

PRESIDENT AND PRESIDENT-ELECT LEADERSHIP HANDBOOK

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APICS The Association for Operations Management
8430 West Bryn Mawr Avenue
Suite 1000
Chicago, IL 60631



Advancing Productivity, Innovation, and Competitive Success

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Contents

Preface.....	3
President's First Steps.....	4
Getting Started—A Timetable.....	7
Promoting a Healthy Chapter.....	12
Put the Power of <i>My Chapter</i> to Work for Your Chapter.....	14
Make Membership in APICS a Premium in Your Chapter.....	15
General Membership Tips.....	15
New Members.....	15
Chapter Officers.....	17
Building a Team.....	17
Defining the Role of the Board of Directors.....	17
Succession Leadership and Planning.....	24
Sample Transition Process.....	25
Board of Directors Meetings.....	26
Board of Directors Meeting Agenda.....	26
General Membership Meetings.....	27
Strategic Planning.....	28
Chapter Financial Management (Fiduciary Responsibilities).....	29
Sample Budgeting Process.....	30
Federal Tax-Exempt Status.....	32
Insurance Protection for Chapter Officers.....	33
Important IRS Form Filing Dates.....	35
Sales and Use Tax, Property Tax.....	35
Chapter Disbursements (Rebates).....	36
Chapter Billing and Invoicing.....	36
Information Flow.....	38
Leadership Central Announcement List.....	38
Leadership Central Newsletter.....	38
CBOX Section—www.apics.org.....	38
Officers' Discussion List.....	39
Where Do You Go for Help?.....	40
Internal Chapter Resources.....	40
CBOX*.....	40
APICS Professional Staff.....	41
APICS Districts.....	42
District Managers Committee (DMC).....	45
APICS Governance.....	45
Other Resources.....	46
Recognizing a Job Well Done Just Became a Little Easier.....	47
Chapter-Level Recognition.....	47
APICS Specialty Gift Items, Lapel Pins, and Recognition Certificates.....	49
APICS-Level Recognition Programs.....	51
Appendix A: Minimum Standards for Maintaining a Chapter Charter.....	55
Appendix B: Suggestions for the President and President-Elect Chapter Leadership Handbook.....	59

Preface

Special thanks to David W. Johnson, CPIM; the Phoenix Chapter; Ronald K. Althaus, CFPIM, CIRM, CSCP; Luis Barcón, CPIM, CIRM, CSCP; and James Semerad, CPIM, for their invaluable contributions to the content and preparation of this resource.

CONGRATULATIONS

You have been elected to the office of chapter president. Serving as your chapter's president is both an honor and a formidable responsibility. As chief executive officer of an APICS chapter, you are responsible for

- Overseeing all chapter activities
- Managing the chapter's affairs, property, and funds
- Presiding over all meetings of the membership and of the board of directors
- Interpreting the chapter's policies, in line with the intent of the bylaws, and establishing goals for your chapter to work toward during your term of office
- Keeping APICS advised of chapter activities and progress
- Upholding chapter bylaws, state/provincial and federal requirements
- Ensuring that the chapter runs smoothly and that your board members are doing their jobs
- Ensuring that all documentation is prepared and distributed on time.

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



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



This symbol indicates the item is available for download from the CBOX section.




This symbol indicates that a sample document is available for download from the CBOX section.

President's First Steps




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. As president, you need to be familiar with all the items on this list; some your chapter may have, others your chapter may need to create.

Organizing Your Chapter

APICS produces several important tools that chapter presidents should have at their fingertips. Some of the most important tools are the CBOX section, My Chapter, and a complete set of leadership handbooks.

- ☐ CBOX section—www.cbox.apics.org
- ☐ My Chapter—Once your term begins as chapter president, please be sure to verify/update key sections of My Chapter including Locator/Events; Board Management; Chapter Billing; and Chapter Address because these sections will contain data based on the prior board term.
- ☐ Complete set of leadership handbooks—one of the best tools you can have to help you manage your chapter organization. You should have a complete set, and chapter officers should have their respective leadership handbook. Please remember some handbooks are available for download in CBOX at no charge. 

Resources

- ☐ *APICS Channel Partner Resources Catalog (stock #82032)* 
- ☐ *APICS Bylaws (stock #01006)* 
- ☐ *Installation of Officers (stock #01007)* 
- ☐ *ABCs of Parliamentary Procedure (stock #01072)*





Administration

- ☐ Status of affiliated student chapter(s) (such as faculty liaison, activity, etc.)
- ☐ External membership/prospective member databases (i.e., i-Chapter, SAMCA backend database), if applicable
- ☐ Current chapter activities
- ☐ Newsletter/chapter president's column schedule
- ☐ Location of chapter's courseware and training materials and whether they are current
- ☐ Status of educational materials
- ☐ Location of chapter presentation equipment, if applicable (i.e., LCD projectors, laptops, software, etc.)
- ☐ Web site details (such as service provider (ISP), domain registration and renewal, etc.)
- ☐ Upcoming programs

- ☐ Upcoming educational classes, seminars, workshops
- ☐ Meeting minutes from prior board meetings
- ☐ Speaker listings
- ☐ Business cards for board members, if applicable
- ☐ Chapter letterhead/stationery, if applicable
- ☐ Honorary chapter members, if applicable
- ☐ District and APICS contacts

Documentation

You can find more detailed information about the below items in this handbook and other chapter management handbooks produced by APICS.

- ☐ Chapter bylaws 
- ☐ Chapter standard operating procedures (SOPs) 
- ☐ Chapter articles of incorporation/incorporation status 
- ☐ Duties/job descriptions for officers, directors, chairs 
- ☐ Relevant insurance documents (certificates of insurance)
- ☐ Current financial status
- ☐ Chapter budget and financial statements
- ☐ IRS/Federal tax status
- ☐ State/Province tax status
- ☐ Chapter billing number
- ☐ Outstanding invoices for chapter billing number, if applicable

Getting Started—A Timetable

Sample Timeline for Your Term as President (Fiscal Year June–July)

Date	Action	Reference/Remarks	Date Completed
July	<p><i>Incoming President</i> Board of directors roster</p> <p>Once the start date associated with your current board term as president begins, use the My Chapter Board Management function to add the incoming/continuing president and other board members to the next board term.</p> <p>If the outgoing president <u>did</u> use the My Chapter Board Management function to add the incoming president, you should be able to access My Chapter.</p> <p>If the outgoing president <u>did not</u> use the My Chapter Board Management function to add the incoming president, you will need to complete and submit an APICS Chapter Officer Roster Form and submit it to chaprel@apics.org. Once the form is received by APICS District & Chapter Services, it will take 2-5 business days to complete your request.</p>	<p>To add board members under the Board Management function of MY CHAPTER, you will need that person's first and last name or their APICS ID number.</p> <p>Chapter presidents and District staff identified in the volunteer database are automatically granted My Chapter access based on the start and end dates associated with their term record. In addition to being identified in the volunteer database, other chapter board members and staff must also be assigned My Chapter access by the chapter's president under the Board Management function to be able to view the My Chapter option on the screen.</p> <p>Note: Once you have access, please verify/update key sections of My Chapter (Locator/Events; Board Management; Chapter Billing; and Chapter Address) since it will contain data based on the prior board term.</p>	
	<p>Join the officers discussion list</p> <p>(Any chapter, district or partner volunteer leader may subscribe to the officers' discussion list.)</p>	<p>To participate, send an e-mail to chaprel@apics.org with the below information.</p> <p>APICS identification number / Name / E-mail address / Phone / Chapter name / Term / Current chapter/District position</p>	
	<p>Review current and past issues of <i>Leadership Central</i>, a monthly e-newsletter featuring APICS updates, best practices, tools of the trade, leadership advice, and important dates at www.cbox.apics.org</p>	<p>All identified chapter and District leaders with valid e-mail addresses on file are subscribed to the Leadership Central list. This is the primary communication vehicle between APICS and volunteer leaders.</p>	

Date	Action	Reference/Remarks	Date Completed
	<p>Monthly chapter board of directors meeting</p> <p>-Officers and chairpersons specify goals and activities for the coming year, by functional office. These goals and activities should be realistically attainable, concrete, tangible, and quantifiable. They will serve as the basis for the chapter's annual budget preparation.</p> <p>-Review the previous year's CBAR program submission.</p> <p>-Review and evaluate the chapter's strategic and marketing plans.</p>	<p><i>-President and President-Elect Handbook</i></p> <p><i>-ABCs of Parliamentary Procedures (stock #01072)</i></p>	
	Review financial and bank statements and open invoices	<i>Finance/Treasurer Handbook</i>	
	Develop budget to support direction for year	<i>Finance/Treasurer Handbook</i>	
	Review and update strategic plan	<i>Strategic Planning Leadership Handbook (stock #01029)</i>	
	Review chapter bylaws		
	Attend District meeting	www.apics.org/membership/Districts/default.htm	
	Nominate District Manager and District Director (as needed)	District SOPs	
	Develop chapter calendar		
August	<p>Monthly chapter board of directors meeting</p> <p>-Review the draft of the annual budget. Officers and chairs should submit their input to the chapter treasurer at least two weeks before this meeting.</p>	<p><i>-President and President-Elect Leadership Handbook</i></p> <p><i>-ABCs of Parliamentary Procedures (stock #01072)</i></p>	
	Review financial and bank statements and open invoices	<i>Finance/Treasurer Leadership Handbook</i>	
	Approve meeting minutes	<i>President and President-Elect Leadership Handbook</i>	
	Approve strategic plan	<i>Strategic Planning Leadership Handbook (stock #01029)</i>	
	Develop marketing plan	<i>Channel Partner Leadership Marketing Handbook</i>	
September	Monthly chapter board of directors meeting	<p><i>-President and President-Elect Leadership Handbook</i></p> <p><i>-ABCs of Parliamentary Procedures (stock #01072)</i></p>	

Date	Action	Reference/Remarks	Date Completed
	Approve meeting minutes	<i>President and President-Elect Leadership Handbook</i>	
	Review financial and bank statements and open invoices	<i>Finance/Treasurer Leadership Handbook</i>	
	Approve the annual budget	Present the budget to the membership before or during the first professional development meeting of the year.	
October	Monthly chapter board of directors meeting	- <i>President and President-Elect Leadership Handbook</i> - <i>ABCs of Parliamentary Procedures (stock #01072)</i>	
	Approve meeting minutes	<i>President and President-Elect Leadership Handbook</i>	
	Review financial and bank statements and open invoices	<i>Finance/Treasurer Leadership Handbook</i>	
	Perform annual financial audit	<i>Finance/Treasurer Leadership Handbook</i>	
	District meeting	www.apics.org/membership/Districts/default.htm	
	APICS International Conference and Exposition	www.apics.org	
November	Monthly chapter board of directors meeting	- <i>President and President-Elect Leadership Handbook</i> - <i>ABCs of Parliamentary Procedures (stock #01072)</i>	
	Approve meeting minutes	<i>President and President-Elect Leadership Handbook</i>	
	Review financial and bank statements and open invoices	<i>Finance/Treasurer Leadership Handbook</i>	
	IRS Form 990	Deadline is November 15	
	File additional tax forms, if necessary	<i>Finance/Treasurer Leadership Handbook</i>	
December	Monthly chapter board of directors meeting	- <i>President and President-Elect Leadership Handbook</i> - <i>ABCs of Parliamentary Procedures (stock #01072)</i>	
	Approve meeting minutes	<i>President and President-Elect Leadership Handbook</i>	
	Review financial and bank statements and open invoices	<i>Finance/Treasurer Leadership Handbook</i>	
January	Monthly chapter board of directors meeting	- <i>President and President-Elect Leadership Handbook</i> - <i>ABCs of Parliamentary Procedures (stock #01072)</i>	
	Approve meeting minutes	<i>President and President-Elect Leadership Handbook</i>	

Date	Action	Reference/Remarks	Date Completed
	Review financial and bank statements and open invoices	<i>Finance/Treasurer Leadership Handbook</i>	
	District meeting	www.apics.org/membership/Districts/default.htm	
February	Monthly chapter board of directors meeting	- <i>President and President-Elect Leadership Handbook</i> - <i>ABCs of Parliamentary Procedures (stock #01072)</i>	
	Approve meeting minutes	<i>President and President-Elect Leadership Handbook</i>	
	Review financial and bank statements and open invoices	<i>Finance/Treasurer Leadership Handbook</i>	
March	Monthly chapter board of directors meeting	- <i>President and President-Elect Leadership Handbook</i> - <i>ABCs of Parliamentary Procedures (stock #01072)</i>	
	Approve meeting minutes	- <i>President and President-Elect Leadership Handbook</i>	
	Review financial and bank statements and open invoices	<i>Finance/Treasurer Leadership Handbook</i>	
	Assign nominating committee	Chapter bylaws	
April	Monthly chapter board of directors meeting	- <i>President and President-Elect Leadership Handbook</i> - <i>ABCs of Parliamentary Procedures (stock #01072)</i>	
	Approve meeting minutes	<i>President and President-Elect Leadership Handbook</i>	
	District meeting	www.apics.org/membership/Districts/default.htm	
	Review financial and bank statements and open invoices	<i>Finance/Treasurer Leadership Handbook</i>	
	Elections	Chapter bylaws	
	Transition planning	President's responsibility	
	Open house for group liability insurance opportunity for APICS chapters	Each year, APICS will attempt to coordinate a group general liability insurance policy for APICS chapters. Note: Due to regulatory issues and industry dynamics, there is a possibility that the insurance policy may not be renewed for a given program year or that it won't cover chapters in Canada, Mexico, and Puerto Rico.	
May	Monthly chapter board of directors meeting	- <i>President and President-Elect Leadership Handbook</i> - <i>ABCs of Parliamentary Procedures (stock #01072)</i>	
	Approve meeting minutes	<i>President and President-Elect Leadership Handbook</i>	

Date	Action	Reference/Remarks	Date Completed
	Review financial and bank statements and open invoices	<i>Finance/Treasurer Leadership Handbook</i>	
	<p><i>Outgoing President</i></p> <p>Board of directors roster</p> <p>Before the end date associated with your current board term as president, use the My Chapter Board Management function to add the incoming/continuing president and other board members to the next board term.</p>	<p>To add board members under the Board Management function of My Chapter, you will need that person's APICS ID number.</p> <p>Chapter presidents and District staff identified in the volunteer database are automatically granted My Chapter access based on the start and end dates associated with their term record. In addition to being identified in the volunteer database, other chapter board members and staff must also be assigned My Chapter access by the chapter's president under the Board Management function to be able to view the My Chapter option on the screen.</p>	
June	<p>Monthly chapter board of directors meeting (transition meeting for outgoing and incoming board)</p> <p>-Review and evaluate the previous year's strategic plan.</p> <p>-Review and evaluate the previous year's budget.</p> <p>-Transfer chapter records and leadership handbooks from former officers to new officers.</p> <p>-Discuss any recommended actions by previous year's officers and chairs for the new year, including, for example, unfinished projects and new ideas.</p>	<p><i>-President and President-Elect Leadership Handbook</i></p> <p><i>-ABCs of Parliamentary Procedures (stock #01072)</i></p>	
	Awards/Recognition	Chapter SOPs	
	Installation of incoming chapter board of directors	Chapter SOPs	
	Approve meeting minutes	<i>President and President-Elect Leadership Handbook</i>	
	Review financial and bank statements and open invoices	<i>Finance/Treasurer Leadership Handbook</i>	

Promoting a Healthy Chapter

In 2004, the APICS Board of Directors approved the following policy establishing minimum standards for maintaining a chapter. The Chapter Minimum Standards (CMS) fall into 6 categories: Customer Expectations, Communications, Professional Development Events, Education, APICS Participation, and Financial Responsibility.

A chapter's ultimate goal is to provide a quality membership and educational experience for its members. Chapter standards are integral to the long-term success of your chapter. Chapters must maintain and report on the following standards, annually. See Appendix A for the complete document.

1. **Customer Expectations.** Chapters will provide the following documentation, which provides data and information relating to customer expectations and feedback.
 - A chapter must conduct a member needs survey or use other mechanisms to collect member needs at least every three years and demonstrate action on those needs ongoing.
 - Three professional development event evaluations annually
2. **Communications.** Chapters will communicate with chapter customers in the following manner:
 - Maintain a Web site with up-to-date content and APICS trademark logo on home page (with accompanying chapter name) and a link to APICS, (www.apics.org) Web site or an officer contact reference through the APICS Web site with that Web site referenced on all other communication.
 - Communicate a minimum of eight times throughout the year. Examples of communication activities may include
 - ✓ Hard copy or soft copy newsletter
 - ✓ Upcoming chapter events announcements via e-mail
 - ✓ Partner with local media (TV, newspapers, job fairs, etc.) to communicate chapter activities
 - ✓ Company Coordinators Program
 - ✓ Mass mailing to prospective members introducing the chapter and its activities
3. **Professional Development Events.** Chapters will hold a minimum of three Professional Development Events per year. Professional Development Events are defined as ...any activity where customers have an opportunity to meet (face to face or virtually) and present and discuss topics related to the APICS body of knowledge. Examples of such events may include

- Professional development meetings to include top management
 - Plant tours
 - Social Media
 - Webinars
 - Joint meetings with other chapters and societies
4. Education. Chapters will hold a minimum of two educational offerings and offer at least three educational offerings per year. These offerings may be offered in workshop, online, or part-time study course formats. Examples of such offerings may include
- Certification (CPIM or CSCP) educational offerings
 - Noncertification educational offerings, e.g., Fundamentals
 - Noncertification educational workshop offerings e.g. Lean Manufacturing Workshop Series
 - In-house education programs as requested
 - Independent topic workshops or seminars
 - Educational offerings held in conjunction with other associations, universities, or consulting companies
5. APICS Participation. Chapters will provide APICS Headquarters with or participate annually in the following:
- A listing of chapter officers for the year, to be submitted as soon as possible but no later than 60 days of election of chapter officers via My Chapter
 - A chapter will review chapter bylaws and submit changes to APICS Headquarters (if required) annually
 - Hold a minimum of four chapter board of directors meetings per year including one transition and/or orientation meeting
 - Officer training attendance. Examples of officer training may include attendance at VLW (Volunteer Leadership Workshop) and/or District meetings and/or officer training sessions.
 - A chapter will have a minimum of one or more officers on the Officers Listserve.
6. Financial Responsibility. Chapters will provide APICS with a letter of assertion from the chapter board of directors that the chapter financial records fairly state the assets, liabilities, revenues, and expenditures of the chapter and that all required regulatory filings have been made in a timely manner.

Put the Power of *My Chapter* to Work for Your Chapter

My Chapter, an online membership database management tool, helps you run your chapter more efficiently. When you need to prepare membership and financial reports, publicize events, and update member records, My Chapter quickly and easily gets the job done.

“I had no idea I had so much power!” said a former Northeast District chapter president. All new and returning chapter presidents have the same ability to use these dynamic capabilities:

- Board Management—Using an APICS ID, chapter presidents can add board members to the current or next term, designate My Chapter access to specific board members, edit officer titles, and change term start and end dates.
- Locator/Events—Use this area to update communications to the public about your chapter which will appear on the Online Chapter Locator.
- Download Reports—Create and run real time membership reports based on customizable criteria.
- Find/Modify Member—Using an APICS ID, view and update member contact information.
- Web Order History—View chapter orders placed online.

At the start of each term, chapter presidents should log on to My Chapter to update board members and chapter locator information. To see how your chapter information appears online, go to www.apics.org.

It's important to note that only chapter presidents and District staff identified in the APICS volunteer database have immediate access to My Chapter. Other chapter officers and staff must be granted access by the chapter's president under the Board Management function before they see the My Chapter option on the screen.

Make Membership in APICS a Premium in Your Chapter

General Membership Tips

Promote APICS membership. Let members and customers know that it is important to be active at the local (chapter) and association (APICS) levels. Every officer in your chapter should know the benefits of APICS membership and should discuss them regularly with members and nonmembers.

- Maintain or establish a chapter Web site as a way to promote the chapter locally and nationally and keep members aware of chapter activities.
- Establish discounts and preferences for APICS members. Set a differential in the price of admission to chapter activities and events for members.
- Limit consideration for awards and rewards to APICS members.
- Implement a formal plan to follow up with suspended members.
- Send membership surveys.

The Membership Handbook contains more information, tips, and samples in the areas of membership processing, record maintenance, recruitment, and retention.



New Members

Recognize new chapter 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. Following are some membership retention tips that focus on developing great first impressions with your new members that will be rewarded with long-term membership growth and involvement.

- Remember to Remember—Set weekly reminders on your calendar (Outlook, Franklin Planner, Google Calendar, Post-It Notes on your monitor) 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 neighborhood.
- 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 welcome.

- **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 don't need to have a ceremony, but a nice letter from the chapter president and the board is a great start. Chapter cost to mail certificate: 75 cents in postage. Setting the standard for a valuable membership experience: Priceless.
- **Spread the Word**—One of the primary reasons people join chapters is networking. 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 didn't know anyone? APICS professional development meetings (PDMs) are a great resource, but it can be quite daunting to enter a room full of professionals who know each other and what's going on, when you don't. Send new members personalized invitations to your next PDM. Ask one of your board members or long-time members to serve as official new member greeters and hosts. 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 in turn value the service you provide.

Chapter Officers

Building a Team

As president, you must build a chapter team. It is impossible for one person to do it all — you need all the support you can get. Undoubtedly, you have your fair share of talents, capabilities, and skills. It is important to build on these strengths, and to do that you need the help of people who share your vision of APICS, the chapter, and the chapter's goals. Leave a trail of trained leaders as part of your presidential legacy—empower and train future leaders through the creation of valuable learning opportunities.

Volunteers can easily suffer burn out. Avoid placing too much responsibility on any one person. Perhaps you can have a membership team instead of a membership director. Breaking projects down into small, manageable pieces is an effective way to attract and keep volunteers. Setting up subcommittees equalizes the volunteer workload and enables more members to contribute to the work of the chapter.

Developing a strong team by delegating responsibility is critical during your tenure as chapter president. You can create a climate in which chapter board members work productively and cohesively as a team through effective delegation. Board members want to believe that you are leading them toward their objectives. If the chapter is not achieving its goals and board members are not doing their jobs, you need to find out why. If you have to replace board members, do so, but don't take on their jobs yourself. No one person can handle it all.

Defining the Role of the Board of Directors

A chapter can define the positions on its board of directors in a variety of ways. While the duties required of positions are often similar from chapter to chapter, each chapter president should consider tasks that may be unique to the chapter in assigning duties to members of the chapter board of directors. Also, depending on the chapter size and volunteer base, responsibilities associated with one office may be shared among one or more volunteers (for example, possible segmentation for Education functions include finding speakers, handling registration, developing seminars and programs, managing certification review courses, etc.).

When selecting candidates for chapter office, keep in mind the following skills and functions for each board position. Other useful information to include in the position description is the skill set and the expected level of commitment in terms of volunteer hours necessary to perform the responsibilities associated with each position.



*Keep APICS informed of any changes in your board of directors using **My Chapter**.*

Board of Directors Members

1. Attend all board and committee meetings and functions, such as special events.
2. Review agenda and supporting materials before board and committee meetings.
3. Perform specific responsibilities that the president and chapter board may assign and that are in the job description for each board member.
4. Be informed about chapter, district and APICS mission, services, programs, and policies.
5. Ensure that the business and affairs of the chapter are conducted in accordance with fiduciary responsibilities, chapter and Association bylaws, and in the best interest of the members.
6. Guide the chapter by anticipating and assessing market and member needs and developing services and programs to meet those needs.
7. Recruit new members and help retain existing members.
8. Suggest possible nominees to the board who can make significant contributions to the work of the board and the chapter.



You must consider the unique needs of your chapter as you define the role of your board of directors. Leadership job descriptions vary among chapters based on chapter size and market demands.

Chapter President

1. Lead, administer, and preside at all board meetings.
2. Serve as spokesperson for the chapter.
3. Coordinate functions of all officers and committees, delegate authority to board members, and evaluate progress periodically.
4. Adhere to chapter standards as defined by the APICS Board of Directors.
5. Work with other board members to establish chapter goals and objectives.
6. Recommend and direct the execution of policies and programs in the interest of the chapter with board approval.
7. Promote active membership participation and develop new officers' talent and training.

8. Cosign with designated signatory all checks and written contracts, obtaining board approval when necessary.
9. Prepare agenda for board meetings.

Expected hours per month: 12



*It is the responsibility of each chapter president to ensure that information is provided to APICS and incorporated into **MY CHAPTER** in a timely manner. Chapter presidents must submit new officer information to APICS when elections are complete by verifying/updating key sections of **MY CHAPTER** (Locator/Events; Board Management; Chapter Billing; and Chapter Address).*

President-Elect/Executive Vice President

1. Attend all board meetings.
2. Understand and perform all duties of the president if he or she is absent or unable to perform those duties for any reason.
3. Assist the president in coordinating and directing chapter operations and perform such duties as may be delegated by the president.
4. Recommend goals, objectives, plans, and programs to the president.
5. Advise the president on matters of policy and procedure.
6. Assist chapter president in conducting new board member orientation.
7. Act as an alternate spokesperson for the chapter.
8. Collect and manage details related to the administration of the CBAR program and Student Chapter Management Program (APICS recognition programs).
9. Assist chapter president in preparing agenda for board meetings.

Expected hours per month: 10

Treasurer

1. Attend all board meetings.
2. Maintain a strong understanding of financial accounting for nonprofit organizations.
3. Work with the chapter president and board in preparing the annual budget, presenting the budget to the board for approval, and revising projections throughout the fiscal year.
4. Work with the chapter president to ensure that appropriate financial reports are made available to the board on a timely basis, highlighting financial status and budget variances.

5. Arrange and review financial audits, comply with federal (i.e., IRS) regulations for filing relevant forms (IRS Form 990), and maintain tax status. Monitor the disbursement of chapter dues from APICS and disburse funds with proper approval.
6. Cosign with chapter president on all checks and written contracts, obtaining board approval when necessary.
7. Manage the board's review of and action related to the board's financial responsibilities.
8. Maintain knowledge of the chapter and personal commitment to its goals and objectives.
9. Keep state incorporation fees current.

Expected hours per month: 8

Secretary

1. Attend all board meetings.
2. Maintain the accuracy and safety of all board records, such as bylaws, meeting programs and evaluations, strategic plan, and so on for future use; forward copies to APICS District & Chapter Services for chapter file.
3. Provide notice of meetings of the board or committee within the specified time frame.
4. Take minutes during board meetings.
5. Review and distribute minutes for approval after board meetings.

Expected hours per month: 8

Programs/Education

Due to the high level of detail, these functions are often divided among two or more board positions (such as speakers, registration, arrangements, certification, etc.).

1. Attend all board meetings.
2. Analyze the educational needs of current chapter members and customers and provide appropriate education to meet those needs.
3. Arrange chapter professional development meetings with good speakers. Remember that speaker references should be checked thoroughly, as one poor speaker can sour many members (particularly new members).

4. Send each confirmed speaker a letter confirming program date, speaker fees, time, location, audiovisual requirements, and topic. Be sure to make a follow-up call or send an e-mail several days before the event to confirm arrangements. If using e-mail, be sure you ask the speaker to respond that everything is in order. If using phone, don't rely on voice mail; be sure you receive a return message stating that everything is in order.
5. Obtain speaker bio and event description for promotional materials (such as the newsletter, advertisements, etc.).
6. Arrange for a speaker gift.
7. Select and confirm location well in advance to guarantee space. Visit the site and determine details before signing a contract.
8. Actively solicit feedback to maintain and improve the quality of instruction (for example, request event evaluations).
9. Maintain a current instructor roster.
10. Maintain inventory of course materials, incorporating updates when necessary.
11. Contract with instructors or consultants to provide workshops or seminars for the chapter.
12. Send notification to membership about meetings (perhaps one month, two weeks, and a few days before the event).
13. Arrange registration process and assign board members to greet guests.

Expected hours per month: 8

Membership (director or vice president level)

A medium to high level of database knowledge is required for this position. At a minimum, this position will require access to a computer, an e-mail account and an Internet connection, and proficiency in Excel and Word.

1. Attend all board meetings.
2. Maintain chapter membership database (such as My Chapter, SAMCA, etc.).
3. Welcome new members and invite them to upcoming programs/events.
4. Call members who have let their membership lapse and inquire as to the reason for nonrenewal (just being wanted by the chapter is often enough to encourage members to continue).

5. Solicit new members and encourage chapter participation.
6. Maintain prospective member database.
7. Maintain personal contact with members.
8. Greet members by name at professional development meetings.
9. Recognize newly certified members.
10. Recognize members who have completed the certification maintenance program.

Expected hours per month: 10

Company Coordinator (director or vice president level)

1. Organize chapter's company coordinator program.
2. Identify company coordinators in local companies and disseminate information to them for further distribution.
3. Hold annual company coordinator meeting.
4. Maintain company coordinator listing and documentation to support chapter's CBAR program.

Expected hours per month: 4

Company Coordinator (assistant)

1. Attend annual company coordinator meeting.
2. Act as main contact for company (must be employed by the company).
3. Serve as a liaison between company and chapter.
4. Disseminate chapter information and materials to employees.

Expected hours per month: 2

Student Chapter Liaison (student member/academic liaison)

1. Act as a liaison between local school or university and local chapter.
2. Attend PDMs (professional development meetings) and encourage students to attend.
3. Provide information regarding student membership.

Expected hours per month: 3

Communications (director or vice president level)

1. Publish chapter newsletter.
2. Act as editor of newsletter if necessary.
3. Arrange newsletter printing and mailing.
4. Actively promote the chapter through local business journals, public access radio, and other avenues.

Expected hours per month: 4

Web master (services may be contracted out to a third party)

1. Manage the ongoing development of chapter's Web site, graphic design, construction, content updates, database development, and site integrity.
2. Liaison with Web hosting service and register or maintain domain name.

Expected hours per month: 6

Marketing (director or vice president level)

1. Survey members and customers.
2. Publicize chapter activities.
3. Promote the benefits of education and membership.
4. Identify current and potential customer needs.

Expected hours per month: 6

Recognition (director or vice president level)

1. Collect and manage details related to administration of APICS recognition programs (currently CBAR program and Student Chapter Management Program.)

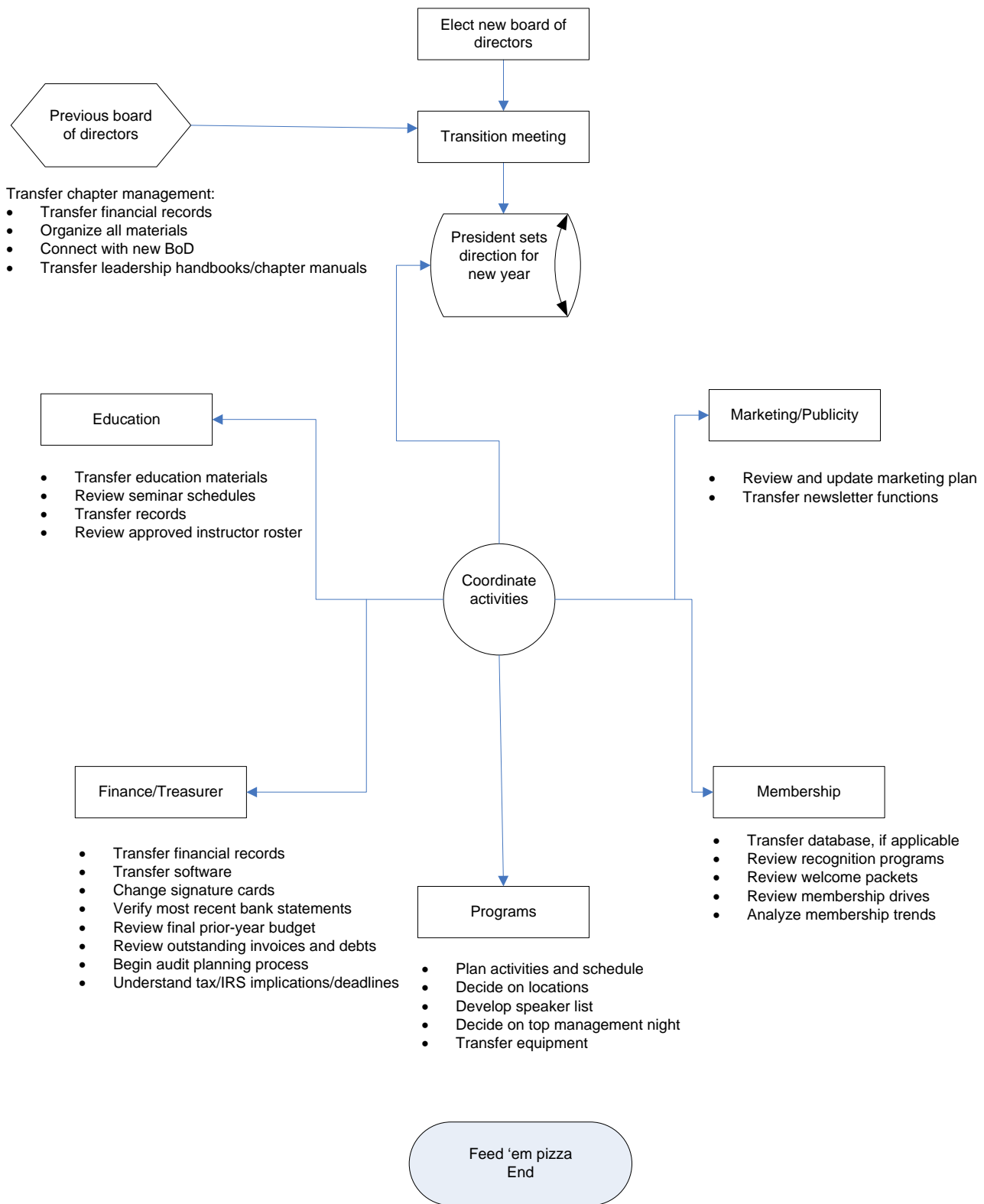
Expected hours per month: 6

Succession Leadership and Planning

Your current board may be a highly effective team of people with leadership qualities—energy, talent, planning, and motivational skills. Or you may need to develop these skills in the board. In either case, you need to plan for the future. One of the primary tasks you will undertake is training your successor. You need to identify the person who will be carrying on the chapter's strategic plan when you leave office. The future of the chapter is in your hands. A strong, capable leader can carry the chapter toward its goals and objectives. A weak leader can flounder and the chapter may wither and die.

If you can identify critical success factors and align the board toward these goals, one or two people who show an interest in a key area will probably be prime candidates for future chapter leadership. If your chapter already has a succession plan in place and an identified successor, then this person needs to be trained to step into your shoes. By concentrating on planning, executing, and measuring chapter goals, you can identify your successor's strengths and weaknesses. This assessment will let you know where to concentrate your efforts in training your replacement, whether in management skills, leadership techniques, or chapter management techniques. This training can be accomplished at the chapter level, at the District level, or at volunteer leadership sessions at the APICS International Conference and Exposition. Training your successor should go on throughout your term as president.

Sample Transition Process



Running Effective Meetings

Board of Directors Meetings

As president, you are responsible for facilitating meetings. You determine the agenda, manage discussions, and assign action items. It is recommended that chapters hold monthly or quarterly board meetings, even during periods when professional development meetings suspend.

- Schedule meetings well in advance.
- Prepare and distribute meeting agendas no later than one week before the meeting.
- Encourage committee chairs (if applicable) to attend board meetings along with officers.
- Insist on good attendance. If an officer or chair cannot attend, an appointed representative should attend in their place.
- Start the meeting promptly and stick to the agenda.
- Require progress reports from officers and chairs on the action items decided at the previous meeting.
- Revisit the strategic plan and review current program offerings.
- Adjourn on time.
- Record and distribute minutes of each meeting within one week of the meeting.
- Follow parliamentary procedures to allow all perspectives to be heard and to make decisions without confusion.

Board of Directors Meeting Agenda

- Specify dates, starting time, and location.
- Identify specific topics to be covered by each officer and chair.
- Request progress reports.
- Review status of strategic plan implementation.
- Review status of the CBAR program submission.
- Highlight any areas of concern.

General Membership Meetings

The notice of a general membership meeting, typically the professional development meeting, should be sent at least two weeks in advance of the meeting date. If your chapter uses company coordinators or a “call” committee, they should contact members to encourage attendance.

Schedule a networking opportunity before the meeting. This is a social event and is typically a time for members to relax, get acquainted, and exchange ideas.

Set up a registration table where an officer is available to welcome chapter guests, answer questions, and provide name tags. Follow up after registration to ensure that each guest is made welcome.

Assign someone to take care of the speaker, making sure the speaker is fed, introducing the speaker to chapter members, and providing the speaker with a token gift of appreciation. If you conduct business at this meeting, assign someone to publish and distribute the minutes.

Regular membership meetings are critical to the health and stability of your chapter. One of the greatest membership values, for many, is the opportunity for professional development and networking that these meetings afford.

Chapter Professional Development Meeting Agenda

Creating an agenda for your professional development meetings is valuable for the president. An agenda might include

- a timetable for the meeting
- special announcements
- a brief overview of chapter activities (classes, seminars, and so on)
- introduction of special guests
- awards presentations

Strategic Planning

As president, you are responsible for the chapter's strategic plan. If your chapter already has such a plan in place, you should be in the midst of a multiyear plan that identifies a vision for the future of the chapter and that needs only some examination and revision or extension. If your chapter does not yet have a strategic plan, you will need to create one. The strategic plan should establish where the chapter will be in the future and how it will get there by assessing current and predicted situations and outlining future objectives. The *Strategic Planning Leadership Handbook* (stock #01029) is an excellent reference on this subject.



Use a strategic plan to set long-term chapter goals and plan how to reach them.

Annually, APICS convenes a Strategic Direction committee to review, and when necessary update the Association's strategic plan. The results of the committee's work are disseminated to the volunteer leadership, generally through district meeting presentations. Chapters are encouraged to review APICS plans and to create synergies within their own strategic plans.

One starting point could be to match your chapter's plan to the APICS mission, objectives, and strategic priorities as they are outlined within communication documents. It's true that your chapter has a unique voice, audience, and abilities, which mean that your strategic plan and the means through which you realize it will also, differ in detail from the organizational strategy (or the strategy of any other chapter). But as a part of the APICS community, your chapter should be pursuing its mission and vision in ways that parallel or complement the strategy of the Association.

As a practical example of this, let's take a look at APICS' Strategic Priority for Affiliation, which reads:

- Point of Arrival: Affiliation with APICS, as the most trusted supply chain and operations management organization, enhances individual and organizational effectiveness.
- Goal: Deliver compelling value by providing access to both the APICS community and related products and services.

Chapters can promote this priority through its care in using the APICS name, logo, and tag line in accordance with the suggested guidelines provided by the APICS marketing division. As well as offering consistent, exemplary educational opportunities featuring the APICS library of courses.

As the APICS community continues forward movement, we synchronize our approach to our shared purpose; we can accomplish more of our plans more effectively.

Chapter Financial Management (Fiduciary Responsibilities)

As president, you are responsible for controlling and managing the affairs, property, and funds of the chapter. It is your responsibility to ensure that the following information is presented to the board of directors:

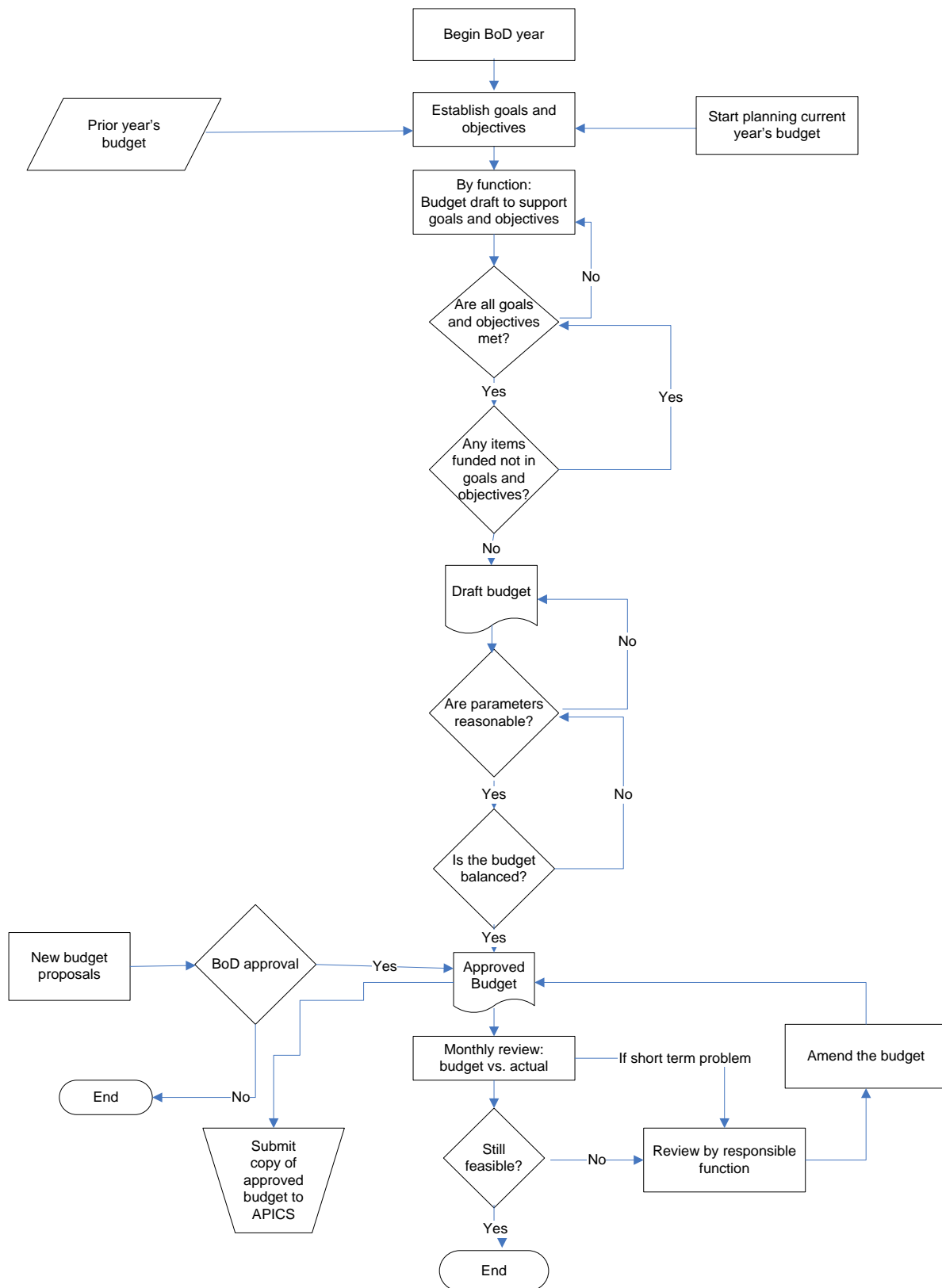
- Budget for program year
- All financial transactions
 - Cash receipts
 - Cash disbursements
- Financial position
 - Balance sheet
 - Surplus and deficit statements
- Activity compared to budget—You must monitor the budget to be certain the chapter is in a sound financial position.

Chapter officers are accountable for their actions in a fiscally responsible manner. Successful management is ensured through a good budgeting process, regular tracking, and annual audits.



Finance/Treasurer Leadership Handbook *contains a wealth of excellent information on managing your chapter's finances.*

Sample Budgeting Process



Incorporation

An APICS chapter is typically a nonprofit corporation. As president, you should review your chapter's status; this review can be done with your state department of commerce, division of corporations and commercial codes. Regulations vary from state to state; you will have to pay a small filing fee and fill out a few forms. Help is available through your District and APICS, if your chapter is not yet incorporated.

The chapter must file annual reports with the state department of commerce, division of corporations and commercial codes, within the month of its anniversary or it will be involuntarily dissolved.

Incorporation offers a number of advantages to APICS chapters.

Why Incorporate?

Professional associations incorporate because doing so offers many advantages. Corporate status or recognition as a legal entity, which can sue and be sued in its corporate name, in most cases provides a liability shelter against individual financial responsibility for corporate officers and directors. In the case of a lawsuit or judgment against an incorporated chapter, no one may seize the personal assets of individual leaders of the chapter. Incorporation is the only rock-solid protection for personal assets that can be had in the business world.

Incorporation is a legal process that is regulated by individual states; therefore, it is best to retain an attorney licensed in your chapter's state to assist in the process. Articles of incorporation and bylaws are requirements for a chapter to incorporate; articles of incorporation define how a chapter is structured, and bylaws define how a chapter operates. A chapter should use the sample articles of incorporation in Appendix L in the *Finance/Treasurer Chapter Leadership Handbook* and the APICS bylaws as a model for its own. An attorney can assist in modifying or adding to these documents as necessary for chapter applicability.

In some states, attorneys are required to provide a minimum number of hours of pro bono (free) service to not-for-profit organizations as a requirement for licensure.



A chapter should use the sample articles of incorporation in Finance/Treasurer Leadership Handbook and the APICS' bylaws as a model for its own. An attorney can assist in modifying or adding to these documents as appropriate for your chapter. See the CBOX section of the Web site for sample bylaws.

Articles of incorporation (your chapter's agreement with the state) serve as an outline of a chapter's formal organization. To obtain corporate status for an APICS chapter, the chapter board of directors must formally request the state where the chapter is located to bestow that status by filing articles of incorporation with the respective secretary of state. They should set out in clear, unambiguous language the essential elements of a chapter's structure.

The *bylaws* (your chapter's agreement with the members) of a chapter serve as a blueprint for the chapter's working structure. Chapter bylaws should be very general and should avoid going into specific details. Specific details about a process should be captured in the standard operating procedures (SOPs). For example, the bylaws may identify the chapter president as the chief governing office for the chapter, whereas the SOPs may outline the specific duties associated with the position. Changes to chapter bylaws must be approved by

the membership, whereas changes to a procedure may be made more simply. As president, you are responsible for interpreting the policies of the chapter in a manner consistent with the intent of the bylaws. They should describe the division of power and the interrelationships among the chapter's members, board, committees, and officers. State law generally stipulates that a nonprofit corporation's bylaws be adopted by the initial board of directors at its initial meeting. For purposes of approving bylaws, the "initial meeting" of a newly incorporated chapter is the first meeting after obtaining corporate status, regardless of how many years the chapter may have been operating as an unincorporated entity.

Standard operating procedures (SOPs) of a chapter govern the day-to-day operation of the chapter, make routine activities repeatable, and help provide continuity between one board of directors and the next. They cut down on the amount of oral history required to effectively operate the chapter.

Federal Tax-Exempt Status

APICS recommends that all chapters achieve tax-exempt status. The *Finance/Treasurer Leadership Handbook* will help you through the process of obtaining federal tax-exempt status if your chapter has not already done so. Help is also available from your District support staff. It is strongly recommended that a chapter get professional legal and accounting help in this regard. In many cases, board members may have access to sources of assistance.

Chapters may apply for exemption from U.S. federal income taxes in one of two ways. First, APICS has a group exemption that enables chapters to obtain tax-exempt status merely by informing APICS in writing of its desire to be covered by the group exemption and providing the chapter's employer identification number (EIN). To be covered by the group exemption, the chapter's articles of incorporation and bylaws must mimic those of APICS. Annually, APICS informs the IRS of the chapters it is covering with its group exemption. Although this method eliminates the necessity for chapters to individually apply to the IRS for tax exemption, it does not relieve the chapters from Form 990 filing requirements.

Second, a chapter may apply for federal tax-exempt status by filing IRS Form 1024, Application for Recognition of Exemption. This form requests information about the chapter's purpose, bylaws, articles of incorporation, and financial activity. Although the form is not difficult to complete, an accountant or attorney specializing in services to tax-exempt organizations should review the document before it is filed with the IRS. There is a fee (\$150-\$500) to file Form 1024, and it takes approximately 8 to 12 weeks for the IRS to respond. The desired result is in the form of an IRS Determination Letter, which indicates in writing the IRS' approval of the chapter's tax-exempt status. Once received, chapters must provide a copy of the Determination Letter to APICS District & Chapter Services.

Insurance Protection for Chapter Officers

A chapter that is incorporated exists as a legal entity separate from the people who volunteer to serve as chapter officers and directors. As such, an incorporated chapter generally shelters chapter volunteers from personal financial liability. Still, in today's litigious world, it is important to recognize that directors, officers, and other chapter volunteers may be liable for some chapter decisions and activities that go awry. To protect chapter assets and provide assurance to chapter volunteers of the protection of their personal assets, an understanding of the availability of insurance and the protection it provides is essential.

Volunteer Protection Act

Signed into federal law in 1997, the Volunteer Protection Act provides certain protections from liability abuses related to volunteers serving not-for-profit organizations. The act may protect chapter volunteers, but it provides no protection to chapters themselves. The intent of the act is to protect volunteers from liability for negligence that occurs within the scope of their work for chapters; however, among several important limitations on the Act's protection are the following:

- Volunteers are protected only to the extent that they are acting within the scope of their responsibilities to the organization at the time.
- While the act protects volunteers from liability arising from simple negligence, it does not protect against liability for intentional acts such as willful or reckless misconduct or gross negligence.
- Only uncompensated volunteers are within the scope of protection.
- The act provides no protection against state and federal sexual offenses or civil rights violations, including charges of discrimination.
- The act does not prohibit anyone from bringing a lawsuit against a volunteer, even if the suit is groundless and its cause of action falls within the protective scope of the act.
- The act clearly applies only to volunteers serving 501(c)(3) organizations, and although the original bill indicates that volunteers serving 501(c)(6) organizations are also intended to be protected, it is unclear whether the courts will agree.
- The act leaves the not-for-profit entity unprotected from its own liabilities and its responsibility to indemnify its volunteer and compensated personnel.

Directors' and Officers' (D&O) and General Liability Insurance

Given its limitations, the Volunteer Protection Act may not significantly reduce a volunteer's need for indemnification protection by the chapter or for proper insurance coverage. Moreover, the act does not change a chapter's need for comprehensive protection for itself and for any compensated personnel and volunteers. Most directors' and officers' (D&O) liability insurance policies cover not only volunteers but also compensated directors, officers, and employees. Moreover, many general liability policies written for 501(c)(6) organizations cover not only these individuals but also the organization itself, including the organization's obligation to indemnify or reimburse its volunteers and the organization's own liability.



Most directors' and officers' (D&O) liability insurance policies cover not only volunteers but also compensated directors, officers, and employees.

D&O insurance may protect volunteers from employment claims based on civil rights violations or noncriminal sexual offenses, as well as provide some protection for non-negligent conduct. In addition, D&O insurance may protect volunteers (and all those insured) against the legal fees and costs to defend a covered claim. General liability policies that cover the organization itself may extend this protection to the organization. A comprehensive policy also may pay all or part of the costs a volunteer may incur in settling a lawsuit.

Perhaps more important than the scope of coverage, most D&O insurance policies are riddled with exclusions. The standard exclusions often involve types of risks that could produce sizable claims against directors and officers. Often excluded are losses covered by other insurance, ERISA claims, fair employment claims, and libel or slander actions. If necessary, most exclusions may be deleted by negotiation or the payment of a separate premium. Because of the particular importance of D&O insurance, all chapter officers and directors should be sure that their policies, as well as the applications for them, have been reviewed with particular care.

The single most important obligation of a chapter under its general liability or D&O insurance policies is to give the insurance company notice of any actual, threatened, or even anticipated lawsuit or claim. All insurance policies have clauses requiring the insured to give notice of a claim within a certain period of time, and failure to give notice within the time limit may result in denial of coverage. Notice should be given to the insurance company itself, not only to the agent or broker.

Scope of Chapter Insurance Coverage Provided by APICS

APICS does not provide general liability or D&O liability insurance coverage for individual chapters. However, since 2000, APICS has managed to secure a program administrator and insurance carrier to offer APICS chapters in the United States the opportunity to be insured under a group master policy for comprehensive general liability coverage at reduced rates. This liability coverage is designed to protect APICS chapters and their directors, officers, employees, and volunteers from claims alleging negligence that causes injuries to third parties. While it is our goal to offer this program each year, due to increasing regulatory issues within the insurance industry, it may not always be possible. Currently, the enrollment period begins in May and the effective dates of the policy are July through June. APICS

chapters in Canada and Mexico and chapters with more specialized insurance needs that require a separate general liability policy are encouraged to contact a local insurance carrier to request the necessary paperwork to receive a quote/proposal.

For additional information about the APICS Group Commercial General Liability Insurance Policy, visit the CBOX area of the Web site or contact APICS District & Chapter Services.

Officers and directors should review their chapter's operations and activities to evaluate the potential for personal and organizational liability that may require insurance protection.

If a chapter has workers who are compensated and are classified as employees, the chapter is obligated to provide workers' compensation insurance for the employees. In states that do not have a workers' compensation fund, insurance must be obtained from either a private insurance carrier or through self-insurance. Contact your state compensation commission to determine where and how insurance may be obtained.

Important IRS Form Filing Dates

Form 1099-MISC, Form 1096

- Mail copy B of Form 1099-MISC to recipients by January 31 of the year following the calendar year in which payment is made.
- Mail copy A of Form 1099-MISC with Form 1096 to the IRS by February 28 of the year following the calendar year in which payment is made.
- Keep copy C of Form 1099-MISC for the chapter's records.

Form 990, 990-EZ, 990-T

- Due no later than the 15th day of the 5th month after the end of the chapter's fiscal year.

Fiscal Year End	Initial Due Date	First Extension Due*	Final Due Date
June 30	November 15	February 15	May 15
December 31	May 15	August 15	November 15

* If Form 990-T is not filed by the initial due date, an extension for time to file may be requested until the final due date of Form 990 or Form 990-EZ.

Sales and Use Tax, Property Tax

Check with your state department of revenue and local taxing authorities for reporting and payment deadlines.

Chapter Disbursements (Rebates)

APICS collects local chapter dues in addition to association dues on most membership applications and distributes those dues back to chapters on a monthly basis in the form of a chapter rebate or disbursement. Note that rebates are distributed at the end of the month following closing (that is, September rebates are distributed at the end of October). Note also that monthly, APICS posts a series of files to the My Chapter section of the Web site that includes the rebate files for the current reporting month.

All chapter rebates must be issued via direct deposit. If your chapter is not receiving disbursements electronically, please send an e-mail request to APICS District & Chapter Services at chaprel@apics.org or call (800) 444-2742 or +1 (773) 867-1778, ext. 5436, to request the form needed to provide your chapter's banking information and change your chapter's rebate delivery status to direct deposit.

Chapter Billing and Invoicing

As stated in section APICS Board Operating Procedures, credit will be extended to chapters in good standing when requested by the chapter president or designated representative. All chapters are assigned a *chapter billing number* that must accompany each order. This billing number will be released only to the current chapter president. To obtain your chapter's billing number or to request a list of outstanding invoices, contact the APICS District & Chapter Services Department.



The chapter president may change the chapter billing number at any time by sending a request for the change in writing to APICS District & Chapter Services at chaprel@apics.org or by calling (800) 444-2742 or +1 (773) 867-1778, ext. 5436.

The chapter or District billing number enables APICS chapters and Districts in good standing to receive special chapter pricing or quantity discounts on products ordered from the Channel Partner Resources catalog and the Educational Resources Catalog. At the time the order is placed, the chapter or District officer must provide a member number and the chapter's billing number. These orders may either be billed to the chapter or paid for using a credit card. When the order is billed to the chapter, an invoice is generated and sent to the chapter's designated billing contact the first business day after the order is shipped.

All chapter invoices are mailed to the address designated under the Chapter Billing function in My Chapter. Chapter presidents can update this address at any time. Most chapters direct chapter invoices to the chapter's treasurer. Chapter presidents automatically receive a monthly summary of all open invoices billed to their chapter's billing number.



Invoices are generated when someone places an order using a chapter billing number and bills those items to the chapter. Once the order has been shipped, invoices are sent to the chapter billing contact address indicated on each chapter's roster update form. The billing term is "Net 30 days."

Statements are generated monthly and are sent directly to the chapter president. Statements list only orders that are outstanding. Any order that has been placed and paid will not appear on the statement. This information enables chapter presidents to monitor order activity and to see which orders have been paid and which are still outstanding.

APICS requires payment of all invoices within 30 days from the date the order is shipped. For chapter accounts, 90 days after an invoice's date, all open chapter accounts receivable are deducted from the chapter's rebate/disbursement check at the discretion of the APICS chief financial officer or a designated representative. A balance exceeding a chapter's credit limit requires the approval of the APICS chief financial officer or a designated representative.

Information Flow

The dissemination of the information that you receive from APICS is an essential chapter function. The primary communication vehicles between APICS and the APICS leadership are the Leadership Central announcement list, *Leadership Central* newsletter, and the CBOX section. On occasion, as chapter president, you will receive mail from APICS, the District manager and District support staff, and other chapters. You should read through this material and pass on relevant information to other board members.

Leadership Central Announcement List

Leadership Central is an announcement list and its sole purpose is delivering news and information directly to the full volunteer leadership. All identified chapter and District leaders with valid e-mail addresses on file are subscribed to this list because we believe access to this information is important for effective leadership.

Leadership Central Newsletter

The monthly newsletter titled *Leadership Central—Your Resource for Volunteer Community Success*, is delivered through the Leadership Central list and features APICS updates, best practices, tools of the trade, leadership advice, important dates, DMC news, and other relevant information. An example of the types of messages forwarded through the Leadership Central list would be an update to APICS courseware or certification pricing.

CBOX Section—www.apics.org

APICS Headquarters produces many resources that can help you during your term of office. The CBOX* section, reserved exclusively for chapter and District officers, contains a wealth of chapter management tools including link to:

- Hot Topics
- Marketing Tool Kits
- Leadership Central
- My Chapter**
- Volunteer Training
- Chapter Support Materials
- Governance

*Note: Only active APICS members may access the CBOX section.

Note: While anyone with access to CBOX may view the **My Chapter link, only those chapter and District officers who have been granted **My Chapter** access will be allowed to enter. Others will receive an error message directing them to contact their chapter president.

Officers' Discussion List

The electronic discussion list for chapter, District and volunteer leaders allows for interactive communication among current chapter, District and volunteer leaders. To subscribe, send the following information to chaprel@apics.org:

1. APICS identification number
2. Name
3. E-mail address
4. Chapter name
5. Current chapter or District position
6. Term start and end dates.
7. Whether you want your messages sent in normal mode (to receive messages throughout the day) or digest mode (to receive messages once a day). Normal mode is the default mode when a preference is not specified.

Where Do You Go for Help?

Internal Chapter Resources

Don't discount the knowledge available from those who have served on your chapter's board in the past. If nothing else, they may be able to answer the "why do we do it this way?" questions. Within your chapter, there may be some of the following documentation:

- *Chapter bylaws—the Chapter "rules of the road" governing such activities as elections, terms of office, broad member responsibilities, fiscal requirements, and so on.
- *Strategic plan including marketing plan—the basic document for chapter operations that includes measurement criteria so you can determine how you are doing.
- Policies, procedures, and SOPs—govern the day-to-day operation of the chapter, make routine activities repeatable, and help provide continuity between one board of directors and the next.
- *BOD minutes and action logs—materials that provide a history of why the chapter does what it does and who is responsible for specific actions or activities.
- *Financial records—these records will provide the information for timely, positive decision making by chapter management. Required by the IRS.
- Newsletters—the most significant document for keeping the membership informed, soliciting its input and support, and encouraging the spirit of "volunteerism."

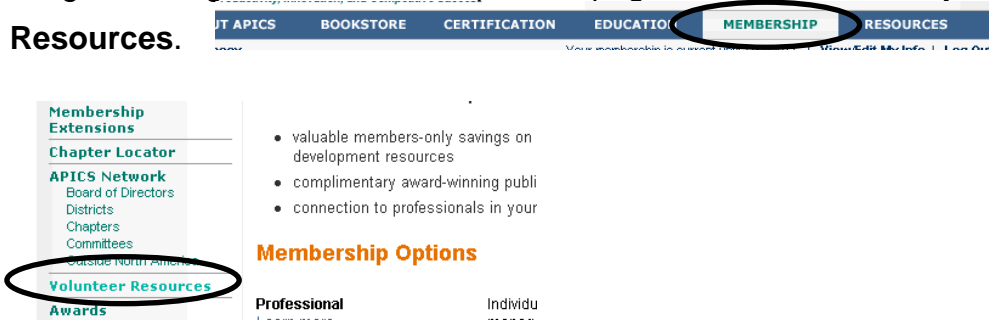
*Note: Required for CBAR program

CBOX*

This section offers a wealth of chapter management tools.

1. Log in to the APICS Web site at **www.apics.org**.
2. Using the Navigation Bar at the top of the page, select **Membership/Volunteers**

Resources.



*Note: Only active APICS members may access the CBOX section.

APICS Professional Staff

Who Do You Contact? Whether you have general membership inquiries or questions on running your chapter, the APICS professional staff have the experience to help. Below are some general guidelines to direct you to the department that can best address your needs.

(800) 444-2742 (APICS) or +1 (773) 867-1778
www.apics.org

Customer Support Call Center
service@apics.org
(Ext. 4300)
Fax: 773-639-3001

APICS District & Chapter Services
chaprel@apics.org
(Ext. 5436)
Fax: 773-639-3007

- Certification Questions
- Certification Maintenance Questions
- Address Changes
- Chapter Orders
 - Courseware/Guides
 - Membership Promotional Materials
 - Chapter Resources
 - Order/Invoice Status
 - Publications Orders
- Membership Inquiries
 - Membership Status
 - Chapter Affiliation
 - Verification of Payment
 - Chapter Locations
 - New and Renewing members
 - Address Updates
- Registration
 - Conference/Workshop
- APICS Career Center
- Chapter Communication
 - Officer Rosters
 - Volunteer Section
 - Leadership Links
 - Rebate Disbursements
 - Officers Discussion List
 - Chapter Locator
 - Recognition Programs
- Chapter History
 - Tax Status/Bylaws
- Volunteer/Leadership Training
 - VLW
 - District Meetings
 - Chapter Leadership Handbooks
- Other Services
 - Membership Reports
 - My Chapter
 - Tabletop Displays
 - Custom Electronic Mailing Lists
 - Suspended Member Lists

Additional Headquarters e-mail Contacts

courseware@apics.org
pdadmin@apics.org
grouptest@apics.org
foundation@apics.org
webmaster@apics.org

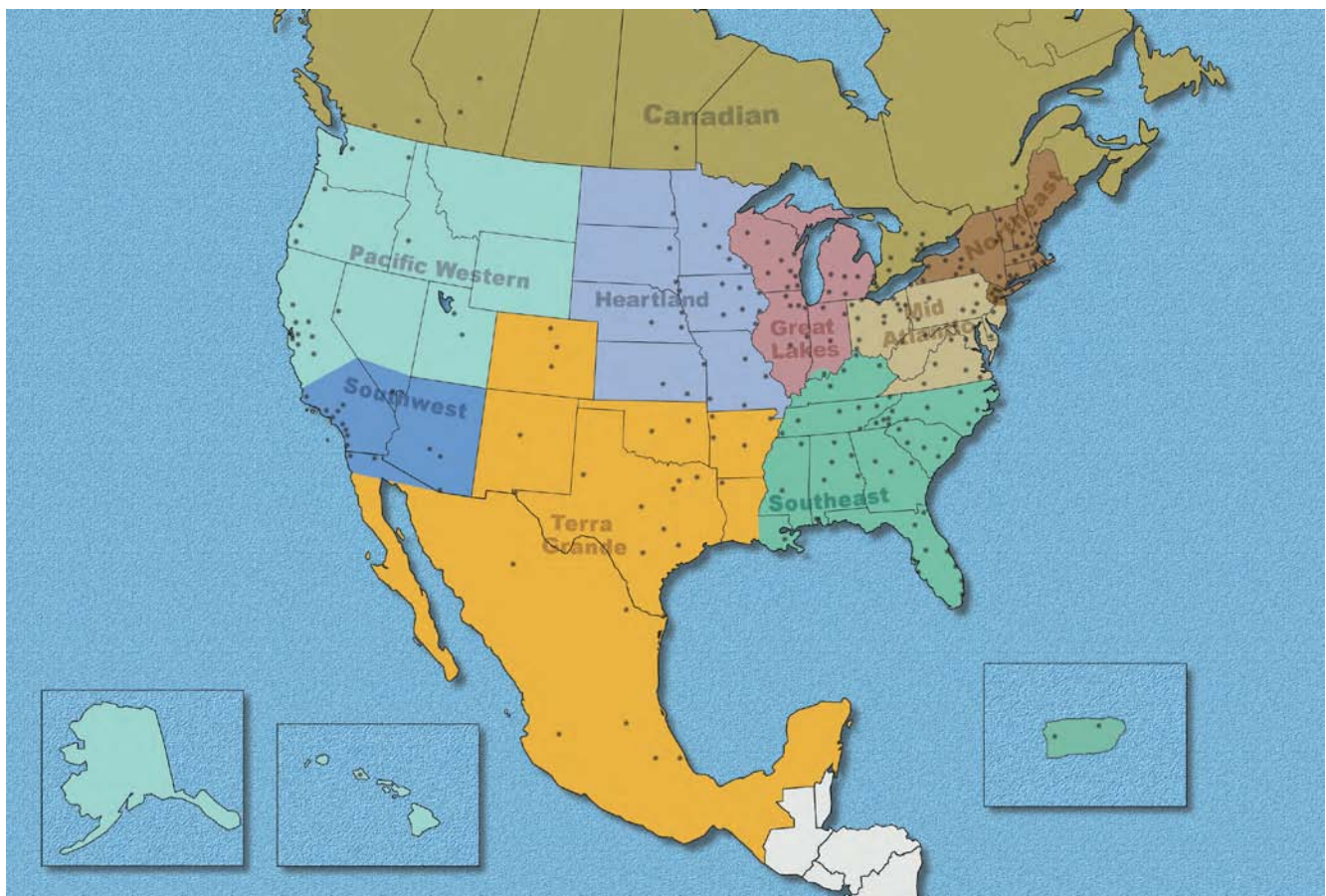
Inquiries regarding APICS courseware
Inquiries for the professional development staff
Inquiries regarding the group-testing process
Questions for the Educational and Research Foundation
Inquiries regarding the APICS Web site

APICS Districts

APICS' more than 220 local chapters are divided into 9 geographic districts that span North America. Districts provide a forum for chapters to share information and association updates. District support staff offer advice to chapters and hold periodic meetings. Many ideas are exchanged and chapter successes are shared at these gatherings of chapter leaders. In addition to your attendance, you should encourage other chapter officers to attend these meetings, particularly if the agenda indicates that sessions will be related to their particular board role. Each District elects a District Director and a District Manager through a special nomination committee made up of chapter presidents within the 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 profession of operations management.

The District Manager has a volunteer District support staff to assist with the development and implementation of chapter management training and two-way communication between APICS corporate and the local chapter. These individuals serve on the District Manager Committee and provide support and guidance to enable chapters to meet the minimum standards in promoting the objectives of the Association.



As a volunteer administrative unit within the overall APICS organization, the District serves APICS in the following specific ways.

The District promotes management excellence and growth at the chapter level by providing training, recognition, and motivation for chapter officers:

- At District meetings through new officer or transition training and by providing a forum for sharing success stories.
- By sponsoring Train the Trainer sessions.
- By providing a forum for volunteer training.
- By promoting excellence (CBAR program, recruitment, student paper competition).
- By fostering interchapter cooperation and communication.
- By providing resources to strengthen chapter educational programs.
- By maintaining District speaker databases.

The District facilitates effective two-way communication between chapters and APICS leadership:

- Through the publication of District newsletters and websites
- By serving as a bridge or conduit between chapters and the board of directors.
- At District meetings by providing an open forum for discussion.
- By communicating ways that chapters deliver education to their customer base.
- By ensuring that chapters submit updated Chapter Officer Roster and update My Chapter.

The District evaluates chapter management, assists distressed chapters, and directs the establishment of new chapters:

- By establishing care teams.
- Through monitoring early warning signs of distress (such as nonattendance at District meetings, weak or absent strategic planning initiatives).
- By periodic visits at chapter professional development meetings and board meetings.
- By meeting with individuals or interest groups wishing to form new chapters.
- By ensuring that chapters meet minimum standards as outlined in the SOPs.
- By investigating and mediating incidents of member dissatisfaction communicated to APICS.

The District assists chapters and APICS as a whole to promote membership growth and retention by marketing APICS within local communities:

- By allocating the skills and resources available through the District ambassador.
- By pinpointing market opportunities and other demographic indicators within the geographic confines of the District.

The District assists chapters in promoting academic liaison activities:

- By helping to establish new student chapters.
- By promoting the student paper competition.
- By training student leaders and advisors through the incorporation of topics of interest to student leaders and academic advisors into District meeting agendas.

District Managers Committee (DMC)

The District Manager Committee is composed of all district managers. The committee's purpose is to ensure a consistent, high-quality member experience throughout APICS chapters in North America.

Special Responsibilities

- A. The committee should provide input and advice in the principal chapter functions: finance, programs, membership, marketing, publications, education, and technology.
- B. Members of the committee participate in the development and deployment of chapter officer training.
- C. The committee identifies key success factors for chapters and helps to establish appropriate performance metrics.
- D. Committee selects representatives to serve on other committees as required by the respective Committee composition.

APICS Governance

You are free to call members of the APICS Board of Directors, DMC or committee chairs with questions, comments, and suggestions at any time. For a list of current board members, visit www.apics.org/about/bod.htm. For a listing of current District Managers, visit <http://www.apics.org/membership/Districts>.

Following is the structure of APICS functional and structural committees. All APICS committees report to the APICS Board of Directors.

2011 APICS Committee Structure

Functional Committees

Body of Knowledge (BOK) Committee
OMBOK Subcommittee
Conference Content Subcommittee
Products & Services Subcommittee
Instructor Subcommittee

Certification Committee
CPIM Subcommittee
Basics of Supply Chain Management
Strategic Management of Resources
Master Planning of Resources
Detailed Scheduling & Planning
Execution & Control of Operations
CSCP Subcommittee

Voice of the Customer (VOC) Committee
Academic Subcommittee
Corporate Subcommittee
International Subcommittee
Market Research Subcommittee
Professional Subcommittee

Structural Committees

Audit Committee

Finance Committee

Ethics Committee

Strategic Direction Committee

Collaboration Committee

District Manager Committee

Governance Committee

Rules and Procedures Committee

Director-at-Large Selection Committee

Nominating Committee

Other Resources

- **APICS Officers Discussion List**—provides a forum for chapter, District and volunteer leaders to discuss issues relevant to chapter and volunteer management. To subscribe, send an e-mail containing the following information to chaprel@apics.org or fax the information to 773-639-3007.
 - APICS Identification Number
 - Name
 - E-mail Address
 - Chapter Name
 - Current Chapter or District Position and Term
- **APICS Instructors Discussion List**—provides a forum for instructors of APICS educational materials. Subscribers may use this forum to discuss techniques, verify information, and recommend changes to courseware developers. To request an instructor list application form, send an e-mail to pdadmin@apics.org. Be sure to include your fax number or e-mail address when you contact APICS so the form can be sent to the proper location.
- **Other chapter presidents or officers**—This applies to those both in and outside of your District. The individuals you meet and network with at District meetings, leadership training events, and the annual conference and exposition are valuable sources of knowledge and will freely help you when they can. Locate chapter contact information at www.apics.org/apics/chapters.aspx.
- **Other APICS Districts**—Access APICS District Web sites at www.apics.org/membership/Districts/default.htm
- **Internet search engines**—sites like www.google.com may be used to find resources (for example, if you want to locate other APICS chapters that are conducting lean workshops, try typing APICS Lean in the search box). Also, because many chapter newsletters are now online, you can also see what other chapters are doing.
- **Other professional organizations.**

Recognizing a Job Well Done Just Became a Little Easier

APICS is an organization founded on the strengths of its volunteers. If you are reading this publication, chances are you are one of the volunteers making this association better every day. Below are several effective methods that your chapter can use to recognize the contributions and efforts of its board members and customers.

- Honor them at your professional development meetings.
- Send praise to their employers to increase the company's awareness of their service.
- Highlight their 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/or certificates as part of award programs and acknowledgments.

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. Below are some suggested awards and criteria.

Member of the Year

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

Company of the Year

1. Has 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. Has actively promoted attendance at chapter meetings in one or more of the following ways:
 - reimbursing the chapter meeting fee
 - posting announcements internally
 - promoting active participation by APICS company coordinators.
3. Has 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. Has integrated APICS concepts and body of knowledge into daily operation of the business.
5. Has shown 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, etc.)
- Service (such as volunteer involvement on the chapter board).

APICS Specialty Gift Items, Lapel Pins, and Recognition Certificates

Reward a member, a fellow volunteer, or yourself with APICS apparel, desk accessories, lapel pins, or certificates. APICS offers several tools to help you show your appreciation for quality work and dedication. A selected few are listed below.

Visit the APICS Bookstore at **www.apics.org** for a complete list of items—featuring the APICS logo. You may also download or order the *APICS Channel Partner Resources Catalog* (stock #82032).



- 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)—This wooden plaque has a Plexiglas™ overlay to accommodate an 8 ½" x 11" certificate. All APICS recognition certificates will fit in this plaque. 
- Use these handsome pins to recognize APICS members based on membership, membership tenure, or certification designations. 
 - APICS Classic Lapel Pin (stock #01362)
 - APICS 5-Year Lapel Pin (stock #01394)
 - APICS 10-Year Lapel Pin (stock #01395)
 - APICS 15-Year Lapel Pin (stock #01396)
 - APICS 20-Year Lapel Pin (stock #01397))
 - APICS 25-Year Lapel Pin (stock #01398))
 - APICS 30-Year Lapel Pin (stock #01399))

Lapel Pins Continued

- APICS 35-Year Lapel Pin (stock #01393))
- APICS 40-Year Lapel Pin (stock #01390))
- APICS 45-Year Lapel Pin (stock #01371))
- APICS 50-Year Lapel Pin (stock #01370)
- CPIM Lapel Pin (stock #01328)
- CFPIM Lapel Pin (stock #01330)
- CSCP Lapel Pin (stock #01327)

APICS-Level Recognition Programs

Chapter Benchmarking and Reporting (CBAR) Program

Excellence in chapter management is a key component to the development of strong chapters and satisfied members. To assist chapters in achieving excellence in chapter management, APICS offers CBAR to define chapter standards and recognize their efforts.

The C-BAR program has three primary purposes:

1. Provide each chapter with a comprehensive set of activities recommended for a successful chapter.
2. Provide an objective process to recognize chapters that meet or exceed the accomplishment of recommended activities.
3. Provide districts, DMC, and association feedback on chapter strengths and weaknesses for the development and implementation of future programs and training needed to assist chapters to better support their customers.

The program requirements are detailed in the CBAR Handbook. The Enhanced CBAR Excel workbook facilitates automatic summary calculations at the chapter, district, and APICS corporate levels. All chapter submissions for C-BAR should be reported annually electronically by using the Excel tool. The handbook and Excel workbook can be found on CBOX at the link listed below.

For additional information on the CBAR program visit

<http://cbox.apics.org/ChapterLeaders/CBARCMS/Pages/default.aspx> or order the *CBAR program Handbook* (stock #01012) by contacting APICS Customer Support at **service@apics.org** or (800) 444-APICS (2742) or +1 (773) 867-1778.



Participating in the CBAR program can give your chapter a framework for improving your chapter management.

Voluntary Service Award

The Voluntary Service Award was established in 1986. The recipient of this annual award must be outstanding in

- local chapter achievements
- contributions to APICS or APICS committees
- special services to and leadership in other professional societies or associations
- leadership and exceptional service to community and civic organizations.

Selection is made by an anonymous panel of reviewers. A commemorative award is presented to the recipient at the recognition event during the annual APICS International Conference and Exposition. Recognition is also given in *APICS* magazine and on the APICS Web site.

For further details on the Voluntary Service Award visit www.apics.org/About/Awards/individual.htm.

Student Chapter Mentor Award

The Student Chapter Mentor Award was established in 1995. The recipient of this annual award must be outstanding in

- student mentorships
- contributions to the APICS parent chapter, District, or national headquarters
- student chapter leadership
- leadership in college or university organizations and professional societies or associations
- leadership or service to community or civic organizations.

Selection is made by an anonymous panel of reviewers. A commemorative award is presented to the recipient at the recognition event during the annual APICS International Conference and Exposition. Recognition is also given in *APICS* magazine and on the APICS Web site.

For further details on the Student Chapter Mentor Award visit www.apics.org/About/Awards/individual.htm.

Student Voluntary Service Award

The Student Voluntary Service Award was established in 1994. The recipient of this annual award must be outstanding in

- student chapter achievements
- contributions to the APICS sponsoring professional chapter, District, or APICS
- leadership in college or university organizations and professional societies or associations
- leadership or service to community or civic organizations.

Selection is made by an anonymous panel of reviewers. A commemorative award is presented to the recipient at the recognition event during the annual APICS International Conference and Exposition. Recognition is also given in *APICS* magazine and on the APICS Web site.

For further details on the Student Voluntary Service Award visit www.apics.org/About/Awards/individual.htm

Summary: Recognition Deadlines

CBAR program submissions—Due to District representatives July 31

Voluntary Service Award nominations—Due to APICS District & Chapter Services May 31

Student Chapter Mentor Award nominations—Due to APICS District & Chapter Services May 31

Student Voluntary Service Award nominations—Due to APICS District & Chapter Services May 31

Corporate Awards of Excellence

The APICS Corporate Awards of Excellence recognize companies for significant contributions and performance excellence in the operations management field. Awards will be presented in three categories: Education, Innovation, and Technology Partnerships.

For further details on the APICS Corporate Awards of Excellence visit www.apics.org/About/Awards/Corporate/

Competitions—Educational and Research (E&R) Foundation

Plossl Doctoral Dissertation Competition

Named in honor of longtime E&R Foundation supporters George and Marion Plossl, the Plossl Doctoral Dissertation Competition honors an outstanding doctoral dissertation on an operations management subject.

The foundation grants awards of \$2,500 for dissertations in the following special interest areas:

- Integrated enterprise management
- Customers and products
- Delivering products and services
- Manufacturing processes
- Support functions.

For further details on the Plossl Competition visit
www.apics.org/Education/ERFoundation/Competitions/plossl.htm

Appendix A: Minimum Standards for Maintaining a Chapter Charter

APICS District and Chapter Handbook

Purpose:

Because APICS wishes its chapters to be successful, it must measure how chapters are meeting expectations in terms of customer service throughout the association. It is in the best interest of the association to support and strengthen its chapters through a feedback mechanism that identifies struggling chapters and that requires both association and district assistance and resources.

Therefore, for APICS to achieve long-term customer satisfaction, recognition, and branding consistency, the preferred feedback mechanism is minimum chapter standards.

Chartered chapters must maintain the following standards annually. The standards fall into six categories: customer expectations, communications, professional development events, education, APICS participation, and financial responsibility.

Section 14.1: Customer Expectations

Chartered chapters will provide the following documentation, which provides data and information relating to customer expectations and feedback:

1. A chapter must conduct a member needs survey or use other mechanisms to collect member needs at least every three years and continually demonstrate action on those needs.
2. A chapter must conduct three professional development event evaluations annually.

Section 14.2: Communications

Chartered chapters will communicate with chapter customers in the following manner:

1. Maintain a Web site that provides up-to-date content, displays the APICS trademarked logo on the home page (with accompanying chapter name), and provides a link to the APICS Web site (www.apics.org) or an officer contact reference through the APICS Web site, with that Web site referenced on all other communication.
2. Communicate a minimum of eight times throughout the year. Examples of communication activities may include
 - a. Hardcopy or softcopy newsletter

- b. Upcoming chapter events announcements via e-mail
- c. Partnership with local media (TV, newspapers, job fairs, and so forth) to communicate chapter activities
- d. Company Coordinators Program
- e. Mass mailings to prospective members that introduce the chapter and its activities.

Section 14.3: Professional Development Events

Chartered chapters will hold a minimum of three professional development events per year. Professional development events are defined as “...any activity where customers have an opportunity to meet (face to face or virtually) and present and discuss topics related to the APICS body of knowledge.” Examples of such events may include:

- 1. Professional development meetings to include top management
- 2. Plant tours
- 3. Online chatroom sessions
- 4. Webinars
- 5. Joint meetings with other chapters and societies.

Section 14.4: Education

Chartered chapters will hold a minimum of two educational offerings and offer at least three educational offerings per year. These offerings may be in the form of a workshop, or online, or part-time study course formats. Examples of such offerings may include:

- 1. Certification (CPIM or CSCP) educational offerings
- 2. Noncertification educational offerings (e.g., Fundamentals)
- 3. Noncertification educational workshop offerings (e.g., Lean Manufacturing Workshop Series)
- 4. In-house education programs, as requested
- 5. Independent topic workshops or seminars
- 6. Educational offerings held in conjunction with other associations, universities, or consulting companies.

Section 14.5: APICS Participation

Chartered chapters will provide the APICS corporate office with, or participate annually in, the following:

1. A list of chapter officers for the year; this list should be submitted as soon as possible, but no later than 60 days from the date of election of chapter officers, via My Chapter.
2. A review of chapter bylaws; changes to chapter bylaws should be submitted to APICS corporate office annually (if required).
3. A minimum of four chapter board of directors meetings per year; this includes one transition and/or orientation meeting.
4. Officer training attendance. Examples of officer training may include attendance at Leadership Institute, district meetings, or officer training sessions.
5. A minimum of one or more officers on the officers' electronic discussion list.

Section 14.6: Financial Responsibility

Chartered chapters will provide APICS with a letter of assertion from the chapter board of directors that the chapter financial records fairly state the assets, liabilities, revenues, and expenditures of the chapter and that all required regulatory filings have been made in a timely manner.

Section 14.7: Monitoring Process and Schedule for Minimum Chapter Standards Review

1. In July of each year, the chapter president or officer submits minimum standards materials to the district manager via the approved reporting method.
2. A chapter may collect standards data throughout the year. If standards are incomplete by July 31, the district manager will inform the chapter president of incompleteness and the chapter will be considered for revitalization status.
3. Chapters that refuse to submit standards data will fall into revitalization status and may face other actions at the district manager's discretion.
4. The district manager will review submitted data against approved chapter standards. The district manager will have 30 days from the date of chapter submission to conduct the review.
5. If the chapter meets all approved standards, only the district manager will approve compliance status and update it via the approved reporting method. The APICS corporate office and the chapter will be notified via e-mail. The

district manager will document the status of all chapters and document why revitalized chapters did not make the approved standards.

6. Variant standards with supporting documentation: If a chapter did not meet the approved standards, the chapter can provide supporting documentation for such variances (based on Voice of the Customer feedback). The district manager may exempt those variant standards. (Such variances must be reviewed each year without exception.) The district manager will update information via the approved reporting method. APICS corporate office, the District Manager Committee, and the chapter will be notified no later than August 15 of each year.
7. If the chapter does not meet minimum standards, the district manager will invoke revitalization status.
8. The district manager will review submitted data against approved chapter standards. The district manager will have 30 days from the date of chapter submission to conduct the review and update via the approved reporting method. The APICS corporate office and the chapter will be notified via e-mail. The district manager will document the status of all chapters and document why revitalized chapters did not make the approved standards.
9. The District Manager Committee and chapter are notified. From the date of notification forward, the chapter will have three years to meet the required standards and must show progress annually.
10. The District Manager Committee and chapter board will determine the best course of action for revitalization.
11. If at year three, all avenues to revitalize the chapter are exhausted, standards cannot be met, and no demonstrated improvement is evident, the district manager may approve the disbandment of the chapter. At any time during the revitalization process, chapters may voluntarily disband if improvement does not seem possible.

Appendix B: Suggestions for the President and President-Elect Chapter Leadership Handbook

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 rate this handbook's:

	Excellent	Good	Fair	Poor
Table of Contents (ability to find topic)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Completeness (enough information)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clarity (easy to understand)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization (structure of subject matter)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Page Layout (easy to find information)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

I would like to see more/less:

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 or phone:

Return completed forms to:

- chaprel@apics.org (e-mail)
- APICS District & Chapter Services
8430 West Bryn Mawr Avenue
Suite 1000
Chicago, IL 60631

Thank you!