

UPCOMING EVENTS

September

- 8th **NAPM-Houston Dinner Meeting**
- 9th **Seminar – “Supply Chain: Strategic Sourcing”** presented by Bob Wislowski, Penn State Univ.
- 24th **Volunteer Dinner Meeting**

October

- 7 – 9th **63rd Southwest Supply Management Conference, Plano, TX**
- 13th **NAPM-Houston Dinner Meeting**
- 14th **CPSM Bridge Review**
- 15 – 16th **CPSM Review**
- 22nd **ISM Satellite Seminar** - “Navigating the Numbers: A Supply Manager’s Guide to Defining and Applying Economic and Financial Concepts”

Check out the details for all events
www.napmhou.org

Pre-Meeting:
“Meet Your Committees”

Location:
Sheraton Houston Brookhollow Hotel
3000 North Loop West,
Houston, Texas 77092

Cost:
\$27 with Reservation,
\$30 at the door without reservation

When:
5:00 pm – Pre-Meeting
6:00 pm – Dinner
7:00 pm – Program
8:30 pm – Adjourn

September 8th General Meeting

“e-Commerce: The Present Environment”

Robert J. Wislowski, CPSM, C.P.M.
Adjunct Instructor, Pennsylvania State University
By Mara Stanfield, C.P.M.

Without question, E-Commerce in general and E-Procurement in particular are some of the most exciting developments in supply management in recent years. No longer are buyers responsible for non-value adding activities and paperwork processing. The release from tactical responsibilities allows supply professionals to focus on the more strategic aspects of their jobs – directly supporting organizational competitive, continuous improvement goals.

Join faculty member, Bob Wislowski, CPSM, C.P.M. of the Pennsylvania State University, as he discusses the current status of E-Commerce in the U.S. business environment, the benefits and pitfalls realized thus far, and future trends for these tools which are recognized as crucial to successful supply chain management.



Robert J. Wislowski is an adjunct instructor affiliated with various campuses at Penn State, as well as Saint Joseph’s University’s online, continuing education, and long-distance learning programs for credit and noncredit courses. He also provides consulting services, primarily in the field of public procurement.

Mr. Wislowski joined Penn State as an adjunct instructor in 1992 and has taught noncredit courses and workshops in supply management and associated technologies, predominantly the Certified Purchasing Manager exam preparation program.

He retired from the Southeastern Pennsylvania Transportation Authority, where he served as manager of data management and control in the materiel and contracts department. He was responsible for all purchasing and inventory support systems, including the development, implementation, and administration of hardware and software systems and special programs, such as procurement cards, property control, divisional and supplier performance metrics, and e-commerce initiatives. He has also conducted numerous supply chain management seminars on behalf of the members of the Philadelphia affiliate of the Institute for Supply Management. Mr. Wislowski earned a B.S. in accounting from Villanova University.

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PRESIDENT'S MESSAGE



Welcome back everyone from your summer break! I hope everyone had an enjoyable summer.

Would you like to serve on a committee but don't know enough about the various committees to make an informed decision? Do you want to help on a project but can't make a long-term commitment?

Your Board and Committee Chairmen have worked hard this summer planning and developing a course for a successful year. In addition, NAPM -Houston has designated September as volunteer month. Starting at 5:00 p.m. on Tuesday, September 8th, the different committees and buyers groups will be available in the ballroom prior to the general meeting. This allows you a comfortable, relaxed environment in which to learn about the committees and their functions. You will be able to find out about long-term and if your time is limited, short-term opportunities. Come get involved; learn about the benefits of volunteering and make some new friends at the same time.

You can also join me on Thursday, September 24, 2009 at 6:00 p.m. at the Sheraton Brookhollow if you are interested in volunteering. During this meeting we will review our agenda for the year and numerous volunteer opportunities available.

Remember, September is also "Back to School" month. We will be collecting school supplies for students at William W. Scarborough Elementary and Patrick Henry Middle Schools.

Again "Welcome Back" and I look forward to meeting you at our volunteer night and I am excited about the great year we have planned!!!

Kim Wren, A.P.P.

President, NAPM - Houston, Inc.
kim.wren@amegybank.com, (713) 232-2134

September 2009 Pre-Meeting: "Meet Your Committees"

All committees & groups sponsored by NAPM-Houston will be participating in the traditional pre-meeting time slot from 5:00 p.m. to 6:00 p.m. Come visit with the committee representatives and learn about their respective committees. If you have questions or just want to express your thanks for their hard work and efforts, this is the time. If you are interested in volunteering, this is definitely your opportunity to find out what would be best for you! Volunteering provides a benefit to your association and your own personal growth Nobody looses! We have a place for you and you can make a difference!

| | |
|-----------------------------|--------------------------------------|
| Awards | Programs |
| Business Survey | Public Relations |
| Communications | School Partnership |
| Greeters | Special Activities (Golf Tournament) |
| Membership Activities (MAC) | Website |
| Marketing | Healthcare Buyers Group |
| Professional Development | Supplier Diversity Group |

Arnold L. Yauch Award Achievement of Excellence Award Presented to Edward M. Wahowski

By: Gail Fuselier



The June 9 Installation of Officers dinner meeting recognized a special honor bestowed upon very few. The Arnold L. Yauch Achievement of Excellence Award recognizes an "outstanding member whose contribution has far exceeded succeeding norms of service." The member must be either a former James O. Cox Outstanding Member award recipient or have served as President of NAPM-Houston. This is

not an annual award, rather given to one who deserves the recognition for contribution that far exceeded norms of service.

Edward M. Wahowski has exhibited outstanding leadership qualities throughout his 14 year tenure with NAPM-Houston with expertise and statesman-ship leadership. Ed is a Past President, 2005-2006 as well as a former James O. Cox Outstanding Member award recipient. For 2008-2009 Ed, is currently serving as our Treasurer/Business Manager, as our Communications Chairman, webmaster, board advisor and mentor to several of our members. He continues to volunteer for our Golf Tournament after eight years of participation. Ed truly exemplifies the spirit of the Yauch Award with his dedication and generous commitments to NAPM-Houston.

In 1990, NAPM-Houston established the Arnold L. Yauch Scholarship Fund and presented the 1st Arnold L. Yauch Achievement of Excellence Award to long time member and Association Secretary/Treasurer, Arnold L. Yauch, C.P.M. There have been only five previous Yauch L. Yauch Award winners; Arnold L. Yauch, C.P.M. in 1990, Earl. D. Cornelson, C.P.M. in 1996, Lee E. Elmore, C.P.M. in 1997, Douglas R. Miller, C.P.M. in 2001 and Sharon Malkovicz, C.P.M. in 2004.

Congratulations, Ed, on receipt of the prestigious Arnold L. Yauch Achievement of Excellence award!

Professional Development Committee

By: Joseph R. Britt

Certification recipients

Congratulations to our affiliate members who recently received a certification!!

John Still, Lifetime C.P.M. – June 24, 2009
Chad Bonstead, C.P.M. – June 24, 2009
Kevin Jones, Lifetime C.P.M. – June 30, 2009
Billie Walker, CPSM – July 1, 2009
Wade Hooker, CPSM – July 22, 2009
Gary Roe, CPSM – August 5, 2009
Cynthia Oswald, C.P.M. – August 5, 2009
Bill Loper, CPSM – August 5, 2009

Dinner Meetings 2009 - 2010

By: Laurie Oberhoff, Communications Chairman

Everyone is asked to RSVP their dinner reservation to attend the monthly 2009-2010 NAPM-Houston General Meetings.

The dinner meeting reservations and cancellation deadline is always the same date, the Thursday prior to the dinner meeting, which would be September 3rd by 5:00 p.m. to naphou@earthlink.net

\$27 with Reservation
\$30 at the door without a reservation

Note:

Dinner is not a requirement. Our program speaker begins at approximately 7:00 pm.

NAPM has provided seating for those who would like to attend our programs and enjoy our Speakers.

Supplier Diversity Group

By: Rose Berberian, Co-Chairperson

Want to add some excitement to your life? Then become a member of the NAPM-Houston Supplier Diversity Group. Our committee is very interactive and we have lots of fun! We meet once a month (except for July, August and December) and discuss how we can bring value to NAPM-Houston members. You may recall some of our previous events such as the real-life business case study presented by UH-Downtown professor, Dr. Adams. There was lively group discussion and great ideas shared with the whole membership. We have had group panel discussions with various corporate organizations' purchasing executives and supplier diversity professionals.

Most recently, we had a panel discussion with local minority-owned businesses and later had the esteemed Dr. Craig Clayton as our speaker. We presented a Supplier Diversity health fair where we had supplier diversity professionals from various industries provide information and diagnose your company's level of inclusion and gave prescriptions on how to improve your company's supplier diversity outreach.

So, if you want to contribute to some great events please feel free to contact us at naphouston.supplierdiversity@gmail.com.

School Partnership Committee

By Matt Meyer

This past year has been quite a hectic one, especially for our local schools. They faced numerous challenges including the pandemics, natural disasters, and lack of school supplies. We ask for your support by contributing during our Annual School Supplies Drive during the September 8th, 2009, General Dinner Meeting. We will be collecting all types of donations with a key focus on:

- Yellow #2 Pencils
- Sets of Washable Markers
- Spiral Notebooks (70 sheets, wide ruled)
- Binders (1", 2")
- Backpacks (Mesh Only)
- Red (6th Grade), White (7th Grade), Navy (8th Grade) Polo Shirts (All Sizes)

If you have any questions, or concerns, please feel free to email the committee at

NAPM.Houston.School.Partnership@gmail.com .

See the links "about" NAPM - Houston's Sponsored Schools

- Walter W. Scarborough Elementary School
3021 Little York Rd., Houston, Texas 77093
Mrs. Susan Bargaleski, Principal
<http://es.houstonisd.org/ScarboroughES/>
- Patrick Henry Middle School
10702 E. Hardy, Houston, Texas 77093
Mr. Christian Sanders, Principal
<http://ms.houstonisd.org/HenryMS/>

Past Presidents Luncheon

By: Jackie Milhoan, Chairman

NAPM-Houston Past Presidents enjoyed lunch Wednesday, August 19, 2009 at Vargo's. Twenty-seven Past President's and current Board Members attended. Everyone seemed to enjoy the social hour and then settled down to a delicious lunch of grilled salmon, steak or chicken with a view of Vargo's beautiful gardens overlooking the bayou.

Jackie Milhoan, Past President and Past President Committee Chairman, welcomed the group and updated the group about a few past presidents unable to attend. Tom and Paula Todd still hale from Mobil, Alabama and send their regards. Allen Brumley has turned into a farmer/rancher in Palestine, Texas and couldn't attend because it's hay-baling season. A trip to Galveston with his young grand children kept Earl Cornelsen away. Denny Newton has moved to a retirement community in Dallas near his son and his family. He misses his friends in Houston but he's staying very busy. Roy Stockton reports that he is still working "some", primarily from home, and that he lost his wife of seventy-two years this past January. Others were working and just couldn't get away.

Kim Wren, President, talked some about her goals for the year and Jo Ann Prazak, Vice President, reported on the budget.

All in all this was a very successful re-union of Past Presidents.

NAPM – Houston, Inc. Welcomes Our Newest Members

By: Gail Fuselier – Immediate Past President

Please join me in welcoming our new Members

Rebecca Morgan, MIT Professionals Inc
 Jerry Adams, Oceaneering International, Inc.
 David Blanc, Ernst & Young LLP
 Robert (Chris) Burnett, Shell Oil
 Robert Cates, Kirby Corp.
 Kathryn Conrad, Shell Oil
 Angela Cook, C.P.M., Wayne Enterprises
 Jaime Garcia, CenterPoint Energy
 Carol Glasgow, ConocoPhillips Co.
 David Hammerle, Bechtel Corporation
 Milka Hernandez, Hess
 Rob Hope, Shell Deer Park
 Terry Hudson, ConocoPhillips Co.
 Mark Hutton
 Dennis G. Jasek, CPSM, C.P.M., CenterPoint Energy
 Ken Johnson, Cameron
 Justin Johnson
 John Jones, Citizens Medical Center
 Larry Kirchner
 Hiroko Kobayashi, Bechtel
 Senthil Kumar, Dresser Inc.
 Richard Lilledahl, Wilhelmsen Maritime Services
 James Martin, Aramco
 Allen McNickle, Shell Oil
 Nage Moummar, Petrolera Ameriven
 Vance Nivens, National Oilwell Varco
 Hou Ong
 John Peacock, Worley Parsons
 Paul Schauer, Shell Oil
 Jonathan Schooler, NRG Energy
 Joshua Scott, Baker Hughes
 Marianna Simmons, Shell Oil
 Ron Theus, Citizens Medical Center
 Amy E. Waldorf, Commonwealth Engineering & Constructions, LLC
 Kelly White, Shell Oil Co.
 Claude Whitsett, NRG Energy Inc.
 Suzane Williams

Student Members:

Chucky D. Nicholson
 Dustin Kieschnick
 Yolanda Langston, Dynegey, Inc
 Daniel McBride
 Tamika Holley

News & Notes

By: Jo Ann Prazak – Vice President

Condolences

Our sincere condolences are extended to Kathy Silverberg, C.P.M. and family in the death of her father who resided in Florida. Kathy is a long time member, served in many board positions and is active on the Pro-D Committee.

Congratulations!

Congratulations to Teena Bell and Marian Nimon, two of our board members who were nominated for the Soaring Heights Award. This very prestigious award, presented by the Texas Business Alliance recognizes those supplier diversity professionals who have demonstrated a commitment to women initiatives and who champion minority and women owned enterprises within their organizations as well as within the community. An awards brunch was held in their honor, along with 9 other nominees on August 8th at the Omni Hotel in the Galleria during the final day of the One Woman™ National Business Conference. The nominees were selected by *Women's Enterprise Texas Magazine*, the WBEA and HMSDC. Teena and Marian, we are so proud of your achievements!

- Teena Bell is Senior Manager Global Supplier Diversity, Halliburton and currently serves as our Special Activities Chairperson.
- Marian Nimon, M.B.A., C.P.M. is Associate Director, Historically Underutilized Business (HUB) and Federal Small Business Program, The University of Texas M. D. Anderson Cancer Center and currently is serving as Director at Large

Speedy Recovery

We are pleased that Kathy Silverberg, C.P.M. is recovering well from minor surgery she had in June. Kathy is a long time member, served in many board positions and is active on the Pro-D Committee.

If you have News or Notes please contact Jo Ann Prazak, C.P.M. Phone: 281-423-0343 or e-mail them to JoAnn.Prazak@SwiftEnergy.com

September 24, 2009 Volunteer Dinner

By Kim Wren A.P.P., President

Thursday September 24, 2009, 6:00 PM at the Sheraton Brookhollow we will host our volunteer dinner, open to all members at no cost, who would like to help us plan our 2009 – 2010 events. During this meeting we will review our agenda for the year and numerous volunteer opportunities available.

Dinner reservations are required. Please Email me directly at kim.wren@amegybank.com by 5:00 Tuesday, September 22, 2009 to RSVP.

We look forward to you joining us.
Kim Wren, APP
President, NAPM Houston Inc.

C.P.M. Exam Registrations EXTENDED through Sept 30, 2009

ISM continues to receive requests from individuals for additional time to complete the C.P.M. examination process. Due to the continued interest ISM has extended the C.P.M. exam registration deadline.

C.P.M. exam registrations will be accepted through September 30, 2009. For those registering to take a specific C.P.M. exam for the first time there are no exceptions to this deadline.

The only exception to the September 30, 2009 C.P.M. exam registration deadline: If an exam candidate fails a C.P.M. exam in 2009, he/she will be allowed to register to RETAKE THE EXAM MODULE FAILED.

All C.P.M. examinations must be completed by December 31, 2009. No exceptions. There are no refunds for C.P.M. exam registrations made in 2009.

ISM strongly recommends candidates schedule exam dates as soon as possible to avoid scheduling conflicts at the testing centers, and to allow time to retake an exam module they failed if needed. ISM cannot guarantee a space at testing centers.

If you have any further questions regarding the C.P.M. program, please contact Kara in ISM Customer Service at 800/888-6276, extension 3072, or kbuckley@ism.ws.

2009 - 2010 Dinner Meetings & RSVP Deadlines

By: Laurie Oberhoff * Communications Chairman

| General Meeting | RSVP Deadline By 5:00 PM |
|---------------------------|-------------------------------|
| September 8, 2009 | Thursday, Sept 3, 2009 |
| October 13, 2009 | Thursday, Oct 8, 2009 |
| November 10, 2009 | Thursday, Nov, 5, 2009 |
| January 12, 2010 | Thursday, Jan 7, 2010 |
| February 9, 2010 | Thursday, Feb 4, 2010 |
| March 9, 2010 | Thursday, March 4, 2010 |
| April 13, 2010 | Thursday, April 8, 2010 |
| May 11, 2010 | Thursday, May 6, 2010 |
| June 8, 2010 | Thursday, June 3, 2010 |
| No Dinner Meetings | July, August, December |

To RSVP for Dinner, email napmhou@earthlink.net

Seminars

September 2009 Local Seminar: “Supply Chain – Strategic Sourcing”

Presented By: **Robert J. Wislowski, CPSM, C.P.M.**
Adjunct Instructor, The Pennsylvania State University

This half-day workshop is a fast-paced and highly interactive and introspective analysis into the nature of strategic sourcing, its mechanics and the methods to effectively implement and maintain a strategic sourcing capability. Participants will consider an actual case study and develop a strategic sourcing plan by applying proven concepts and techniques for the discovery, evaluation, selection, development and management of the supplier base.

When: Wednesday, September 9, 2009

Location: Sheraton Houston Brookhollow at 3000 North Loop West in Houston, TX 77092

Time: 8:30 a.m. – 12:30 p.m. (Arrive 8:00 a.m. for check in)

Member registration fee and deadline: \$65 by Monday, September 7, 2009

For details, see link for “[2009-2010 Seminars](#)” on our website, www.napmhou.org

CPSM Bridge Review and CPSM Regular Review

Presented By: **Dr. Russell Morey, C.P.M., CPSM**

When: Wednesday, October 14 (Bridge only) – Thursday and Friday (Regular), October 15-16, 2009

Location: Sheraton Houston Brookhollow at 3000 North Loop West in Houston, TX 77092

Time: 8:00 a.m. - 5:00 p.m.

Registration fees and deadline:

Bridge - \$150

Regular - \$150/day or \$225/Both days (Includes materials, continental breakfast and lunch) by Thursday, October 8, 2009.

For details, see link for “[2009 -2010 Seminars](#)” on our website, www.napmhou.org

ISM Satellite Seminar: “Navigating the Numbers: A Supply Manager's Guide to Defining and Applying Economic and Financial Concepts”

Supply managers continue to find themselves immersed in a sea of numbers. To gain competitive advantage and navigate through today's rocky economy, supply chain professionals need the ability to make sense of a multitude of numbers -- what they mean, where they come from, how to forecast them, and how they impact supply management decisions.

When: Thursday, October 22, 2009

Location: Aramco Services Company at 9009 West Loop South in Houston, TX 77096

Time: 9:00 a.m. – 1:30 p.m. (Arrive 8:15 a.m. for check in)

For details, see link for “[2009-2010 Seminars](#)” on our website, www.napmhou.org

November 2009 Local Seminar: “The LeaseSpeak System™: Your Guide to Saving Money on Leases”

Presented By: **Mary A. Redmond**, President of Independent Lease Review, Inc.

Are you spending too much on your equipment leases? Do you know? How often have you experienced automatic renewals or extensions? Did the first lease invoice contain a few surprises that cost you extra money?

When: Thursday, November 19, 2009

Location: Sheraton Houston Brookhollow at 3000 North Loop West in Houston, TX 77092

Time: 8:30 a.m. – 12:30 p.m. (Arrive 8:00 a.m. for check in)

Member registration fee and deadline: \$65 by Friday, November 13, 2009

For details, see link for “[2009-2010 Seminars](#)” on our website, www.napmhou.org

"Energize Your Career"

at the 63rd Southwest Supply Management Conference!

Marriott Dallas/Plano at Legacy Town Center

October 7-9, 2009



The **63rd Annual Southwest Supply Management Conference** will be held *October 7-9, 2009* in Dallas! By attending this conference, you will have the opportunity to learn new skills, enhance the skills you have, network with peers, earn 12 CEH's and learn best practices that are critical for business today. Make your reservations early to receive the *special conference rate* of \$179/night.

The **Educational Theme** of this year's conference is "**Energize Your Supply Management Career.**" The Conference will include six leading edge educational tracks for supply management professionals that provide 30 workshops to choose from. Learn best practices and reinforce skills that work in today's business environment. **CPSM**[®] reviews and pre-conference seminars will be held for additional educational value.

You can take advantage of the expertise and winning perspectives shared by this year's line-up of **keynote speakers** including **Valerie Pelan**, Certified Leadership Coach and Executive Trainer; **Bryan Dodge**, professional speaker, author and radio show personality and **Carl Youngberg**, professional speaker and author of "Make Yourself Matter-Becoming Your Own Best Asset."

Don't miss out on this timely line-up. See the [Conference Brochure](#) for a complete list of sessions in each track.

- Track 1 – CPSM[®] Bridge Exam Review
- Track 2 – Strategic Cost Analysis and Management
- Track 3 – World Class Negotiation Practices
- Track 4 – Risk Mitigation and Management
- Track 5 – Effective Contracting for the World Class Supply Chain
- Track 6 – Supply Chain Efficiencies-Logistics, Transportation

[Register Now!](#) Conference Registration Fee: \$350 for ISM Members; \$400 for Non-ISM Members



Host Hotel:

Marriott Dallas/Plano at Legacy Town Center
7120 Dallas Parkway
Plano, Texas 75024

Toll-Free Reservations: 1-800-228-9290 Mention "Institute for Supply Management" to reserve your room at the *special conference rate* of \$179/night, available through **September 14, 2009**. You also may [REGISTER ONLINE](#).

For more information see our website: <http://www.ismswscf.org/swpc/index.htm>

NAPM - HOUSTON BUSINESS REPORT

For further information, contact: Mike Valant, C.P.M., A.P.P. (281) 518-8575

Press Release

August 10, 2008

HOUSTON PMI BASICALLY UNCHANGED

Employment Better While Rest Remain Unchanged

The Houston Purchasing Managers Index, a leading indicator of regional production, moved slightly upward to **43.8** in July, marking a fourth consecutive month of modest improvement from the record low of **39.0** in March. The PMI, which indicates likely shifts in production volume three or four months in advance continues to signal production declines, but at a decelerating pace.

The PMI has a possible range of 0 to 100. Readings over 50 indicates production gains over the near term; readings below 50, coming contraction. July is the Houston PMI's ninth consecutive month in negative territory.

The Houston PMI is based on diffusion indexes for eight indicators. (A diffusion index is simply the percentage of respondents reporting increases from the previous month less the percentage reporting declines.)

The largest change among the eight components in July was in Employment, which continued to increase since the low of -48 in March, rising from -32 to -29 in July. Finished Goods fell from -12 to -27. Production which had been stagnant since the beginning of the year, ranging between -12 and -21 fell to -27. Purchases edged down to -22, a little different from June's -20. Prices Paid (for major purchases), which fell consistently from 13 last October to a deeply depressed -48 in April, continued up to -27 in July.

Purchased Inventory one of the two components of the PMI for which declines represent *good news*, improved to -17 in June and July from -25 in May. The Finished Goods Inventory went from -25 May to -12 June to -27 in July. Given the relatively small upward movement of the Houston PMI again in July, it's not surprising that "no change" dominated responses on most components. Only for Employment where 12 percent of respondents reported increases and 40 percent reported the same and on Finished Goods Inventory, where 10 percent saw increases and 37 percent saw decreases,

The Houston PMI has fallen sharply over the past 12 months. In May and June last year, it posted readings above 60, a level that represents an extremely positive outlook for regional production. Before turning negative last November, 2008, the Houston PMI posted 58 consecutive months of positive readings that averaged a robust 59.1. For the past twelve months, in contrast, the Houston PMI has averaged 45.1.

It bears emphasis that the recent "improvements" on PMI components still leave it in negative territory, indicating likely further slowing in production. The rate at which regional performance declines should taper, but Houston still hasn't reached a bottom.

Commodities in Short Supply:

Nothing in short supply at this time, Pipe Flanges, pipe from Mills, Hubs for piping. Some shortages are actually reflections of fewer people due to cutbacks and fewer quantities of material being ordered resulting in slowdowns in production, Sales orders.

Commodities UP in Price:

Vaccines, copper, Highly Engineered equipment, None, Carbon & Stainless Steel, none, ERW Pipe is on the rise due to Coil increases, Everything is negotiable.

Commodities DOWN in Price:

Computers & Components, commodities; gasoline is going down again. Housing prices are still depressed, stable, none, Domestic seamless pipe may see some price decreases before stabilizing-inventories are still very high

July, 2009

| | UP | SAME | DOWN | N/A |
|-------------------------------|-----|------|------|-----|
| Sales | 20% | 37% | 41% | 2% |
| Production | 10% | 44% | 37% | 10% |
| Employment | 12% | 46% | 41% | 0% |
| Purchases | 27% | 24% | 49% | 0% |
| Prices Paid (Major Purchases) | 7% | 59% | 34% | 0% |
| Lead Times (from Sellers) | 12% | 61% | 27% | 0% |
| Purchased Inventory | 12% | 44% | 29% | 15% |
| Finished Goods Inventory | 10% | 41% | 37% | 12% |

Index 2008 - 2009 (9 months)

| NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | July |
|-----|-----|-----|-----|-----|-----|-----|-----|------|
| -10 | -27 | -34 | -40 | -28 | -13 | -30 | -22 | -22 |
| -3 | -27 | -21 | -20 | -18 | -20 | -18 | -12 | -27 |
| -15 | -19 | -39 | -38 | -48 | -43 | -33 | -32 | -29 |
| -3 | -16 | -39 | -30 | -43 | -38 | -35 | -20 | -22 |
| 8 | -11 | -32 | -38 | -40 | -48 | -43 | -24 | -27 |
| -3 | -11 | -29 | -38 | -43 | -33 | -33 | -22 | -15 |
| -15 | -30 | -13 | -20 | -20 | -15 | -25 | -17 | -17 |
| -8 | -22 | -13 | -15 | -13 | -18 | -25 | -12 | -27 |

Note: Each monthly index was calculated by subtracting the "DOWN" percentage from the "UP" percentage. The indices are not seasonally adjusted.

| | Aug08 | Sept08 | Oct08 | Nov08 | Dec08 | Jan09 | Feb09 | Mar09 | Apr09 | May09 | Jun09 | Jul09 |
|---------------|-------|--------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Composite PMI | 55.7 | 51.5 | 51.7 | 49.0 | 45.4 | 39.6 | 39.6 | 39.0 | 40.9 | 41.9 | 43.5 | 43.8 |

A reading above 50 indicates that the Houston economy is generally expanding; a reading below 50 indicates that it is generally contracting.

The NAPM-Houston Business Report began publication in January 1995.

Subscriptions to the report are available through NAPM-Houston.

N. A. P. M. - Houston, Inc. is an affiliate of the Institute for Supply Management

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NAPM-Houston, Inc.
P. O. Box 771203
Houston, TX 77215-1203

Address Service Requested

September 2009 Dinner Menu

Tossed Mediterranean Salad
Citrus & Almond Crusted Chicken With Thyme Sauce
Rice Pilaf
Roasted Seasonal Vegetables
Rolls with Whipped Butter
Lemon Cake

Vegetarian & Chicken dinners available upon request.
Please notify us at the time your reservations are made.
You must request an alternate meal in advance.

NAPM - Houston, Inc. - Policy Statement

NAPM-Houston, Inc. shall conduct all association functions in a professional manner, and without malice or discrimination, by word or action, with relation to race, religion, national origin, color, sex, age, or disability. Anyone who feels an offense against them has transgressed, or has infringed upon, or violated their protection under this policy, should contact any member of the Board of Directors Executive Committee for resolution under the established rules and regulations adopted by NAPM-Houston, Inc. Board of Directors.