



Chapter: Mid Florida Chapter
 Board Year: 2015 - 2016
 District: Southeast

	Chapter Eval	District Eval
Total Points	16	0
Requirements Met?	Yes	No

Chapter Evaluator: Denise D. Gillespie
 District Evaluator:
 District Evaluation Date:

Section 1. CPA - Requirements

	Chapter Submittal		District Evaluation		Chapter Comment	Evaluator Comment
	Response	Points	Response	Points		
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.)	Completed Survey or Equivalent	1		0	See in folder	
2. Did the chapter perform at least three Professional Development event surveys either electronically or via hard copy?	Yes	1		0	See sample in folder	
B. Communications						
1. Did the chapter maintain a current website that includes the chapters APICS approved logo on the homepage and a link to APICS Corporate (www.apics.org)? The chapter website also contains key chapter contact information and an overview of its services and activities. (List chapter Web site URL- example: http://www.apicsphoenix.org.) Web site URL: www.apicsorlando.com	Chapter Website	1		0		
2. Did the chapter communicate with members or customers via 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.	Yes	1		0	Program Notecard at beginning of year; e-vites for upcoming events during the year	
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.	Yes	1		0	8 programs - See website for Past PDM schedule	
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 or CSCP certification courses; b) noncertification educational offerings (e.g., Principles); c) noncertification educational workshop offerings (e.g., Lean Manufacturing, Global Sourcing); d) in-house education programs; e) independent topic workshops or seminars, f) educational offerings held in conjunction with other associations, universities or consulting companies.	Yes	1		0	Offered 7 and completed 7	
2. Is the chapter only using instructors that are actively engaged in the Instructor Development Program (IDP) for APICS programs? (Actively engaged is defined as an individual who has been designated as an IDP instructor or who has submitted an application and is working toward IDP designation.)	Yes	1		0	Jim Pullin, Fred Griffith, and Denise Gillespie	
E. APICS Participation						
1. Did the chapter submit a listing of current officers to APICS Corporate within 60 days of elections using Partner Connect area of the APICS.ORG website?	Yes	1		0		
2. Did the chapter review their bylaws and submit changes to APICS Corporate and state agency (if applicable)?	Yes	1		0		
3. Did the chapter hold at least four BOD meetings including one transition or orientation meeting for the BOD? (Attach BOD meeting minutes.)	Yes	1		0	BOD notes on website	
4. Did the chapter BOD have a minimum of three (3) board members serving? (The members are listed on board management roster in Partner Connect)	Yes	1		0	BOD is also on website	



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Total Points	16	0
Requirements Met?	Yes	No

Section 1. CPA - Requirements

- Did at least one BOD member attend one officer training session? Examples of officer training may include attendance at ALS (APICS Leadership Summit), and/or district meetings, and/or officer training sessions, either in person or via documented presence at a webinar.
- Does the chapter have at least one BOD member participating in the officers electronic discussion list (i.e., listserv, Supply Chain Channel, etc.)?
- Is the chapter a legal entity in good standing?
- Did the chapter provide (or will provide) APICS Corporate with a letter of compliance to the Channel Partner Agreement within 30 days of the end of the chapters program year? (**Attach Letter of compliance, Appendix C of Channel Partner Agreement.**)

Chapter Submittal		District Evaluation		Chapter Comment	Evaluator Comment
Response	Points	Response	Points		
Yes	1		0	Anthony, Katie & Tim	
Yes	1		0	Denise Gillespie, Anthony McCall	
Yes	1		0		
Yes	1		0	See folder	
Yes	1		0	See folder	

F. Financial Responsibility

- Has the chapter provided APICS Corporate 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, Appendix B of Channel Partner Agreement.**)

Total Points:	16	0
% of Points Earned:	100.0%	

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
Yes	Member needs survey or equivalent (Sub Section A-1). Mutually exclusive with item below.
No	Action Plan for member needs survey or equivalent (Sub Section A-1). Mutually exclusive with item above.
Yes	BOD meeting minutes. Four required. (Sub Section E-3)
Mandatory	CPA Letter of Compliance/signature page, Appendix C (Sub Section E-8)
Mandatory	CPA Letter of Assertion/Financial Responsibility, Appendix B (Sub Section F-1)

Review by a second evaluator is suggested if the Chapter claims to have met all CPA criteria but the District evaluator does not agree.

District Evaluator:
 District Evaluation Date:



Chapter: Mid Florida Chapter
 Board Year: 2015 - 2016
 District: Southeast

CPA-Requirements must be met to be eligible for awards.

Chapter Evaluator: Denise D. Gillespie

	Chapter Eval	District Eval
Total Points	305	0
Award Level	Silver	None
Requirements Met?	Yes	No

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

	Chapter Submittal		District Evaluation		Chapter Comment	Evaluator Comment
	Response	Points	Response	Points		
A. Customer Expectations/Marketing						
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.)	No	0		0	Will be doing for coming year	
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?	No	0		0		
3. How many e-mail letters of introduction, brochures, flyers, or information packets has the chapter prepared and delivered to various members, customers, and companies in the local area? (e.g. Professional Membership Brochure-Stock # 82034. This example and additional resources can be found in CBOX on the APICS website.)	>100	10		0	Email blasts monthly; postcard of PDM sched	
4. Did the chapter formally recognize at least one APICS volunteer for efforts during the past year?	Yes	10		0	Chris St. Clair	
5. Did the chapter formally recognize at least one company or corporation for its support during the last year?	Yes	10		0	Lockheed Martin	
6. Does the chapter have a formal company coordinator (or other contact group, e.g. HR Mgrs) program?	Yes	5		0	See website	
Total points for this area		35		0		
Percentage of the total of 55 points possible for this area		63.6%		0.0%		

B. Communications																				
1. How many separate announcements (e.g. mailings, e-mail, etc.) to your members concerning PDMs, classes, seminars, etc. did the chapter complete? Includes promotion on chapter website or chapter social media sites.	2 or More Times	10		0	e-vites for each PDM (8); and postcard and Facebook															
2. How many times did the chapter announce its events, such as PDMs, seminars, tours, or classes, in local periodicals, (includes chapter) websites, radio, TV station, or some other appropriate medium for the area? Indicate below the name of the publication, (includes chapter) website, radio, TV station, or outlet used, the description of the article, and the date.	2 or More Times	10		0	website & link in MACF weekly newsletters															
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">www.apicsorlando.com</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>www.macf.biz - newsletters -example in file</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table>							www.apicsorlando.com							www.macf.biz - newsletters -example in file						
www.apicsorlando.com																				
www.macf.biz - newsletters -example in file																				
3. How many times did an article appear in a local periodical, website, radio, or TV station about the chapter or a member of the chapter where APICS was prominently mentioned? Indicate below the name of the publication, website, radio, or TV station, the description of the article and the date.	None	0		0																
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;"></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table>																				
4. 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)?	5 or More Times	10		0	New members: every month on website.															
5. Does your chapter regularly promote its activities on social networking sites such as Facebook, LinkedIn, etc.?	Yes	5		0	LinkedIn and FB															
Total points for this area		35		0																
Percentage of the total of 45 points possible for this area		77.8%		0.0%																

C. Professional Development 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		0	See example email in folder	
2. Does the chapter ask members to evaluate PDM's and does the chapter review those evaluations?	Yes	5		0	See PDM Evals in folder	
3. Did attendance at the PDM's meet or exceed the chapter's goal? (If not, include a corrective action plan, showing actions already taken in the chapter narrative - see Section J-2.)	No	0		0	See narrative	
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.)?	None	0		0		
5. Did the chapter schedule, plan, and publish its PDMs and plant tours at least two months in advance?	Yes	5		0	6 months schedule on website-postcard mailing	
6. Did the chapter conduct a specific PDM for Top Management or other executive event during the last year?	No	0		0		



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Chapter Evaluator: Denise D. Gillespie

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

		Chapter Eval	District Eval		
Total Points		305	0		
Award Level		Silver	None		
Requirements Met?		Yes	No		
Chapter Submittal		District Evaluation			
Response	Points	Response	Points	Chapter Comment	Evaluator Comment
Total points for this area		15	0		
Percentage of the total of 40 points possible for this area		37.5%	0.0%		
D. Education					
1. Indicate how many months in advance the chapter published a master education plan listing classes and dates?					
6 Months or more	10		0	2 yr schedule - see website	
2. Does the chapter have a formal instructor compensation policy?					
Yes	5		0	See website (SOP)	
3. Did the chapter formally recognize at least one instructor during the past year?					
Yes	10		0	Sept 2015 PDM - Jjim Pullin	
4. Indicate the percentage of chapter membership who are either CFPIM, CPIM, CIRM, or CSCP certified.					
31% - 100%	10		0	40 out of 120 (33%)	
5. Indicate the number of other APICS educational offerings other than CPIM, CSCP, e.g., Principles, TOC Workshop Series, Lean Enterprise Workshop Series, Global Sourcing Workshop Series, etc. that the chapter offered during the past year? (No points for TTT, LDI or AIS. Principle class =one point)					
0	0		0		
6. Did the chapter encourage APICS certifications on the chapter website?					
Yes	5		0	See "Certifications" on website	
Total points for this area		40	0		
Percentage of the total of 60 points possible for this area		66.7%	0.0%		
E. APICS Participation/External Support					
1. Indicate the number of chapter officer(s) and/or BOD member(s) who attended all district meetings/officer trainings? It does not have to be the same chapter officer/BOD member to attend all meetings/trainings.					
Min 2 to all	10		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, samples of plans, procedures or forms).					
No Support	0		0		
3. Did the chapter make a voluntary contribution of time or money to district, APICS association, or community programs to market APICS?					
Yes	10		0	Second Harvest - January PDM	
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		0		
Indicate below the name of the speaker, organization, and the date.					
Denise D. Gillespie - Jax chapter PDM - What is a Lean Enterprise					
Denise D. Gillespie - Southern AL Chapter PDM - Inventory Reduction Tactics					
5. Did a member of the chapter publish a technical book or article in a formal magazine (APICS magazine, etc.) concerning any operations subject?					
Yes	5		0	Dothang Truong, Ph.D., CSCP	
Indicate below the name of the author and the title of the book or the name of the periodical.					
Efficiency and Risk Management Models for Cloud-Based Solutions in Supply Chain Management					
International Journal of Business Analytics, 2(2), 14-30 - May 2015					
6. Did a member of your chapter serve as a member of a district or association committee or board (e.g., VOC, BOK, International Conference Committee, editorial review board, etc.)? If so, indicate whether it was a district or association level assignment.					
None	0		0		
Indicate below the name of the member and the name of the organization or committee.					
Total points for this area		30	0		
Percentage of the total of 60 points possible for this area		50.0%	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 and budget of planned vs. actual.)					
Yes	10		0	See folder & on website	
2. Did the chapter purchase general liability and/or directors and officers liability insurance?					
Yes	5		0	Chubb & Son	
3. Did the chapter file applicable tax forms (US required) for the past fiscal year? (If no tax form is required, submit a signed statement to that effect. Mexican chapters to include a copy of the "Acuse de Recibo" de la Declaracion Anual ante el SAT.)					
Yes	5		0	See Folder - Fiscal Year Financial Letter & Statements 2015-16	
4. Did the chapter have an audit review of the financial records for the year and did it develop a plan to meet all audit recommendations?					
Yes	5		0		



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	Chapter Eval	District Eval			
Total Points	305	0			
Award Level	Silver	None			
Requirements Met?	Yes	No			
Chapter Submittal		District Evaluation		Chapter Comment	Evaluator Comment
Response	Points	Response	Points		
Total points for this area		25	0		
Percentage of the total of 25 points possible for this area		100.0%	0.0%		
G. Membership					
1a. Enter the number of members as of July 1 of the current program year (from APICS Retention report posted in CBOX)					
1b. Enter the number of members as of June 30 of the current program year (from APICS Retention report posted in CBOX).					
1c. The chapter had a membership growth rate of.....					
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.					
2. What percentage of the time does the chapter attempt to contact members when their status changes, (i.e., new, suspended, or expired)?					
3. Does the chapter maintain a local job bank or provide a service to members and local companies announcing job openings (e.g., via website or newsletter)?					
4. What is the percentage of members renewing their membership from last year to this year (from APICS issued Retention Report)?					
Total points for this area		15	0		
Percentage of the total of 35 points possible for this area		42.9%	0.0%		
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.)					
2. Of all the BOD positions authorized/required by the bylaws, what percentage of the positions are filled?					
3. Did the chapter create /review and make copies available of a SOP or internal chapter manual that explains the responsibilities of each position, including duties and processes (e.g., checklists, forms, instructions, etc.)?					
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.)					
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?					
6. What percentage of BOD members are either CFPIM, CPIM, CIRM, or CSCP certified?					
7. Did the chapter win an award in the chapter incentive award program during the previous year?					
8. Did the chapter utilize the Net Promoter Score (NPS) method to gauge the chapter's performance from the chapter's customers point of view? (See worksheet "Info on NPS" for more information.)					
9. Is the chapter's Net Promoter Score positive?					
Total points for this area		40	0		
Percentage of the total of 75 points possible for this area		53.3%	0.0%		
I. Students, Student Chapters/Other Educational Organizations					
1. Did the chapter donate to APICS Supply Chain Council or a district level student activity? (Donation is based on chapter total members (excluding students)) Members: 1 to 50 - \$50 for each point; Members: 51 to 100 - \$100 for each point; Members: 101 to 200 - \$150 for each point; Members: 201+ - \$200 for each point. Maximum of 5 points awarded. (Example: Chapter has 75 members and donates \$300 to Foundation. The chapter is awarded 3 points)					
2. Did the chapter financially or otherwise support and encourage participation in a local and/or national student competition?					
3. Did the chapter provide financial aid for students by providing free admission/guest status (including meals and transportation) for PDM's and plant tours as a chapter policy?					



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

- 4. Did the chapter hold any on-campus PDM's?
- 5a. Did the chapter have any of its professional members participate as mentors at conference? (For each mentor 1 point is given - up to 5 points.)
- 5b. Did the chapter mentor stay in contact with student for the balance of the year? (Documented via chapter BOD meeting minutes.)
- 6. Was a chapter board position occupied by a student during evaluation year?
- 7. Did the chapter participate in a career assistance program with students? (Documented and visible through resume reviews, mentoring, job board, etc.)
- 8. Does the chapter 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?
- 9. Did the chapter provide financial aid for students via scholarship, grant or other financial assistance?
- 10. Did the chapter demonstrate active and on-going recruitment for acceptance and promotion of APICS by an Academic at an educational institution? 5 points awarded for documented program (documented thru the
- 11. Did the chapter demonstrate strategic pursuit of educational institution acceptance of APICS as an acknowledged and/or supported club or chapter for students? 5 points awarded for documented program (documented thru the Chapters Strategic Plan or Marketing Plan).
- 12. Did the chapter demonstrate successful acceptance of APICS by creating a new Student Chapter?
- 13. Does the chapter organizational structure identify "student and student Interests" as an area of focus and support with a position on the chapter BOD? (Example: VP of Student Affairs, Director of Student Activities,
- 14. Does the chapter have a social media presence by the students involved (Facebook, Twitter, etc.)?
- 15. Did the chapter have a professional development meeting where a student was the presenter on a subject of the student's choice? (5 points for each PDM up to 10 points total)

		Chapter Eval	District Eval		
Total Points		305	0		
Award Level		Silver	None		
Requirements Met?		Yes	No		
Chapter Submittal		District Evaluation		Chapter Comment	Evaluator Comment
Response	Points	Response	Points		
No	0		0		
No	0		0		
No	0		0		
Yes	5		0	Chrsi St. Clair	
No	0		0		
Yes	5		0	Dir of Student Affairs working with SSC	
No	0		0		
Yes	5		0	Anthony & Robin on SC advisory board for SCC	
Yes	5		0	Dir of Student Affairs on BOD; See Strat Plan	
No	0		0		
Yes	5		0	Dir of Student Affairs on BOD	
Yes	5		0	Chris St. Clair managed until Dec 2015	
1 PDM	5		0	Chris presented Sept 2015	
Total points for this area		50	0		
Percentage of the total of 95 points possible for this area		52.6%	0.0%		

J. Narrative & Innovations

Questions 1-4 below pertain to the contents of a 2-5 page narrative. If you did not write a narrative, answer "No" to the first four questions. (Attach narrative document.) Question 5 pertains to an innovations document. (Attach innovations document.)

- 1. Does the narrative include chapter performance to objectives as noted in the strategic plan for the past year?
- 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.
- 3. Does the narrative describe any planning/replanning efforts undertaken to meet your organizational challenges?
- 4. Does the narrative address chapter performance issues over the past year?
- 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

Yes	5		0		
Yes	5		0		
Yes	5		0		
Yes	5		0		
No	0		0		
Total points for this area		20	0		
Percentage of the total of 30 points possible for this area		66.7%	0.0%		



C-BAR Section 2

Chapter: Mid Florida Chapter
 Board Year: 2015 - 2016
 District: Southeast

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

Chapter Evaluator: Denise D. Gillespie

	Chapter Eval	District Eval		
Total Points	305	0		
Award Level	Silver	None		
Requirements Met?	Yes	No		
Chapter Submittal		District Evaluation		
Response	Points	Response	Points	Chapter Comment
	305		0	
	58.7%		0.0%	
	Silver		None	

Documentation is required for certain items that the chapter submitted for points. Below is a list of all documentation and	
Required?	Documentation
No	Marketing Plan (Sub-Sections A-1, I-11, I-12)
Yes	Corrective action plan included in narrative for not meeting PDM attendance goal (Sub-Section C-3)
Yes	APICS certifications on the chapter website (Sub-Section D-9)
Yes	Planned vs. Actual Budget and Year-end Report (Sub-Section F-1)
No	A letter stating that no federal tax form is required (Sub-Section F-3) (Non US Chapters only) (Mexican chapters to
Yes	Strategic Plan (Sub-Sections H-1, I-11, I-12)
No	Chapter Metrics (Sub-Section H-4)
Yes	Narrative Document (Sub-Section J, questions 1-4)
No	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

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:
 District Manager:
 Date: