



APICS Society Update



Fred Tolbert
September 13, 2007



*Advancing Productivity, Innovation,
and Competitive Success*



APICS: Our Mission

APICS builds knowledge and skills in operations management professionals to enhance and validate abilities and accelerate careers.

We help our members and their organizations successfully compete and build a stronger global economy.



APICS Today

- 270 Chapters and 43,000 members
- 170 Student chapters and 2,300 student members
- Certifications
 - 30,000 current CPIMs
 - 4,000 CIRM
 - 1,600 CSCP (2006)
- Certification Exams
 - 30,000 in 30 countries



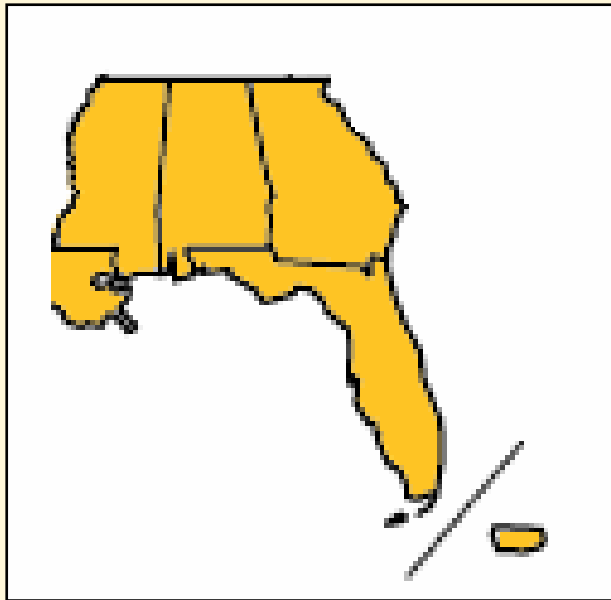
APICS Governance

- New APICS Governance Structure implemented beginning in January, 2008
- Key initiatives:
 - Reduced Board of Directors from 21 members to 17
 - Created Directors-at-Large on the APICS society BOD
 - Consolidated regions from 14 administrative regions to 9 regions.
 - APICS Region 4 (Alabama, Florida, Georgia, Mississippi, Louisiana, Puerto Rico) join Tennessee, Kentucky, North Carolina, & South Carolina to form the the Southeast District



Today's APICS Region 4

States:



Alabama

Florida

Georgia

Louisiana (New Orleans)

Mississippi

Puerto Rico

24 Chapters

2,700+ Members

New Southeast District

States:

Alabama

Florida

Georgia

Kentucky

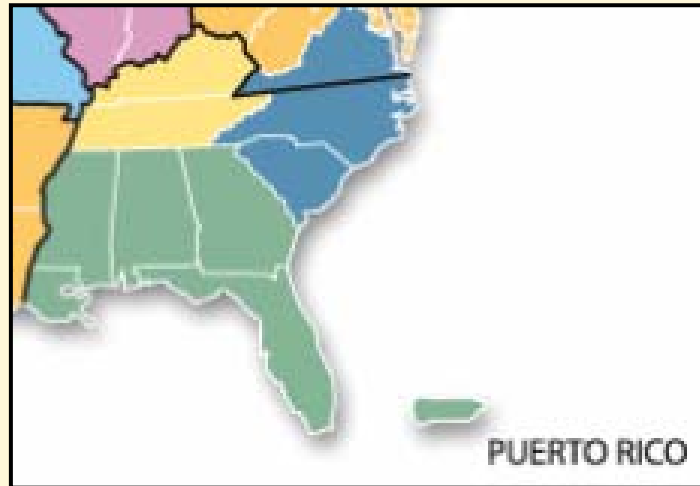
Louisiana (New Orleans)

Mississippi

North Carolina

South Carolina

Tennessee



Puerto Rico

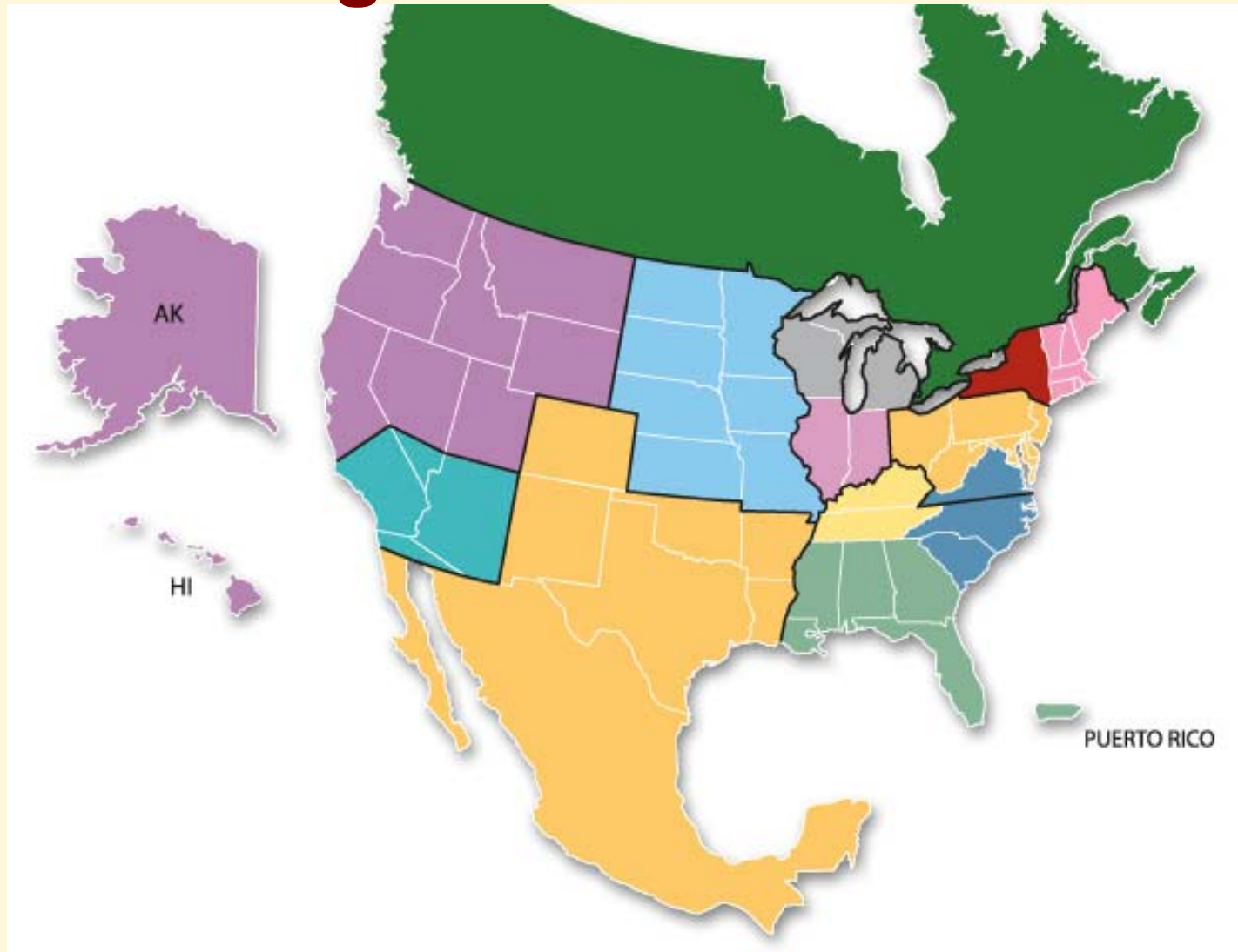
49 Chapters

5,500+ Members



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14 Regions = 9 Districts



Southeast District Transition

- The District Meeting has been planned by the District Transition Team
 - Region VP's (Fred Tolbert, KC Kasserian, Bob Castleman)
 - Transition Team Members:
 - » Region 4: Alma Ballard, Denise Gillespie
 - » Region 11: Scott Campbell, Wilson Grab
 - » Region 12: Betsy Tucker, Arvil Sexton,



APICS Directors at Large

- Purpose:
 - To diversify input into Board discussions and decisions
 - To provide resources / momentum to address strategic priorities
 - To create advocates for APICS within the professional communities and markets we are trying to reach.
- I am looking for nominations!!



APICS Strategic Direction

- Strategic Committee presented consolidated recommendations for goals in 6 key areas for 2010:
 - Finance
 - Membership
 - Products
 - Body of Knowledge
 - Internationalization
 - Awareness



APICS Integrated Membership Strategy

- This strategy supports the membership strategic initiative:

Focus on providing the value that members and prospective members

are seeking to improve their on the job performance, advance in their

careers, and thrive as operations management professionals.

- 2010 Membership Objectives:
 - Membership = 60,000
 - International Membership = Increase 15,000
 - Membership Retention = 82%



APICS Integrated Membership Strategy

- Creation of APICS Local Field Staff
- BOD authorized Corporate Staff to implement Local Field Staff in the Districts.
- Objective are to:
 - Support partners (chapters, districts, etc.)
 - Incubate new programs and services to meet member needs
 - Participate in District meetings and training
 - Provide support for chapters to meet standards



APICS Integrated Membership Strategy

- Expanding the Membership Value Proposition
- Working to develop a revenue-sharing model, including a likely dues increase
- Working to standardize association and Chapter dues
- If approved, the plan would rollout in January 2008 with a completion dates of December 2008



Membership Models

- Group site & Enterprise models reviewed by Group Site Task Force, alternatives presented to BOD
- BOD recommendations to guide task force:
 - Corporate Associate/Corporate Subsidiary category will not be offered after December 31, 2008
 - Task Force to develop implementation plan by July
 - Timeline, communications plan, conversion recommendation
 - Motion from committee if changes to bylaws are recommended
- What are we trying to accomplish
 - Deliver membership value for enterprise, employee, and chapter
 - Meet needs of employees and employers
 - Drive long-term relationship with APICS (retention)



Membership Models

- Key Elements of the Group Site Membership Offering:
 - Single corporate offering
 - Chapters and Corporate Services can sell the new model
 - Two Tiers:
 - Tier 1: 5 member minimum
 - Tier 2: 25 member minimum
 - Enhanced reporting and account management for Tier 2
 - Offer centralized or individual billing
 - Consistent membership fee (so we don't have to know members location before quoting a package price)
 - Pricing set to enable chapters to receive comparable or increased dues revenue
 - No Corporate Associates membership category



Membership Models

- Group Site Membership Implementation Plan
 - Gradual implementation, coinciding with scheduled membership expirations
- Communications Plan
 - Step 1, 2, 3, etc. Key Elements of the Group Site Membership Offering:
 - Single corporate offering
 - Chapters and Corporate Services can sell the new model
 - Two Tiers:
 - Tier 1: 5 member minimum
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My Priorities as District Director

- Restore focus on the development of APICS education products and services.
- Advocate consolidation of CMS and CBAR programs into one mandatory program for all chapters.
- Advocate modification of CPIM to make it more relevant to distributors and global sourcing companies.



APICS 50th Anniversary

Powering the Future of
Operations



Advancing Productivity, Innovation, and Competitive Success

APICS 50th Anniversary

- Supply Chain Contest / Second Harvest
 - Individuals and chapters will participate
 - Highlights links between our members and the power of the APICS network
 - Contest goals emphasize:
 - Number of participants
 - \$100,000 goal
 - An opportunity to support your local community
 - Contest winners will be announced in Denver



APICS Society Service Project

Imagine...

...a life where a hot meal is a luxury.
...a life where going to bed hungry happens all too often.
...a life where dessert and birthday cake are only a dream.

Thirteen million children in our country
don't have to imagine this life. They're living it.

Help change these children's lives

In honor of APICS' 50 years of accomplishments,
we're giving back to the community in the best way we know how.
We're building a supply chain against hunger, and we need your help.



- APICS is sponsoring a 50th Anniversary Supply Chain Contest
- Second Harvest is a national network of food banks
- Our national goal is \$100,000 - Region 4 Goal is \$7,500
- Project administered by local chapters
- Information at:

• http://www.apics.org/education/conference/secondharvest_FAQ.asp



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Headquarters Office

- Current lease expires in 2009
- Relocation Committee
- Final candidates
 - Washington, DC
 - Chicago
 - Cincinnati
 - Dallas
- Final selection – Chicago
- Negotiations are underway to select the specific office building
- Expect move in 2008



APICS International Conference



APICS International Conference & Expo

October 21–23, 2007 • Denver, Colorado

Home Sessions Speakers Events Schedule & Travel Exhibit & Sponsorship

REGISTER ▶

Quick Links

- Schedule at a Glance
- Preliminary Program
- Sign up for the Conference Newsletter
- APICS Scholars Education Program
- Certification Testing
- Expo
- Community Center

23 MyScheduler

APICS 2007: 50 Years in the Making!

Fifty years of building a strong membership. Fifty years of providing operations management education. Fifty years of offering comprehensive resources.

APICS 2007 is celebrating 50 years of you!
This year's conference is all about you and what you need to succeed in the marketplace, make your company more competitive, and further your career. We'll take a look at the last 50 years and where the profession has taken us. And we'll examine where we are today. But we're not stopping there.

Watch APICS 2007 general session speaker, Ken Blanchard Ph.D., best selling coauthor of *The One Minute Manager*, tell you why he's looking forward to being a part of the APICS 2007.



Powering the Future of Operations



2007 APICS Region 4 Awards

- Chapter Minimum Standards (CMS) specifies minimum administration functions required of all APICS chapters
- Key elements of CMS
 - Financial responsibility
 - Member needs survey
 - Functioning Board of Directors
 - Communications – chapter web site
 - Professional development activities
 - Delivery of APICS education
- Participation in Chapter Benchmarking & Reporting (CMS) is mandatory for all chapters



2007 APICS Region 4 Awards

- Chapter Benchmarking and Reporting (C-BAR)
- C-BAR recognizes chapters for activities completed over and above Chapter Minimum Standards
- C-BAR Primary Purposes
 - Provide chapters with a set of activities for a successful chapter
 - Provide process to recognize chapter that meet or exceed the accomplishment of recommended activities
 - Provide regions, Chapter Development Committee (CDC) and Society feedback on chapter strengths and weaknesses.
- Participation in Chapter Benchmarking & Reporting (CBAR) is optional



2007 APICS Region 4 Awards

- Platinum Chapters
 - Florida West Coast
 - Florida Gulf Coast
 - Puerto Rico
- Gold Chapters
 - Atlanta
 - Mid-Florida



2007 APICS Region 4 Awards

- Silver Chapter
 - BAMA
 - Central Georgia
 - Northeast Alabama
 - South Alabama
- Bronze Chapters
 - Jacksonville
 - New Orleans



2007 APICS Region 4 Awards

- Chapters Participating in CMS Program
 - Florida Space Coast (Meets CMS)
 - Central Savannah River – (Not CMS)
 - North Central Florida – (Not CMS)



2007 APICS Region 4 Awards

- Chapters Not Participating in CMS
 - Central Alabama
 - Chattahoochee Valley
 - Florida Gold Coast
 - Gumtree
 - Oeste
 - Florida Southeast
 - South Central Mississippi
 - South Florida
 - Tennessee Valley



2007 APICS Region 4 Awards

- Chapter Revitalization Status
 - Chapters have three years to achieve CMS
 - Must show progress in the interim
 - Letter will be sent to chapter presidents this month
 - Region Chapter Reps will contact chapters to discuss discuss CMS plans
 - Chapters not meeting CMS after three years face:
 - disbanding and merging with another chapter



- Questions?
- Comments?





**Thanks for your
participation in APICS!**



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