

23-24 Board Strategy Session

July 15, 2023

The logo for the Association to Advance Collegiate Schools of Business International (AACSB), Accredited Schools of Management (ASCM). The letters are in a bold, green, sans-serif font. The 'A' and 'S' are stylized with horizontal bars.

**NORTH TEXAS
CHAPTER**

Agenda

- Introductions
- Year in Review – 2022/2023 by the Numbers
- Plans for 2023/2024
- Financial Update
- Education Update
- Adopt Budget
- Adopt Calendar

NTX ASCM
*Globally
Connected,
Locally Invested*

The North Texas Chapter of ASCM fosters the community of supply chain professionals in the DFW area.

Join us for best-in-class certification courses, networking events and student mentorships.

Setting the standard for supply chain organizations in DFW.

2023-2024 Board

- President – Amanda Lehde
- President-Elect – Shelly Stalvey
- Treasurer – Jaime Candelaria
- Secretary – Shilpa Ganesh
- Administrator – Desiree Ballard
- VP Education – Vince Mozik
- VP Marketing – Mike Milosevich
- VP Membership – Sara Lemrick
- Dir. Of Programs – Charles Gorz

Year in Review – By the Numbers

Membership

2021-2022

- Average – 690
- High – 719
- Low - 653

2022-2023

- Average – 580
- High – 607
- Low - 553

Data from June 2014 – June 2023

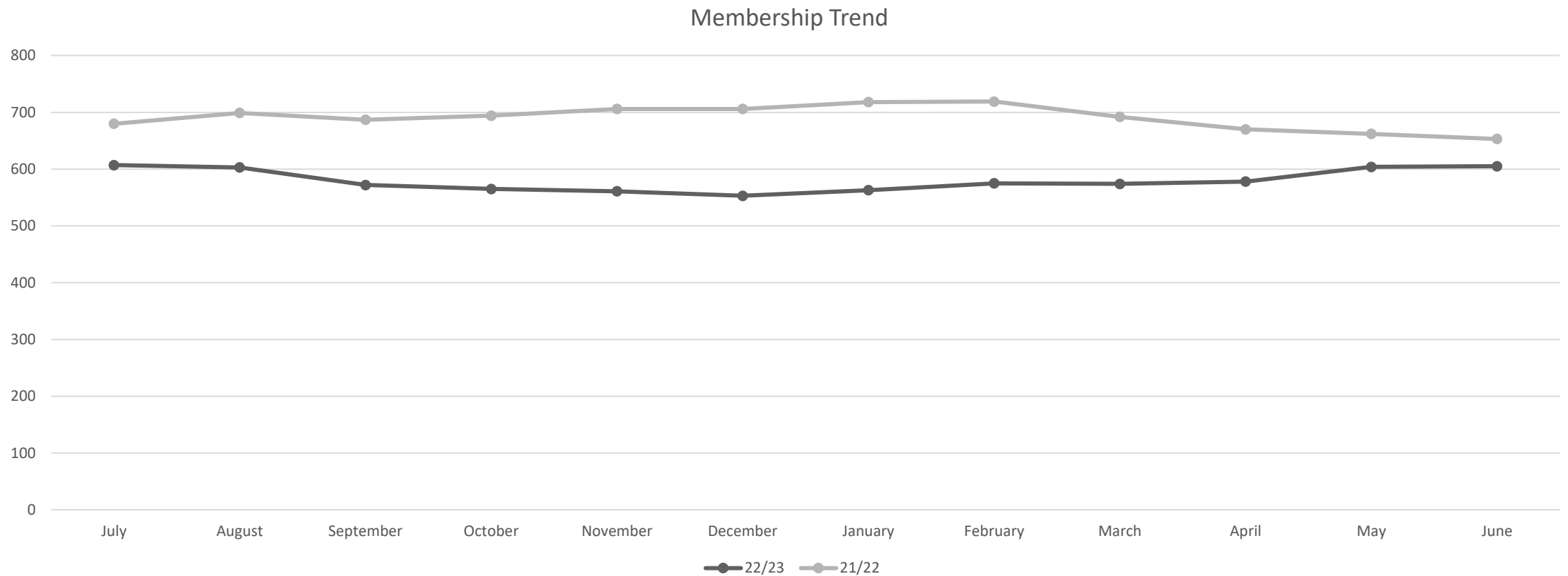
Lowest level = 448 members (June 2014)

Highest level = 910 members (June 2019)

\$19,731.57 = Revenue Generated by Membership Dues	
Quarter	Membership Dues
2023 – Q2	\$5596.07
2023 – Q1	\$5486.03
2022 – Q4	\$4046.84
2022 – Q3	\$4602.63
2022 – Q2	\$4610.12

Year in Review – By the Numbers

Membership



Year in Review – By the Numbers

Membership

- # of Events by Type

- PDM = 6
- Socials = 5
- Tours = 6

- Average Attendance

- PDM = 37
- Socials = 30
- Tours = 35

Year in Review – By the Numbers

Operations

of Events by Type

- PDM = 6
- Socials = 5
- Tours = 6

Average Attendance by Type

- PDM = 37
- Socials = 30
- Tours = 35

Plans for 2023-2024

Operations

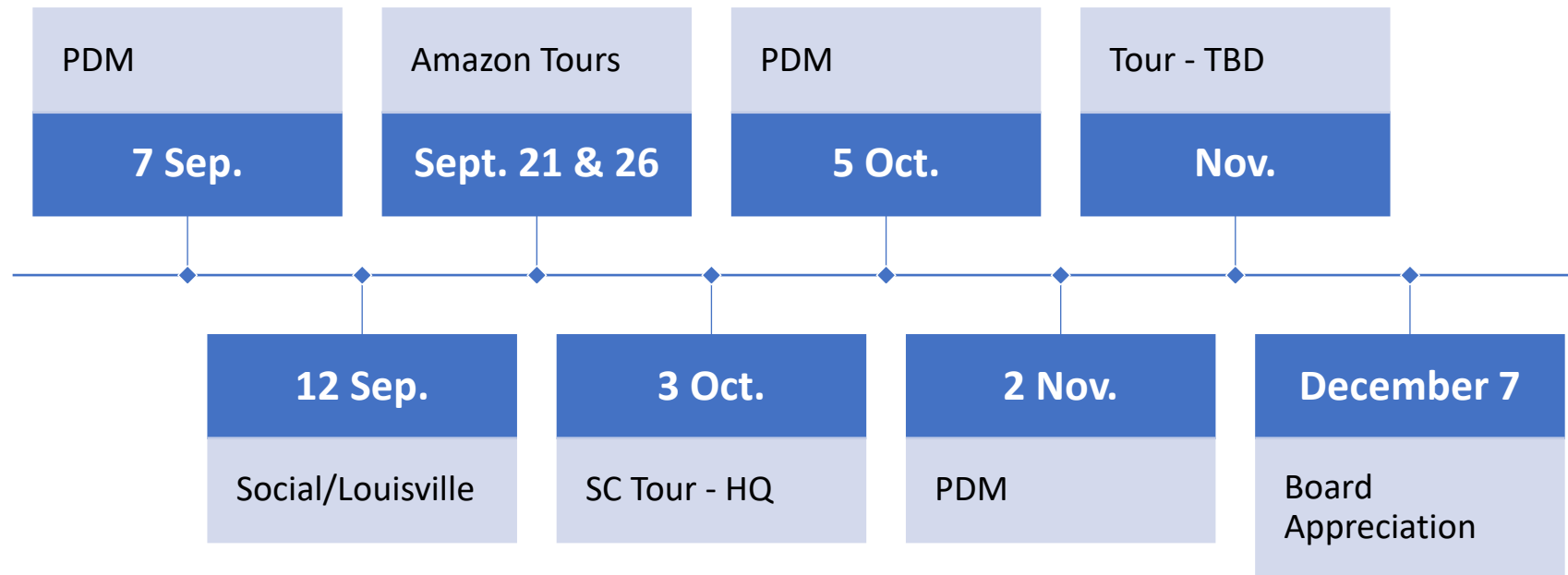
- 6 PDMs; 3-4 Socials; 6+ tours
- Add virtual lunch sessions – Technology Talks
- Support Supply Chain Tour 2023, help plan 2024

Board Meetings – Virtual, Every Other Month

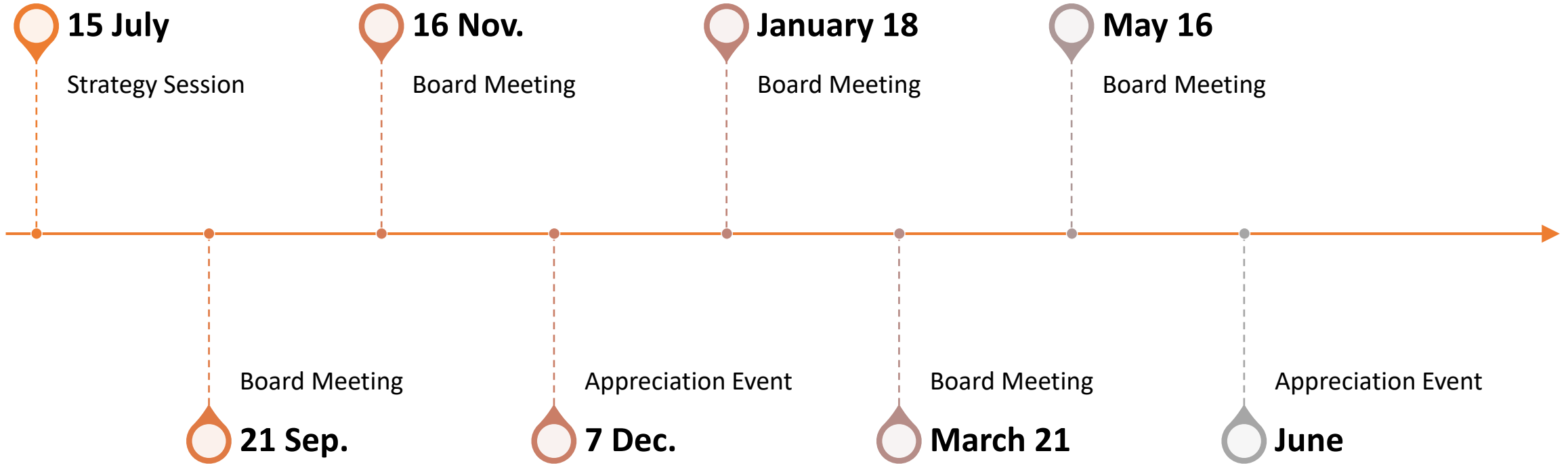
- Discussion about weekday lunchtime vs. after 5
- What day of week is best?

Member Engagement Events

- **2023 - FALL LINEUP**



Board Meeting Schedule - Proposed



Financial Update

2022-2023 Financials		
Description	Budget	Actual
Income	\$105,880	\$113,797
Expenses	\$157,155	\$161,709
Net Income	\$(51,275)	\$(47,913)

Financial Update – Proposed 23-24 Budget

	Chapter Relations	Corp	Marketing	Membership	Operations	Education	TOTALS
INCOME	\$0	\$1,200	\$0	\$18,000	\$0	\$132,123	\$151,323
EXPENSES	\$2000	\$26,060	\$7,576	\$1,200	\$44,120	\$105,142.60	\$186,098.60
NET INCOME	-\$2000	-\$24,860	-\$7,576	\$16,800	-\$44,120	\$26,980.40	-\$34,775.60

Education Update

VP of Education Summary One Pager 8-14-23



Last Year Class Delivered Classes 2022-2023

Class	Class Start	Total Hours	Type
CPIM 2	July 22	48	Public Online
CSCP	Aug 22	48	Public Online
CPIM 1	Oct 22	24	In Person
CSCP	Nov 22	48	Public Online
CPIM 2	Jan 23	48	In Person
CPIM 8.0	April 23	56	Public Online
CSCP	June 23	48	Public Online
S&OP	June 23	4	Public Online
Total	-	324	-

Upcoming Class Schedule 2023 – 2024

Class	Class Start	Dates	Total Hours
CSCP	Aug. 19 – Oct. 14	8/19, 8/26, 9/9, 9/16, 9/23, 9/30, 10/7, 10/14	48
CPIM	Oct 14 – Dec. 16	10/14, 10/21, 10/28, 11/4, 11/11, 11/18, 12/2, 12/9, 12/16	56
CSCP	Jan. 20 – March 9	1/20, 1/27, 2/3, 2/10, 2/17, 2/24, 3/2, 3/9	48
CPIM	April 6 – June 1	4/6, 4/13, 4/20, 4/27, 5/4, 5/11, 5/18, 5/25, 6/1	56
S&OP	June 14	6/14	4
CSCP	June 29 – Aug 17	6/29, 7/13, 7/20, 7/27, 8/3, 8/10, 8/17, 8/24	48
CPIM	Sept 7 – Oct. 26	9/7, 9/14, 9/21, 9/28, 10/5, 10/12, 10/19, 10/26, 11/2	56
			316

Benchmark Prices at Other Chapters 7/7/23

Chapter	Type	Basic / Non-Member	Upgrade Bundle / Plus
Twin Cities	CSCP	\$4,360	\$4,210
Twin Cities	CPIM	\$4,085	\$3,495
El Paso	CSCP	\$3,295	-
Houston	CPIM	\$3,270	-
New Jersey	CPIM	\$3,155	\$3,670
New Jersey	CSCP	\$2,965	\$3,570
Houston	CSCP	\$2,870	\$3,874
Colorado	CPIM	\$2,800	-

NTX Price	2023 Price	2024 Price
CSCP Non-Member/Core	\$ 3,249.00	\$ 3,549.00
CSCP Member/Student	\$ 2,999.00	\$ 3,029.00
CPIM Non-Member/Core	\$ 3,050.00	\$ 3,350.00
CSCP Member/Student	\$ 2,800.00	\$ 3,100.00
S&OP Non-Member/Core	\$ 150.00	\$ 150.00
S&OP Member/Student	\$ 125.00	\$ 125.00

Opportunities & Targets

- \$300 price increase CPIM/CSCP
- Consider CTSC New Training
- Consider FSOM New Training
- Increased Focus on Private Classes
- Target Board Year Revenue = \$157.3K
- Target Board Year Net Income = \$32.3K

8/19 – 10/14 CSCP Class

10/14 – 12/16 CPIM Class

1/20 – 3/9 CSCP Class

4/6 – 6/1 CPIM Class

6/14 S&OP Class Start

6/29 – 8/17 CSCP Class

July	Aug.	Sept.	Oct.	Nov	Dec.	Jan.	Feb .	Mar.	Apr.	May	June	July
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Challenges We Face



REVENUE

Selling certification classes
Increasing Membership
Finding new sources of revenue
(event sponsors, ads)



MEMBERSHIP

Engaging Members across large
geographic area

- Fort Worth (westside) events
- Non-traditional connections
(forums, newsletter, social media)



LEADERSHIP

Growing chapter leaders
Adding support to Board

Notes from Meeting

- Create Member-benefit analysis
- Review member vs. guest costs to ensure member benefit
- Increase cost for PDM, Social and Tours
- Increase courses by \$300 per student
- Increase instructor pay to \$110 hourly rate
- Need more than 6 students to make a class
- Board Meetings –virtual @ 6:30 PM 3rd. Thursday, alternating months

Financial Update – Revised 23-24 Budget

	Chapter Relations	Corp	Marketing	Membership	Operations	Education	TOTALS
INCOME	\$0	\$1,200	\$0	\$18,000	\$5,500	\$132,123	\$156,823
EXPENSES	\$2000	\$26,060	\$7,576	\$1,200	\$30,670	\$105,142.60	\$172,648.60
NET INCOME	-\$2000	-\$24,860	-\$7,576	\$16,800	-\$25,170	\$26,980.40	-\$15,825.60