

APICS Southeast District Meeting
Charleston SC
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How to “Throw a Membership Recognition Event”



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Advancing **performance**, **innovation**, and career **success** worldwide.



What Will Be Covered?

- **Why hold a membership recognition event?**
- **Setting objectives**
- **Having a budget**
- **Identifying members to recognize**
- **Planning the details**
- **Other considerations**
- **How to know it's a success?**

APICS Members

- They are our greatest asset
- Recognition is key to retention
- Retention is paramount to chapter success

Set the Stage

- **Mid Florida Chapter Event – May 2006**
- **130 members**
 - **Average 17 attendees at PDMs**
 - **Several long-term memberships (20+ years)**
 - **Dave W. Buker – celebrating 40 years**
- **Chapter treasury is good, but not strong revenue in past year**
 - **Offer 8 PDMs a year**
 - **Two with others (ISM, IMA, and/or MACF)**

- Get into groups
- Brainstorming for 10 minutes

ASK:

How would I want to be recognized?

If gift is given, what type?

- Select two unique ideas from group and spokesperson
- Regroup and share

Setting Objectives

- **Purpose and goals**
 - Recognize members
 - Increase PDM attendance
 - Increase member involvement
- **Define measurement of success**
- **Determine type of recognition**
 - Membership key anniversary milestones
 - Volunteers and Instructors
 - Combined or other

What Did We Do?

- **Objective**
 - To increase PDM attendance by 25 percent and to provide recognition to long-term members**
- **Type of recognition**
 - **Membership key anniversary milestones**
 - 1, 5, 10, 15, 20, 25, 30, and 40 years
 - **Board of directors**

The Budget

- **How much can your chapter spend?**
- **What does it need to include**
 - **Promotional materials**
 - Signs, advertising, invitations, etc.
 - **Recognition awards**
 - APICS recognition items
 - Other rewards (see workshop items)
 - **Facilities**
 - **Other items**

What Did We Do?

- **Part of PDM at end of program year**
 - **Top speaker**
- **Sent out invitations**
 - **Customized for each key anniversary**
 - **Dinner included for major key anniversaries**
- **Promoted in newspaper, Web site, and with MACF - *Free***
- **Gave APICS membership certificates - *Free***
- **Gave out recognition items**
- **One- and five-year celebrants who attended got a Coupon for a free PDM next program year**

Recognition Items

- **APICS lapel pins**
 - 5, 10, 15, 20, 25, 30, and 40 years
- **Glass frames for certificates (2)**
- **Paper framed certificates for others**
- **APICS desk clock (40 years) and prism set (30 years)**
- **Gift cards**

Budget Example

Item	Budget
Trophies for recognition (plan C)	\$214.00
Pins & Plaques	
Certificates	
Picture Frame for Certificates (2)	
Paper Frame for Certificates	
Promotional Items	\$444.39
Invitations & Postage	\$435.39
Signage	\$9.00
Recognition Awards	\$525.00
Gift Cards	
APICS Items (clock & prism set)	
Free PDM Dinners (@\$25/ea)	
TOTAL	\$1,183.39

Identifying Members

- **Membership listing from APICS**
 - **CBOX/Chapter Leaders/My Chapter**
- **Export to Excel**
 - **Sort on “Original Join Date”**
- **Determine cutoff**
 - **We used 2005 program year (Jul 05 – Jun 06)**

Membership Example

Original Join Date Individual	Aniv	Prefix	First Name	MI	Last Name	Suffix	CPIM CFPIM Cert Code
3/1/1966	40		David	William	Buker		
5/1/1975	31	Mr	Charles	T	Carroll		
6/1/1976	30	Mr	Richard	G	Abramowski		
8/1/1977	29	Mr	Milo	G	Ringe	Jr	CPIM
7/1/1979	27	Mr	Dick	W	Driggs		
9/1/1979	27	Mr	Gary	S	Brannan		
1/1/1981	25		Stephen	H	Goodman		
5/1/1981	25	Mr	James	R	Pullin		CPIM
4/1/1982	24	Mr	Larry	D	Tedrow		CPIM
9/1/1983	23	Ms	Denise	D	Gillespie		CPIM
10/1/1983	23		Louis	G	Lansrud		CPIM
1/1/1984	22	Mr	Floyd	L	Westervelt	Jr.	
3/1/1984	22	Mr	David	B	Brault		CPIM
4/1/1984	22	Mr	Donald	E	Martin		CPIM
1/1/1985	21		Howard		Bessonette		
6/1/1985	21		Nilda	M	Brain		
7/1/1985	21	Mr	David	M	Goldstein		CFPIM
2/1/1986	20		Josephine	M	Fickes		CPIM
2/1/1986	20	Mr.	Roger	A	Southard		
4/1/1987	19	Mr	Thomas	A	Russell	Jr.	CPIM
5/1/1987	19	Mr	Daniel	J	Karaffa		
6/1/1987	19	Mr	Horst	D	Riechers		
7/1/1987	19	Mr.	James	D	Robison		CPIM
10/1/1987	19	Mr	Ronald	R	Price		
12/1/1987	19	Mr	Maxim	O	Bhoorasingh		CPIM

The Details

- **Determine budget and BOD approval**
- **Identify members to be recognized 8 weeks before**
- **Order APICS items 6 weeks before**
- **Mail invitations 3 weeks before event**
- **Obtain other recognition items 3 weeks before**
- **Promote in newspaper 2 weeks before**

The Details (continued)

- **Print up membership certificates 2 weeks before**
 - **Need signatures of president and other**
- **Print certificates for free PDMs in future**
- **Wrap or package recognition items 2 days before**
- **Seamless registration for “free” members**
- **Greet all members at day of event**

Other Considerations

- **What if you are financially strapped?**
 - APICS certificates are **FREE**
 - Suggestions from workshop
- **Still have a program speaker at the event?**
 - Top Management Night
 - Conduct a “roast”
 - Invite others (Manufacturing Association, ISM, etc.)
 - “Meet the Expert” event
- **Where to host it?**
- **When in the program year to have it?**

Measure for Success

- **Define measurement during objectives and goals**
- **Take measurement**
- **Analyze for continuous improvement**
- **Set in place enhancements for next year**

How Did We Do?

Goal: 25 percent increase in PDM attendance

Results:

- **43 attendees at the membership event (May PDM)**
 - 110 percent increase
- **23 attendees at the August PDM**
 - 17.6 percent increase
- **Today average 20+ at each PDM**

Resources

- **Invitations**
 - **Avery Matte White Note Cards (#3379)**
 - **Uses Avery template #5315**
- **APICS Certificate of Membership (Stock # 01051)**
- **APICS Lapel Pins (Stock #s 01390-99 & 01371)**
- **APICS Prism Gift Set (Stock #01381)**
- **APICS Desk Clock (Stock #01376)**

Electronic Templates

- **Avery invitations – 3 types**
- **Budget worksheet**
- **Actual vs. budget reporting**
- **Membership listing template**
- **APICS membership certificate template**

Available on my Web site at

www.thedenmarkgroup.com/membertemplates.htm

Or email me at: dgillespie@thedenmarkgroup.com