



C-BAR Chapter Planning Tool

Date Printed: 6/3/2010

Chapter: Tri-State Chapter
 Board Year: 2009 - 2010
 District: Southeast

Chapter Evaluator: Hansford

Section 2. C-BAR. Chapter Planning Tool

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

Points Completed:	330
Points Will Complete:	40
Total Forecast:	370
Forecast Award Level:	Gold
Minimum Stds Met?	Yes

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.)	Yes	10	Complete	Deb		Completed
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?	Yes	10	Complete	Deb		Completed
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 members and non member individuals and companies in the local area? Example is Professional Membership Brochure, Stock # 82034	>100	10	Complete	Donald, Cyndi, Deb		Completed
A. Cust Exp/Mktg	4. Did the chapter formally recognize at least one APICS volunteer for efforts during the past year?	Yes	10		BOD		Completed
A. Cust Exp/Mktg	5. Did the chapter formally recognize at least one company or corporation for its support during the last year?	Yes	10		BOD		Completed
A. Cust Exp/Mktg	6. Does the chapter have a formal company coordinator (or other contact group ie: HR Mgrs) program?	Yes	5	Note to BOD on 2/8	BOD, could we implement?		Completed
B. Communication	1. How many separate announcements (e.g. mailings, e-mail, etc.) to your members concerning PDMS, classes, seminars, etc. did the chapter complete?	2 or More Times	10	Complete	Cyndi, Deb		Completed
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?	2 or More Times	10	Complete	Cyndi, Deb		Completed
B. Communication	3. How many times did the chapter announce its events, such as PDMS, seminars, tours, or classes, in local periodicals, radio, TV, or some other appropriate medium for the area?	2 or More Times	10	Did this happen?	Cyndi		Completed
B. Communication	4. How many times did an article appear in a local periodical, radio, or TV station about the chapter or a member of the chapter where APICS was prominently mentioned?	None	0				Will not complete
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)?	8 or More Times	10		Donald, Cyndi, Deb		Completed
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?	Yes	5	Complete and will continue	Cyndi		Completed
C. Professional Develop Events	2. Does the chapter evaluate the overall quality/venue of the PDMS for its members?	Yes	5	Complete and will continue	Cyndi		Completed
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.	Yes	5	Complete - Meet CMS	BOD		Completed
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.)?	2 Times	10	Complete	Cyndi		Completed
C. Professional Develop Events	5. Did the chapter schedule, plan, and publish its PDMS and plant tours at least three months in advance?		0		Cyndi		Will not complete
C. Professional Develop Events	6. Did the chapter conduct a specific PDM for Top Management or other executive event during the last year?	Yes	5	Complete	Cyndi		Completed
D. Education	1. Indicate how many months in advance the chapter published a master education plan listing classes and dates?	12 Months or more	10	Complete	Deb		Completed
D. Education	2. Does the chapter have a formal instructor compensation policy?	Yes	5	Complete	Deb		Completed
D. Education	3. Indicate the percentage of chapter instructors who are either CFPIM, CPIM, CIRM, or CSCMP certified?	100%	10	Complete	Deb		Completed
D. Education	4. Are all the Chapter's instructors qualified per current chapter designated standards or national APICS qualification standards, if they exist? (This includes instructors on loan from other chapters.)	Yes	10	Complete	Deb		Completed
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?	Yes	10	Complete	Deb		Completed



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D. Education	6. Did the chapter formally recognize at least one instructor as an outstanding instructor during the past year?	Yes	10		Deb		Completed
D. Education	7. Indicate the percentage of chapter membership who are either CFPIM, CPIM, CIRM, or CSCP certified.	31% - 100%	10	Complete	Deb		Completed
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.?	2	10	Complete	Deb		Completed
E. APICS Partcip External Support	1. Indicate the number of chapter officers and/or BOD members who attended all district meetings/officer training?	Min 2 to all	10	In process, San Juan in June	BOD		Will complete
E. APICS Partcip 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).	Full Support (mentor/finance/ sponsor/educ)	10	Deb helping chapters	Deb		Completed
E. APICS Partcip External Support	3. Did the chapter make a voluntary contribution of time or money to district, APICS association, or community programs to market the APICS brand?	Yes	10	Deb, market APICS to ISM	Deb		Completed
E. APICS Partcip External Support	4. Indicate whether a member of the chapter served as a presenter at a chapter or a district event, or at the International Conference and Exposition?	Chapter or District	5	Complete	Deb		Completed
E. APICS Partcip 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				Will not complete
E. APICS Partcip External Support	6. Did a member of your chapter serve as a member of a district or association committee or board (e.g., VOC, BOK, Fogarty Awards evaluator, International Conference Committee, editorial review board, etc.)? If so, indicate whether it was a district or association level assignment.	Association	10				Completed
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.)	Yes	10		Kelly		Completed
F. Financial Responsibility	2. Did the chapter purchase general liability and/or directors and officers liability insurance?	Yes	5		Kelly		Completed
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.)	Yes	5		Kelly		Completed
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?	Yes	5		Kelly		Completed
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.	Loss	0		Donald		Will complete
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).	75% or more	10	Complete	Donald		Completed
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)?	Yes/Not Allowed	5	Complete	Deb		Completed
G. Membership	4. What is the percentage of members renewing their membership from last year to this year (from My Chapter).	At least 66%	10	Donald, please confirm	Donald		Completed
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.)	Yes, Multiple Yrs	10		Deb		Completed
H. Chapter Management	2. Of all the BOD positions authorized/required by the bylaws, what percentage of the positions are filled?	76% or more	10		Deb		Completed



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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.)?	No	0	In process	Deb		Will complete
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.)	Yes	10	Metrics is Cbar	Deb		Completed
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?	Yes	10	Complete	Deb		Completed
H. Chapter Management	6. What percentage of BOD members are either CFPIM, CPIM, CIRM, or CSCP certified?	50% - 75%	5	Complete	BOD		Completed
I. Student Chapter /Other Orgs	1. Does the chapter provide organizational, educational, and/or financial support for student involvement for students involved in a logistics/operations education program?		0		BOD		Will not complete
I. Student Chap/ Other Orgs	2. Did the chapter provide or participate in or encourage a student paper competition to encourage students to be more involved in Operations Management as a field?		0		BOD		Will not complete
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? Ultimate would be involvement on chapter board.	Yes	10	Complete	BOD		Completed
I. Student Chap/ Other Orgs	4. Do you encourage students who are not part of an affiliated student chapter to promote the future of APICS by attending educational offerings/seminars/meetings or be involved with the chapter board and encourage them to join as a student membership at large?		0		BOD		Will not complete
I. Student Chap/ Other Orgs	5. Did the chapter sponsor at least one student scholarship or grant at the collegiate level?		0		BOD		Will not complete
J. Narrative & Innovations	1. Does the narrative include chapter performance to objectives as noted in the strategic plan for the past year?	Yes	5		Deb		Will complete
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.	Yes	5		Deb		Will complete
J. Narrative & Innovations	3. Does the narrative describe any planning/replanning efforts undertaken to meet your organizational challenges?	Yes	5		Deb		Will complete
J. Narrative & Innovations	4. Does the narrative address chapter performance issues over the past year?	Yes	5		Deb		Will complete
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 could be used by only your chapter or by other chapters as well.	Yes, all chapters	10		Deb		Will complete