

Getting Started—A Timetable

Sample Timeline for Your Term as VP of Membership (Fiscal Year June–July)

Thank you for participating in your local APICS chapter as vice president of membership. Your contribution to the APICS membership is an important part of what makes APICS a valued professional resource for the supply chain and operations management community.

Month	Action	Reference/Remarks	Date Completed
July	Acquire a copy of the Membership Chapter Leadership Handbook	Download copy from C-Box, or visit Shop APICS to purchase (Stock #01021)	
	Join the officers discussion list (Any chapter, district, or partner volunteer leader may subscribe to the officers' discussion list.)	To participate, send email to chaprel@apics.org with the below information. APICS identification number / Name / Email address / Phone / Chapter name/ Term / Current chapter/district position	
	Join the APICS Supply Chain Channel Discussion List	To participate, log on to the Supply Chain Channel: http://www.supplychainchannel.org	
	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.apics.org/C-Box	All identified chapter and district leaders with valid email addresses on file are subscribed to the Leadership Central list. This is the primary communication vehicle between APICS and volunteer leaders	
	Attend monthly chapter board of directors meeting -Provide an update of your chapters membership counts (new/renew/suspends)	Download a Real-Time report in Excel from Partner Connect. Ensure that sufficient membership literature is on hand for distribution; and encourage networking for any upcoming chapter events.	
	Plan/promote Fall chapter educational courses	Provide member email addresses to the VP of education for promoting courses.	
	Promote Fall chapter courses on chapter website/newsletter	Provide member email addresses to chapter webmaster/newsletter editor	

Month	Action	Reference/Remarks	Date Completed
	Review CPA/CBAR program worksheet	Discuss with chapter officers the chapters membership requirements to acquire program points	
	Develop/Review Member Communication Plan	Establish a formal program to welcome new members, reach out to suspended and renewing members. Recognize newly certified members and those who have maintained their certification. Suggested vehicles include recognition on the chapter Web site, chapter newsletter, personal phone calls, emails, and invitations to upcoming programs/events.	
	Thank Renewing Members	Download a Real-Time report in Excel from Partner Connect.	
	Welcome New Members	Download a Real-Time report in Excel from Partner Connect.	
	Reach out to Suspended Members	Download a Real-Time report in Excel from Partner Connect. Contact members 30 or 60 days before membership expiration date and contact suspended members again to inquire about the reason for nonrenewal.	
	Congratulate members that obtain or maintain certifications	Download a Real-Time report in Excel from Partner Connect.	
	Review Rebate/Sales Report with Chapter Treasurer/VP of finance	From Snap Shot reports in Partner Connect. Prepare and obtain approval for an operating budget for membership activities.	
	Review Snap Shot and Member Summary Reports	Snap Shot Reports available on Partner Connect. Membership Summary report is available on C-Box	
August	Attend monthly chapter board of directors meeting -Provide an update of your chapters membership counts (new/renew/suspends)	Download a Real-Time report in Excel from Partner Connect. Ensure that sufficient membership literature is on hand for distribution; and encourage networking for any upcoming chapter events.	
	Consider attending APICS annual conference and Leadership Summit	<i>Visit www.apics.org for information</i>	

Month	Action	Reference/Remarks	Date Completed
	District Meeting Attendance	Review agenda for next district meeting, provide a report with chapter membership program successes, issues, and needs.	
	Thank Renewing Members	Download a Real-Time report in Excel from Partner Connect.	
	Welcome New Members	Download a Real-Time report in Excel from Partner Connect.	
	Reach out to Suspended Members	Download a Real-Time report in Excel from Partner Connect. Contact members 30 or 60 days before membership expiration date and contact suspended members again to inquire about the reason for nonrenewal.	
	Congratulate members that obtain or maintain certifications	Download a Real-Time report in Excel from Partner Connect.	
	Review Rebate/Sales Report with Chapter Treasurer/VP of finance	From Snap Shot reports in Partner Connect. Reconcile chapter dues received per member.	
	Review Snap Shot and Member Summary Reports	Snap Shot Reports available on Partner Connect. Membership Summary report is available on C-Box	
September	Attend monthly chapter board of directors meeting -Provide an update of your chapters membership counts (new/renew/suspends)	Download a Real-Time report in Excel from Partner Connect. Ensure that sufficient membership literature is on hand for distribution; and encourage networking for any upcoming chapter events.	
	Thank Renewing Members	Download a Real-Time report in Excel from Partner Connect.	
	Welcome New Members	Download a Real-Time report in Excel from Partner Connect.	
	Reach out to Suspended Members	Download a Real-Time report in Excel from Partner Connect. Contact members 30 or 60 days before membership expiration date and contact suspended members again to inquire about the reason for nonrenewal.	

Month	Action	Reference/Remarks	Date Completed
	Congratulate members that obtain or maintain certifications	Download a Real-Time report in Excel from Partner Connect.	
	Review Rebate/Sales Report with Chapter Treasurer/VP of finance	From Snap Shot reports in Partner Connect. Reconcile chapter dues received per member.	
	Review Snap Shot and Member Summary Reports	Snap Shot Reports available on Partner Connect. Membership Summary report is available on C-Box	
October	Attend monthly chapter board of directors meeting -Provide an update of your chapters membership counts (new/renew/suspends)	Download a Real-Time report in Excel from Partner Connect. Ensure that sufficient membership literature is on hand for distribution; and encourage networking for any upcoming chapter events.	
	Plan/promote Winter chapter educational courses	Provide member email addresses to the VP of education for promoting courses.	
	Promote Winter chapter courses on chapter website/newsletter	Provide member email addresses to chapter webmaster/newsletter editor	
	Thank Renewing Members	Download a Real-Time report in Excel from Partner Connect.	
	Welcome New Members	Download a Real-Time report in Excel from Partner Connect.	
	Reach out to Suspended Members	Download a Real-Time report in Excel from Partner Connect. Contact members 30 or 60 days before membership expiration date and contact suspended members again to inquire about the reason for nonrenewal.	
	Congratulate members that obtain or maintain certifications	Download a Real-Time report in Excel from Partner Connect.	
	Review Rebate/Sales Report with Chapter Treasurer/VP of finance	From Snap Shot reports in Partner Connect. Reconcile chapter dues received per member.	
	Review Snap Shot and Member Summary Reports	Snap Shot Reports available on Partner Connect. Membership Summary report is available on C-Box	

Month	Action	Reference/Remarks	Date Completed
November	Attend monthly chapter board of directors meeting -Provide an update of your chapters membership counts (new/renew/suspends)	Download a Real-Time report in Excel from Partner Connect. Ensure that sufficient membership literature is on hand for distribution; and encourage networking for any upcoming chapter events.	
	Thank Renewing Members	Download a Real-Time report in Excel from Partner Connect.	
	Welcome New Members	Download a Real-Time report in Excel from Partner Connect.	
	Reach out to Suspended Members	Download a Real-Time report in Excel from Partner Connect. Contact members 30 or 60 days before membership expiration date and contact suspended members again to inquire about the reason for nonrenewal.	
	Congratulate members that obtain or maintain certifications	Download a Real-Time report in Excel from Partner Connect.	
	Review Rebate/Sales Report with Chapter Treasurer/VP of finance	From Snap Shot reports in Partner Connect. Reconcile chapter dues received per member.	
	District Meeting Attendance	Review agenda for next district meeting, provide a report with chapter membership program successes, issues, and needs.	
	Review Snap Shot and Member Summary Reports	Snap Shot Reports available on Partner Connect. Membership Summary report is available on C-Box	
December	Attend monthly chapter board of directors meeting -Provide an update of your chapters membership counts (new/renew/suspends)	Download a Real-Time report in Excel from Partner Connect. Ensure that sufficient membership literature is on hand for distribution; and encourage networking for any upcoming chapter events.	
	Thank Renewing Members	Download a Real-Time report in Excel from Partner Connect.	
	Welcome New Members	Download a Real-Time report in Excel from Partner Connect.	

Month	Action	Reference/Remarks	Date Completed
	Reach out to Suspended Members	Download a Real-Time report in Excel from Partner Connect. Contact members 30 or 60 days before membership expiration date and contact suspended members again to inquire about the reason for nonrenewal.	
	Congratulate members that obtain or maintain certifications	Download a Real-Time report in Excel from Partner Connect.	
	Review Rebate/Sales Report with Chapter Treasurer/VP of finance	From Snap Shot reports in Partner Connect. Reconcile chapter dues received per member.	
	Review Snap Shot and Member Summary Reports	Snap Shot Reports available on Partner Connect. Membership Summary report is available on C-Box	
January	Attend monthly chapter board of directors meeting -Provide an update of your chapters membership counts (new/renew/suspends)	Download a Real-Time report in Excel from Partner Connect. Ensure that sufficient membership literature is on hand for distribution; and encourage networking for any upcoming chapter events.	
	Plan/promote Spring chapter educational courses	Provide member email addresses to the VP of education for promoting courses.	
	Promote Spring chapter courses on chapter website/newsletter	Provide member email addresses to chapter webmaster/newsletter editor	
	Thank Renewing Members	Download a Real-Time report in Excel from Partner Connect.	
	Welcome New Members	Download a Real-Time report in Excel from Partner Connect.	
	Reach out to Suspended Members	Download a Real-Time report in Excel from Partner Connect. Contact members 30 or 60 days before membership expiration date and contact suspended members again to inquire about the reason for nonrenewal.	
	Congratulate members that obtain or maintain certifications	Download a Real-Time report in Excel from Partner Connect.	

Month	Action	Reference/Remarks	Date Completed
	Review Rebate/Sales Report with Chapter Treasurer/VP of finance	From Snap Shot reports in Partner Connect. Reconcile chapter dues received per member.	
	Update Member contact information via Partner Connect	Update member contact information as needed	
	Review Snap Shot and Member Summary Reports	Snap Shot Reports available on Partner Connect. Membership Summary report is available on C-Box	
February	Attend monthly chapter board of directors meeting -Provide an update of your chapters membership counts (new/renew/suspends)	Download a Real-Time report in Excel from Partner Connect. Ensure that sufficient membership literature is on hand for distribution; and encourage networking for any upcoming chapter events.	
	Thank Renewing Members	Download a Real-Time report in Excel from Partner Connect.	
	Welcome New Members	Download a Real-Time report in Excel from Partner Connect.	
	Reach out to Suspended Members	Download a Real-Time report in Excel from Partner Connect. Contact members 30 or 60 days before membership expiration date and contact suspended members again to inquire about the reason for nonrenewal.	
	Congratulate members that obtain or maintain certifications	Download a Real-Time report in Excel from Partner Connect.	
	Review Rebate/Sales Report with Chapter Treasurer/VP of finance	From Snap Shot reports in Partner Connect. Reconcile chapter dues received per member.	
	District Meeting Attendance	Review agenda for next district meeting, provide a report with chapter membership program successes, issues, and needs.	
	Review Snap Shot and Member Summary Reports	Snap Shot Reports available on Partner Connect. Membership Summary report is available on C-Box	

Month	Action	Reference/Remarks	Date Completed
March	Attend monthly chapter board of directors meeting -Provide an update of your chapters membership counts (new/renew/suspends)	Download a Real-Time report in Excel from Partner Connect. Ensure that sufficient membership literature is on hand for distribution; and encourage networking for any upcoming chapter events.	
	Thank Renewing Members	Download a Real-Time report in Excel from Partner Connect.	
	Welcome New Members	Download a Real-Time report in Excel from Partner Connect.	
	Reach out to Suspended Members	Download a Real-Time report in Excel from Partner Connect. Contact members 30 or 60 days before membership expiration date and contact suspended members again to inquire about the reason for nonrenewal.	
	Congratulate members that obtain or maintain certifications	Download a Real-Time report in Excel from Partner Connect.	
	Review Rebate/Sales Report with Chapter Treasurer/VP of finance	From Snap Shot reports in Partner Connect. Reconcile chapter dues received per member.	
	Review Snap Shot and Member Summary Reports	Snap Shot Reports available on Partner Connect. Membership Summary report is available on C-Box	
April	Attend monthly chapter board of directors meeting -Provide an update of your chapters membership counts (new/renew/suspends)	Download a Real-Time report in Excel from Partner Connect. Ensure that sufficient membership literature is on hand for distribution; and encourage networking for any upcoming chapter events.	
	Plan/promote Summer chapter educational courses	Provide member email addresses to the VP of education for promoting courses.	
	Promote Summer chapter courses on chapter website/newsletter	Provide member email addresses to chapter webmaster/newsletter editor	
	Thank Renewing Members	Download a Real-Time report in Excel from Partner Connect.	
	Welcome New Members	Download a Real-Time report in Excel from Partner Connect.	

Month	Action	Reference/Remarks	Date Completed
	Reach out to Suspended Members	Download a Real-Time report in Excel from Partner Connect. Contact members 30 or 60 days before membership expiration date and contact suspended members again to inquire about the reason for nonrenewal.	
	Congratulate members that obtain or maintain certifications	Download a Real-Time report in Excel from Partner Connect.	
	Review Rebate/Sales Report with Chapter Treasurer/VP of finance	From Snap Shot reports in Partner Connect. Reconcile chapter dues received per member.	
	Review CPA/CBAR program worksheet	Provide educational report to chapter board member responsible for CBAR reporting.	
	Review Snap Shot and Member Summary Reports	Snap Shot Reports available on Partner Connect. Membership Summary report is available on C-Box	
May	Attend monthly chapter board of directors meeting -Provide an update of your chapters membership counts (new/renew/suspends)	Download a Real-Time report in Excel from Partner Connect. Ensure that sufficient membership literature is on hand for distribution; and encourage networking for any upcoming chapter events.	
	Budget Assistance	Assist chapter with budget preparation by providing educational income/expense projections to chapter treasurer	
	District Meeting Attendance	Review agenda for next district meeting, provide a report with chapter membership program successes, issues, and needs.	
	Thank Renewing Members	Download a Real-Time report in Excel from Partner Connect.	
	Welcome New Members	Download a Real-Time report in Excel from Partner Connect.	

Month	Action	Reference/Remarks	Date Completed
	Reach out to Suspended Members	Download a Real-Time report in Excel from Partner Connect. Contact members 30 or 60 days before membership expiration date and contact suspended members again to inquire about the reason for nonrenewal.	
	Congratulate members that obtain or maintain certifications	Download a Real-Time report in Excel from Partner Connect.	
	Review Rebate/Sales Report with Chapter Treasurer/VP of finance	From Snap Shot reports in Partner Connect. Reconcile chapter dues received per member.	
	Transition Plan	Prepare transition for the incoming membership director.	
	Review Snap Shot and Member Summary Reports	Snap Shot Reports available on Partner Connect. Membership Summary report is available on C-Box	
June	Attend monthly chapter board of directors meeting -Provide an update of your chapters membership counts (new/renew/suspends)	Download a Real-Time report in Excel from Partner Connect. Ensure that sufficient membership literature is on hand for distribution; and encourage networking for any upcoming chapter events.	
	Awards/Recognition	Recognize chapter members who have acquired certification during the year. Recognize chapter instructors who have contributed to the chapter's success.	
	Thank Renewing Members	Download a Real-Time report in Excel from Partner Connect.	
	Welcome New Members	Download a Real-Time report in Excel from Partner Connect.	
	Reach out to Suspended Members	Download a Real-Time report in Excel from Partner Connect. Contact members 30 or 60 days before membership expiration date and contact suspended members again to inquire about the reason for nonrenewal.	
	Congratulate members that obtain or maintain certifications	Download a Real-Time report in Excel from Partner Connect.	

Month	Action	Reference/Remarks	Date Completed
	Review Rebate/Sales Report with Chapter Treasurer/VP of finance	From Snap Shot reports in Partner Connect. Reconcile chapter dues received per member.	
	Review Snap Shot and Member Summary Reports	Snap Shot Reports available on Partner Connect. Membership Summary report is available on C-Box	