



Thank you for joining us!

Annual Member Meeting
September 3, 2026

- Welcome & Advancing the TOCICO Mission
- Highlights & Organizational Progress: What We've Accomplished Together
- Download Annual Update with CPA Financial Statement review
- What's Next? Strategic Priorities for the Year Ahead
- 2026 Board Election Results – Introduction of your newly elected Board Members
- Your Voice Matters: Answers to Member Questions



Our Mission

To advance the science, adoption, and effective practice of the Theory of Constraints.



TOCICO Board of Directors



Simon M White



Demi Anderson



Dr Alan Barnard



Dr Lisa Ferguson



Alejandro Fernandez
TOCIC™



Ian Gillott
TOCIC™



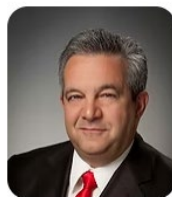
Andrew Kay
TOCPC™



Val King



Dr Danilo
Sirias
TOCIC™



Rocco
Surace
TOCIC™



Daniel (Danny) Walsh
TOCIC™



TOCICO Administration Team



Jennifer Eckman (*General Manager*) | **Michelle Ackley** (*Certification Manager*)
Tricia Barone (*Accounting Specialist*) | **Christianna DeVoe** (*Event Manager*)
Tracy Petrotto (*Member Support*) | **Jana Purcell** (*Graphic Design*)





TOCICO THEORY OF CONSTRAINTS
INTERNATIONAL CERTIFICATION ORGANIZATION
"Bringing People and TOC Knowledge Together Globally"

TOCICO ANNUAL UPDATE 2026

**A Year of Progress,
Connection &
Looking Ahead**



CONNECT
A global community
working together.



LEARN
Expanding access to
TOC knowledge.



CERTIFY
Upholding standards.
Advancing excellence.



APPLY
Creating impact.
Driving results.





ACADEMIA



COMMUNITY



INNOVATION



PARTNERSHIP



GLOBAL IMPACT

INSIDE:

- Committee & Initiative Updates
- Highlights of Achievements
- What's Next
- CPA-Reviewed Financial Statements
for the Fiscal Year Ended
November 30, 2025



**ANNUAL
UPDATE
2026**
A Year of Progress,
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TOCICO Annual Update 2026





Committee Reports • CPA Reviewed Financial Statement

**Conferences
&
Events**

**Marketing
&
Communications**

**TOC
Marketplace &
Learning Center**

Governance

**Awards and
Recognition**

FLOW

Membership

**Special
Interest
Groups**

Certification

**Bridge to
Academia**

**TOC Body of
Knowledge**





Achievements in the Past Year

- **Launched the new TOCICO website and Learning Center**, transforming more than **1,300 on-demand videos** and decades of TOC knowledge into a much more accessible member learning resource.
- **Expanded TOCICO into year-round learning and engagement.** Webinar programming grew from **9 to 37 planned webinars in 2026**, generating more than **1,300 registrations**, with new formats including the TOCICO Masterclass Series and Author Spotlights.
- **Broadened TOCICO's global event reach.** Critical Chain 2026 attracted **444 registrations from 48 countries**, including **282 first-time participants**, while the 2026 TOC Innovation Summit grew to **159 registered attendees**, compared with 113 in 2025.
- **Began building structured Learning Pathways**, starting with Critical Chain Project Management, with a long-term vision of guiding learners from foundational knowledge through certification and ultimately to **implementer-level capability**.
- **Modernized TOCICO Certification**, transitioning multiple Fundamentals exams to a **new online testing and proctoring platform**, strengthening question banks, launching the **CCPM Fundamentals Course**, and expanding certification opportunities through TOCICO Partners.

TOCICO has been building infrastructure, expanding access, growing engagement, modernizing certification, strengthening the community, and creating clearer pathways for learning and applying TOC.

TOCICO Conference & Events 2026

Expanding Access & Engagement Across the TOCICO Community



WEBINARS

9 → 37

webinars planned in 2026



1,300+ webinar registrations



Near-weekly live learning for members



New Masterclasses, Author Spotlights & Academic Spotlights



Expanded practitioner and special-interest programming



Included with TOCICO membership



\$2,566+

directly traceable webinar & membership revenue



CRITICAL CHAIN

Online Conference | April 22, 2026



444 registrations



48 countries



282 first-time participants (63.5%)



1 day • **3** tracks • **19** sessions



\$7,181 total revenue



\$5,300 sponsorship support



*Excellent, thought-provoking topics
on the future of TOC tools.*



TOC | INNOVATION SUMMIT 2026



159 registered attendees



61 first-time attendees



45 sessions across 3 days



University of Manchester, UK



New TOCx Talks, Working Sessions & Open Session



More accessible registration model



**Stronger participation and
broader global reach in 2026.**



Achievements in the Past Year

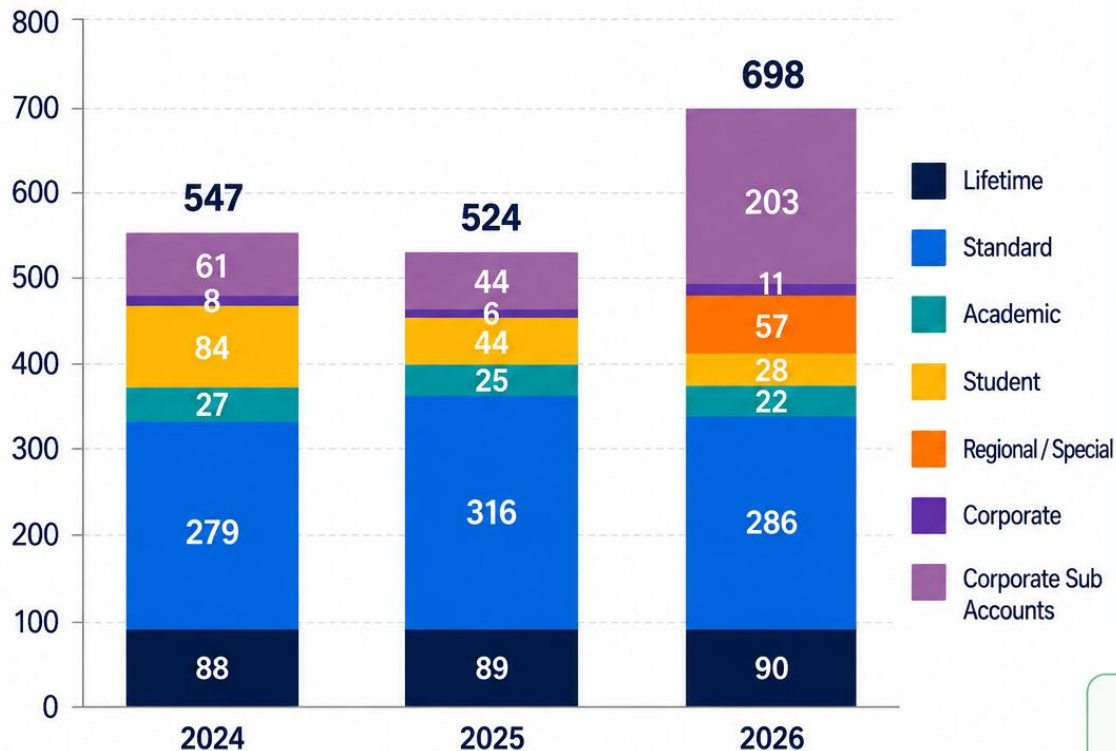
- **Expanded membership, partnerships and member value.** TOCICO added **5 new Corporate Members and 6 new Partners**, introduced new member benefits, launched the CCPM Learning Center community, and expanded opportunities for certified members.
- **Significantly increased TOCICO's digital reach.** YouTube generated **84,700 views**, added **782 subscribers** and more than **2,700 viewing hours**, while LinkedIn surpassed **5,000 followers**.
- **Strengthened TOCICO's connection with academia**, including initiating work toward a dedicated TOC academic journal, curating the **TOCICO Special Collection of TOC Papers (2011–2026)**, continuing the peer-reviewed Academic Stream at the Summit, growing academic outreach through webinars and LinkedIn, and making the **TOCICO Research Library** accessible.
- **Advanced the TOC Body of Knowledge**, establishing clearer criteria for evaluating new TOC knowledge and making the **3rd Edition of the TOCICO Dictionary** a major priority in collaboration with Certification and Bridge to Academia.
- **Expanded recognition and community participation**, including the new **TOC Ambassador Award** and recognition of **22 award recipients** at the 2026 Awards Ceremony.
- Strengthened TOCICO governance through a **new Privacy Policy** and key Bylaws updates

TOCICO has been building infrastructure, expanding access, growing engagement, modernizing certification, strengthening the community, and creating clearer pathways for learning and applying TOC.



TOCICO MEMBERSHIP GROWTH: 2024–2026

Members



2026 HIGHLIGHTS



Corporate Members:

6 → 11



Corporate Sub Accounts:

44 → 203

(159 more people connected through corporate memberships)



Lifetime membership remains strong and stable



Growing visibility into regional and special membership participation



+33%

Growth from 2025 to 2026

+28%

Growth from 2024 to 2026







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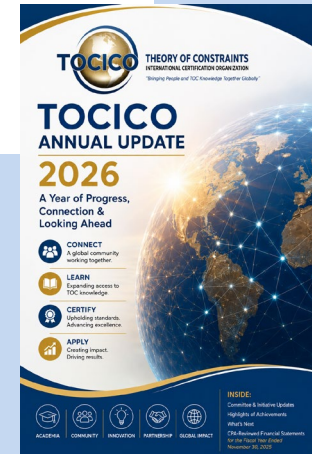
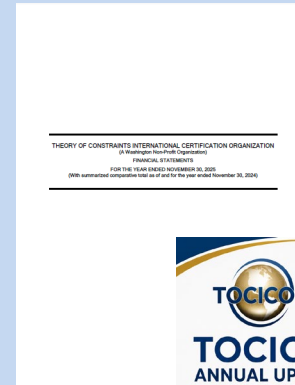
Committee Reports • CPA Reviewed Financial Statement



Financial Update

- **Revenue for Conferences, Membership, Certification improving**
- **WiseTech Global sponsorship \$250K 12 months**
- **TOCICO Learning Center & Partner Network opportunities**

The CPA-Reviewed Financial Statements for year ended November 30, 2025 is included in the TOCICO Annual Update.





What's Next?

- **Build Clear Learning Pathways — From Fundamentals to Implementation**

Expand structured Learning Pathways across TOC disciplines—from foundational knowledge through advanced learning, certification, and ultimately **implementer-level capability**.

- **Make TOC Knowledge Easier to Find & Use**

Improve Learning Center search and content discovery, expand Fundamentals courses, and make TOCICO's **1,300+ resources** easier for members to navigate and apply.

- **Continue Modernizing & Expanding Certification**

Improve the candidate journey, expand Fundamentals preparation, introduce additional language options, bring **Level 2 certifications online**, and expand certification delivery through TOCICO Partners.

- **Grow Membership, Partnerships & Member Value**

Continue expanding Corporate Membership and the TOCICO Partner Network, introduce new member benefits and communities, and create clearer journeys that move people from **discover → learn → engage → certify → contribute**.

- **Expand Year-Round Learning & Global Engagement**

Continue building webinars, Masterclasses, conferences and on-demand learning into a sustainable year-round portfolio, while expanding TOCICO's global reach and engagement.

- **Strengthen the TOC Body of Knowledge & Academic Foundation**

Advance the **3rd Edition of the TOCICO Dictionary**, Curate an AI-based “TOC Encyclopedia”, establish the proposed **TOC Academic Journal**, and strengthen the global academic TOC network.



EARLY COMMITMENT

Taking place in the United States in **Fall 2027**

Reserve your **Early Commitment Ticket** during this year's Summit and receive:

- ✓ **Lowest Price Guaranteed:** Our BEST price for the 2027 Summit
- ✓ **Awards Dinner Included** – A premium add-on with regular tickets
- ✓ **Fully transferrable** – If your plans change, your ticket doesn't go to waste

This offer is available only during the 2026 Summit!



Lock in the Best 2027 Offer now — Register in the App

We're Excited to Introduce TOCICO's New Board Officers!

These leaders bring deep expertise, commitment, and passion for advancing the Theory of Constraints and strengthening TOCICO's global community. We're grateful for their willingness to serve and help guide TOCICO into the future. Join us in congratulating them and wishing them success in their new roles!



Dr Alan Barnard



Val King



Christoph Lenhart





A special **Thank you!**



Ian Gillott



Andrew Kay



Rocco Surace

Thank you for your service, passion, and insights as a TOCICO Board Member.

Your leadership and influence have been instrumental for promoting TOCICO and TOC community.

We are extremely grateful for your contributions and friendship!



Questions

We're here to answer your questions and provide clarity and any additional information you may need today and always – email admin@tocico.org



Thank you

*Your engagement and support for TOCICO
and the TOC community are greatly appreciated!*

