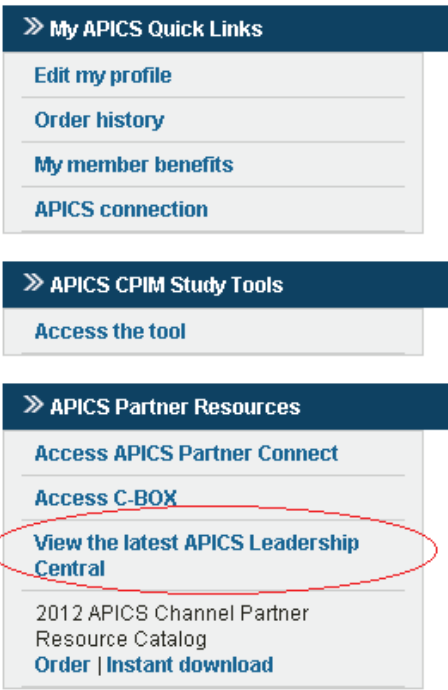


## Getting Started—A Timetable

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

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

Date	Action	Reference/Remarks	Date Completed
July	<p><b>Update board roster inside Partner Connect</b></p> <p>If you do not have access to Partner Connect, contact the APICS District and Chapter Services Department at:  <a href="mailto:chaprel@apics.org">chaprel@apics.org</a>            1-800-444-2742 ext 5436</p>	<p>Instructions on how to access Partner Connect and update the board roster are as follows:</p> <ul style="list-style-type: none"> <li>- Log onto apics.org</li> <li>- Click on the ‘My APICS’ tab</li> <li>- Click on ‘Access Partner Connect’</li> <li>- Click on ‘Board Management’</li> <li>- Click on ‘Add New Member’</li> </ul> <div data-bbox="727 1056 1117 1577" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>» Quick Links</p> <ul style="list-style-type: none"> <li><a href="#">Partner Connect Home</a></li> <li><a href="#">Partner Order History</a></li> <li style="border: 2px solid red; border-radius: 50%; padding: 2px;"><a href="#">Board Management</a></li> <li><a href="#">Partner Profile</a></li> <li><a href="#">Real-Time Reports</a></li> <li><a href="#">User Feedback</a></li> <li><a href="#">Member Search</a></li> <li><a href="#">Snap Shot Reports</a></li> <li><a href="#">Class Administrators</a></li> </ul> </div>	

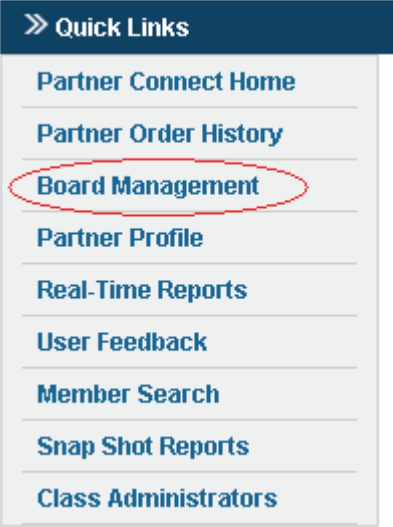
	<p><b>Thoroughly review the chapter management tools and resources found in CBox</b></p> <p><b>Share the link to CBox with your board of directors</b>  <a href="http://www.cbox.apics.org">www.cbox.apics.org</a></p> <p><b>Empower your board by ensuring they are aware of the tools that are available to assist them in their role as chapter officers.</b></p>	<p>CBox contains best practices, templates, and guidelines for developing and maintaining successful APICS districts, chapters, and International Associates. It provides resources to support delivery of APICS programs and services locally.</p>	
	<p><b>Review current and past issues of Leadership Central, a monthly e-newsletter</b></p> <p>This e-newsletter provides chapter officers with updates from the corporate office, best practices, tools of the trade, leadership advice, important dates and much more.</p> <p>This is the primary communication vehicle between APICS and volunteer leaders.</p>	<p>Instructions on how to access Leadership Central are as follows:</p> <ul style="list-style-type: none"> <li>- Log onto apics.org</li> <li>- Click on the ‘My APICS’ tab</li> <li>- Click on ‘View the latest APICS Leadership Central’</li> </ul>  <p>The screenshot shows a user interface with three main sections:</p> <ul style="list-style-type: none"> <li><b>My APICS Quick Links:</b> Edit my profile, Order history, My member benefits, APICS connection.</li> <li><b>APICS CPIM Study Tools:</b> Access the tool.</li> <li><b>APICS Partner Resources:</b> Access APICS Partner Connect, Access C-BOX, <b>View the latest APICS Leadership Central</b> (circled in red), 2012 APICS Channel Partner Resource Catalog, Order   Instant download.</li> </ul>	

	<p><b>Subscribe yourself and your officers to the officer list serv</b></p> <p>APICS provides an officer listserv you can use to interact and communicate with other officers across North America.</p>	<p>To subscribe contact the APICS District and Chapter Services Department at: <a href="mailto:chaprel@apics.org">chaprel@apics.org</a> 1-800-444-2742 ext 5436</p>	
	<p><b>Host first board of directors meeting; during the meeting:</b></p> <ul style="list-style-type: none"> <li>-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.</li> <li>-Review the previous year's CPA/CBAR program submission</li> <li>-Review and evaluate the chapter's strategic and marketing plans.</li> <li>-Develop chapter calendar for education classes and professional development meetings (PDM)</li> </ul>	<p>Available for order online at Shop APICS:</p> <ul style="list-style-type: none"> <li>-President and President-Elect Handbook (Stock #01011)</li> <li>-ABCs of Parliamentary Procedures (stock #01072)</li> </ul>	
	Review financial and bank statements and open invoices	:Finance/Treasurer Handbook	
	Develop budget to support direction for year	Finance/Treasurer Handbook	
	Review and update strategic plan	Strategic Planning Leadership Handbook (stock #01029)	
	Review chapter bylaws		
	Attend District meeting	<a href="http://www.apics.org/about/overview/leadership/district-leadership">http://www.apics.org/about/overview/leadership/district-leadership</a>	

<b>August</b>	<b>Host monthly chapter board of directors meeting</b>  -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.	Available for order online at Shop APICS: -President and President-Elect Handbook (Stock #01011) -ABCs of Parliamentary Procedures (stock #01072)	
	Review financial and bank statements and open invoices	Finance/Treasurer Leadership Handbook	
	Approve meeting minutes	President and President-Elect Leadership Handbook	
	Approve strategic plan	Strategic Planning Leadership Handbook (stock #01029)	
	Develop marketing plan	Channel Partner Leadership Marketing Handbook (Stock #01030)	
<b>September</b>	<b>Host monthly chapter board of directors meeting</b>	-President and President-Elect Leadership Handbook -ABCs of Parliamentary Procedures (stock #01072)	
	Approve meeting minutes	President and President-Elect Leadership Handbook	
	Review financial and bank statements and open invoices	Finance/Treasurer Leadership Handbook	
	Approve the annual budget	Present the budget to the membership before or during the first professional development meeting of the year.	
<b>October</b>	<b>Host monthly chapter board of directors meeting</b>	-President and President-Elect Leadership Handbook -ABCs of Parliamentary Procedures (stock #01072)	
	Approve meeting minutes	President and President-Elect Leadership Handbook	
	Review financial and bank statements and open invoices	Finance/Treasurer Leadership Handbook	
	Perform annual financial audit	Finance/Treasurer Leadership Handbook	
	District meeting	<a href="http://www.apics.org/about/overview/leadership/district-leadership">http://www.apics.org/about/overview/leadership/district-leadership</a>	
	APICS annual conference and Leadership Summit	<a href="http://www.apics.org">www.apics.org</a>	

<b>November</b>	<b>Host monthly chapter board of directors meeting</b>	-President and President-Elect Leadership Handbook -ABCs of Parliamentary Procedures (stock #01072)	
	Approve meeting minutes	President and President-Elect Leadership Handbook	
	Review financial and bank statements and open invoices	Finance/Treasurer Leadership Handbook	
	IRS Form 990	Deadline is November 15	
	File additional tax forms, if necessary	Finance/Treasurer Leadership Handbook	
<b>December</b>	<b>Host monthly chapter board of directors meeting</b>	-President and President-Elect Leadership Handbook -ABCs of Parliamentary Procedures (stock #01072)	
	Approve meeting minutes	President and President-Elect Leadership Handbook	
	Review financial and bank statements and open invoices	Finance/Treasurer Leadership Handbook	
<b>January</b>	<b>Host monthly chapter board of directors meeting</b>	-President and President-Elect Leadership Handbook -ABCs of Parliamentary Procedures (stock #01072)	
	Approve meeting minutes	President and President-Elect Leadership Handbook	
	Review financial and bank statements and open invoices	Finance/Treasurer Leadership Handbook	
	District meeting	<a href="http://www.apics.org/about/overview/leadership/district-leadership">http://www.apics.org/about/overview/leadership/district-leadership</a>	
<b>February</b>	<b>Host monthly chapter board of directors meeting</b>	-President and President-Elect Leadership Handbook -ABCs of Parliamentary Procedures (stock #01072)	
	Approve meeting minutes	President and President-Elect Leadership Handbook	
	Review financial and bank statements and open invoices	Finance/Treasurer Leadership Handbook	

<b>March</b>	<b>Host monthly chapter board of directors meeting</b>	-President and President-Elect Leadership Handbook -ABCs of Parliamentary Procedures (stock #01072)	
	Approve meeting minutes	-President and President-Elect Leadership Handbook	
	Review financial and bank statements and open invoices	Finance/Treasurer Leadership Handbook	
	Assign nominating committee	Chapter bylaws	
<b>April</b>	<b>Host monthly chapter board of directors meeting</b>	-President and President-Elect Leadership Handbook -ABCs of Parliamentary Procedures (stock #01072)	
	Approve meeting minutes	President and President-Elect Leadership Handbook	
	District meeting	<a href="http://www.apics.org/about/overview/leadership/district-leadership">http://www.apics.org/about/overview/leadership/district-leadership</a>	
	Review financial and bank statements and open invoices	Finance/Treasurer Leadership Handbook	
	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.	
<b>May</b>	<b>Host monthly chapter board of directors meeting</b>	-President and President-Elect Leadership Handbook -ABCs of Parliamentary Procedures (stock #01072)	
	Approve meeting minutes	President and President-Elect Leadership Handbook	
	Review financial and bank statements and open invoices	Finance/Treasurer Leadership Handbook	

	<p><b>Outgoing President - update board roster inside Partner Connect</b></p> <p>Before the end date associated with your current board term as president, use the Partner Connect Board Management function <b>to add</b> the incoming/continuing president and other board members to the next board term.</p>	<p>Instructions on how to access Partner Connect and update the board roster are as follows:</p> <ul style="list-style-type: none"> <li>- Log onto apics.org</li> <li>- Click on the 'My APICS' tab</li> <li>- Click on 'Access Partner Connect'</li> <li>- Click on 'Board Management'</li> <li>- Click on 'Add New Member'</li> </ul>  <p>The screenshot shows a 'Quick Links' menu with the following items: Partner Connect Home, Partner Order History, Board Management (circled in red), Partner Profile, Real-Time Reports, User Feedback, Member Search, Snap Shot Reports, and Class Administrators.</p>	
--	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

<p><b>June</b></p>	<p><b>Host monthly chapter board of directors meeting (transition meeting for outgoing and incoming board)</b></p> <ul style="list-style-type: none"> <li>-Review and evaluate the previous year's strategic plan.</li>   <li>-Review and evaluate the previous year's budget.</li>   <li>-Transfer chapter records and leadership handbooks from former officers to new officers.</li>   <li>-Discuss any recommended actions by previous year's officers and chairs for the new year, including, for example, unfinished projects and new ideas.</li> </ul>	<ul style="list-style-type: none"> <li>-President and President-Elect Leadership Handbook</li> <li>-ABCs of Parliamentary Procedures (stock #01072)</li> </ul>	
	<p>Awards/Recognition</p>	<p>Chapter SOPs</p>	
	<p>Installation of incoming chapter board of directors</p>	<p>Chapter SOPs</p>	
	<p>Approve meeting minutes</p>	<p>President and President-Elect Leadership Handbook</p>	
	<p>Review financial and bank statements and open invoices</p>	<p>Finance/Treasurer Leadership Handbook</p>	