

APICS SOUTHWEST MICHIGAN (SWMI) CHAPTER

STANDARD OPERATING PROCEDURE

Position: VP Membership

Document No: SOP0024_VP Membership

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Revised By: Board of Directors

1. Purpose And Scope
 - a. To establish and maintain, documented information, on the responsibilities of the VP of Membership position on the Board of Director.
2. References
 - a. APICS – The Association of Operations Management
3. Areas of Responsibility
 - a. Reports and Reporting
 - i. Monthly
 1. BOD Meetings
 - a. This position will be responsible for producing a brief report at each BOD meeting.
 2. Newsletter Articles
 - a. This position will be responsible for writing newsletter articles as requested by the VP of Communication.
 - b. Meetings
 - i. Board of Directors
 1. There are 12 BOD meetings every program year (September – August). It is anticipated that this position will attend all meetings. The minimum attendance expectation is at least 10 of the 12 meetings. It is the responsibility of this position to communicate your attendance by registering under the Board Meeting section of the APICS Southwest Michigan website.
 - ii. Transition and Strategic Planning Meetings
 1. There is one Transition meeting (June) and one Strategic Planning meeting (July) every program year. It is expected that this position will attend both meetings.
 - iii. Professional Development Meetings / Seminars / Plant Tours
 1. It is expected that this position will attend the majority of PDM's throughout the year.
 - c. Financials
 - i. Monthly
 1. Report Expense monthly for all expenses incurred during the month.
 - ii. Yearly (These budgetary responsibilities are added to the president's budget)
 1. Advise the president on your financial needs to support this position.
 - d. Chapter Benchmarking and Reporting (CBAR) Program
 - i. This position is responsible for supporting the "Chapter Benchmarking and Reporting (CBAR)" program according to the established responsibilities on both

the Chapter Benchmarking and Reporting (CBAR) checklist and yearly strategic plan. This responsibility includes submitting documentation on a timely basis.

- e. Chapter Equipment and Office Products
 - i. This position is responsible for any equipment and office product that they have that the Chapter owns.
- f. Web Site Support
 - i. This position is responsible for supporting the web site development and maintenance.
- g. Important Dates
 - i. Refer to the Chapter Timeline.

4. Detailed Job Description

a. Main Duties

- i. Recruits and develops an effective membership committee to ensure enough resources for membership responsibilities.
- ii. Informs headquarters of any changes affecting membership records (address, phone number, e-mail, company, and so forth).
- iii. Resolves issues concerning membership records or membership processing at a member's request.
- iv. Leads programs to promote growth in the chapter's membership, as well as membership retention.
- v. Greets guests and new members at all chapter functions.
- vi. Monitors the chapter's progress monthly and provides data for the chapter awards program, newsletters, and Web site.
- vii. Compiles membership statistics for chapter and region use and for CBAR program.
- viii. Issues membership certificates to the new members with cover letters.
- ix. Issues pins with cover letters for the membership anniversary of 5, 10, 15, and 20 years.
- x. Documents membership plan, policies and procedures, and strategic plan worksheets.
- xi. Prepares and obtains approval for an operating budget for membership activities.
- xii. Functions as an active member of the chapter BOD to ensure that all chapter programs are compatible with the interest of membership.

b. Technical Requirements

- i. Ability to work with the BOD
- ii. Phone, e-mail, Internet
- iii. Access to computer with Microsoft Word, Excel, PowerPoint, and Access programs
- iv. President and President-Elect Chapter Leadership Handbook review
- v. Willingness to learn how to run a nonprofit business

c. Required Skill Set

- i. Leadership, motivation, delegation, teambuilding, communication, organization, project planning, negotiation

- ii. Typing and computer skills: word processing, spreadsheets, graphs, PowerPoint, Internet downloading, e-mail address groups
- iii. Familiarity with APICS body of knowledge
- iv. Writing skills (grammar, spelling, proofreading)
- v. Public speaking and presentation skills (TTT minimum)

d. Time Requirements

- i. BOD meetings: 1 per month (12 per year) at 3 hours each
- ii. Transition meeting: 1 per year in June (All Day)
- iii. Strategic Planning Meeting: 1 per year in July
- iv. Professional development meetings: 1 per month (9 - 12 per year) at 2 hours each
- v. 5 to 10 hours additional per month depending on level of chapter activity (Special projects additional)

1. Work Instructions

a. Simplified Job Duties

- i. Monthly Certified Member Info
- ii. Monthly APICS Membership Reports
- iii. Annual Member Needs Survey
- iv. Monthly Contact (New, Renewed, Lapsed)
- v. Recruiting Packets

b. Work Instructions

- i. Monthly Certified Member Info
 - 1. Review the Monthly Membership Report located at
 - a. <https://www.apics.org/apics/Chapters/MyChapter.aspx>
 - b. Kalamazoo-SW Michigan
 - c. Real-Time Reports
- ii. Open Current Months Report (Excel Format)
 - 1. Sort By Chapter Code, CPIM Cert Code, CSCP Cert Code
- iii. Compare Certified Members (CPIM, CFPIM, CIRM & CSCP) members to the previous month's list that was published in the Newsletter. Make any necessary updates and submit the new list to the VP of Communication for the Newsletter.
- iv. Monthly APICS Membership Reports
 - 1. Go to
 - a. <https://www.apics.org/apics/Chapters/MyChapter.aspx>
 - b. Kalamazoo-SW Michigan
 - c. Real-Time Reports
 - 2. Right Click on the most recent Membership Reports
 - a. Choose Save Target as
 - i. Put into a Folder on your PC to be saved
- v. Repeat step ii for the New Members and Suspended Members Reports
- vi. Send an electronic version of all three reports to the VP of Quality for inclusion in our yearly CBAR Reporting.

c. Annual Member Needs Survey

- i. Refer to previous years surveys. This will need to have a detailed outline created.

- d. Monthly Contact (New, Renewed, Lapsed)
 - i. Refer to Monthly Membership Report.
 - 1. Look at as outlined in section b) above.
 - a. New: Look at the New Members Report and send each one a welcome email or letter. Use the Standard Membership Forms – New Member Welcome Form.
 - b. Renewed: Look at the Sales & Rebate Report for Renewed Members and send each one a thank you for renewing email or letter. Use the Standard Membership Forms – Renewed Members Form.
 - c. Suspended/Lapsed: THIS SHOULD BE DONE 60 DAYS AND 30 DAYS BEFORE THEIR MEMBERSHIP EXPIRES. Look at the Membership Report. Sort by Chapter Code & Dues Paid Thru. In January, you should be sending reminder emails or letters to those expiring in February (if not renewed) and March. Use the Standard Membership Forms – Suspended Member Form.
 - 2. The mentions forms can be used “as is” with the insert areas filled in or you can add your own touch to these contacts.
- e. Recruiting Packets
 - i. Maintain a supply of APICS Southwest Michigan Membership Recruiting Packets.
 - 1. These packets are a combination of APICS supplied forms and .PDF and .DOC documents we print as needed.

Revision Box

Requests for changes to this document must be made in writing to the issuing and approving authority together with documentation on which to base the review and approval. Listed below is the record of changes for this document. Revision level and approval of revisions are recorded on title page.				
Rev	Date	Page	Paragraph	Nature of change
0	3/16/09	All	All	New Document Split from Larger Document