

# Membership



## Chapter Leadership Handbook

| Stock #01021-1



*Advancing Productivity, Innovation, and Competitive Success*

# MEMBERSHIP

## Chapter Leadership Handbook

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Advancing Productivity, Innovation, and Competitive Success

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*Membership–Chapter Leadership Handbook*

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## Welcome

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Congratulations on assuming the important role of membership director for your chapter! We are pleased that you have accepted the challenge to serve as a leader in the APICS community. This handbook contains information that can help you succeed in your role as a chapter membership director. It contains information, tips, and samples in the areas of membership processing, record maintenance, recruitment, and retention. These elements can be used independently or in collaboration, and they are customizable to fit your chapter's needs. The APICS Chapter and District Services Department hopes this information will help you and your chapter be successful in all aspects of membership development and recruitment.

As chapter membership director, you are the chief liaison between the chapter officers and membership. The membership director serves a vital role on the chapter board, because the success of the chapter depends on the satisfaction and involvement of the members and customers. Serving as the chapter membership director can be enjoyable and satisfying, but it requires a great deal of time, imagination, and effort. You are strongly urged to assemble a membership committee of two or three people to share in the work and the rewards (and the fun!).

As membership director, you should be aware of the key techniques and resources that will build the satisfaction and involvement of your members. In addition, effective use of key membership data and resources and development of comprehensive membership recruitment and retention strategies specific to your chapter are keys to success. Involving other chapter officers in the creation of recruitment and retention plans is also useful.

The support of volunteers like you is key to APICS maintaining its position as the global leader and premier source of the body of knowledge in operations management. To assist you with fulfilling the responsibilities associated with your role, resources are available in C-BOX (<http://cbox.apics.org>) and in the latest edition of the *Chapter Resources Catalog* (Stock #82032). There, you can access chapter management materials, tools, and samples. The APICS Leadership Central e-newsletter, and additional training resources provide you with the comprehensive tool set you need to assume your leadership role.

***Throughout this document, the following symbols indicate where to find additional information.***



***This symbol indicates the item is available for purchase from the APICS Bookstore.***



***This symbol indicates the item is available for download via C-BOX (<http://cbox.apics.org>).***

## **Incoming Membership Director's Checklist – First Steps**

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On the following list you will see some important resources, as well as key chapter administration details and documentation that you will need to have accessible.

### **The following items should be passed down from year to year:**

- an overview of My Chapter download reporting and/or membership database
- status of new member recognition activities
- status of suspended member follow-up activities
- status of certification and certification maintenance recognition activities
- prospective member data access, if available
- written summary of membership campaign planning, results, and status
- written summary of data collected via surveys and focus groups
- written report on project status or pending issues (lost applications, etc.)
- *Membership—Chapter Leadership Handbook* and C-BOX (<http://cbox.apics.org>) (marketing tool kits, *Leadership Central* newsletter, etc.)
- supply of membership brochures, applications, certificates, and promotional literature
- status of any ongoing communication with chapter members
- membership files from previous years (as far back as possible)
- names and contact information for key contacts within the district and chapter
- names and contact information for company coordinators, if applicable
- a chart with the timelines of important membership activities (newsletter deadlines, mailing labels, e-mail list, etc.)
- chapter strategic plan, chapter marketing plan, etc.
- e-mails, letters, and postcards used in recruitment and retention efforts

### **The incoming membership director should prepare for the year's program by completing the following steps:**

- Review the chapter's strategic plan.
- Review the *Membership—Chapter Leadership Handbook* featured in C-BOX.
- Contact, and interact with, other chapter officers to coordinate projects.
- Recruit a membership committee or appoint company coordinators.
- Contact the outgoing membership director to gather and review the information listed above.
- Establish responsibilities within the membership committee (contacting suspended members, welcoming new members, assisting company coordinators, etc.)
- Review and update chapter membership information on the chapter's Web site and in chapter newsletters, if applicable.

## **Membership Responsibilities**

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## Chapter Membership Director

An effective membership program requires extensive coordination and ongoing activity. As chapter membership director, it is vital you start planning to carry out the responsibilities associated with your position without delay.

The membership director is a member of the chapter board of directors and must fulfill the following responsibilities:

- Implement effective planning and coordination, in advance, to help ensure that the job doesn't get out of control.
- Use My Chapter to manage the chapter membership roster and update member contact information, as needed.
- Lead programs to promote growth in the chapter's membership; greet guests and new members at all chapter functions (e.g., professional development meetings, tradeshow, and career fairs); ensure that sufficient membership literature is on hand for distribution; and encourage networking.
- Inform the district leadership of chapter membership program successes, issues, and needs.
- Monitor the chapter's progress monthly and provide data for the chapter standards and recognition programs (CMS/C-BAR). Prepare and obtain approval for an operating budget for membership committee activities.
- Establish a formal program to welcome new members. Recognize newly certified members and members who have completed the certification maintenance program. Suggested vehicles include recognition on the chapter Web site, recognition in the chapter newsletter, personal phone calls, e-mails, and invitations to upcoming programs/events.
- Establish a program to contact members 30 or 60 days before membership expiration date and contact suspended members again to inquire about the reason for nonrenewal.
- Function as an active member of the chapter board of directors to ensure that all chapter programs are compatible with the interest of membership.
- Submit progress reports on membership committee activities to the board, as appropriate.
- Conduct membership surveys and/or focus groups periodically.
- Help to organize new student chapters and support existing student chapters.
- Identify a successor and prepare for an orderly transition to the incoming membership director.

### Keys to a Chapter Membership Director's Success

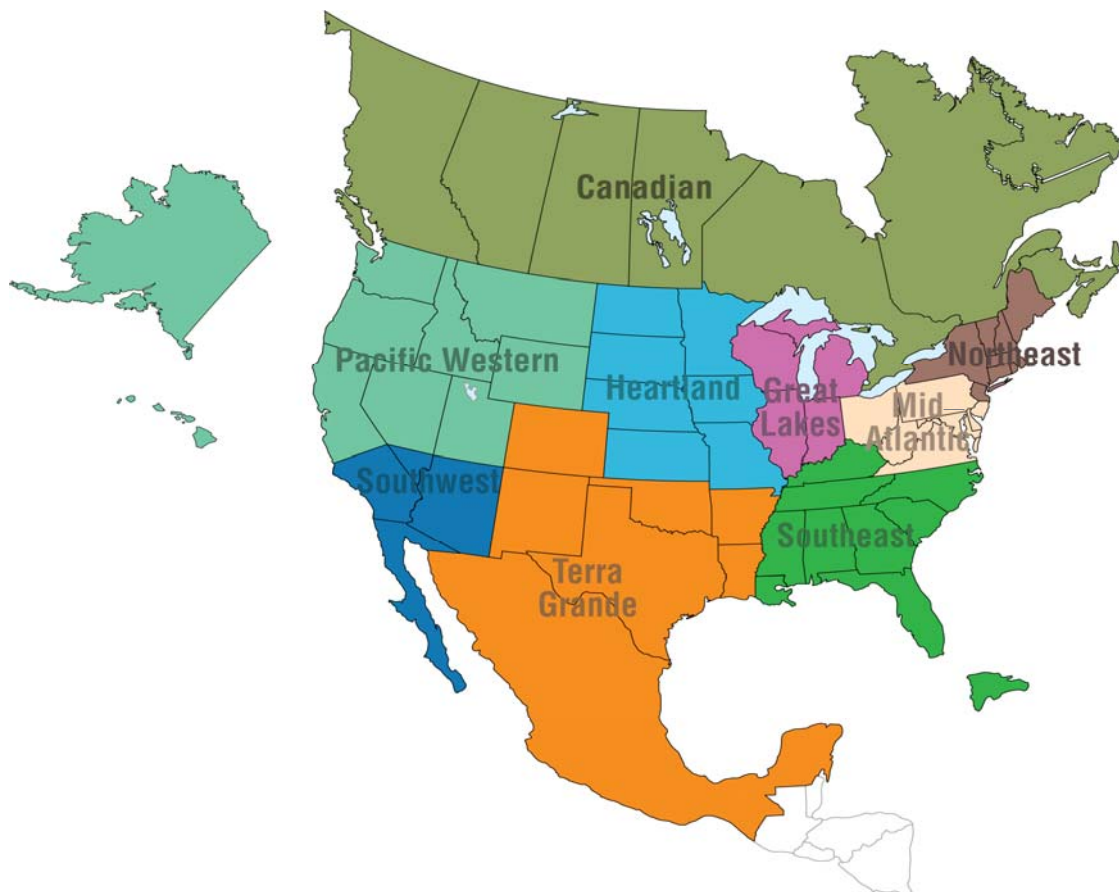
- **A carefully managed transition** between the outgoing and incoming membership director is essential to the new chapter membership director's success. Chapters often struggle with lack of continuity, training challenges, succession planning, and volunteer turnover. Your chapter's strategic plan should include a membership section that will help ensure a successful transition and continuity in ongoing recruitment and retention operations.
- **Detailed and complete membership records** can be extremely useful to a new membership director who wishes to examine trends or analyze the success of past efforts. Membership activities for the year can then be directed and prioritized based on past results rather than guesswork.
- **Communications and linked campaigns** by chapter officers can contribute significantly to the overall success of the chapter. The chapter board should perform strategic planning and identify goals for the year. All initiatives should be coordinated with these goals in mind. For example, if a chapter program with a well-known speaker or compelling topic is expected to draw a large number of prospective members, the chapter might increase the registration fee for the program to include membership dues. In addition, the chapter may wish to increase participation in its certification courses by giving each new member free registration to one review course. Even if nothing this ambitious is planned, strategic planning and communication are still vital to the chapter.
- **Carefully planned and administered membership campaigns** linked to chapter education programs are one way to achieve significant membership growth. Activities, such as mailings, invitations to meetings, personal letters, e-mails, or calls should be regular functions of the membership committee.
- **Forming a strong membership committee** is a critical element to the success of any membership program. Coordinating and conducting a multifaceted recruiting and retention campaign is not a task one person should undertake alone.
- **APICS offers a wealth of tools and resources**, including online chapter management tools that can be accessed by visiting C-BOX (<http://cbox.apics.org>). In addition, APICS provides marketing materials, brochures, and applications for free to chapter and district officers to assist in recruiting new members and retaining current members.

## APICS Districts

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APICS' more than 230 local chapters are divided into 9 districts that span North America. Each district elects a district director and a district manager nominated by the chapters of the district and elected by the nominating committee of that district. The district director's primary function is to be a member of the APICS Board of Directors. As a member of the Board of Directors, the district director provides recommendations and philosophical direction during the development of policies, procedures, and educational offerings to ensure they enhance the professionalism of operations management. The district manager has a volunteer district support staff to assist with developing and implementing chapter management training, facilitating two-way communication, and providing support and guidance to chapters to meet the objectives of the association. **Listed in alphabetical order are the nine APICS districts:**

- Canadian District
- Great Lakes District
- Heartland District
- Mid-Atlantic District
- Northeast District
- Pacific Western District
- Southeast District
- Southwest District
- Terra Grande District



## **APICS Corporate/Professional Staff Membership Responsibilities**

APICS Corporate staff is responsible for processing membership applications and renewals. Other responsibilities include coordinating the fulfillment of new and renewed membership cards; providing new member welcome packages; publishing the *APICS Dictionary* and *APICS* magazine; sending renewal notices; e-publishing the *APICS Connection* e-newsletter; and producing an assortment of other member mailings and publications. Chapter and District Support, Member Services, and Communications Divisions' staff work with the APICS Board of Directors, district managers, and volunteers committees to coordinate membership initiatives, resources, and policies. Any questions regarding APICS policies and procedures should be addressed to APICS Chapter and District Services ([chaprel@apics.org](mailto:chaprel@apics.org)).

For frequently asked questions, go to C-BOX (<http://cbox.apics.org>). For more specific needs, contact APICS corporate staff.

- **Customer Support Call Center** ([service@apics.org](mailto:service@apics.org)) can be reached by calling (800) 444-2742, ext. 4300, with inquiries about membership, chapter orders, registration issues, and certification.
- **Chapter and District Services** ([chaprel@apics.org](mailto:chaprel@apics.org)) can be reached by calling (800) 444-2742, ext. 5436, with questions about chapter communications, chapter history, volunteer training, and My Chapter.

## Information Flow

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The primary communication vehicles between APICS and chapter leadership are C-BOX, the Leadership Central Announcement List, the *Leadership Central* e-newsletter, *APICS Operations Management Now*, *APICS Connection*, APICS Learning Communities, Volunteer Leadership Workshop, and My Chapter.

An essential chapter function is disseminating information that you receive from APICS. These APICS communication vehicles provide key access to membership data, tools, and resources, APICS news, valuable interaction with your volunteer peers, and much more. A brief description of each vehicle follows.

### **C-BOX** (<http://cbox.apics.org>)

C-BOX – an essential resource for APICS leaders. The micro site contains an array of chapter management tools and materials, including:

- *Leadership Central* e-newsletter
- Membership development materials
- Training resources
- My Chapter database tool
- APICS governance materials.

### **Leadership Central Announcement List**

The Leadership Central Announcement List delivers news and information directly to the volunteer leaders. All chapter and district leaders with valid e-mail addresses on file are automatically subscribed to this list.

### **Leadership Central E-Newsletter**

The monthly e-newsletter, *Leadership Central-Your Resource for Volunteer Community Success*, is delivered to the entire Leadership Central Announcement List and features APICS updates, best practices, tools of the trade, leadership advice, important dates, committee news, and other relevant information for effective chapter management. You can read the latest issue of *Leadership Central*, as well as past issues, by visiting C-BOX (<http://cbox.apics.org>).



***Note: To ensure that the APICS Leadership Central e-newsletter and e-mail responses to your inquiries are not filtered into your "junk" or "bulk" folder, please add the following domains to your list of trusted senders:***

***lists.apics.org or apics.org***

### ***APICS Operations Management Now***

This electronic newsletter, distributed weekly, provides insights into weekly news and the APICS body of knowledge.

### ***APICS Connection***

This electronic newsletter, distributed monthly, is a resource to increase business performance.

### **APICS Learning Communities**

APICS Learning Communities for chapter/district officers and instructors can be accessed at [www.apics.org/communities](http://www.apics.org/communities). Learning communities offer participants a means to communicate with one another and share ideas, best practices, and solutions relating to chapter administration, membership development, and more. E-mail [chaprel@apics.org](mailto:chaprel@apics.org) for more information.

### **Volunteer Leadership Workshop**

The APICS Volunteer Leadership Workshop provides consistent, high-quality leadership training to chapter board members to enhance chapter development. The program is delivered before to the APICS International Conference & Expo and in alternate session formats at locations throughout the APICS districts to provide greater access for chapter leaders. Schedule details and presentations from past sessions are available for download in C-BOX (<http://cbox.apics.org>).

### **Future Leaders Program**

The Future Leaders Program is a strategic initiative that enables APICS to identify and prepare qualified professionals to lead the organization and the operations management profession. Supported by the APICS Board of Directors, this annual program creates a learning environment in which participants can explore key leadership concepts and gain greater awareness of APICS' current and future state, as well as a sense of their own values and leadership styles. Attendance at this event is limited. For information about the nomination process or selection criteria, please contact APICS Chapter and District Services.

### **My Chapter**

As your chapter's chief membership officer, access to membership data is a primary requirements. My Chapter, an online membership database management tool, helps you managed your chapter's membership more efficiently. My Chapter provides access to membership and financial reports and gives users the ability to update chapter details on the online chapter locator, publicize events, update member contact information, or view online purchase records. It is important to note that only chapter presidents and district staff identified in the database have immediate access to My Chapter. Other chapter officers must be assigned My Chapter access by the chapter president.

1. To access My Chapter, go to the APICS Web site at [www.apics.org](http://www.apics.org) and log in using the user name and password that you have selected.
2. Once you are logged in, you will see a welcome panel. Click on the view/edit my info link.
3. Go to the left-hand navigation bar and select Manage My Chapter (the last item on the list).

### **My Chapter Key Functions (Chapter Officers)**

These functions are available to all chapter officers with access designated by the chapter president.

- **My Chapter Home**—View member counts, new members, rebates/renewals and suspends.
- **Real-Time Reports**—Create/download membership reports.
- **Member Search**—View/update member profile/address.
- **Chapter Profile**—View/update online chapter locator details.
- **Web Orders**—View chapter orders placed online.

### **My Chapter Key Functions (Chapter Presidents)**

Only a chapter's president is authorized to view and update chapter address information, report and update board rosters for the current and future terms, and assign My Chapter access to other chapter officers/staff. In addition, the chapter president has exclusive access to view and update the chapter billing address and manage the board management function (i.e., adding board members to the current or future term and designating My Chapter access to desired board members).

- **Board Management** - Designate board members.
- **Chapter Billing** - View/update chapter billing address.

If you don't have access to My Chapter, please contact your chapter president to request that rights/access be granted. For more information, visit C-BOX (<http://cbox.apics.org>) and download the My Chapter Tutorial Overview.



## ***My Chapter Key Membership Reports:***

***As membership director, one of the most important functions within My Chapter is the ability to download key membership reports to identify current, new, and suspended members. My Chapter offers two types of reporting functions:***

- ***Real-time reports enable users to generate membership reports using LIVE membership data based on customized criteria, including member status, member type, and certification.***
- ***Snapshot reports enable users to download reports that were created for a designated time period. Data in these reports are not provided in real time; they are based on data from a specific point in the past.***

***Common My Chapter reports include:***

- ***xxxxMzz.xls—This is your chapter's Membership listing of all current members for the reporting period. It contains a list of all members.***
- ***xxxxSzz.xls—This is your chapter's Suspend listing for the reporting period, which contains a list of individuals who did not renew their memberships. Members are suspended 30 days after their membership expiration/dues paid thru date.***
- ***xxxxRzz.xls—This report contains the detailed transactions for chapter Rebate activity for the reporting period. These actual rebates will be distributed to chapters the month following the reporting month (e.g., September rebates are distributed at the end of October. APICS collects local chapter dues in addition to association dues on most membership applications and distributes those dues back to chapters monthly in the form of a chapter rebate or disbursement.***
- ***xxxxWzz.xls—This is your chapter's New Member listing for the reporting period. It contains a listing of all new members who joined APICS during the reporting period.***
- ***xxxx.tot and readme.txt—For those chapters using SAMCA or iChapter, these files are used to update your database. To update, copy both files and perform your update as normal. SAMCA is a chapter database program that enables chapters to electronically maintain the chapter membership roster. For more information on SAMCA, visit C-BOX (<http://cbox.apics.org>).***

## Chapter Management Collateral

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Membership marketing materials, brochures, and applications are available for free to chapter and district officers to assist in recruiting new members and retaining current members. While your chapter is encouraged to keep these brochures on hand, we urge you to order only what you will need for approximately a 90-day period. Electronic copies can also be downloaded from C-BOX (<http://cbox.apics.org>). Materials can also be ordered by contacting APICS Customer Support at [service@apics.org](mailto:service@apics.org) or (800) 444-2742 x4300. These brochures and applications are periodically updated due to changes to branding, membership benefits, dues, and chapter selection.

### Chapter Administration

#### **Membership Brochures/Applications**



*Items denoted with this symbol are available for download via C-BOX (<http://cbox.apics.org>). Materials can also be ordered by contacting APICS Customer Support at [service@apics.org](mailto:service@apics.org) or (800) 444-2742 x4300.*

Professional Membership Brochure/Application (Stock #82034) 


- Target Audience: Individual members residing in North America

Enterprise Membership Brochure/Application (Stock #82002) 


- Target Audience: Companies

Student Membership Brochure/Application (Stock #82025) 

- Target Audience: Degree-seeking students (part-time or full-time)

Academic Professional Membership Application (Stock #82040) 

- Target Audience: Professionals employed full-time by one or more accredited academic institutions

Other applications available for download in C-BOX (<http://cbox.apics.org>) include: 

- [Young Professional e-Membership Application, Editable](#) (PDF)
- [International Professional e-Membership Application, Editable](#) (PDF)
- [Professional Membership Application, Editable](#) (PDF)
- [Enterprise Membership Application, Editable](#) (PDF)
- [Enterprise Membership Application](#) (PDF)
- [Academic Membership Application](#) (PDF)
- [Military Reservist Member Application](#) (PDF)
- [Retired Member Application](#) (PDF)
- [Student Membership Prospectus and Application](#) (PDF)
- [Unemployed Member Benefit Extension Program Application](#) (PDF)

## **Membership Counts Summary Reports** (available for download only)

Summary reports are produced monthly and provide a snapshot report of membership counts by district and chapter. Data from January 2005 through current are available for download in C-BOX ([www.apics.org/membership/volunteers/chaptermanagementmaterials](http://www.apics.org/membership/volunteers/chaptermanagementmaterials)).

## **APICS Folder** (Stock #01014)

Whether you are meeting with a prospective on-site training client, contacting an organization interested in APICS membership, or conducting business for your chapter, packaging your presentation materials in this colorful two-pocket folder will help ensure you convey a professional image and make an excellent first impression. Folders can be ordered through the APICS bookstore.

## **APICS Fact Sheets** (available for download only)

Download and print APICS fact sheets, for insertion in the APICS folder, from the Chapter Marketing Tool Kit in C-BOX (<http://cbox.apics.org>). Fact sheets available for download include:

- [About APICS Fact Sheet](#) (PDF)
- [APICS International Conference and Exposition Fact Sheet](#) (PDF)
- [APICS Workshops Fact Sheet](#) (PDF)
- [APICS CSCP Fact Sheet](#) (PDF)
- [APICS CPIM Fact Sheet](#) (PDF)
- [Fundamentals of Materials and Operations Management Fact Sheet](#) (PDF)

## **Retractable Exhibit Reservation Form** (available for download only)

APICS provides a display on loan for special events, including top management nights, career fairs, or tradeshow. These displays are also ideal for chapter and district meetings. Chapters and districts are responsible for the cost of shipping the display from their events and will be charged for any excessive damage or missing parts. These charges will be billed directly to the requesting chapter's or district's APICS account. Download and print the form from the Chapter Marketing Tool Kit in C-BOX (<http://cbox.apics.org>).

- [APICS Retractable Exhibit Reservation Form](#)
- [APICS Retractable Exhibit FAQ](#)

To reserve an exhibit, submit the completed reservation form to [Chapter and District Services](#) at [chaprel@apics.org](mailto:chaprel@apics.org).

## **APICS Corporate Awards of Excellence Application** (available for download only)

The APICS Corporate Awards of Excellence recognize companies for significant contributions and performance excellence in the operations management field. Awards are presented in three categories: Education, Innovation, and Technology Partnerships. For further details, go to the APICS Corporate Awards of Excellence section of the APICS Web site.

## **Suspended Member Listing Request Form** (available for download only)

APICS chapter and district officers can request an Excel file containing a list of suspended members based on date range and membership type. This file lists members who have been suspended more than 90 days. Reports listing members suspended within the past 90 days must be obtained using the real-time reporting function under My Chapter.

## **Customized Electronic Mailing List Request Form** (available for download only)

Current APICS chapter and district officers can request an electronic mailing list for the purpose of promoting an event, seminar, or other comparable chapter educational activity. Electronic mailing lists can be based on district, chapter, membership type, state, certification, or other designated criteria. There is a nominal cost for this mailing list. Due to the Canadian Personal Information Protection and Electronic Documents (PIPED) Act, individuals with Canadian addresses are temporarily excluded from these lists.

## **Chapter Marketing Tools**

Many marketing materials are available in C-BOX (<http://cbox.apics.org>) to assist you with your chapter marketing initiatives, including:

### **[APICS International Conference & Expo Marketing Tool Kit](#)**

This kit contains marketing collateral for annual APICS International Conference and Exhibition (tile ads, flier, postcard, and PowerPoint presentation).

### **[Lean Enterprise Workshop Series Chapter Marketing Tool Kit](#)**

This kit contains marketing collateral for the new Lean Enterprise Workshop series (newsletter ads, flier, tri-fold, and PowerPoint presentation).

### **[Global Sourcing Workshop Series Chapter Marketing Tool Kit](#)**

This kit contains marketing collateral for the new Global Sourcing Workshop series (newsletter ads, flier, tri-fold, and PowerPoint presentation)..

### **Integrated Membership Strategy Communications and Dues Structure Tool Kit**

To help your chapter communicate the new dues structure, the materials that you will need have been assembled here in a tool kit.

### **APICS Branding Tool Kit**

To help your chapter promote the APICS brand, the materials that you will need have been assembled in the Branding Tool Kit. Included are APICS logos with the registered trademark and usage guidelines, the Web Template, PowerPoint presentations, a press release, newsletter article, boilerplate copy, the APICS Value Proposition, and fact sheets.

### **CDC's Chapter Marketing and Sales Tool Kit**

These materials have been contributed by APICS chapters and compiled by the 2006-2007 Chapter Development Committee. Find sample letters, sales tactics, testimonials, promotional flyers, and ideas to help you market and sell your chapter's offerings. To contribute, contact [chaprel@apics.org](mailto:chaprel@apics.org).

### **Chapter Marketing Tool Kit**

Use these materials to promote association membership and offerings, including APICS logos with the registered trademark, APICS advertising campaigns, membership brochures, press releases, presentations, the tabletop exhibit, mailing lists, and magazine listings for chapter events.

### **APICS CSCP Marketing Tool Kit**

Use these materials to promote the APICS Certified Supply Chain Professional (CSCP) program to your member and customer audience. Please check back often as we continue to post new and updated material.

### **APICS CPIM Marketing Tool Kit**

Use these materials to promote the APICS Certified in Production and Inventory Management (CPIM) program to your member and customer audience. Please check back often as we will continue to post new and updated material.

***"I credit APICS membership with contributing to my business and career success."***

*— Jim Bacon, Director-Global Supply Chain, Talecris Biotherapeutics*

## APICS Membership Options

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Unless otherwise indicated, all the membership options identified below include full membership privileges, including an APICS membership card, online access to members-only content, member publications, discounts on APICS products and services, voting privileges, and more. Visit the Membership Section of the APICS Web site for more information about APICS membership options and benefits.

### Individual Membership Options

APICS has several membership options for individuals who reside within North America (the United States, Canada, and Mexico):

- Professional\* members account for nearly three-quarters of the APICS membership. A professional member can change contact information or local chapter affiliation (no additional dues apply) at any time within the membership term. Chapter affiliation is designated by the individual. An individual who does not designate a chapter affiliation is placed in the closest chapter using the chapter data reported in the My Chapter, Chapter Profile function. Professional members are billed for the full association dues which include local chapter dues.
- Honorary Chapter members are designated at the request of a chapter, typically for past chapter presidents, local college libraries, retired long-time chapter members, or student chapter academic advisors. Honorary membership privileges are identical to those for professional members, except that renewal notices for these memberships are sent directly to the chapter's billing address (as listed in the My Chapter, Chapter Profile). Honorary memberships are billed for the association's portion of the dues.
- Honorary members are nominated via a petition process spearheaded by APICS members and approved by the APICS Board of Directors for individuals who have made extraordinary contributions to the association, profession, and/or industry. Once designated these memberships are never invoiced. No association/chapter dues apply.
- Lifetime members are past international presidents or chairs of the board of directors of APICS. Once designated, these memberships are never invoiced. No association/chapter dues apply.

APICS has three membership options for individuals who reside outside of North America (United States, Canada and Mexico):

- International\* members are professional members who reside outside of North America and who are not affiliated with an APICS International Associate. International memberships are billed for the full association dues.
- International Associate members are professional members who reside outside of North America and belong to one of the growing network of APICS International Associates located in more than 28 countries in six regions worldwide. Association dues are billed to and paid by the international associate organization.

- International Professional e-Members are professional members who reside outside of North America. E-Members receive electronic access to member benefits (i.e., APICS magazine, APICS Dictionary, APICS OMBOK Framework, e-newsletters, and more). E-members who have International Associates in their countries will also benefit from joint membership with the local organization.

*\*Members who choose these options can join APICS or renew membership online.*

## Company Membership Options

APICS has several membership options for companies inside and outside of North America:

- Enterprise Membership provides full benefits to five or more employees, whether at a single site or multiple locations. (For example, a company with offices in Rochester, NY; Buffalo, NY; and New York City, NY that wishes to designate members at each site would only need to purchase one Enterprise Membership.) The organization holds the membership, allowing the transfer of an individual membership to another employee at any time. Enterprise Membership enables organizations to provide cost-effective training and resources to a broad base of employees. Enterprise members obtain full access to APICS members-only resources, networking, and customized benefits to meet the needs of each organization. Enterprise membership dues are \$1,000 for the first five members (\$750 for APICS Corporate dues and \$250 for the chapter dues portion). Additional members can be added according to a tiered dues structure.

| Tiers  | Total # of Members | Amount Per Member |
|--------|--------------------|-------------------|
| Tier 1 | 5-24               | \$200             |
| Tier 2 | 25-50              | \$190             |
| Tier 3 | 50>                | \$180             |

- Enterprise Billing (EB)—Organizations must designate a single employee contact for the Enterprise Membership. The enterprise renewal details are sent to this individual. This contact can be one of the enterprise professional members or someone else within the company. No membership benefits apply.
- Enterprise Professional (EP) members—Organizations can designate five or more employees, whether at a single site or multiple locations as EP members.
- Enterprise Professional e-Membership (EM) members— Available to organizations with 25 or more enterprise members, this new membership type enables companies to provide more employees with access to valuable APICS content, products, and services. EM members receive electronic access to member benefits (i.e., APICS magazine, APICS Dictionary, APICS OMBOK Framework, e-newsletters, and more). The dues amount for companies with 25 or more enterprise e-members is \$125 per member.

## Conditional Membership Types

APICS has four conditional membership options for individuals. These memberships require that the member meets certain criteria before the membership is approved and processed. The membership options are:

- Student membership is a conditional category for individuals currently enrolled, part-time (six or more credit hours) or full-time in a degree-seeking program (undergraduate or graduate), at an accredited college or university. Regardless of the number of credit hours taken, no person shall be eligible for APICS Student membership if gainfully employed full-time. Student members enjoy all of the benefits of APICS membership (with the exception of voting privileges). Individuals renewing or applying for Student Membership must meet the above conditions, submit a current course curriculum/schedule, and complete the required field on the membership renewal/student application. Student members pay \$25 for association dues. Student members belong to student chapters or are student members at large. No local chapter dues apply.
- Young Professional e-Membership is a conditional membership category specifically for recent graduates who have at least one full year of previous APICS Student membership and is limited to a two-year period following graduation. Young Professional e-members receive electronic access to member benefits (i.e., *APICS* magazine, *APICS Dictionary*, *APICS OMBOK Framework*, e-newsletter, and more). Young Professional e-members pay \$100 for association dues including chapter dues.
- Academic Professional is a conditional membership category for individuals who are employed full-time by one or more accredited academic institutions. These members have full access to valuable APICS resources and opportunities and can belong to a chapter. Professional academic members are billed \$25 for association dues plus chapter dues.
- Retired is a conditional membership category for individuals who have reached the age of 62, are retired from formal employment, and have been APICS chapter members for a minimum of five years. These members are eligible for membership at a 50-percent discount off association dues including chapter dues. Retired members enjoy all the benefits of APICS membership. Individuals seeking this option must submit the retired membership application to their chapter president for approval.

## Members in Transition

APICS offers a number of programs to assist members in transition. Share the benefits of these programs as necessary with members who are unemployed, military reservists, or affected by a natural disaster. Details of each program are outlined below:

- Unemployed Member Benefit Program—Available to APICS members who are temporarily unemployed and actively seeking work within the APICS business sector. This program extends membership for a six-month period at no cost. Members may apply for this extension up to three times for coverage over an 18-month period. Members apply for the extension through their local chapter, which must approve the request and waive chapter dues. Members approved for this waiver will receive electronic membership for the duration of the waiver, which entitles the member to electronic communication of all member benefit materials. Students and retirees are not eligible. Download from C-BOX (<http://cbox.apics.org>).
- The Military Reservists Extension Program—Available to APICS members called to serve in the military due to activation of reserve commitments. This program extends membership for a six-month period at no cost. Members apply for the extension through their local chapter, which must approve the request and waive chapter dues. Members approved for this waiver will receive electronic membership for the duration of the waiver, which includes electronic communication of all member benefit materials. Download from C-BOX (<http://cbox.apics.org>).

## Starting a New Chapter

Professional APICS chapters are established through charters approved by the respective APICS district manager, APICS district committee chair, and APICS chief executive officer. Affiliated student chapters are established with the approval of the professional (parent) chapter. While there are many reasons for starting a new chapter, each request for a chapter charter is considered on the merits of supporting evidence (i.e., group of individuals in an area where no chapter exists).

## **Professional Chapter**

The recommended procedure for establishing a new chapter is summarized in the following steps:

1. Obtain buy-in from the district manager.
2. Contact Chapter and District Services to request chapter charter materials.
3. Hold chapter interest meeting(s).
4. Hold chapter organization meeting.
5. Ensure 25-member minimum.
6. Complete and submit chapter charter application/chapter charter process.
7. Review supporting documentation for the Chapter Benchmarking and Reporting (C-BAR) program regularly. Newly chartered chapters must submit Chapter Minimum Standards (CMS) documentation to the District Manager via approved reporting method by July 31 of each year. From the date following their first CMS submission, chapters will have three years to meet the required standards and must show progress annually.



*The Chapter Benchmarking and Reporting (C-BAR) program is divided into two sections:*

***Section 1: Chapter Minimum Standards (CMS) for Chapter Maintenance Tool***

*Chapters are required to use the guidelines outlined in Section 1 of the C-BAR Handbook and the C-BAR Excel Workbook to report their annual compliance with CMS to their district manager/district staff for evaluation by July 31 of each year.*

***Section 2: Chapter Benchmarking and Reporting (C-BAR) Tool***

*Chapters electing to participate in C-BAR must be in compliance with the CMS and complete Sections 1 and 2 of the C-BAR Excel Workbook and submit to their district manager/district staff for evaluation by July 31 of each year.*

*Supporting Documents and Tools are available via download from C-BOX at (<http://cbox.apics.org>).*

*-Enhanced C-BAR Handbook*

*-Enhanced C-BAR Workbook*

*For assistance with CMS/C-BAR, please contact your district liaison or APICS Chapter and District Services via e-mail at [chaprel@apics.org](mailto:chaprel@apics.org) or by phone at (800) 444-2742 or (773) 867-1777, ext. 5436.*

## **Affiliate Student Chapter (ASC)**

The recommended procedure for ASC development is as follows:

1. Obtain the support of a local professional chapter.
2. Secure the involvement of the school/faculty.
3. Contact Chapter and District Services to request student chapter charter materials.
4. Form a student chapter organizing committee.
5. Set up and conduct the first meeting with a university representative.
6. Conduct a general organizational meeting.
7. Ensure 15-member minimum.
8. Complete and submit student chapter application/chapter charter process.

## **Chapter Membership Benefits**

Chapters provide a forum for exchanging ideas, information, and career opportunities. Most chapters send monthly e-newsletters, recognize their members' accomplishments, provide onsite/in-house training to area companies, and offer member discounts on their educational programs. Many chapters offer additional benefits, such as job referral programs and networking with local professionals. Chapters should ensure the benefits they offer are as valuable to their market as possible and make existing and potential members well aware of them.

## **APICS Membership Benefits**

APICS membership provides individuals with a wide array of timely news, proven practices, essential resources, and expert connections to help them excel in their operations management career. Every chapter officer should know the benefits of APICS and local chapter membership and should discuss them regularly with members and non-members. Key benefits include:

Make the most of APICS membership. Get involved in the local chapter, attend educational events, read APICS publications, and visit [www.apics.org/membership](http://www.apics.org/membership) for complete access.

- APICS International Conference & Expo – designed to help you compete in the global marketplace and providing skills to make your company run more effectively in an increasingly competitive economy.
- Get in-depth exposure to a wide array of subject areas integral to success in operations management—from demand management, forecasting, and S&OP to navigating the global supply chain—APICS conference will provide actionable education to prepare you for what's next in your career. Learn more at [www.apicsconference.org](http://www.apicsconference.org).

- *APICS Dictionary*– The *APICS Dictionary* is the standard for terms and definitions in the inventory and supply chain management field. The *APICS Dictionary* contains more than 4,000 essential terms. New members can request their complimentary copy at [www.apics.org/freedictionary](http://www.apics.org/freedictionary) or by contacting APICS Customer Support at [service@apics.org](mailto:service@apics.org) or (800) 444-2742 x4300.
- *APICS* magazine – Stay current on industry trends and developments with the award-winning *APICS* magazine. *APICS* magazine features innovative ideas and real-world strategies for inventory, materials, production, and supply chain management; planning and scheduling; purchasing; logistics; warehousing; and e-business solutions for professionals at every level of an organization. Members receive print copies in the mail, and can also read *APICS* magazine online at [www.apics.org/resources/magazine](http://www.apics.org/resources/magazine). (E-members do not receive print copies.)
- Aberdeen Research – Get the facts that drive business decisions. APICS members have full access to the Aberdeen Research Archive that contains more than 5,000 documents focused on the global value chain, at a substantial discount. Research channels include current, relevant information on supply chain, manufacturing, information technology, finance, retail, human resources, and product research and development. Visit [www.apics.org/benefits](http://www.apics.org/benefits) for current pricing.
- American Society of Transportation and Logistics (AST&L) – All APICS student members will enjoy dual membership with AST&L. APICS student members will have access to the most current information in the transportation logistics field found in the *Transportation Journal*; ability to apply for a blanket waiver for the designation, Certification in Transportation Logistics (CTL); and eligibility to enroll in the L.L. Waters Scholarship Program, offering an award of \$2,000 to be used exclusively for tuition/books or direct college expenses.
- The American Logistics Aid Network (ALAN) – APICS and ALAN have developed a new alliance to help ALAN connect disaster relief organizations to supply chain resources. Through this alliance, APICS members, chapters, and districts will be able to provide expertise to disaster relief organizations in need of supply chain resources.
- Supply Chain Council (SCC) - APICS members worldwide will receive member rates on SCC training classes, events, and SCOR Professional Certification and have access to the acclaimed SCORmark benchmarking program. SCORmark benchmarks an organization's supply chain based on SCOR metrics and enables users to measure how it rates in relation to other organizations.
- AMA Business and Management Training – APICS members can enhance their competitive edge with business and management training through the American Management Association, the leading force in business and management education. APICS members receive up to 30 percent off training along with news and APICS Web site access. Visit [www.apics.org/benefits](http://www.apics.org/benefits).

- APICS Certification Discounts – APICS members pursuing certification enjoy savings on certification preparation classes, review materials, and testing fees. Members belonging to chapters can more effectively work through the certification process by taking chapter review courses and participating in study groups.
- APICS Career Center – Fill a position or find a job at the APICS Career Center—the online career destination for operations management professionals. Now the APICS Career Center will host career development Webinars led by recognized career development experts offering practical tips on résumé writing, career transition, and professional development. Only members may post their résumés for review by potential employers and subscribe to the job alerts service. Members also receive discounts on job posting packages. Members have full access to the online APICS Career Center at [www.apicscareercenter.org](http://www.apicscareercenter.org).
- APICS Webinars – APICS Webinars provide convenient, online educational opportunities for members. More topics and expanded offerings are available. APICS also presents webinars for volunteers and chapter leaders. A number of APICS Webinars are available on demand at member savings and free of charge at [www.apics.org/webinars](http://www.apics.org/webinars).
- APICS Learning Communities – Connect and collaborate with your peers through the APICS global network. APICS Learning Communities are online forums where members can gather regularly to share ideas, develop best practices, and find solutions to everyday challenges in operations management. Visit APICS Learning Communities at [www.apics.org/communities](http://www.apics.org/communities).
- *APICS Production and Inventory Management Journal (P&IMJ)* – The journal publishes original research that has a significant effect on operations management.
- APICS Web Site – APICS members can access exclusive, members-only content on the APICS Web site. Members can use the site to research pressing issues using the searchable Publications Database, stay abreast of industry terms and definitions using the online *APICS Dictionary*, obtain white papers; and find free APICS Webinars On-Demand on operations management topics and other valuable industry information.

If you have questions about member benefits, contact APICS Customer Support at (800) 444-2742 x4300 or (773) 867-1777 Monday-Friday, 8:00 a.m. to 5:00 p.m. CT or email [service@apics.org](mailto:service@apics.org).

# Membership Processing

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## Membership Processing—APICS Corporate

All membership processing—including applications, renewals, and address changes—must be routed through APICS corporate. This procedure ensures that the correct information resides in the APICS association management database. It is important that chapters use My Chapter to verify that information contained in the APICS database is up to date. The process for hardcopy applications/renewals is as follows:

1. The application/renewal is received at APICS corporate, and payment is processed (1-2 business days).
2. The applicant/member details and profile data are entered/updated in the APICS association management database (2-4 business days).
3. The membership becomes active in the APICS database, and the update is visible to chapters via My Chapter.



*Membership card reports are generated twice weekly and e-mailed to an external vendor for processing and mailing.*

*New members receive a new member packet that contains a membership card/personalized letter, New Member Resource Brochure, current issue of APICS magazine, and the Educational Resource Catalog.*



- *A current or former member who renews or reinstates membership receives a replacement membership card/personalized letter. The member's subscription to APICS magazine begins the following month.*

### *Additional Ways to Join or Renew*

- *Return completed application or renewal notice by mail to APICS, Membership Dues, P.O. Box 4050, Carol Stream, IL 60197-4050.*
- *Return completed application or renewal notice by fax to (773) 639-3011.*
- *Join or renew via telephone by contacting APICS Customer Support at (800) 444-2742.*

### *Joining or Renewing Online*

*Already registered on the APICS Web Site?\**

Go to <http://www.apics.org/join>

- *Enter User Name and Password.*
- *Select the Begin button.*
- *Receive prompt to designate chapter and membership options, and complete the payment transaction.*

**Already Registered on the APICS Web Site**

Log in here and skip the registration step.

User Name

Password

## Tips for Ensuring Proper Membership Processing

Please follow each of these steps to avoid delays in processing membership records and inaccuracies in the APICS database:

- Applicants should provide their APICS ID number whenever possible.
- Applicants should be encouraged to provide other identifiers (i.e., birth date, last four digits of SSN, and gender). This reduces the chance of a duplicate record being created and is not shared with any third party.
- Applications/renewals cannot be processed without full payment (association and chapter). Membership will not be activated until full payment is received.
- Information provided on the applications/renewals must be complete and legible.
- Applications/renewals and payment must be submitted at the same time.
- APICS does not accept purchase orders or chapter billing numbers for payment of membership.
- Applications received by the chapter should be forwarded immediately to APICS Corporate.
- Members and/or chapter officers are encouraged to update contact information online via the APICS Web site on a regular basis.
- Enterprise applications/renewals must list the names of the enterprise billing (EB) contact and enterprise members.
- Individuals renewing or applying for Student Membership must meet the conditions outlined on the application/renewal, submit a current course curriculum/schedule, and complete the required fields on the membership renewal/student application.

### Renewal Cycle—APICS Corporate/Your Local Chapter

To assist chapters with membership retention efforts, renewal alert and former/suspended member reports can be generated via the Real-Time reports function provided in My Chapter. These reports and tools enable chapters to contact members who are near their membership anniversary or about to suspend. Before contacting members, you may find it useful to familiarize yourself with the membership recruitment and retention tips and activities listed on pages 34-39.



*It is important to note that an individual's membership officially suspends one month following the membership's actual expiration date (also known as grace period).*

## Renewal Schedule

The schedule below depicts APICS membership renewal cycle.

| End of Month Closing: | Renewal Notice Sent: | 1 <sup>st</sup> E-mail Notice (Members w/ Dues Paid Thru Date in Range): | 1 <sup>st</sup> Mail Notice (Members w/ Dues Paid Thru Date in Range): | 2 <sup>nd</sup> E-mail Notice (Members w/ Dues Paid Thru Date in Range): | Final Mail Notice (Members w/ Dues Paid Thru Date in Range): | Final E-mail Notice (Members w/ Dues Paid Thru Date in Range): | Suspend File Posted to MY CHAPTER (Members w/ Dues Paid Thru Date in Range): |
|-----------------------|----------------------|--|--|--|--|--|--|
| January               | February             | April  | March  | February   | January  | December   | December   |
| February              | March                | May  | April  | March  | February   | January  | January  |
| March                 | April                | June   | May  | April  | March  | February   | February   |
| April                 | May                  | July   | June   | May  | April  | March  | March  |
| May                   | June                 | August   | July   | June   | May  | April  | April  |
| June                  | July                 | September  | August   | July   | June   | May  | May  |
| July                  | August               | October  | September  | August   | July   | June   | June   |
| August                | September            | November   | October  | September  | August   | July   | July   |
| September             | October              | December   | November   | October  | September  | August   | August   |
| October               | November             | January  | December   | November   | October  | September  | September  |
| November              | December             | February   | January  | December   | November   | October  | October  |
| December              | January              | March  | February   | January  | December   | November   | November   |

## 24/7 Membership Management

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The APICS Web site is designed to help members manage their memberships quickly and easily at any time. All members need to do is log in to the APICS Web site if they are registered, or register using their last name and APICS ID. Designated chapter officers also have the ability to update contact and address information for chapter members using the My Chapter Member Search function.

### Manage Individual Memberships

Individuals associated with an individual membership **can** update their contact and home or work address information online. A chapter officer **can** also change the work or home contact information for individual members of the chapter. In addition, individuals can:

- order publications
- register for educational opportunities
- learn about APICS certifications
- access member-only content.

See the My Chapter Tutorial Overview under C-Box (<http://cbox.apics.org>) for more information on how to manage membership records in My Chapter.

### Manage Enterprise Memberships

An individual associated with an enterprise membership **cannot** change work contact information online. A chapter officer **cannot** change the work contact information for members of the chapter associated with an enterprise membership. All enterprise membership changes must be submitted to APICS Customer Support at [service@apics.org](mailto:service@apics.org) or (800) 444-2742 x4300.

The following information is to be provided to Customer Support when replacing or removing an enterprise member. Inquiries related to adding new members to an existing enterprise membership should be referred to Customer Support for pricing details.

When replacing an existing enterprise member with another employee, please provide the following details:

Company ID • Company Name • APICS Member Number/ID (if applicable) • Full Name • Job Title • E-mail Address • Work Phone • Work Fax • Date of Birth (optional) • Last Four Digits of Social Security Number (optional) • Gender (optional)

When removing an enterprise member from your company's membership, please provide the following details:

Company ID • Company Name • APICS Member Number/ID (if applicable) • Full Name • Is this person still employed at your company?

## Membership Chapter Transfers

If you have a chapter member that requests a transfer into your chapter, or transfer to another chapter, contact APICS Customer Support at [service@apics.org](mailto:service@apics.org) or (800) 444-2742 x4300 and provide the following information:

APICS Member Number/ID • Full Name • Name of chapter to transfer to

## APICS Commercial Third-Party Mail List Exclusion Policy

We encourage chapters to continue sending welcome materials to all new members. The Opt Out fields, under the My Chapter Member Search function, do not apply to regular correspondence from APICS or the local chapter, including

- welcome e-mails
- e-newsletters
- *APICS* magazine
- membership cards
- course announcements
- surveys
- other chapter-related correspondence.

When members join APICS and designate a chapter affiliation, it is reasonable to assume that they expect to receive communication from both APICS and the local chapter. The Opt Out fields apply only to exclusion from commercial third-party mailing list requests coordinated through APICS, including customized electronic mailing list requests received from active chapter/district officers for members in other chapters and districts.

Chapter membership data should only be used for official APICS and chapter communications and should not be shared with other individuals. Chapter officers should never share membership list(s) with individuals for purposes or activities unrelated to the chapter or district. Sponsorship in a chapter newsletter or on the chapter's Web site might be one way for a company to promote its services to chapter members without having access to the membership database.

In response to the recent privacy legislation, APICS has clarified our member communication policy for third-party mailings as follows:



*APICS respects and protects your privacy. As part of your APICS membership, the contact and demographic information that you provide will be used by APICS and its affiliated chapters to communicate with you about your membership and related programs, products, and services. From time to time, you may also be invited to participate in surveys and research studies that allow us to better meet your needs as an APICS member and promote the profession. APICS may provide limited contact information to third parties that offer programs, products, and services that our members may find of interest. The contact information includes name, job title, company, and preferred address, but does not include phone, fax, or e-mail address.*

**Chapters are responsible for managing their membership data including those who have requested to be excluded from chapter communications.** If members ask to be excluded from APICS communications, please direct them to the APICS Web site where they can log in and update their Opt Out selections or direct them to contact APICS Customer Support at [service@apics.org](mailto:service@apics.org) or (800) 444-2742 x4300.



### ***APICS Mailing List Rental***

*Under certain conditions, the APICS mailing list is available for rental through APICS' list broker, InFocus Marketing, Inc. The list may be sorted by a number of criteria, including geographic area, department, business environment classification, job title, industry, manufacturing environment, and acquisition role. For more information about APICS mailing lists, or to place an order, please contact InFocus Marketing, Inc. at 1-800-708-5478.*

*Members who opt out of receiving Commercial Third-Party Mail will be excluded from the mailing list.*

## **Membership Recruitment and Retention**

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### **General Membership Tips**

The responsibilities of a chapter membership director are varied and often complex. Programs to enhance or provide recruitment, retention, recognition, company coordinators, and awareness of member needs must all be harmonized, implemented, and evaluated continuously. To succeed, a chapter must balance its human and financial resources among these activities. The following sections contain examples of techniques and ideas that have worked for chapters in the past. Consider these techniques to enrich your chapter or try inventing a few of your own.

Promote APICS membership. Let members and customers know the importance of being active at the local (chapter) and corporate (APICS) levels. Every officer in your chapter should know the benefits of APICS membership and should discuss them regularly with members and nonmembers.

- Establish and maintain a current chapter Web site as a way to promote the chapter locally and nationally and keep members abreast of chapter activities.
- Establish discounts and preferences for APICS members. Set different prices for members' admission to chapter activities and events.
- Limit consideration for awards and rewards to APICS members.
- Implement a formal plan to follow up with suspended members.
- Implement a formal plan to recognize new members.
- Implement a formal plan to recognize member milestones (i.e., new certification designations, membership anniversaries, and job promotions).
- Regularly conduct membership surveys and analyze and act upon results.
- Advertise your chapter meetings/events in local newspapers, business papers, or online community sites.
- Offer potential members a FREE meeting and make sure the invitation is to one of your chapter's best programs of the year. Remember how important a first impression can be!

## Reasons Why People Join an Association

Be aware of the most common reasons why people join an association and their perceived value for belonging:

- Access to up-to-date information, technical information and industry trends
- Education and professional development offerings
- Networking opportunities
- Career and employment resources
- Leadership opportunities
- Access to products, services and suppliers
- Member discounts or group purchasing activities

Increasing membership benefits your chapter in the following ways:

- An increased networking base. Members will benefit from interacting with more experts in the field and sharing knowledge with new peers.
- Expanded knowledge of new industries. Representatives from new or different industries bring new insights, concepts, and strategies for successful operations management. They also bring more diversity to the association and the industry, new ideas and new ways of addressing challenges.
- A larger pool of volunteers. Individuals will have the ability to pursue leadership opportunities that expand skill sets and enhance career growth. Volunteers can lend their expertise and give back to the association and industry.
- More members = more revenue. More dollars means more opportunities to deliver education, programs, and other services to members.

## Membership Recruitment Resources

Be creative in reaching out to prospective members. Consider a variety of industries and resources. For example, has your chapter explored markets such as healthcare, retail and distribution? What types of products and services might you offer to professionals in these markets? What is the perceived value for professionals from these markets to belong to APICS?

## Membership Recruitment Activities

Effective membership recruitment requires a continuous effort. If your predecessor did not develop a system of recruitment, you should strive to create long-range programs. Incorporate membership goals into your chapter's strategic plan. You may wish to use C-BAR as a guide. While periodic membership drives are certainly valuable, to be successful in the long run, membership recruitment must be an ongoing activity. It is important that chapters use every available tool when trying to connect with current and potential members. Effective ongoing membership recruitment activities include:

- **Letters**—Many chapters use letters to contact local companies for member recruitment. It is important that these letters stress the advantage of engaging active APICS members in terms of the bottom line.
  - Direct mail campaigns can be costly, as mailing lists are expensive to purchase, and the response rate on bulk mail often is below 5 percent. However, a success rate as low as 2 percent on a 1,000-piece mailing can breakeven in the short-term, and renewals will make it profitable in the long term.
- **E-mail**—E-mail is almost a necessity in today's membership marketing environment.
  - Sending an e-mail is a cost-effective, convenient way to target prospective members. Make sure your e-mails are engaging, informative, and provide information about upcoming events and a link to your chapter's Web site. Always provide a method for members and potential members to opt out of receiving e-mails.
- **Telephone**—Telephone is an overlooked opportunity in many chapters.
  - In today's communications-overloaded environment, it is getting harder and harder to reach people by telephone. However, the telephone has one advantage over direct mail: The telephone enables you to listen to the prospect instead of just talking to the prospect.
- **Professional development meetings**—For meetings at which you anticipate a good turnout, encourage members and company coordinators to bring nonmember guests at no charge.
  - Be sure to have APICS Professional Membership Brochures (Stock #82034) on hand.
  - Offer prizes for the most nonmembers brought to a meeting.
  - Provide plenty of networking opportunities.
  - Ask one or more members to share testimonials at the meetings about why they joined APICS and the value they receive.
- **Educational programs**—Charge separate rates for nonmembers and build the cost of one year's membership into the registration fee.
  - Ask instructors to promote membership during classes and ensure they have promotional materials available.

- **Publicity**—Publicity from the local media, at colleges and universities, and particularly within local manufacturing and service organizations is crucial to attracting potential members.
  - Use APICS press releases found in each of the Chapter Marketing Tool Kits under C-BOX (<http://cbox.apics.org>) to announce new programs and events.
  - Participate in social media sites such as Facebook® and LinkedIn® to find out what prospective members are discussing. Link them to your chapter’s Web site, to your chapter’s events and to a point of contact.
  - APICS is constantly providing new marketing materials for chapters. Please check C-BOX for updates (<http://cbox.apics.org>).
- **Company Coordinator Program**—implementing this program and recognizing APICS members who are employed at the same company is an easy and effective way of maintaining good relations with management and securing ongoing support from these companies.

Find tools for membership recruitment in C-BOX (<http://cbox.apics.org>). Items denoted with a stock number are also available by contacting APICS at [service@apics.org](mailto:service@apics.org) or (800) 444-2742 x4300.

**Chapter Web site** maintenance is vital for membership recruitment and is a key communications vehicle for APICS chapters. To get the most out of your chapter Web site, be sure to

- Access the APICS Branding Tool Kit located in C-BOX (<http://cbox.apics.org>) for a template.
- Update your site regularly to inform members and prospects about your chapter’s activities.
- Include a link to [www.apics.org](http://www.apics.org) to capitalize on Web search engines.

## Optimizing Search Engine Results

To optimize search engine results, follow these steps:

1. **Increase corporate and chapter rankings by maintaining consistent messaging between APICS corporate and chapter Web sites.**

To help build a consistent message, update your Web site with the correct APICS name and messaging.

- APICS The Association for Operations Management
  - Not the “**American Production and Inventory Control Society**”
  - Not “**APICS—The Educational Society for Resource Management**”

- For the APICS standard messages on other topics
  - Refer to the Branding Tool Kit and C-BOX (<http://cbox.apics.org>) for guidance.

## 2. Ensure the consistency of your chapter's site.

It is important that chapter sites be consistent. Ensure all content is consistent with the current APICS brand messaging. In your HTML coding, make sure that the information in the following tags is consistent with the content of each page:

- Title tags—The title on each page should be the same as the title at the top of your main content.
- Keywords—Your keywords should be reflected in the content of your pages, as close to the top of the page as possible. They should also be as unique to each page as possible.
- Description tags—The description used for each page should uniquely reflect the content of that page. Use the page's main keywords in the description.
- The ALT attribute for the main header graphic (the one at the top of each page that says APICS)—The text in this tag should read "APICS The Association for Operations Management, Chapter Name."

## 3. Link to the APICS site to maximize Google™ search results.

In addition to site rank and site content, Google™ looks specifically at the content of the referring link to help it determine the relevance of a given site to a given search.

- Link to [www.apics.org](http://www.apics.org) using the association's full name: APICS The Association for Operations Management.

## 4. List your chapter's site in the Yahoo!® directory to raise rankings.

Yahoo!® is a very popular site. Listing your site in Yahoo!® should raise your Google™ ranking because Google™ ranks your site based, in part, on the ranking of the sites that link to you. That, in turn, should raise the ranking of [www.apics.org](http://www.apics.org) and send more members back to the chapters.

## 5. Submit your site to Google™ and Yahoo!®

Site submission lets search engines know your site exists and where they can find it. If you don't submit to any others, submit to Google™ and Yahoo!®.

Your chapter is a powerful force for improving APICS Web marketing. For example, let's look at page views per month:

- [www.apics.org](http://www.apics.org) = 1,000,000
- [www.abcchapter.org](http://www.abcchapter.org) = 10,000 X 200 = 2,000,000 (a very rough estimate)
- Estimated Total = 3,000,000 page views per month

If the majority of chapters implemented the five steps outlined above for optimizing search engine results, APICS could easily gain another million or more page views per month.

## **Social Networking**

Social networking has had a significant impact on how people connect on a global level. Your chapter can connect with prospective members and build community with people in the operations and supply chain management fields, among others. APICS has an increasing number of fans on sites such as LinkedIn® and Facebook®. Your chapter is encouraged to explore and become involved in social networking opportunities. APICS provides outstanding social networking tools enabling you to grow professionally, and engage with thousands of operations and supply chain management individuals. Visit [www.apics.org/socialnetworking](http://www.apics.org/socialnetworking) to access these resources.

## **Membership Retention Activities**

APICS places heavy emphasis on chapter retention because it is easier and more cost-efficient to keep an existing member than to find a new one. If your chapter is going to keep growing, you should strive to encourage members to renew. The easiest ways to accomplish this are to offer your members quality education and resolve any problems they may have as quickly as possible. Do not give up on members who lapse for a few months. With a little work, you can bring them back.

If your chapter does not gather information on retention rates, establish a program to determine why members join and why they leave. The most common reasons members leave include:

- job change
- loss of interest in APICS (lack of perceived value)
- employer no longer supports membership
- lack of time to participate
- inadequate benefits
- member does not view APICS as relevant to his or her career
- joined another association
- newly certified—no further interest
- retirement
- unemployment.

An effective retention program can minimize turnover in your membership and provide steady growth for your chapter. To ensure that members keep coming back, consider the following:

- **Increase member satisfaction by offering quality chapter programs.**
  - Survey both members and their employers to determine their respective needs.
  - Try to attract dynamic speakers and emphasize subjects of interest to your members based on survey results.
  - Focus on actual case studies and real-world examples.

- Target your programs to the interest and needs of local companies.
- **Enhance membership retention by offering quality chapter professional development meetings.**
  - Facilitate networking opportunities for your members and remember that networking is of particular significance to members at the local level.
  - Ensure that your professional development meetings have a lively, friendly atmosphere, so your members will enjoy meeting fellow professionals and hearing good speakers.
- **Ensure that new and returning members feel appreciated.**
  - Use greeting committees, attendee name tags, and assigned officer greeting tables.
  - Introduce guests and new members during professional development meetings (PDMs).
  - Recognize renewing member anniversaries on the chapter website or in chapter newsletters.
- **Find ways to get members involved.**
  - Send periodic, short, online surveys to get members' opinions on important issues in the chapter, industry, or profession.
  - Ask members to take on small tasks, such as handling registration at a PDM or event.
  - Ask all members to provide information at the beginning of each year about their needs and interests. For example, ask members to update their professional experiences and areas of expertise, as well as skills they can offer to the chapter (e.g. Website, public relations, leadership development, education planning). Ask members to indicate where they are willing to contribute time, expertise, or resources to the chapter, and what their professional development needs and career goals are for the year. What types of training and other continuing education do they need? What ideas do they have for PDM topics?
  - Invite members to host PDMs or plant tours, write articles, give presentations at PDMs, help to recruit members, or mentor a new member.
  - Identify the least active members and conduct online or telephone focus groups to get their input about chapter matters.
  - Don't forget to thank and recognize members who are actively engaged in chapter activities. If they believe you appreciate their time, you might get more of it!
- **Make your chapter's newsletter and website valuable and entertaining.**
  - Make your communications count; newsletters and websites are often the only contact chapters have with members who do not attend meetings.



*Communicate with members regularly throughout their memberships. Don't make a suspension call the first contact from your chapter!*

## Reach Out for Renewals

When it comes to membership retention, a personalized phone call has the most impact. While members may ignore renewal notices received in the mail, a friendly telephone call is harder to resist. It is difficult to say you are not interested in renewing when somebody actually telephones to say that you are missed.

- Keep following up; keep telephoning. If a suspended member is no longer employed at the address of record, try calling other members to get a new phone number.
- Make your calls with a script in front of you. Remember sales principles when asking questions, and formulate queries that make it easy for the member to give a positive response and easy-to-offer information.
- Report the reasons for dropped memberships to the chapter board. Are there changes in programs or policies (or in perceptions) that will eliminate recurring objections to renewal?
- Keep a supply of promotional materials on hand. While you are on the telephone, you can write out address labels and send these materials out to people who ask for additional information.

Before you begin making phone calls, it is helpful to have a script prepared. A script should be brief and include an introduction, fact finding questions, improvement suggestions, a resolution, and a close to the deal. A sample retention telephone script is included on pages 61-63. You may also wish to familiarize yourself with the key benefits of APICS membership listed on pages 24-26. See the Chapter Marketing Tool Kit under C-BOX at (<http://cbox.apics.org>) for talking points.

## Member Recognition

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APICS is an organization founded on the strengths of its volunteers. Below are several effective methods that your chapter can use to recognize board member and customer contributions and efforts.

- Honor them at your professional development meetings.
- Send praise to an individual's employer to increase the company's awareness of its employee's service.
- Highlight accomplishments in the chapter newsletter.
- Send a letter of recognition to individual volunteers.
- Offer incentives, such as free class enrollment.
- Use APICS signature apparel, desk accessories, lapel pins, and certificates as part of award programs and acknowledgments.

Other opportunities abound for member recognition:

- new CPIMs, CFPIMs, CSCPs
- members who have maintained their certification
- members who have renewed
- membership milestones (e.g., an anniversary)
- members who attend a certain number of chapter meetings
- members who have been promoted
- companies that have sponsored memberships or program fees
- company of the month and/or year awards in newsletter
- member of the month and/or year awards in newsletter
- annual dinner dedicated to recognition
- company coordinator recognition.

## Recognize New Members

Every new member presents an opportunity for you to expand the reach of APICS. These professionals have expressed their interest by making a short-term, up-front investment in your chapter. How you reward or acknowledge that investment determines whether members stay and whether your chapter will grow.

The chapter reward for recognizing new members is long-term membership growth and involvement. The following list offers tips for recognizing new members:

- **Remember to remember.** Set weekly reminders on your electronic calendar to check the My Chapter home page for new members. My Chapter is updated in real time every day. There is no need to wait until the end of the month to see who is new to your chapter.
- **Bring back the welcome wagon.** Have you ever been visited by a welcoming committee when you moved into a new neighborhood or been assigned a buddy/mentor when you took a new job? What was your first reaction to this gesture? “Wow, what a great neighborhood or place to work; I made the right decision.” You want your members to feel that sense of belonging. A brief phone call or a quick e-mail to a new member will be just as welcoming.
- **Emphasize the connection.** APICS membership is a privilege. You volunteer because you believe in the organization. Start building that pride in your new members right away. APICS Certificates of Membership (stock #01051) enable chapters to personally recognize a new member’s commitment to lifelong learning. You do not need to have a ceremony, but a letter from the chapter president and the board is a great start. Chapter expense to mail a certificate is a nominal postage cost. Creating a valuable membership experience: Priceless.
- **Spread the word.** Networking is one of the primary reasons people join chapters. They want to know who is doing what in their industry and in their community. Make sure your new members are given opportunities to get to know their peers.
- **Create a comfort zone.** Have you ever attended an event or meeting where you did not know anyone? APICS professional development meetings (PDMs) are a great resource, but it can be quite intimidating to enter a room full of people who know each other and what is going on. Send new members personalized invitations to your next PDM. Ask one of your board members or long-time members to serve as the official new member greeter and host. At the very least, your new members should know every board member when they leave that first meeting. At best, they will begin to make connections that will benefit their personal and professional development.
- **Express gratitude.** Your members have numerous options for where they could spend their education dollars. Let them know you are happy they selected your chapter. Say thank you often and request feedback. When your members feel valued, they will value the service you provide.

## **Chapter-Level Recognition**

Your chapter may have established (or may want to establish) its own award programs. Many of your members and board members may also be interested in making business contacts and establishing themselves in their field. Official recognition of their efforts can help make their resumes even more impressive. An annual event to recognize volunteers and award APICS certificates or merchandise can also be effective.

### **Sample Award Guidelines**

Below are some guidelines you can use to recognize a member or company for outstanding contributions, including promotion of APICS membership, attendance at meetings and PDMs, membership milestones, and other significant achievements.

#### **Member of the Year**

1. A member in good standing with the chapter and who has gone out of the way to help the local chapter.
2. A member who has promoted membership by
  - attending local monthly meetings
  - conducting a membership campaign within a company
  - promoting or encouraging student participation at local universities
3. A member who has made an outstanding contribution to the chapter to enable the chapter to better meet its objectives.

## **Company of the Year**




1. A company that actively promoted membership in APICS in one or more of the following ways:
  - reimbursing employees for annual association or chapter dues
  - encouraging or requiring APICS certification (CPIM or CSCP)
  - demonstrating a measurable increase in the percentage of employee members
2. A company that actively promoted attendance at chapter meetings in one or more of the following ways:
  - reimbursing the chapter meeting fee
  - posting announcements internally
  - encouraging active participation by APICS company coordinators
3. A company that supported APICS educational activities in one or more of the following ways:
  - sponsoring in-house APICS seminars
  - encouraging employee attendance at certification and other seminars
  - encouraging or providing an incentive for employees to act as speakers or seminar instructors
4. A company that integrated APICS concepts and body of knowledge into the daily operation of the business.
5. A company that showed other significant, measurable contributions to the chapter, such as:
  - donating materials or supplies for APICS projects
  - providing locations for seminars or special events
  - giving direct support for special events
  - supporting volunteer involvement on the chapter board

## **Other Awards**

- Company coordinator of the month, quarter, or year
- Membership milestones (5 years, 10 years, 15 years, and so forth)
- Service (e.g., volunteer involvement on the chapter board)
- Top Management Night

## APICS Specialty Gift Items, Lapel Pins, and Recognition Certificates

APICS offers several tools to help chapters show appreciation for membership and service. Reward a member with APICS recognition certificates, specialty gift items, or an assortment of lapel pins. Use these handsome pins to recognize APICS members based on membership, membership tenure, or certification designations. View the Chapter Resources Catalog (stock #82032) or visit the APICS Bookstore at [www.apics.org](http://www.apics.org) for a complete list of items featuring the APICS logo. Items include:

- Certificate of Membership (stock #01051)—Use this certificate to welcome and recognize new members to your chapter.
- Certificate of Recognition (stock #01058)—Use this certificate to recognize members and board members whose volunteerism or accomplishments merit special chapter recognition.
- Completion Certificate (stock #01050)—Use this certificate to reward individuals who complete certification review courses and/or attend chapter educational activities. 
- Certificate Plaque Kit (stock #01055)— Use this wooden plaque, which has a Plexiglas™ overlay, to accommodate an 8 ½" x 11" certificate. All APICS recognition certificates will fit in this plaque. 
- Use these service or designation pins to recognize APICS members based on membership, membership tenure, or certification designations: 
  - APICS Classic Lapel Pin (stock #01362)
  - APICS 5-Year Anniversary Lapel Pin (stock #01394)
  - APICS 10-Year Anniversary Lapel Pin (stock #01395)
  - APICS 15-Year Anniversary Lapel Pin (stock #01396)
  - APICS 20-Year Anniversary Lapel Pin (stock #01397)
  - APICS 25-Year Anniversary Lapel Pin (stock #01398)
  - APICS 30-Year Anniversary Lapel Pin (stock #01399)
  - APICS 35-Year Anniversary Lapel Pin (stock #01393)
  - APICS 40-Year Anniversary Lapel Pin (stock #01390)
  - APICS 45-Year Anniversary Lapel Pin (stock #01371)
  - APICS 50-Year Anniversary Lapel Pin (stock #01370)
  - CPIM Lapel Pin (stock #01328)
  - CFPIM Lapel Pin (stock #01330)
  - CSCP Lapel Pin (stock #01327)

# Appendix A: Chapter Records Checklist

For year beginning \_\_\_\_\_ Chapter Name \_\_\_\_\_ District \_\_\_\_\_

| Check Appropriate Item    |  | Rec'd      | Partially Rec'd | Not Avail |
|---------------------------|--|------------|-----------------|-----------|
| <b>Function</b>           |  |            |                 |           |
| President                 | President/President Elect Handbook         | _____      | _____           | _____     |
|                           | Chapter billing number                     | _____      | _____           | _____     |
|                           | President's files                          | _____      | _____           | _____     |
|                           | Chapter bylaws and charter                 | _____      | _____           | _____     |
|                           | Meeting agenda copies                      | _____      | _____           | _____     |
|                           | Student chapter files (if applicable)      | _____      | _____           | _____     |
| Vice President            | Vice president's files                     | _____      | _____           | _____     |
|                           | Previous year award entry                  | _____      | _____           | _____     |
| Secretary                 | Secretary's files                          | _____      | _____           | _____     |
|                           | Board minutes                              | _____      | _____           | _____     |
|                           | Officer's roster                           | _____      | _____           | _____     |
| Treasurer                 | Treasurer's files                          | _____      | _____           | _____     |
|                           | Banking Details/Signature Cards            | _____      | _____           | _____     |
|                           | Budget/financial statements                | _____      | _____           | _____     |
|                           | Annual audit report                        | _____      | _____           | _____     |
|                           | Letter of exemption from IRS               | _____      | _____           | _____     |
|                           | Copies of previous 990s                    | _____      | _____           | _____     |
| Education/Research        | Federal and State tax filing documentation | _____      | _____           | _____     |
|                           | Education and research files               | _____      | _____           | _____     |
|                           | Seminars/workshops files                   | _____      | _____           | _____     |
|                           | Student activities                         | _____      | _____           | _____     |
|                           | Certification/course materials             | _____      | _____           | _____     |
|                           | Training aids                              | _____      | _____           | _____     |
| Programs                  | Books/reprints/publications catalog        | _____      | _____           | _____     |
|                           | Program files                              | _____      | _____           | _____     |
|                           | Programs planned                           | _____      | _____           | _____     |
|                           | Meeting notices                            | _____      | _____           | _____     |
|                           | Previous Speakers                          | _____      | _____           | _____     |
|                           | Inventory of equipment and materials       | _____      | _____           | _____     |
| Membership                | My Chapter access/member files             | _____      | _____           | _____     |
|                           | Sample letters/e-mails                     | _____      | _____           | _____     |
|                           | Status of active campaigns                 | _____      | _____           | _____     |
|                           | New/Suspended member activities            | _____      | _____           | _____     |
|                           | Student chapter activity                   | _____      | _____           | _____     |
|                           | Company Coordinator list/files             | _____      | _____           | _____     |
| Public Relations          | Public relations files                     | _____      | _____           | _____     |
|                           | Press releases                             | _____      | _____           | _____     |
|                           | Newsletters                                | _____      | _____           | _____     |
|                           | Major contacts                             | _____      | _____           | _____     |
| Historian                 | Historian files                            | _____      | _____           | _____     |
|                           | Open Contracts/Agreements                  | _____      | _____           | _____     |
| <b>Outgoing President</b> | (Signature) _____                          | Date _____ |                 |           |
| <b>Incoming President</b> | (Signature) _____                          | Date _____ |                 |           |

The following letters are provided as a guideline. Please feel free to copy and edit as you see fit.

## Appendix B: Letter Regarding Request for Membership Application (send/e-mail with enclosure/attachment)

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(Show Chapter Address Line 1  
Address Line 2  
Phone Number  
Web Address Here)

**[Insert Date]**

**[Insert Name]**  
**[Insert Company Name]**  
**[Insert Address]**  
**[Insert City, State, and Zip Code]**

Dear **[Insert Name]**:

Thank you for your interest in APICS The Association for Operations Management. Enclosed/attached is the APICS membership application you requested. Also included/attached is a brochure which explains the benefits of APICS membership in greater detail, and our latest chapter newsletter (optional).

Please take a moment to complete your membership application now. The annual dues are **[Insert \$\$]**. This amount includes both APICS and chapter dues. Payment information is listed on form.

You may also learn about the benefits and join APICS online at <http://www.apics.org/Membership/>

Membership in APICS is an investment in your professional development. Nearly 40,000 operations management professionals worldwide take advantage of APICS' outstanding products and services. These members are found in more than 230 chapters in North America, plus a growing network of international associates and authorized education providers worldwide.

Our local chapter, **[Insert Chapter Name]**, has **[Insert #]** members representing **[Insert #]** firms. The chapter meets every **[Insert week, day]** of the month at **[Insert location]** for a professional development meeting at **[Insert time]**, with presentations on timely issues affecting operations management, supply chain, and service industries. In addition to these gatherings, the chapter also conducts plant tours, workshops, certification review courses, and periodic seminars.

I am confident you will find your membership in APICS professionally rewarding. If I can be of further assistance, please feel free to call me at **[Insert telephone #]** or e-mail me at **[Insert e-mail address]**. You can also visit our Web site at **[Insert chapter Web site address]** for more information.

I look forward to seeing you at our next meeting and welcoming you as a new member of APICS.

Sincerely,

**[Insert Name]**  
**[Insert Title]**

---

**[Insert Chapter Name and Address, Web Site Address, and Phone Number Here]**

## Appendix C: Letter to Prospective Member (send/e-mail with enclosure/attachment)

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(Show Chapter Address Line 1  
Address Line 2  
Phone Number  
Web Address Here)

[Insert Date]

[Insert Name]  
[Insert Company Name]  
[Insert Address]  
[Insert City, State, and Zip Code]

Dear [Insert Name]:

Enclosed/attached please find information explaining the member benefits, products, services, and activities of APICS The Association for Operations Management. Established more than 50 years ago, APICS is widely recognized as the global leader and premier source of the body of knowledge in operations management, including, production, inventory, supply chain, materials management, purchasing, and logistics.

APICS membership is an investment in your professional development. Nearly 40,000 operations management professionals worldwide take advantage of APICS' outstanding products and services. These members are found in more than 230 chapters in North America, plus a growing network of international associates and authorized education providers worldwide.

Our local chapter, [Insert Chapter Name], has [Insert #] members representing [Insert #] firms. The chapter meets every [Insert week, day] of the month at [Insert location] for a professional development meeting at [Insert time], which is followed by presentations on timely issues affecting the operations management, supply chain, and service industries. In addition to these gatherings, the chapter also conducts plant tours, workshops, and periodic seminars.

APICS' strength comes from the shared expertise and contributions of thousands of members, including business leaders, industry practitioners, and consultants. APICS members receive timely and informative publications, including: *APICS* magazine, the official magazine of APICS. You will also benefit from valuable discounts on educational programs, certification exams, publications, and business services. In addition, you will have the opportunity to meet, network, exchange knowledge, and consult with area professionals at local chapter meetings and activities.

You are cordially invited to apply for membership in APICS. Enclosed/attached is a brochure that explains the benefits of APICS membership in greater detail. Also included/attached is a membership application. Please take this moment to complete and return the application to us. If I can be of further assistance, please feel free to call me at [Insert telephone #]. You may also visit our Web site at [Insert chapter Web site address] for more information.

I look forward to seeing you at our next chapter meeting.

Sincerely,  
[Insert Name]  
[Insert Title]

---

[Insert Chapter Name and Address, Web Site Address, and Phone Number Here]

## Appendix D: Letter to Prospective Member

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(Show Chapter Address Line 1  
Address Line 2  
Phone Number  
Web Address Here)

[Insert Date]

[Insert Name]  
[Insert Company Name]  
[Insert Address]  
[Insert City, State, and Zip Code]

Dear [Insert Name]:

APICS membership is an investment in your professional development. Established more than 50 years ago, APICS The Association for Operations Management is the premier source of the body of knowledge in operations management. Leading employers and universities globally recognize APICS CPIM and APICS CSCP designations as worldwide standards of professional competence in production and inventory control, supply chain management, and enterprise operations management.

Nearly 40,000 operations management professionals worldwide take advantage of APICS' outstanding products and services. These members are found in 230 chapters in North America, plus a growing network of international associates and authorized education providers worldwide.

Our local chapter, [Insert Chapter Name], has [Insert Number] members representing more than [Insert Number] firms. The chapter meets every [Insert Week and/or Day] of the month at [Insert Location] for a professional development meeting. Chapter meetings start at [Insert Time] and are followed by presentations on timely issues that affect the manufacturing and service sectors in the operations management field. In addition to these gatherings, the chapter also conducts plant tours, workshops, certification review courses, and periodic seminars on relevant topics.

APICS' strength comes from the shared expertise and contributions of thousands of members, including business leaders, industry practitioners, and consultants. APICS members gain a competitive advantage by staying up to date on industry knowledge through timely and informative publications, such as the award-winning *APICS* magazine. As an APICS member, you will have exclusive access to the APICS body of knowledge and cost savings on educational materials, including CPIM and CSCP certification exams and study aids, publications, and business services. In addition, you will meet, exchange knowledge, and consult with area professionals at local chapter meetings and activities.

You are cordially invited to apply for membership in APICS. Enclosed/attached is a brochure with a membership application that explains the benefits of APICS membership in greater detail. Please take this moment to complete and return the application. If I can be of assistance, please feel free to call me at [Insert Telephone Number] or e-mail me at [Insert E-mail Address]. You may also visit our Web site at [Insert Chapter Web Site Address] for more information.

I look forward to seeing you at our next chapter meeting.

Sincerely,

[Insert Name]  
[Insert Title]

---

[Insert Chapter Name and Address, Web Site Address, and Phone Number Here]

## Appendix E: Letter for Recruitment in a Company (send/e-mail with enclosure/attachment)

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(Show Chapter Address Line 1  
Address Line 2  
Phone Number  
Web Address Here)

[Insert Date]

[Insert Name]  
[Insert Company Name]  
[Insert Address]  
[Insert City, State, and Zip Code]

Dear [Insert Name]:

To compete in a dynamic, complex marketplace, your organization must constantly strive to maintain its competitive advantage. With a membership in APICS The Association for Operations Management, you and your company are assured of immediate access to vital information about your industry.

Established more than 50 years ago, APICS is widely recognized as the global leader and premier source of the body of knowledge in operations management, including production, inventory, supply chain, materials management, purchasing, and logistics. More than 15,000 member companies and nearly 40,000 individual members worldwide are investing in their future by taking advantage of the many progressive products and services APICS has to offer.

APICS can help your organization gain the competitive advantage by

- exploring progressive management trends and techniques that enhance your ability to compete in a dynamic, global marketplace
- offering educational programs to streamline production strategies and management practices
- providing results-oriented CPIM and CSCP certification programs that develop confident, competent goal-oriented managers
- offering discounts of up to 20 percent on innovative educational programs, products, and services.

Our chapter meets monthly at [Insert Location]. Your company is cordially invited to participate by attending our next meeting. Enclosed/attached is a membership brochure that explains the benefits of APICS membership in greater detail. Also included are copies of both the professional and enterprise applications. Please take a moment to review this information.

If I can be of further assistance, please feel free to call me at [Insert Telephone #] or e-mail me at [Insert E-mail Address]. You can also visit our Web site at [Insert Chapter Web site Address] for more information. I look forward to meeting you at our next meeting [Insert Date and Time].

Sincerely,

[Insert Name]  
[Insert Title]

---

[Insert Chapter Name and Address, Web Site Address, and Phone Number Here]

## Appendix F: Letter Regarding Follow-up, Seminar Attendee (send/e-mail with enclosure/attachment)

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(Show Chapter Address Line 1  
Address Line 2  
Phone Number  
Web Address Here)

[Insert Date]

[Insert Name]  
[Insert Company Name]  
[Insert Address]  
[Insert City, State, and Zip Code]

Dear [Insert Name]:

Thank you for attending the [Insert Program Name] on [Insert Date]. We hope you found the information beneficial to your continued professional development.

Our local chapter, [Insert Chapter Name], has [Insert # of Members] members representing [Insert # of Companies] firms. The chapter meets every [Insert Week, Day] of the month at [Insert Location] for a professional development meeting at [Insert Meeting Time], which includes a presentation on timely issues affecting the operations management, supply chain, and service industries. In addition to these gatherings, the chapter also conducts plant tours, workshops, and periodic seminars.

As operations management professionals, the rapidly changing business environment requires all of us to reduce costs and increase productivity. To meet the demands of the future, you must stay on top of the latest industry trends and information. APICS membership helps you achieve those goals in a variety of ways. Nearly 40,000 operations management professionals worldwide take advantage of APICS outstanding products and services. These members are found in more than 230 chapters in North America, plus a growing network of international associates and authorized education providers worldwide.

APICS' strength comes from the shared expertise and contributions of thousands of members, including business leaders, industry practitioners, and consultants. As a member of APICS, you will receive timely and informative publications, including *APICS* magazine, the official magazine of APICS. You will also benefit from valuable discounts on educational programs, certification exams, and an impressive library of publications and business services. In addition, you will have the opportunity to meet, network, exchange information, and consult with other area professionals at local chapter meetings and activities.

You are cordially invited to apply for membership in APICS. Enclosed/attached is a membership brochure that explains the benefits of APICS membership in greater detail. Please take this moment to complete the application. If I can be of further assistance, please feel free to call me at [Insert Telephone #] or e-mail me at [Insert E-Mail Address]. You can also visit our Web site at [Insert Chapter Web Site Address] for more information.

I look forward to seeing you at our next chapter meeting.

Sincerely,

[Insert Name]  
[Insert Title]

---

[Insert Chapter Name and Address, Web Site Address, and Phone Number Here]

## Appendix G: Letter Regarding Follow-up, Membership Dues

---



(Show Chapter Address Line 1  
Address Line 2  
Phone Number  
Web Address Here)

**[Insert Date]**

**[Insert Name]**  
**[Insert Company Name]**  
**[Insert Address]**  
**[Insert City, State, and Zip Code]**

Dear **[Insert Name]**:

It was very nice to see you at the APICS **[Insert Name]** Chapter meeting that was held on **[Insert Date]**. I hope you found the meeting informative and helpful in filling your business needs.

In this fast-paced, global market, we are all pressed to allocate resources effectively and reduce costs while increasing productivity. I realize how tempting it is to cut what may appear to be discretionary items, such as additional training; however, membership in APICS is a wise investment in your professional development. I hope that membership in the **[Insert Name]** Chapter has afforded you the opportunity to realize all of the outstanding benefits APICS membership has to offer and that you plan to renew your membership.

APICS' strength comes from the shared expertise and contributions of thousands of members like you. Don't miss a moment of enjoying the outstanding benefits APICS membership has to offer. To remind you of the many benefits, products, and services available through APICS membership, I've enclosed a copy of our membership brochure for your review.

If there is some reason you feel we have not contributed enough as a chapter, please feel free to call me at **[Insert Telephone #]** or e-mail me at **[Insert E-Mail Address]**. You can also visit our Web site at **[Insert Chapter Web Site Address]** for more information. Your feedback is greatly appreciated.

Please take this moment and renew your membership today! I look forward to seeing you at a chapter meeting again.

Sincerely,

**[Insert Name]**  
**[Insert Title]**

---

**[Insert Chapter Name and Address, Web Site Address, and Phone Number Here]**

## Appendix H: Letter to New Member from Chapter President

---



(Show Chapter Address Line 1  
Address Line 2  
Phone Number  
Web Address Here)

[Insert Date]

[Insert Name]  
[Insert Company Name]  
[Insert Address]  
[Insert City, State, and Zip Code]

Dear [Insert Name]:

Welcome to the APICS [Insert Name] Chapter, and congratulations on taking a leap in your professional development and education. You should receive your membership card from APICS corporate in the coming weeks, if you have not already received it.

We are very happy to welcome you into our chapter as a new member and look forward to seeing you at our next meeting on [Insert Date] at [Insert Location] at [Insert Time].

As a new APICS member, you have the opportunity to participate on one of our committees. We encourage you to become a committee member so that your colleagues can benefit from your expertise. While serving on the committee, you also will help guide the development of this chapter. Once you make a decision to join a committee, the committee chair will contact you to discuss the exciting duties for which you have generously volunteered your time. Active participation of members such as you enables us to provide interesting and valuable chapter activities and services.

If there is anything I can do to make your membership in our chapter and APICS more beneficial, please feel free to call me at [Insert Telephone #] or e-mail me at [Insert E-Mail Address]. You can also visit our Web site at [Insert Chapter Web Site Address] for more information.

Sincerely,

[Insert Name]  
[Insert Title]

---

[Insert Chapter Name and Address, Web Site Address, and Phone Number Here]

## Appendix I: Letter to Welcome New Member

---



(Show Chapter Address Line 1  
Address Line 2  
Phone Number  
Web Address Here)

**[Insert Date]**

**[Insert Name]**  
**[Insert Company Name]**  
**[Insert Address]**  
**[Insert City, State, and Zip Code]**

Dear **[Insert Name]**:

Welcome to the APICS **[Insert Chapter Name]** Chapter. As a new member, you will soon receive your membership package from APICS Corporate, if you have not already received it.

We are happy to welcome you into our **[Insert Chapter Name]** family as a new member. We look forward to seeing you at our next professional development meeting on **[Insert Date]** at **[Insert Meeting Location]** at **[Insert Time]** or at one of our educational programs. You may also visit our Web site at **[Insert Chapter Web Site Address]** for more information on upcoming chapter education programs, speakers, and other events, including our CPIM and CSCP certification review courses.

As a new member of APICS, you have the opportunity to participate on one of our chapter committees. We encourage you to become a committee member so that your colleagues can benefit from your expertise. While serving on the committee, you also will help guide the development of this chapter. Once you make a decision to join a committee, the committee chair will contact you to discuss the exciting duties for which you have generously volunteered your time. Active participation of members like you enables us to provide interesting and valuable chapter activities and services.

If there is anything I can do to make your membership in our chapter and in APICS more beneficial, please feel free to call me at **[Insert Phone Number]** or e-mail me at **[Insert E-mail Address]**.

I look forward to seeing you at our next chapter meeting.

Sincerely,

**[Insert Name]**  
**[Insert Title]**

---

**[Insert Chapter Name and Address, Web Site Address, and Phone Number Here]**

## Appendix J: Letter to Suspended Member Follow-Up (send/e-mail with enclosure/attachment)

---



(Show Chapter Name Here)

(Show Chapter Address Line 1  
Address Line 2  
Phone Number  
Web Address Here)

[Insert Date]

[Insert Name]  
[Insert Company Name]  
[Insert Address]  
[Insert City, State, and Zip Code]

Dear [Insert Name]:

I look forward to meeting you at our next professional development meeting. It will be held on [Insert Date] at the [Insert Location] at [Insert Time], and I strongly encourage you to visit our upgraded Web site at [Insert Chapter Web Site] to get the most current details about upcoming events.

In this fast-paced, global market, we are all pressed to allocate resources effectively and reduce costs while increasing productivity. I realize how tempting it is to cut what may appear to be discretionary items, such as additional training; however, membership in APICS is a wise investment in your professional development.

APICS' strength comes from the shared expertise and contributions of thousands of members like you. Don't miss a moment of enjoying the outstanding benefits APICS membership has to offer. To remind you of the many benefits, products, and services available through APICS membership, I've enclosed/attached a copy of our membership brochure for your review.

I hope that membership in the APICS [Insert Chapter Name] Chapter has afforded you the opportunity to realize the benefits of APICS and that you plan to renew your membership. If there is some reason you feel we haven't contributed enough as a chapter, please feel free to call me at [Insert Phone Number] or e-mail me at [Insert E-Mail Address]. Your feedback is greatly appreciated.

Please take this moment and renew your membership today! Renewing your APICS membership is easy. Renew your APICS membership online at <http://www.apics.org/renew> or via telephone by contacting APICS Customer Support at [service@apics.org](mailto:service@apics.org) or (800) 444-2742. Or simply send the enclosed membership application and payment to:

APICS Membership Dues  
P.O. Box 4050  
Carol Stream, IL 60197-4050

I look forward to seeing you at the next meeting.

Sincerely,

[Insert Name]  
[Insert Title]

---

[Insert Chapter Name and Address, Web Site Address, and Phone Number Here]

## Appendix K: Letter to Past APICS Member (send/e-mail with enclosure/attachment)

---



(Show Chapter Address Line 1  
Address Line 2  
Phone Number  
Web Address Here)

[Insert Date]

[Insert Name]  
[Insert Company Name]  
[Insert Address]  
[Insert City, State, and Zip Code]

Dear [Insert Name]:

I am sorry to report that your membership in the APICS [Insert Chapter Name] Chapter has been suspended. Despite several reminders, your membership dues have not been paid. Therefore, we can no longer continue to offer you the valuable services and opportunities available to APICS members.

We are very sorry to lose you as an APICS member because your participation, experience, and creativity have contributed to APICS' ability to offer high-quality educational programs, seminars, publications, and workshops.

Membership in APICS is an investment in your professional development. APICS members receive many significant benefits, including timely and informative publications such as *APICS* magazine and the *APICS Dictionary*. As a member, you also benefit from valuable discounts on educational programs; APICS CPIM and CSCP certification review courses, exams, study aids; and business services. In addition, you have the opportunity to meet, network, exchange knowledge, and consult with area professionals at local chapter meetings and activities.

We hope you will reconsider the value an APICS membership can offer you. If you are currently unemployed, APICS has a program to extend your membership at no charge. We also have a reduced membership fee for retired members. APICS membership is a bargain and one of the lowest professional association dues around. Association and chapter dues for the APICS [Insert Chapter Name] Chapter are [Insert Dues].

Rejoining APICS is easy. Simply renew online at [www.apics.org/renew](http://www.apics.org/renew), call us at (800) 444-2742 to renew by phone, or send the enclosed membership form and payment to:

APICS Membership Dues  
P.O. Box 4050  
Carol Stream, IL 60197-4050

If you have any questions, please feel free to call me at [Insert Phone Number] or e-mail me at [Insert E-Mail Address]. I hope to see your name back on our membership roster soon.

Sincerely,

[Insert Name]  
[Insert Title]

---

[Insert Chapter Name and Address, Web Site Address, and Phone Number Here]

## Appendix L: Letter to Suspended Member (send/e-mail with enclosure/attachment)

---



(Show Chapter Address Line 1  
Address Line 2  
Phone Number  
Web Address Here)

[Insert Date]

[Insert Name]  
[Insert Company Name]  
[Insert Address]  
[Insert City, State, and Zip Code]

Dear [Insert Name]:

We missed seeing you at the APICS [Insert Name] Chapter meeting that was held on [Insert Date at Location]. We had a great speaker [Insert Name], who spoke on [Insert Topic]. The people in attendance found the meeting to be very informative and helpful. They left the meeting with at least one or two great ideas that will help them improve their performance at work.

In this fast-paced, global market, we are all pressed to allocate resources effectively and reduce costs while increasing productivity. I realize how tempting it is to cut what may appear to be discretionary items such as professional development; however, membership in APICS is a wise investment in your career. It's more important than ever to keep up to date on industry knowledge to improve your skills and maintain a competitive advantage in the marketplace.

APICS' strength comes from the shared expertise and contributions of thousands of members like you. Don't miss a moment of enjoying the outstanding benefits APICS membership has to offer. To remind you of the many benefits, products, and services available through APICS membership, I've enclosed/attached a copy of our membership brochure for your review.

There are many other ways to maximize the value of your APICS membership including:

- **Webinars** (including access to free on-demand): <http://www.apics.org/Education/Webinars/default.htm>
- **Social networking (Facebook, LinkedIn and learning communities)** where you can network online with thousands of professionals. Share and develop ideas, practices, and solutions in the field of operations management: <http://www.apics.org/resources/learningcommunities/>
- **Staying up to date on the latest trends** the industry. Access APICS publications, online resources and the **publications database** to research numerous topics: <http://www.apics.org/resources/publications/>

I hope that membership in APICS [Insert Chapter Name] Chapter has afforded you the opportunity to realize all the outstanding benefits APICS membership has to offer and that you plan to renew your membership. If there is some reason you feel we haven't contributed enough as a chapter, please feel free to contact me at [Insert Phone Number] or e-mail me at [Insert E-Mail Address]. Your feedback is greatly appreciated.

Please take this moment to renew your membership today! I look forward to seeing you at a chapter meeting again.

Sincerely,

[Insert Name]  
[Insert Title]

---

[Insert Chapter Name and Address, Web Site Address and Phone Number Here]

## Appendix M: Letter to Past APICS Member (send/e-mail with attachment/enclosure)

---



(Show Chapter Name Here)

(Show Chapter Address Line 1  
Address Line 2  
Phone Number  
Web Address Here)

[Insert Date]

[Insert Name]  
[Insert Company Name]  
[Insert Address]  
[Insert City, State, and Zip Code]

Dear [Insert Name]:

I regret to inform you that your membership in APICS has been suspended. Despite several reminders, your membership dues have not been paid. Therefore, we can no longer continue to offer you the valuable services and opportunities available to APICS members. We are very sorry to lose you as an APICS member as your participation, experience, and creativity have contributed to APICS' ability to offer high-quality educational programs, seminars, publications, and workshops.

Some members let their membership lapse—perhaps without even realizing it—and we understand why. Life is busier than ever, and even with online banking, personal digital assistants, and refrigerator magnets, things fall between the cracks. Membership in APICS is an investment in your professional development. APICS members receive many significant benefits, including timely and informative publications such as *APICS* magazine, the official magazine, and APICS Webinars. As a member, you also benefit from valuable discounts on educational programs, certification exams, and business services. In addition, you also have the opportunity to meet, network, exchange knowledge, and consult with area professionals at local chapter meetings and activities.

We hope you will reconsider the value an APICS membership has to offer you. If your company has stopped sponsoring membership, perhaps we can help you explain the many ways APICS membership can benefit your company. Enclosed/attached is a brochure that contains valuable information to help you communicate the benefits of membership to corporate decision-makers. Also included is a membership application that you can use to renew your membership.

APICS membership is a bargain and the most cost-effective professional association dues around. APICS dues are [Insert \$\$] and your local chapter dues are [Insert \$\$]. Rejoining APICS is easy. Renew your APICS membership online at <http://www.apics.org/renew> or via telephone by contacting APICS Customer Support at (800) 444-2742 x4300. Or simply send the enclosed/attached membership application and payment to:

APICS Membership Dues  
P.O. Box 4050  
Carol Stream, IL 60197-4050

I hope you'll agree that it makes good sense to come back to APICS and reinstate your membership now. And if you have any hesitations at all about joining, please get in touch with me personally at [Insert Telephone #]. I look forward to welcoming you back soon!

Sincerely,

[Insert Name]  
[Insert Title]

---

[Insert Chapter Name and Address, Web Site Address, and Phone Number Here]

## Appendix N: Letter to Prospective Academic Members (send/e-mail with enclosure/attachment)

---



(Show Chapter Name Here)

(Show Chapter Address Line 1  
Address Line 2  
Phone Number  
Web Address Here)

[Insert Date]

[Insert Name]

[Insert Company Name]

[Insert Address]

[Insert City, State, and Zip Code]

Dear [Insert Name]:

We need your help to address economic challenges facing the operations and supply chain management industry. APICS The Association for Operations Management is seeking academic professionals such as you to share their knowledge and expertise. We invite you to join APICS as an Academic Professional Member. As an APICS member, there are opportunities to participate in field-related research, publish articles, mentor students, deliver presentations at the international conference and local professional development meetings, and much more.

### About APICS

APICS The Association for Operations Management is a nonprofit professional association working diligently to support its 40,000 members and their organizations as they weather the financial storm. Leading employers and universities throughout the country recognize APICS CPIM and CSCP designations as a worldwide standard of professional competence in production and inventory control, supply chain management, and enterprise operations management.

Members take advantage of APICS' outstanding products and services, including continuing education in programs such as inventory control, planning, lean enterprise, and global sourcing. APICS' members are found in more than 230 professional chapters and nearly 200 student chapters in North America, along with International Associates and Authorized Education Providers located in 28 countries outside North America.

### APICS Member Benefits

APICS' strength comes from the shared expertise and contributions of thousands of members, including academic professionals, business leaders, industry practitioners, and consultants. Some of the benefits that academic professionals experience from their involvement with APICS and the [Name of Chapter] Chapter are:

- Staying up to date on APICS progressive management trends and techniques that enable professionals to compete in a dynamic, global marketplace.
- Accessing industry publications and resources to stay current on practical applications of developing topics.
- Connecting and networking with nearly 40,000 industry professionals worldwide.
- Making a difference in the professional growth of students entering the workforce.

Please refer to the enclosed/attached Academic Professional Membership Application for more details. APICS and many of its professional chapters partner with local colleges and universities to work with students. The enclosed “What’s in it for You” flyer explains the potential return on investment of working together to serve students. We recognize the need to provide students with career and leadership opportunities as they make the transition from student to young professional and to prepare them to be future leaders of the industry and the association. I’ve also included an APICS Student Membership Application to provide you with information about the resources and services available to students.

**[Name of Chapter]**, your local chapter, hosts professional development meetings, which include presentations on timely issues that affect operations management, supply chain, and service sectors in the operations management field. In addition to these gatherings, the chapter also conducts plant tours, workshops, and periodic seminars on relevant topics. Students and their faculty advisors are welcome to attend these events, often at a reduced cost.

An officer of the APICS **[Name of Chapter]** Chapter will be calling you in the next few weeks to answer questions and discuss how APICS and the **[Name of Chapter]** Chapter can meet your professional needs. You can also visit the APICS Web site at [www.apics.org](http://www.apics.org) and the local chapter Web site at **[website address]** for more information. If I can be of assistance in the meantime, please feel free to call me at **(Insert Phone Number)** or e-mail me at **(Insert E-mail Address)**.

Sincerely,

**[Insert Name]**  
**[Insert Title]**

---

**[Insert Chapter Name and Address, Web Site Address, and Phone Number Here]**

## Appendix O: Sample Retention Telephone Script

---

### A. Introduction

Hello. This is (your name). I am with the APICS (chapter name) Chapter. (Pause here for recognition and to establish rapport :)

### B. Fact-Finding

I'm responsible for membership this year, and I noticed on our printout from APICS that your membership has lapsed. Were you aware of that? (Pause here. Usually, they'll tell you why.)

### C. Improvement Suggestions

I wonder if you could do me a favor. When we contact former members we try to find out if there is anything that APICS could be doing better. May I ask, could you tell me the reason your membership has lapsed? (Stay positive; responses like "I can certainly appreciate that" or "we would like to change that" can diffuse negative situations. If the member is firm about not renewing, end on a friendly note if you can. "We're sorry to lose your support, but thank you for talking to me.")

### D. Resolution: Getting to "Yes"

You know, even if you can't always attend meetings, there are so many other APICS benefits: *APICS* magazine, access to free, select Webinars On-Demand, a chapter newsletter; reduced fees for educational events and exam fees for certification; discounts on materials from the APICS Bookstore; and many other advantages. (Mention your chapter programs.)

### E. Closing the Deal

It's easy to renew your membership online at [www.apics.org/join](http://www.apics.org/join).

Just log in and click on the Renew link at the top of the page. Or, if you still have your renewal notice from APICS, you can send it back to APICS with your payment information and your membership will be reinstated immediately. If not, I'll send the application to you and you can forward it to APICS with your check or your credit card information. You can also renew your APICS membership via telephone by contacting APICS Customer Support at (800) 444-2742 x 4300.

Some members will leave APICS for reasons outside of our control, but others may have forgotten or experienced problems that you are able to resolve. You can be prepared to address specific problems, such as these:

**Reason:** I have been busy with other activities and was not aware that my membership had lapsed.

**Response:** No problem. Did you know that you can renew your APICS membership online or telephone APICS Customer Support at (800) 444-2742 x4300? To review online, go to [www.apics.org/join](http://www.apics.org/join).

- If you are already registered, enter your User Name and Password.
- Select the Begin button.
- Next, you will be prompted to designate chapter and membership options and complete the payment transaction.  
(\*Instructions for users who are new to APICS, or who have never registered on the APICS Web site, are also displayed to the left of the page.)

Let's get together at the next meeting and get acquainted.

**Reason:** I misplaced or lost my renewal notice. Can you please send me a replacement?

**Response:** Yes, I would be happy to request a renewal notice for you. However, did you know that you can renew your APICS membership online or telephone APICS Customer Support at (800) 444-2742 x4300?

To review online, go to <http://www.apics.org/join>

- If you are already registered, enter your User Name and Password.
- Select the Begin button.
- Next, you will be prompted to designate chapter and membership options and complete the payment transaction.  
\*Instructions for users who are new to APICS, or who have never registered on the APICS Web site, are also displayed to the left of the page.

If you need a hard copy invoice, please contact APICS Customer Support at (800) 444-2742 x4300 or [service@apics.org](mailto:service@apics.org) for a replacement.

**Reason:** I'm too busy with other activities.

**Response:** You might still want to receive our publications to stay up to date on the industry.

**Reason:** I don't find the meetings to be very valuable to me.

**Response:** We would like to change that. Do you have specific suggestions? Would you be willing to volunteer to help us improve our programs? Would you be willing to teach a course for us?

**Reason:** My Company won't pay anymore.

**Response:** Would it help if we sent you information on APICS benefits and educational events so you could show your manager the value of membership?

**Reason:** I'm already CPIM/CSCP certified, so there's really no reason to renew.

**Response:** Did you know renewing your membership gives you 6 points toward your certification maintenance? Would you like information about the certification maintenance program? Would you like information about CPIM/CSCP?

**Reason:** I don't work in operations management anymore.

**Response:** APICS is a lot more than operations management. Can I send you information on APICS offerings? APICS meetings and publications are a good way to keep up with changes in the industry.

**Reason:** I'm going to be moving away from the area served by the chapter.

**Response:** APICS has more than 230 chapters in North America that serve as the face-to-face component of APICS membership. Would you like information on how to find an APICS chapter near your new location? (If yes) Use the Chapter Locator at [www.apics.org](http://www.apics.org) to find the nearest chapter by entering a zip code or search by chapter name, code, country, or state/province. To access the Chapter Locator, go to [www.apics.org](http://www.apics.org), click on the membership menu, and hover your mouse over chapter and then click Chapter Locator.

**Reason:** I am currently unemployed and can't afford to renew my membership.

**Response:** Did you know APICS offers a complimentary six month unemployed member benefit extension? I would be glad to forward you the application. (The application is available on page 15 of this document). Return the completed application to the chapter president. (Provide president's e-mail address and/or fax number).

\*\* If you receive a response relating to military deployment or retirement, refer to page 15 for available applications.

## Appendix P: Sample Member Needs Survey

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**[INSERT CHAPTER NAME]**

### Membership Survey

Your needs and opinions are very important to your chapter's board of directors. Your responses will help us plan our programs and courses.

Surveys completed and returned by [date] will be entered into a drawing; **[Insert offer if applicable]** the winner will receive a \$100 Gift card.

Your Full Name: \_\_\_\_\_(Optional)

E-mail Address: \_\_\_\_\_(Optional)

Telephone #: \_\_\_\_\_(Optional)

1. If you are a new member, how did you first hear about our association/chapter (choose all that apply)?

- Recruitment letter sent via e-mail
- Recruitment letter sent via mail
- Via the local chapter website
- Via the APICS corporate website
- Recommendation from a colleague or friend
- Recommendation from a supervisor or boss
- Other \_\_\_\_\_

2. What communication vehicle is best for notifying you of upcoming chapter events?

- E-mail
- Chapter newsletter
- Chapter website
- Mail
- Other \_\_\_\_\_

3. I have attended \_\_\_ chapter meetings in the past 12 months. My chief reason for not attending more meetings is \_\_\_\_\_

4. I would attend more meetings if  
 \_\_\_ location was changed to \_\_\_\_\_  
 \_\_\_ meetings were held on a different day \_\_\_\_\_  
 \_\_\_ meetings were held before work  
 \_\_\_ meeting were held at lunchtime  
 \_\_\_ meetings were held virtual  
 \_\_\_ other \_\_\_\_\_
5. The highest amount I am willing to pay for  
 a professional development meeting is \_\_\_\_\_  
 a half-day workshop is \_\_\_\_\_  
 a certification review course is \_\_\_\_\_
6. I would prefer certification review courses  
 \_\_\_ once a week for \_\_\_ weeks, on \_\_\_\_\_ evening  
 \_\_\_ all day Saturday  
 \_\_\_ other \_\_\_\_\_
7. My company reimburses me for  
 \_\_\_ membership dues  
 \_\_\_ professional development meetings  
 \_\_\_ seminars  
 \_\_\_ certification classes  
 \_\_\_ certification examinations  
 \_\_\_ district events  
 \_\_\_ international conference
8. My company would be willing to host a plant tour or chapter meeting \_\_\_\_\_  
 If yes, please provide your company name, contact name, and phone number.

9. On a scale of 1 to 5 (5 being the highest), I would like to see these topics offered:

| <b>Rating</b> | <b>Topic</b>            | <b>Prof.</b> | <b>Dev. Mtg.</b> | <b>Seminar</b> |
|---------------|-------------------------|--------------|------------------|----------------|
| ___           | Basics and fundamentals | ___          | ___              | ___            |
| ___           | Warehouse management    | ___          | ___              | ___            |
| ___           | Supplier certification  | ___          | ___              | ___            |
| ___           | Logistics/traffic       | ___          | ___              | ___            |
| ___           | CPIM topics             | ___          | ___              | ___            |
| ___           | CSCP topics             | ___          | ___              | ___            |
| ___           | RFID/Bar coding         | ___          | ___              | ___            |
| ___           | Quality management      | ___          | ___              | ___            |
| ___           | Lean Enterprise         | ___          | ___              | ___            |
| ___           | Systems implementation  | ___          | ___              | ___            |
| ___           | DRP                     | ___          | ___              | ___            |
| ___           | Personal development    | ___          | ___              | ___            |
| ___           | ERP                     | ___          | ___              | ___            |
| ___           | Global Sourcing         | ___          | ___              | ___            |
| ___           | Other                   | ___          | ___              | ___            |

10. I would like to hold one or more joint meetings with other association(s).

|         |           |           |           |
|---------|-----------|-----------|-----------|
| ___ ASQ | ___ CSCMP | ___ SME   | ___ AST&L |
| ___ IMA | ___ ASTD  | ___ PMI   |           |
| ___ ISM | ___ IIE   | ___ Other | _____     |

11. What are we, as a chapter, currently doing really well?

12. What could we do better?

13. Would you like to participate in any of the following chapter activities (choose all that apply)?

|                         |   |
|-------------------------|---|
| ___ teaching classes    | ___ professional development presentation |
| ___ database management | ___ Web site                              |
| ___ newsletter          | ___ membership                            |
| ___ other               | _____                                     |

14. If you have heard a really good speaker outside APICS, please tell us who it is and how we can get in touch with this person.
15. Are there any special topics that you would like to see covered in future chapter activities (e.g., PDM)?
16. Would your company be willing to host an APICS event or meeting?

**Thank you for taking the time to let us know your opinions.**

**Please return your survey by [Insert date]**

**to [Insert Name]**

**[Insert Address]**

**[Insert Telephone number]**

**[Insert Fax]**

## Membership – Chapter Leadership Handbook Evaluation

---

Efforts are continually being made to improve this resource. Please take a moment to help us improve the quality of this handbook with your comments or suggestions:

**I would like more information about:**

**What I like best about this handbook:**

**What I like least about this handbook:**

**Other comments or suggestions on improving this handbook:**

**Contact Information (optional):**

- APICS ID:
- Name:
- Chapter affiliation:
- Contact e-mail and/or phone.

**Return completed forms to:**

APICS Chapter and District Services  
8430 West Bryn Mawr Avenue, Suite 1000  
Chicago, IL 60631  
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