Points		

Total points for Section 2	0	0
Percentage of the total of 435 points possible for Section 2	0.0%	0.0%
Award Level		

Documentation is required for certain items that the chapter submitted for points. Below is a list of all documentation and whether or not the chapter is required to submit the documentation based upon the chapter's claim for points. If the chapter claims credit in an area that requires documentation, a "Yes" indicator will appear next to the documentation description. A "No" in the list below indicates that the chapter did not claim the points; therefore, documentation is not expected. A blank space indicates that the question has not been answered.

Required?	Documentation
	Marketing Plan (Sub-Section A-1)
	Corrective action plan included in narrative for not meeting PDM attendance goal (Sub-Section C-3)
	Planned vs. Actual Year-end Budget Report (Sub-Section F-1)
	A letter stating that no federal tax form is required (Sub-Section F-3)
	Strategic Plan (Sub-Section H-1)
	Chapter Metrics (Sub-Section H-4)
	Narrative Document (Sub-Section J, questions 1-4)
	Innovations Document (Sub-Section J, question 5)

At a minimum, the evaluator should include a comment for each item where the score differs from the chapter's score. Review by a second evaluator is suggested if the final award differs from chapter's expected award.

Overall Reviewer Comments (comments on specific areas should be made in column H)

Note: Data input for below must be made on the "Mandatory Info" page

1st Reviewer:
Date:
2nd Reviewer:
Date:
RVP Approval:
Date:



C-BAR Chapter Planning Tool

Date Printed: 1/29/2007

Chapter:
Board Year:
Region:

Chapter Evaluator:

Points Completed:	0
Points Will Complete:	0
Total Forecast:	0
Forecast Award Level:	
Minimum Stds Met?	

Section 2. C-BAR. Chapter Implementation Tool

Section	Description	Chapter Forecast Response	Chapter Forecast Points	Comment	Person Responsible for Implementation	Due Date	Completion Status
A. Cust Exp/Mktg	1. Did the chapter implement a formal marketing plan to reach potential customers and advise them of their programs and education? (Attach a copy of the chapter's marketing plan.)		0				
A. Cust Exp/Mktg	2. Has the chapter conducted an analysis of local area companies' needs, for programs and education offerings based on local market, industries, and diversity of business?		0				
A. Cust Exp/Mktg	3. How many e-mail letters of introduction, brochures, flyers, or information packets has the chapter prepared and delivered to various companies in the local area? Example is APICS Membership Recommendation Card, Stock # 82011		0				
A. Cust Exp/Mktg	4. Did the chapter formally recognize at least one APICS volunteer for efforts during the past year?		0				
A. Cust Exp/Mktg	5. Did the chapter formally recognize at least one company or corporation for its support during the last year?		0				
A. Cust Exp/Mktg	6. Does the chapter have a formal company coordinator program?		0				
B. Communication	1. Did the chapter submit its newsletter for the Fit-to-Print Award (equivalent)? (Not effective until the 2007/2008 program year.)		0				
B. Communication	2. How many separate announcements (e.g. mailings, e-mail, etc.) to your members concerning PDMs, classes, seminars, etc. did the chapter complete?		0				
B. Communication	3. How many times did the chapter announce its events, such as PDMs, seminars, tours, or classes, in local periodicals, radio, or TV?		0				
B. Communication	4. Was there an article in a local periodical, radio, or TV station about the chapter or a member of the chapter where APICS was prominently mentioned?		0				
B. Communication	5. How many times did the chapter recognize its members for their accomplishments (e.g., completing classes, passing exams, welcoming new members and achieving/maintaining certification)?		0				
C. Professional Develop Events	1. Does the chapter follow a process for evaluating all professional development meeting (PDM) speakers and do you share that information with the speakers?		0				
C. Professional Develop Events	2. Does the chapter evaluate the overall quality/venue of the PDMs for its members?		0				
C. Professional Develop Events	3. Did attendance at the PDMs meet or exceed the chapter's goal? If not, include a corrective action plan, showing actions already taken in the chapter narrative - see Section 2-J.		0				
C. Professional Develop Events	4. How many times did the chapter conduct a joint networking session (e.g., PDM, plant tour, seminar, etc.) with other professional organizations (e.g. ISM, ASQ, CSCMP, etc.)?		0				
C. Professional Develop Events	5. Did the chapter schedule, plan, and publish its PDMs and plant tours at least three months in advance?		0				
C. Professional Develop Events	6. Did the chapter conduct a specific PDM for Top Management or other executive event during the last year?		0				
D. Education	1. Indicate how many months in advance the chapter published a master education plan listing classes and dates?		0				
D. Education	2. Does the chapter have a formal instructor compensation policy?		0				
D. Education	3. Indicate the percentage of chapter instructors who are either CFPIM, CPIM, CIRM, or CSCP certified?		0				
D. Education	4. Are all the Chapter's instructors qualified per current APICS standards? (This includes instructors on loan from other chapters.)		0				
D. Education	5. Does the chapter ask students to evaluate the instructors at the end of the course and communicate the evaluations to the instructors?		0				
D. Education	6. Did the chapter formally recognize at least one instructor as an outstanding instructor during the past year?		0				



C-BAR Chapter Planning Tool

Chapter:
Board Year:
Region:

Chapter Evaluator:

Section 2. C-BAR. Chapter Implementation Tool

Points Completed:	0
Points Will Complete:	0
Total Forecast:	0
Forecast Award Level:	
Minimum Stds Met?	

Section	Description	Chapter Forecast Response	Chapter Forecast Points	Comment	Person Responsible for Implementation	Due Date	Completion Status
D. Education	7. Indicate the percentage of chapter membership who are either CFPIM, CPIM, CIRM, or CSCP certified.		0				
D. Education	8. Indicate the number of other APICS educational offerings other than CPIM, CIRM, and CSCP e.g., JIT (Lean), ERP, Fundamentals, Principles of Material Handling and Warehousing, etc.?		0				
E. APICS Particip External Support	1. Indicate the number of chapter officers and/or BOD members who attended all region meetings/CDC officer training?		0				
E. APICS Particip External Support	2. Did the chapter provide support to another chapter in distress or with limited resources? Support includes financial, management or material support (e.g., advice, suggestions, loan instructors, names of speakers, instructor kits, samples of plans, procedures or forms).		0				
E. APICS Particip External Support	3. Did the chapter make a voluntary contribution of time or money to region, APICS association, or community programs to market the APICS brand?		0				
E. APICS Particip External Support	4. Indicate whether a member of the chapter served as a presenter at a chapter or a region event, or at the International Conference and Exposition?		0				
E. APICS Particip External Support	5. Did a member of the chapter publish a technical book or article in a formal magazine (APICS magazine, etc.) concerning any operations subject?		0				
E. APICS Particip External Support	6. Did a member of your chapter serve as a member of a region or association committee or board (e.g., CDC, VOC, BOK, Fogarty Awards evaluator, International Conference Committee, editorial review board, etc.)? If so, indicate whether it was a region or association level assignment.		0				
F. Financial Responsibility	1. Did the chapter formally manage a budget of planned vs. actual? (Attach a copy of the chapter's year end report.)		0				
F. Financial Responsibility	2. Did the chapter purchase general liability and/or directors and officers liability insurance?		0				
F. Financial Responsibility	3. Did the chapter file IRS Form 990 (including checking box K if less than \$25K) or other applicable federal tax form for the past fiscal year? (If no tax form is required, submit a signed statement to that effect.)		0				
F. Financial Responsibility	4. Did the chapter have an audit committee review the financial records for the year and did it develop a plan to meet all audit recommendations?		0				
G. Membership	1d. Based on the membership growth rate, the chapter earns 0 points for negative growth, 5 points for 0 - 4% growth, and 10 points for 5% or more growth.		0				
G. Membership	2. What percentage of the time does the chapter attempt to contact members when their status changes, (i.e., new, suspended, or expired).		0				
G. Membership	3. Does the chapter maintain a local job bank or provide a service to members and local companies announcing job openings (e.g., via Web site or newsletter)?		0				
G. Membership	4. What is the percentage of members renewing their membership from last year to this year (from My Chapter).		0				
H. Chapter Management	1. Indicate whether the chapter reviewed/updated its strategic plan and whether or not it covered the current year or multiple years. This plan must have been completed no later than the end of the third month of the fiscal year. (Attach a copy of the chapter's strategic plan.)		0				
H. Chapter Management	2. Of all the BOD positions authorized/required by the bylaws, what percentage of the positions are filled?		0				



C-BAR Chapter Planning Tool

Date Printed: 1/29/2007

Chapter:
Board Year:
Region:

Chapter Evaluator:

Section 2. C-BAR. Chapter Implementation Tool

Points Completed:	0
Points Will Complete:	0
Total Forecast:	0
Forecast Award Level:	
Minimum Stds Met?	

Section	Description	Chapter Forecast Response	Chapter Forecast Points	Comment	Person Responsible for Implementation	Due Date	Completion Status
H. Chapter Management	3. Did the chapter create or review a SOP or internal chapter manual that explains the responsibilities of each position, including duties and processes (e.g., checklists, forms, instructions, etc.)?		0				
H. Chapter Management	4. Did your BOD establish metrics in the beginning of the year and measure its successes in support of the strategic plan during the year? (Attach a copy of the chapter's metrics for the year.)		0				
H. Chapter Management	5. Did the chapter follow a transition plan in which key chapter deliverables are detailed for review and information on variances is provided for incorporation into the next year's strategic plan?		0				
H. Chapter Management	6. What percentage of BOD members are either CFPIM, CPIM, CIRM, or CSCP certified?		0				
I. Student Chapter /Other Orgs	1. Does the chapter provide organizational, educational, and/or financial support for a student chapter involved in a logistics/operations education program?		0				
I. Student Chap/ Other Orgs	2. Did the chapter provide a student paper competition similar to or in support of the Donald W. Fogarty International Student Paper Competition?		0				
I. Student Chap/ Other Orgs	3. Does the chapter have a policy and execute programs for at least one of the following: providing student discounts; encouraging attendance to tours, PDMS, seminars, or classes; student mentorship programs; sponsoring memberships for professors; sponsor a student to attend the international conference?		0				
I. Student Chap/ Other Orgs	4. Do you encourage students who are not part of an affiliated student chapter to attend educational offerings or do you provide student memberships at large?		0				
I. Student Chap/ Other Orgs	5. Did the chapter sponsor at least one student scholarship or grant at the collegiate level?		0				
J. Narrative & Innovations	1. Does the narrative include chapter performance to objectives as noted in the strategic plan for the past year?		0				
J. Narrative & Innovations	2. Does the narrative highlight internal and external conditions that affected the organization both positively and negatively? Include those items not evident in the submitted documentation provided.		0				
J. Narrative & Innovations	3. Does the narrative describe any planning/replanning efforts undertaken to meet your organizational challenges?		0				
J. Narrative & Innovations	4. Does the narrative address chapter performance issues over the past year?		0				
J. Narrative & Innovations	5. Based on the innovations document, has the chapter demonstrated an innovative way to manage the chapter or improve services to its customers? If yes, please indicate whether the innovation can be used by only your chapter or by other chapters as well.		0				



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