

# Student Chapter Management Program



## Chapter Leadership Handbook

2006 | Stock #01024



*Advancing Productivity, Innovation, and Competitive Success*

# **STUDENT CHAPTER MANAGEMENT PROGRAM**

## **CHAPTER LEADERSHIP HANDBOOK**

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*Advancing Productivity, Innovation, and Competitive Success*

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# **INTRODUCTION**

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The Student Chapter Management Program is designed as a management tool for student chapters that are seeking to improve their processes, products, and services. It encourages the operation of a well-managed chapter that is properly balanced and effective in meeting its customers' needs.

Chapter management requires attention to five categories: administration, education, programs, membership, and public relations. Activities within each category provide educational opportunities and enhance a chapter's capabilities.

The second half of the program is designed to provide recognition for the chapters efforts. While participation in the recognition portion of the program is optional, it is strongly encouraged by APICS, regions, and chapters. Records show that participating student chapters have a strong membership base and significant support from faculty advisors.

Participation in this program requires evidence of performance of measurable tasks in the five chapter management categories. The evaluation conducted by the parent chapter enhances its relationship with the student chapter.

We extend a special welcome to chapters new to this program. Our goal is to help your chapter grow in meeting the needs of your customers. We look forward to congratulating you on your accomplishments.



## **SECTION A. STUDENT CHAPTER MANAGEMENT PROGRAM**

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The Student Chapter Management Program provides insight into the APICS recognition program. Use this section as a guide to plan your chapter's administration, education, programs, membership, and public relations activities. Activities within each portion of this section provide educational opportunities and enhance the capabilities of your chapter.

Your active involvement in this program will enhance chapter performance and provide valuable personal and professional outcomes for you and your chapter members.

### **Contents for this section**

*Administration*

*Education*

*Programs*

*Membership*

*Public Relations*

*Bonus Items*

# 1. ADMINISTRATION

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These tasks comprise the basic administration requirements for a successful chapter. A student chapter provides this information to the parent chapter, region, and APICS headquarters.

## 1.1 CHAPTER ORGANIZATION

### Requirement

Prepare a student chapter organization chart or student chapter officers' roster including names, preferred mailing addresses, and telephone numbers for each academic advisor, officer, and committee chairperson. Distribute the chart or roster to student chapter members, advisor, parent chapter president, region vice president, and APICS' membership department within 30 days of the start of the chapter officers' terms. **(Note: An officers' roster form is included in the appendix.)**

### Supporting Documentation

A dated copy of the organization chart or roster with proof of distribution within 30 days of every change of officers.

- a) *Copy of roster of officers*
- b) *Indicate method used for distribution to student members, parent chapter president, and region vice president.*

**Note:** As student chapter president, you now have the power to manage and update your chapter's Board Roster online, in real-time.

To keep the process paperless and convenient for everyone, your board roster should be submitted to APICS headquarters using the MY CHAPTER Board Management function at <https://www.apics.org/APICS/Chapters/BoardMgmt.aspx>.

If your term expires before you update the new board roster in MY CHAPTER, none of the incoming board members will be able to access this powerful chapter management tool. To gain access to MY CHAPTER after a term expires, the new chapter president must complete and return the APICS Student Chapter Officer Roster Form on page 43 to APICS Chapter Relations.

## **1.2 CHAPTER GENERAL MEMBERSHIP MEETING AGENDA**

### **Requirement**

Submit agendas of three to six meetings per program year to show that general membership meetings were conducted efficiently.

Complete compliance is required. Note that this is an agenda, not minutes of the meeting. Do not submit minutes of regular student chapter meetings. The purpose of an agenda is to promote advance planning. The agenda may include a timetable, a special announcement, checklist, etc. It is acceptable to submit the original agenda, including last-minute penciled notes.

### **Supporting Documentation**

*Three to six agendas*

*10 pts. - three meeting agendas*

*20 pts. - six or more meeting agendas per program year*

## **1.3 CHAPTER BUDGET**

### **Requirement**

Prepare a budget for the program year (April 1 to March 31) that includes estimated funds to be received and disbursed.

### **Supporting Documentation**

A signed, dated copy of the budget that was approved by the academic advisor and officers of the student chapter.

## **1.4 CHAPTER INCOME STATEMENT**

### **Requirement**

Prepare a year-end document comparing actual receipts and disbursements to budgeted amounts.

### **Supporting Documentation**

A current year (April 1 to March 31) income statement signed by the academic advisor showing budgeted versus actual amounts.

## **1.5 OFFICER TRANSITION MEETING**

### **Requirement**

Provide documentation that the outgoing and the newly elected officers, academic advisor, and/or representative of the parent chapter have met at least once to review and

evaluate the past year, clarify their position responsibilities, plan for the coming year's programs, and see that the new chapter president has received any relevant chapter management resources at the officer transition meeting. **(Note: A recommended checklist is included in the appendix.)**

### **Supporting Documentation**

A dated copy of the minutes of the joint meeting between the outgoing and incoming officers. Minutes must include a list of attendees.

*15 points; 5 additional points if the academic advisor or representative of the parent chapter attended meeting*

## **1.6 STUDENT CHAPTER EXECUTIVE BOARD MEETINGS**

### **Requirement**

Hold three to six meetings per program year of the Student Chapter Executive Board. An agenda and minutes should be prepared for each meeting.

### **Supporting Documentation**

Agenda and minutes of each meeting, including dates, times, and topics discussed, or the signature of the academic advisor on the Student Chapter Summary Sheet.

*10 points for holding three meetings*

*20 points for holding six or more meetings*

*5 bonus points if advisor or parent chapter representative attended three of the meetings*

*10 bonus points if advisor or parent chapter representative attended six of the meetings*

*Maximum of 30 points*

## **1.7 ATTENDANCE AT PARENT CHAPTER BOD MEETINGS**

### **Requirement**

The student chapter president or another board member should represent the chapter at the BOD meetings of the parent chapter.

### **Supporting Documentation**

A copy of the parent chapter BOD meeting minutes that document that a student chapter representative presented the chapter's concerns, needs, and progress, or the signature of the academic advisor on the Student Chapter Summary Sheet.

*10 points for attending three meetings*

*20 points for attending six meetings*

*Maximum of 20 points*

## **2. EDUCATION**

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These tasks comprise the basic requirements to meet the educational needs of student chapter members.

### **2.1 EDUCATIONAL SUBJECT MATTER AT STUDENT CHAPTER**

#### **Meeting Requirement**

Devote at least two meetings of the student chapter to education related to resource management.

#### **Supporting Documentation**

Two to four meeting notices or published announcements, or the signature of the academic advisor on the Student Chapter Summary Sheet.

*10 points for two meetings*

*20 points for four meetings*

*Maximum of 20 points*

### **2.2 ATTENDANCE AT PARENT CHAPTER MEETINGS**

#### **Requirement**

Student members attend their parent chapter meetings.

#### **Supporting Documentation**

Letter from parent chapter president identifying student members who attended and date of attendance, or a dated copy of attendance sheet, or the signature of the parent chapter president on the Student Chapter Summary Sheet.

5 points per meeting with two or more student chapter members in attendance

Maximum of 20 points

### **2.3 STUDENT PRESENTATIONS ON RESOURCE MANAGEMENT**

#### **Requirement**

Give presentations on a resource management topic.

#### **Supporting Documentation**

Specify date and location of the presentation. Provide a copy of the outline or presentation, or the signature of the academic advisor or the instructor on the Student Chapter Summary Sheet.

*10 points per presentation*

*Maximum of 20 points*

## **2.4 STUDENT INFORMATION CHANGE**

### **Requirement**

Coordinate and/or participate in a student information exchange with APICS student chapters to learn about each other's programs.

### **Supporting Documentation**

A copy of a letter or materials and the related distribution list.

*10 points*

## **2.5 REGION MEETING PARTICIPATION AND ATTENDANCE**

### **Requirement**

Make a presentation, conduct a workshop, or attend a region meeting.

### **Supporting Documentation**

A letter from the region vice president authorizing the points claimed a copy of the regional meeting agenda and attendee roster, or the signature of the region vice president on the Student Chapter Summary Sheet.

*10 points for a presentation or workshop*

*5 points per student in attendance*

*Maximum of 20 points*

## **2.6 CERTIFICATION EXAM PARTICIPATION (CPIM/CIRM/CSCP)**

### **Requirement**

Student takes a certification exam.

### **Supporting Documentation**

A copy of the score report for each exam taken. (Scores may be blocked out.)

*5 points for one exam taken*

*10 points for two to three student exams taken*

*15 points for four to six student exams taken*

*20 points for seven or more student exams taken Maximum of 20 points*

## **2.7 CPIM/CFPIM/CIRM/CSCP AWARDED**

### **Requirement**

Students complete certification.

### **Supporting Documentation**

A copy of the certification report (may be obtained from APICS Chapter Relations).

*10 points*

## **2.8 DONALD W. FOGARTY INTERNATIONAL STUDENT PAPER COMPETITION**

### **Requirement**

Submit papers to the Donald W. Fogarty International Student Paper Competition following the requirements of the program.

### **Supporting Documentation**

- a) A copy of student paper competition announcement*
- b) A copy of title pages of papers submitted, signed and dated by academic advisor.*

*5 points for each paper submitted  
Maximum of 20 Points*

## **2.9 DONALD W. FOGARTY INTERNATIONAL STUDENT PAPER COMPETITION WINNERS**

### **Requirement**

Win a student paper award at the chapter level of the Donald W. Fogarty International Student Paper Competition.

### **Supporting Documentation**

- a) An announcement of student paper winners. Include:*
- b) Name of the winner*
- c) Name of the college or university*
- d) Title of the winning paper*
- e) Level of the award*
- f) A copy of a letter specifically from the parent chapter president.*

*10 points per chapter-level student paper award winner Maximum of 20 points*

## **2.10 ATTENDANCE AT AN EDUCATIONAL SEMINAR/WORKSHOP**

### **Requirement**

Attend an educational resource management or technical seminar or workshop. To qualify for this item, the activity must last for at least three instruction hours and at least four chapter members must attend.

### **Supporting Documentation**

- a) *A copy of the seminar/workshop announcement*
- b) *Attendee list signed by the instructor with four student names highlighted.*

*20 points*

### **3. PROGRAMS**

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These tasks comprise the basic requirements for the student chapter to conduct professional development programs.

#### **3.1 FUTURE PROGRAM PLANNING**

##### **Requirement**

Publish a three-month or semester calendar of events including all student chapter meeting dates, sponsored and cosponsored events, parent chapter dinner meeting dates, special speaker meetings, projected fund-raising events, region meeting, etc. The calendar must be posted or issued to all student chapter members in advance.

##### **Supporting Documentation**

A copy or copies of the completed calendar(s) issued to all chapter members or the signature of the academic advisor on the Student Chapter Summary Sheet.

*5 points per three-month or semester calendar  
Maximum of 10 points*

#### **3.2 SPEECH BY AN APICS PROFESSIONAL MEMBER**

##### **Requirement**

Schedule an APICS professional member to speak to your student chapter on a resource management topic during the program year.

##### **Supporting Documentation**

A copy of the announcement or minutes of the meeting at which a visiting speaker was in attendance, or the signature of the academic advisor or speaker on the Student Chapter Summary Sheet (complete all blanks).

*10 points*

### **3.3 SPEECHES BY STUDENT MEMBERS BEFORE THEIR CHAPTER OR OTHER APICS STUDENT CHAPTERS**

#### **Requirement**

Schedule a student member to speak at your student chapter meeting. Possible topics include career opportunities, internships, and education requirements.

#### **Supporting Documentation**

A copy of the meeting announcement or minutes containing the name of the member, topic, chapter name, and meeting date at which the speech was delivered, or the signature of the academic advisor on the Student Chapter Summary Sheet.

*10 points per speech  
Maximum of 20 points*

*Note: This presentation must not be about resource management.*

### **3.4 PLANT VISITS**

#### **Requirement**

Conduct at least one student chapter-sponsored plant visit or attend an APICS chapter's plant tour. At least two student chapter members must attend.

#### **Supporting Documentation**

Copies of letters or announcements notifying the membership of the date and names of the company or companies to be visited. List the dates and names of students attending.

*20 points for first plant visit  
10 points for second plant visit  
Maximum of 30 points*

### **3.5 STUDENT CHAPTER ACTIVITIES REPORT**

#### **Requirement**

Give a chapter activity report at a parent chapter dinner meeting.

#### **Supporting Documentation**

A copy of the meeting agenda with the student member's name highlighted, a letter signed by the parent chapter president or parent chapter vice president of programs, or the signature of the parent chapter president on the Student Chapter Summary Sheet.

*5 points per report  
Maximum of 15 points*

### **3.6 INTERFACE WITH OTHER PROFESSIONAL ASSOCIATIONS**

#### **Requirement**

Participate as a cosponsor in a regularly scheduled chapter meeting with a student chapter of another professional association.

#### **Supporting Documentation**

A copy of the announcement and the agenda of the meeting noting the name of both the student chapter and the other professional association.

*10 points*

### **3.7 STUDENT INTERNSHIP PROGRAM**

#### **Requirement**

Participate in an industry internship.

#### **Supporting Documentation**

A listing of students placed in internship programs during the awards year (include the student's name, company name, and title of intern position held) or the signature of the academic advisor on the Student Chapter Summary Sheet.

*5 points per student internship*

*Maximum of 15 points*

### **3.8 STUDENT CHAPTER PARTICIPATION IN HIGH SCHOOL CAREER DAY**

#### **Requirement**

Conduct a presentation on resource management at a high school.

#### **Supporting Documentation**

A copy of the program brochure, a letter signed by a high school representative, or the signature of a high school representative on the Student Chapter Summary Sheet.

*10 points*

## **4. MEMBERSHIP**

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These tasks comprise the basic requirements for maintaining and recruiting student chapter membership.

### **4.1 MEMBERSHIP ROSTER**

#### **Requirement**

Publish a roster of all members in your student chapter and distribute it to the membership, academic advisor, and parent chapter president.

#### **Supporting Documentation**

A dated copy of the roster signed by the academic advisor or the signature of the academic advisor on the Student Chapter Summary Sheet.

*10 points per roster published  
Maximum of 20 points*

### **4.2 MEMBERSHIP CAMPAIGN**

#### **Requirement**

Conduct a membership campaign, using college, university, or external newspapers, television, or radio; personal contacts; or other means to develop a prospective membership list. Provide the prospective members with information about your student chapter and APICS' programs and goals.

#### **Supporting Documentation**

- a) *Samples of printed materials*
- b) *A memo describing the methods and techniques used for membership campaign.*

*10 points per campaign  
Maximum of 20 points*

### **4.3 MEMBER NEEDS SURVEY**

#### **Requirement**

Conduct a survey of your chapter's members to determine their needs and how to meet those needs. The survey can be a simple questionnaire about such items as meeting topics, meeting format, location, other activities, and employment information.

#### **Supporting Documentation**

- a) *A copy of the questionnaire*
- b) *The number of responses*
- c) *A list of prevalent needs indicated by responses*
- d) *Board of directors meeting minutes indicating the items discussed and actions taken by the board to satisfy the indicated needs.*

*10 points per survey  
Maximum of 20 points*

### **4.4 NEW MEMBERS**

#### **Requirement**

Add student chapter members during the program year.

#### **Supporting Documentation**

Copies of April through March transaction summary reports or highlighted names of new members on membership roster in 4.1. Reports may be obtained from the parent chapter or APICS Chapter Relations Department.

*10 points for three to seven new members  
20 points for eight or more new members  
Maximum of 20 points*

### **4.5 STUDENT MEMBER OF THE YEAR AWARD**

#### **Requirement**

Establish or maintain a program to recognize an outstanding student chapter member. This award may be presented annually to a member whose accomplishments have been acknowledged as superior. Selection should be based on the candidate's contribution to the student chapter and service to APICS headquarters.

#### **Supporting Documentation**

- a) *Name and member number of the award recipient*
- b) *Summary of the recipient's accomplishments*
- c) *Date of selection of the award recipient.*

*20 points*

#### **4.6 STUDENT VOLUNTARY SERVICE AWARD**

##### **Requirement**

Submit a completed application for the Student Voluntary Service Award to APICS headquarters, following the requirements of the program.

##### **Supporting Documentation**

A copy of the completed application signed and dated by the academic advisor.

*10 points*

#### **4.7 STUDENT CHAPTER MENTOR AWARD**

##### **Requirement**

Submit a completed application for the Student Chapter Mentor Award to APICS headquarters, following the requirements of the program.

##### **Supporting Documentation**

A copy of the completed application signed and dated by the academic advisor.

*10 points*

#### **4.8 PRESENTATIONS TO PROMOTE APICS MEMBERSHIP**

##### **Requirement**

Promote APICS by giving presentations to students

##### **Supporting Documentation**

A signed statement from the student member and academic advisor noting the date and location of the presentation, or the signature of the academic advisor on the Student Chapter Summary Sheet.

*10 points per presentation*

*Maximum of 20 points*

## **5. PUBLIC RELATIONS**

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These tasks comprise a student chapters basic requirements for promoting the benefits of the chapter and APICS education and membership.

### **5.1 INTERNAL PUBLICITY — CHAPTER NEWSLETTER**

#### **Requirement**

Publish a student chapter newsletter at least three times per program year. This could be an information bulletin as well as an announcement of meetings, etc.

#### **Supporting Documentation**

Copies of chapter newsletters. A minimum of three issues must be included for the program year.

*10 points for three newsletters*

*20 points for six or more newsletters*

*Maximum of 20 points*

### **5.2 INTERNAL PUBLICITY—MEETING ANNOUNCEMENTS**

#### **Requirement**

Place meeting announcements or flyers on campus bulletin board locations.

#### **Supporting Documentation**

Photographs of bulletin board postings for each activity, or letter from the student chapter president or academic advisor stating dates posted, or the signature of the academic advisor on the Student Chapter Summary Sheet.

*10 points for three postings*

*20 points for six or more postings*

*Maximum of 20 points*

### **5.3 EXTERNAL PUBLICITY—SUBMITTED**

#### **Requirement**

During the program year, submit at least six column inches of newspaper publicity (approximately 200 words) about student chapter activities to a local or campus newspaper, bulletin, or brochure. This publicity can also be obtained through local or campus radio or television time. (One minute of airtime equals three inches of newspaper space.)

#### **Supporting Documentation**

Copies of a cover letter to the media and press releases or other material submitted to be published, announced on radio, or shown on television.

*10 points for submitting at least six column inches*

*Maximum of 10 points*

### **5.4 EXTERNAL PUBLICITY—PUBLISHED**

#### **Requirement**

During the program year, generate at least three column inches of newspaper publicity about local student chapter activities in a local or campus newspaper, bulletin, or brochure. This publicity can also be obtained through local or campus radio or television time.

#### **Supporting Documentation**

- a) *Newspaper clippings showing the number of column inches, publication name, and the dates when publicity appeared*
- b) *A memo of radio and/or TV coverage as to date, time, station name, and type of program, showing the number of minutes. (One minute of airtime equals three inches of newspaper space.)*

*10 points for publication of three column inches*

*20 points for publication of six column inches*

*Maximum of 20 points*

### **5.5 PARENT CHAPTER NEWSLETTER PUBLICITY**

#### **Requirement**

Submit an article about the student chapter and its activities for publication in the parent chapter newsletter.

#### **Supporting Documentation**

A copy of each submittal signed and dated by the academic advisor or a copy of each published article.

*5 points per submission*

*Maximum of 30 points*

## **5.6 STUDENT CHAPTER RESUME BOOK**

### **Requirement**

Publish copies of resumes in a binder for promoting student members to the business community.

### **Supporting Documentation**

- a) A copy of the cover page of the resume book.*
- b) A memo or letter indicating how the book was distributed.*

*20 points*

## **BONUS ITEMS**

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The following bonus items can be applied towards any category. A total of 70 bonus points may be earned.

### **B1 PERFORM SPECIAL PROJECTS FOR APICS HEADQUARTERS, REGION, OR PARENT CHAPTER**

#### **Requirement**

Complete a project designated by an APICS headquarters, region, or chapter representative.

#### **Supporting Documentation**

A letter signed by an APICS headquarter, region, or parent chapter representative indicating that the requested project has been completed, as well as a description of the project.

*10 points*

### **B2 PUBLISH AN ARTICLE IN A PROFESSIONAL PUBLICATION**

#### **Requirement**

Publish an article in a professional publication. The Donald W. Fogarty International Student Paper Competition winners published in the Production and Inventory Management Journal are not eligible.

#### **Supporting Documentation**

A copy of the article showing the publication name and date.

*10 points*

### **B3 PERFORM A COMMUNITY SERVICE PROJECT**

#### **Requirement**

Complete 60 hours of service for a local community organization (e.g., tutoring non college students, Big Brother/Big Sister, Meals-on-Wheels, homeless shelters, Red Cross blood drive).

#### **Supporting Documentation**

A letter signed by an academic advisor confirming the hours of service and type of service performed.

*10 points*

## **B4 ESTABLISH A PROGRAM WITH LOCAL INDUSTRY**

### **Requirement**

Establish or maintain a process with local industries to help student chapter members gain an understanding of resource management.

### **Supporting Documentation**

A document defining the steps to develop or maintain the process.

*10 points*

## **B5 ESTABLISH STRATEGIC PLANNING**

### **Requirement**

Develop a mission statement and define strengths, weaknesses, opportunities, and threats for the chapter. Include measurable chapter goals as part of the strategic plans. Refer to the Strategic Planning Chapter Leadership Handbook, worksheets 1-7 (stock #01029) for more detailed information.

### **Supporting Documentation**

A strategic plan defining the mission, strengths, weaknesses, opportunities, and threats and how the student chapter plans to address these issues.

*10 points*

## **B6 PROMOTE APICS TO STUDENTS AT OTHER COLLEGES, UNIVERSITIES, ETC.**

### **Requirement**

Promote membership in the local student chapter to post-secondary schools that do not have a student chapter.

### **Supporting Documentation**

*A letter including:*

- a) The targeted institution*
- b) The date of presentation*
- c) A list of prospective students*
- d) The names of students who joined.*

*10 points*

## **B7 SUBMIT A COMPLETED STUDENT CHAPTER MANAGEMENT PROGRAM COMMENT SHEET**

### **Requirement**

Complete the Student Chapter Management Program Comment Sheet indicating what you like about the program, what you would change, and how you would like to see it changed.

### **Supporting Documentation**

The completed sheet, placed at the beginning of your recognition entry.

*10 points*

## **SECTION B. STUDENT CHAPTER RECOGNITION PROGRAM**

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### **PROCEDURES**

While encouraged by APICS headquarters, regions, and parent chapters, the student chapter recognition program is optional. If the student chapter wishes to receive recognition at the APICS level, both the student chapter and the respective parent chapter evaluator should review and follow the listed item procedures. Please refer to the guidelines and schedule for specific actions for the appropriate student and/or parent chapter representative(s).

### **Contents for this section**

*Recognition Overview*  
*Organizing Your Entry*  
*Evaluation Guidelines*  
*Evaluation Schedule*  
*Citation of Excellence Award Selection*  
*Appeals Process*  
*Recognition*

## RECOGNITION OVERVIEW

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All student chapters chartered before March 31 are eligible to compete in the current program year. An entry will include a completed Student Chapter Summary Sheet, found in the appendix, and supporting documentation. If your chapter is new, write "new chapter" and the date chartered on the Student Chapter Summary Sheet. Send all entries to your parent chapter liaison. ENTRIES MUST BE POSTMARKED BEFORE MIDNIGHT ON APRIL 30, and should be sent through first-class mail, UPS, or airfreight (courier) to arrive in time for evaluation. Early submission is encouraged.

The award year runs from April 1-March 31. All entries must comply with this handbook and the Student Chapter Summary Sheet.

### RECOGNITION LEVEL REQUIREMENTS

Section	Maximum Points	Minimum Points Required in Each Section for Gold Circle Award	Minimum Points Required in Each Section for Silver Circle Award	Minimum Points Required in Each Section for Bronze Circle Award
1. Administration	130	90	70	50
2. Education	180	120	90	70
3. Programs	120	90	70	50
4. Membership	140	90	70	50
5. Public Relations	120	90	70	50

The levels of Recognition achievement include the following. A monetary award accompanies the level of achievement.

*BRONZE CIRCLE AWARD*  
 \$25 Educational Materials Certificate  
 Certificate of Recognition

*SILVER CIRCLE AWARD*  
 \$50 Educational Materials Certificate  
 Certificate of Recognition

*GOLD CIRCLE AWARD*  
 \$75 Educational Materials Certificate  
 Certificate of Recognition

*PLATINUM CIRCLE AWARD*  
 \$275 Educational Materials Certificate  
 Certificate of Recognition

- A. To qualify for the Gold, Silver, or Bronze Circle Award, the minimum points for that award must be attained in all five sections. Points cannot be transferred from one section to another. If you qualify for the Gold Circle Award in four sections, but only for a Silver Circle Award in the fifth section, your chapter will receive a Silver Circle Award.
- B. To earn the Platinum Circle Award, a chapter must have earned the Gold Circle Award for five consecutive years. The chapter will receive a \$275 educational materials certificate (\$75 for the Gold and \$200 for the Platinum) and a Platinum recognition certificate each year.
- C. In turn, the Platinum certificate will show the consecutive years that the chapter was a Gold Circle Award recipient. For example, if the ABC Chapter wins the Gold Circle Award consecutively from 1993 to 1997, the Platinum certificate will read "Gold Circle Award 1993-1997." If a chapter fails to achieve the Gold Circle Award, then it must earn this award for five more consecutive years before the chapter will be eligible for another Platinum Circle Award.

## **STUDENT CHAPTER SUMMARY SHEET COMPLETION**

Only points claimed on the summary sheet will be credited. Documentation must be presented under the applicable section and item number. Verify that the summary sheet corresponds to binder contents. Complete compliance and documentation for each item are required or no points will be allowed.

## **ENTRY PREPARATION**

1. All entries should be typed and must be submitted in an 8"-by-11-inch, three-ring, loose-leaf binder. Supporting documentation smaller than 8"-by-11 inches must be mounted on a separate sheet of that size or firmly affixed in the binder. Use a three-ring binder that is large enough to accommodate your entry, and please be sure that all pages can be turned easily. Spring-type (pressure) clamp binders are not acceptable. Evaluation will be based upon data submitted.
2. The binder cover should include all of the following:
  - *Student chapter name and number*
  - *Parent chapter name*
  - *Region number*
  - *Return-mailing label (should be paper-clipped to front binder cover or summary sheet).*

3. Complete the Student Chapter Summary Sheet and place in the front of the binder preceded by a divider.
4. Tab the supporting documentation with the section and item number. Tabs should be used for each item within each section. Tabs should be stapled to the divider to prevent them from falling out. Sections and items must be arranged in the binder in the same manner as on the summary sheet.
5. Use a colored highlighter pen to emphasize specific support material. As necessary, refer the evaluator to proper section, item, and date. When correspondence is used as supporting documentation, a dated original or dated photocopy must be included as an exhibit.

## **ORGANIZING YOUR ENTRY – A Step-by-Step Procedure**

This section describes the general approaches to organizing, collecting, and coordinating the information and documentation that must be submitted for an APICS award. The information presented is to assist chapters submitting for the first time as well as chapters that are already experienced in the process. We hope you find this section helpful in making your chapter the most well run organization on your campus.

We recommend that you follow the general suggestions presented here. Many chapters appreciate this comprehensive overview.

### **Shop Early!**

Some basic items are needed, such as a three-ring binder and section dividers (three-hole dividers with tabs). Plastic pages keepers (or photo keepers) make it easy to keep small documents in place. Remember that all submissions have to be in a binder of 8½-by-11 inch sheets. Pasting or gluing small items to 8½-by-11-inch sheets is another way to handle the problem of odd-sized.

### **Who's Ultimately Responsible?**

Assign one individual to be your chapter recognition chairperson. This person will be responsible for coordinating the overall effort, and ensuring that the binder is completed on time.

Since the entire Student Chapter Management Program is designed as a guidance tool to assist in managing your chapter, it makes sense to have the chapter recognition chairperson report the status of each of the program items. This report can be presented at the monthly meetings of your student chapter board of directors.

## **Does Anyone Else Have Responsibility?**

The Student Chapter Management Program is organized along traditional functional lines; the five areas are administration, education, programs. Membership, and public relations. Whether or not your board of directors is organized along these same lines, all of these **functions** must be addressed to run your chapter. This program should be seen as a way to ensure that your chapter is well run. **Assign an individual to each of the specific items in which your chapter wishes to obtain points.** Individual responsibility is crucial to ensure that all documentation is captured in a timely manner. The chapter recognition chairperson can then follow up on any items missing or undocumented and know exactly who to ask for results.

Do not confuse individual **responsibility with team effort.** Team effort is also an essential part of the process, and the president should use teamwork to involve many members of the chapter. The active participation in itself will make for a stronger chapter.

## **Going for the Gold (or Silver or Bronze)**

If you have assigned items to individuals, you can now determine the number of points you are going to aim for in each section. Remember, to obtain a certain award level, all sections must attain that level. For example, for a Gold Circle Award enough points must have been earned in all five sections for Gold.

## **Use Sign-offs When Needed**

A few chapters do a good job of managing, yet are unable to “prove” it since they cannot put their hands on the proper documentations for a past event. We have attempted to alleviate this type of situation by adding many sign-offs. (See the Student Chapter Summary Sheet.) By sign-off, we mean that a signature is used, along with dates, subjects, etc., in lieu of the actual documents, letters, or memos.

For example, if your chapter held six board meetings, complete with agendas and minutes, 20 points can be claimed. If one set of documents (agenda and minutes) has been misplaced, you have no documents to show that all six meetings were held. An academic advisor who knows that the meeting was actually held could date and sign for that meeting. An appropriate signature is sufficient to obtain credit for the meeting.

## **Document When Possible**

Recognize that your ability to pass on the meeting notes (to officers who follow you) is beneficial to your chapter's health. Don't hesitate to use sign-offs when appropriate, but we suggest that you think of them as a last resort. Document archives allow future student chapter members to see what has been done and attempted in the past because a recorded history exists.

## **Use the Boilerplate Method**

You will need to send thank-you letters, collect lists of attendees at functions, and perhaps obtain signatures while at certain events. Save time and create the basic formats before you need them. You will then only have to alter the basic letters or forms slightly for each use. If the event or occasion will merely require a signature on the Student Chapter Summary Sheet (a sign-off), be sure to take it with you. Chasing down information, documents, and signatures later is time consuming. Collect the document the first time and you'll simplify the whole process.

We hope that these instructions will be useful and that your participation in the program will benefit you and your chapter. Please share with us your comments and ideas for continued improvement.

## **EVALUATION GUIDELINES**

An essential part of the student chapter recognition program is evaluation, which is conducted by the respective parent chapter. These guidelines have been developed for student chapter evaluators and are provided in this handbook so that students may better understand the judging criteria. It is not our intent to force parent or student chapters to comply with these guidelines, but it is our intent to recommend a standard approach and demonstrate its value. The region and parent chapter representatives will play a major role in communicating the details of the program within the region.

## **RESPONSIBILITY**

Parent Chapter Evaluator

### **Action**

1. Provide a fair and objective evaluation of the documents submitted.
2. Protect the integrity of the program. Ensure that all evaluations are judged by the same standard.
3. Read through the Student Chapter Management Program Chapter Leadership Handbook for an understanding of how the submissions will be presented.
4. Ensure that the proper signature or sign-offs on the Student Chapter Summary Sheet accompany the dates, subjects, and so forth in cases in which points are claimed but the actual document is not presented.
5. Award points claimed on the Student Chapter Summary Sheet only. Verify that the summary sheet corresponds with the submission's contents.

6. Apply bonus points to any one of the five sections if a chapter falls short of needed points for a particular award level. A student chapter can earn seven 10-point bonus items by meeting the requirements. (See the Bonus Items section.) The student will indicate on the Student Chapter Summary Sheet where they want to apply the bonus points. The evaluator may move bonus points from one section to another if claimed points are not allowed in a section.
7. Qualify a chapter for a Gold, Silver, or Bronze Circle Award only if the minimum points for that award are attained in all five sections. For example, if a chapter qualifies for the Gold Circle Award in four sections but only a Silver Circle Award in the fifth section, the chapter will receive a Silver Circle Award.
8. Obtain a second opinion if an evaluation results in a downgrade due to scoring. The second evaluation will confirm the missing documentation that resulted in a downgrade.
9. Refer to the requirements in the Student Chapter Management Program Chapter Leadership Handbook for constructive comments and address a deficiency clearly. (See the Sample of a Completed Evaluation Form.)
10. Select a chapter, if applicable, to receive the Citation of Excellence Award. (See Citation of Excellence Award Selection.)
11. Complete and sign a Student Chapter Summary Sheet. Indicate the award level, and place it in front of the submission along with the student chapter's completed Student Chapter Summary Sheet. Place your comment sheets in front of the submission as well.

**Use the following resources during an evaluation:**

1. The Student Chapter Management Program Chapter Leadership Handbook
2. The submitting student chapter's completed Student Chapter Summary Sheet
3. A blank Student Chapter Summary Sheet to record your points (make copies from this handbook as needed)
4. A blank evaluation form for your comments and score adjustments, if applicable (make copies from this handbook as needed)
5. A calculator.

## **EVALUATION SCHEDULE**

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This schedule was developed to help chapters and evaluators stay on track for a successful process.

<b>Responsibility</b>	<b>Completion Date</b>	<b>Action</b>
<i>APICS Chapter Relations</i>	<i>April 15</i>	<i>Provide evaluation guidelines and materials to the parent chapter liaisons.</i>
<i>Student Chapters</i>	<i>April 30</i>	<i>Send submissions to the liaisons. Submissions must be postmarked by this date.</i>
<i>Parent Chapter Evaluator</i>	<i>May 1 to 18</i>	<i>Evaluate submissions.</i>
	<i>May 19</i>	<i>Return copies of completed student chapter summary sheets, indicating approved award, and completed evaluation form, including comments, with submissions to the respective student chapters.</i>
	<i>May 19</i>	<i>Send copies of completed student chapter summary sheets, indicating approved award, and completed evaluation form to the parent chapter president and to APICS Chapter Relations. Citation of Excellence selections also must be sent by this date to APICS Chapter Relations.</i>  <i>APICS Chapter Relations 5301 Shawnee Road Alexandria, VA 22312-2317 E-mail: <a href="mailto:chaprel@apicshq.org">chaprel@apicshq.org</a></i>
<i>APICS Chapter Relations</i>	<i>September</i>	<i>Survey chapters and regions for feedback on any changes that should be made to the Student Chapter Management Program. The survey responses will provide insight and ideas for the future direction of the program.</i>

**Note: Dates may be adjusted in accordance with the calendar program year.**

## **CITATION OF EXCELLENCE AWARD SELECTION**

---

The Citation of Excellence Award is presented to chapters that demonstrate excellence in both submission presentation and content.

### **RESPONSIBILITY**

#### **Parent Chapter Evaluator**

##### **Action**

After evaluating a submission, you may choose to select it for this award. The submission must meet or exceed the requirements.

Indicate your selection of a Citation of Excellence on an entry's Student Chapter Summary Sheet. Submit the selection to the parent chapter's president and APICS Chapter Relations by May 19.

APICS Chapter Relations  
5301 Shawnee Road  
Alexandria, VA 22312-2317  
E-mail: [chaprel@apicshq.org](mailto:chaprel@apicshq.org)

#### **APICS Chapter Relations**

##### **Action**

Inform selected Citation of Excellence Award student chapter(s) when and where to send the submission for display at the Recognition Reception during the APICS International Conference and Exposition.

Issue "Citation of Excellence Award" certificates to parent chapter presidents for presentation to the student chapters. (See the Recognition section for event details.)

## APPEALS PROCESS

Occasionally, a student chapter may not receive the award level of achievement originally anticipated. If the chapter believes that the evaluation was incorrect, it has the right to appeal.

<b>Responsibility</b>	<b>Completion Date</b>	<b>Action</b>
<i>Student Chapters</i>	<i>May 31</i>	<i>Review returned submission as soon as possible. Read the evaluation comments. If the award level request was not granted and the chapter feels the evaluators reached that decision in error, the student chapter has the right to appeal.</i>
	<i>June 4</i>	<i>Send a letter of appeal along with the original submission to the parent chapter liaison.</i>
<i>Parent Chapter Evaluator</i>	<i>June 9</i>	<i>Send a copy of the appeals letter to the parent chapter president and to APICS Chapter Relations.</i>  <i>APICS Chapter Relations 5301 Shawnee Road Alexandria, VA 22312-2317 E-mail: <a href="mailto:chaprel@apicshq.org">chaprel@apicshq.org</a></i>
	<i>June 9 to 18</i>	<i>Select another chapter officer to provide a second review. If the second review confirms the first, comments should clearly address the deficiencies driving the downgrade. If a downgrade is not supported, both evaluators should discuss and confirm a decision. All parties must rely on objective facts.</i>
	<i>June 19</i>	<i>Return the submission to the respective student chapter with clear comments on award granted.</i>
	<i>June 19</i>	<i>Send copies of the final award and comments to the parent chapter president and to APICS Chapter Relations.</i>  <i>APICS Chapter Relations 5301 Shawnee Road Alexandria, VA 22312-2317 E-mail: <a href="mailto:chaprel@apicshq.org">chaprel@apicshq.org</a></i>

**Note: Dates may be adjusted in accordance with the calendar year.**

## **RECOGNITION**

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The achievements of dedicated chapters and their leaders in advancing the APICS mission are recognized at both the region and national levels.

<b>Responsibility</b>	<b>Completion Date</b>	<b>Action</b>
<i>Parent Chapters/ Region Staff</i>		<i>Develop a recognition process for your student chapters contact APICS Chapter Relations.</i>
<i>APICS Chapter Relations</i>	<i>June</i>	<i>Distribute award level and monetary certificates to the parent chapter presidents for presentation to student chapters.</i>
	<i>July</i>	<i>Update and distribute award records to region vice presidents and parent chapter presidents.</i>
	<i>September</i>	<i>Announce recipients in the APICS Leadership Central newsletter, and on the APICS Web site. Use this announcement as a promotional kickoff for back-to-school recruiting.</i>
<i>APICS</i>	<i>October</i>	<i>Hold a recognition reception during the APICS International Conference to honor all chapter management and Citation of Excellence Award recipients.</i>

**Note:** *Dates may be adjusted in accordance with the calendar year*



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# APP1. APICS STUDENT CHAPTER SUMMARY SHEET

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*For Award Year April 1-March 31*

<b>1 ADMINISTRATION</b>		<b>Possible</b>	<b>Claimed</b>
1.1	Chapter Organization	20	_____
1.2	Chapter General Membership Meeting Agenda	10-20	_____
1.3	Chapter Budget	10	_____
1.4	Chapter Income Statement	10	_____
1.5	Officer Transition Meeting	15-20	_____
1.6	Student Chapter Executive Board Meetings	10-30	_____
Approvals by Academic Advisor			
Meeting #1	Date: _____	Signature: _____	
Meeting #2	Date: _____	Signature: _____	
Meeting #3	Date: _____	Signature: _____	
Meeting #4	Date: _____	Signature: _____	
Meeting #5	Date: _____	Signature: _____	
Meeting #6	Date: _____	Signature: _____	
1.7	Attendance at Parent Chapter BOD Meetings	10-20	_____
Approvals by Academic Advisor			
Meeting #1	Date: _____	Signature: _____	
Meeting #2	Date: _____	Signature: _____	
Meeting #3	Date: _____	Signature: _____	
Meeting #4	Date: _____	Signature: _____	
Meeting #5	Date: _____	Signature: _____	
Meeting #6	Date: _____	Signature: _____	
1.8	Bonus Points Claimed (Circle B1,B2, B3, B4, B5, B6, B7)	10 each	_____
		Total 0-130	_____
		Gold 90 (min)	_____
		Silver 70 (min)	_____
		Bronze 50 (min)	_____

## **APICS STUDENT CHAPTER SUMMARY SHEET (Continued)**

<b>2. EDUCATION</b>	<b>Possible</b>	<b>Claimed</b>
2.1 Educational Subject Matter at Student Chapter Meetings	10-20	_____
Approvals by Academic Advisor		
Meeting #1	Date: _____	Signature: _____
Meeting #2	Date: _____	Signature: _____
Meeting #3	Date: _____	Signature: _____
Meeting #4	Date: _____	Signature: _____
2.2 Attendance at Parent Chapter Meetings	5-10	_____
Approvals by Chapter President		
Meeting #1	Date: _____	Signature: _____
Meeting #2	Date: _____	Signature: _____
Meeting #3	Date: _____	Signature: _____
Meeting #4	Date: _____	Signature: _____
2.3 Student Presentations on Resource Management	10-20	_____
Approvals by Academic Advisor/Instructor		
Meeting #1	Date: _____	Signature: _____
Meeting #2	Date: _____	Signature: _____
Meeting #3	Date: _____	Signature: _____
Meeting #4	Date: _____	Signature: _____
2.4 Student Information Exchange	10	_____
2.5 Region Meeting Participation and Attendance	10-20	_____
Approvals by Region Vice President		
Presentation	Date: _____	Signature: _____
2 Attendees	Date: _____	Signature: _____
4 Attendees	Date: _____	Signature: _____
2.6 Certification Exam Participation (CPIM/CIRM/CSCP)	5-20	_____
2.7 CPIM/CFPIM/CIRM/CSCP Awarded	10	_____
2.8 Donald W Fogarty International Student Paper Competition	5-20	_____
2.9 Donald W Fogarty Student Paper Winners	0-20	_____
2.10 Attendance at an Educational Seminar/Workshop	20	_____
2.11 Bonus Points Claimed (Circle B1,B2, B3, B4, B5, B6, B7)	10 each	_____
	Total 0-180	_____
	Gold 120 (min)	_____
	Silver 90 (min)	_____
	Bronze 70 (min)	_____

## **APICS STUDENT CHAPTER SUMMARY SHEET (Continued)**

---

<b>3. PROGRAMS</b>	<b>Possible</b>	<b>Claimed</b>
3.1 Future Program Planning	5-10	_____
Approvals by Academic Advisor		
Calendar #1                      Date: _____	Signature: _____	
Calendar #2                      Date: _____	Signature: _____	
3.2 Speech by an APICS Professional Member	10	_____
Approvals by Academic Advisor		
Date: _____	Speaker: _____	
Topic: _____	Signature: _____	
3.3 Speech by Student Chapter Members	10-20	_____
Approvals by Academic Advisor		
Speech #1                      Date: _____	Signature: _____	
Speech #2                      Date: _____	Signature: _____	
3.4 Plant Visits	20-30	_____
3.5 Student Chapter Activities Report	5-15	_____
Approvals by Parent Chapter President		
Report #1                      Date: _____	Signature: _____	
Report #2                      Date: _____	Signature: _____	
Report #3                      Date: _____	Signature: _____	
3.6 Interface with Other Professional Societies	10	_____
3.7 Student Internship Program	5-15	_____
Approvals by Academic Advisor		
Internship #1                      Date: _____	Signature: _____	
Internship #2                      Date: _____	Signature: _____	
Internship #3                      Date: _____	Signature: _____	
3.8 Student Chapter Participation in High School Career Day	10	_____
Approvals by High School Representative		
Internship #1                      Date: _____	Signature: _____	
3.9 Bonus Points Claimed (Circle B1,B2, B3, B4, B5, B6, B7)	10 each	_____
	Total 0-120	_____
	Gold 90 (min)	_____
	Silver 70 (min)	_____
	Bronze 50 (min)	_____

## **APICS STUDENT CHAPTER SUMMARY SHEET (Continued)**

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<b>4. MEMBERSHIP</b>	<b>Possible</b>	<b>Claimed</b>
4.1 Membership Roster	10-20	_____
Approvals by Academic Advisor		
Roster #1	Date: _____	Signature: _____
Roster #2	Date: _____	Signature: _____
4.2 Membership Campaign	10-20	_____
4.3 Member Needs Survey	10-20	_____
4.4 New Members	10-20	_____
4.5 Student Member of the Year Award	20	_____
4.6 Student Voluntary Service Award	10	_____
4.7 Student Chapter Mentor Award	10	_____
4.8 Presentation to Promote APICS Membership	10-20	_____
Approvals by Academic Advisor		
Presentation #1	Date: _____	Signature: _____
Presentation #2	Date: _____	Signature: _____
Presentation #3	Date: _____	Signature: _____
Presentation #4	Date: _____	Signature: _____
Presentation #5	Date: _____	Signature: _____
Presentation #6	Date: _____	Signature: _____
4.9 Bonus Points Claimed (Circle B1,B2, B3, B4, B5, B6, B7)	10 each	_____
	Total 0-140	_____
	Gold 90 (min)	_____
	Silver 70 (min)	_____
	Bronze 50 (min)	_____

## APICS STUDENT CHAPTER SUMMARY SHEET (Continued)

<b>5. PUBLIC RELATIONS</b>	<b>Possible</b>	<b>Claimed</b>
5.1 Internal Publicity – Chapter Newsletter	10-20	_____
5.2 Internal Publicity – Meeting Announcements	10-20	_____
Approvals by Academic Advisor		
Posting #1	Date: _____	Signature: _____
Posting #2	Date: _____	Signature: _____
Posting #3	Date: _____	Signature: _____
Posting #4	Date: _____	Signature: _____
Posting #5	Date: _____	Signature: _____
Posting #6	Date: _____	Signature: _____
5.3 External Publicity – Submitted	10	_____
5.4 External Publicity – Published	10-20	_____
5.5 Parent Chapter Newsletter Publicity	5-30	_____
5.6 Student Chapter Resume Book	20	_____
5.7 Bonus Points Claimed (Circle B1,B2, B3, B4, B5, B6, B7)	10 each	_____
	Total 0-120	_____
	Gold 90 (min)	_____
	Silver 70 (min)	_____
	Bronze 50 (min)	_____

**CHAPTER:** \_\_\_\_\_

**REGION:** \_\_\_\_\_

**AWARD SUBMITTED:** \_\_\_\_\_

**AWARD RECEIVED:** \_\_\_\_\_

Award Applied For:    Gold       Silver       Bronze

Award Approved:     Gold       Silver       Bronze

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Name (Please Print):** \_\_\_\_\_

**Contact Phone/e-Mail:** \_\_\_\_\_

## APP2. APICS STUDENT MANAGEMENT PROGRAM EVALUATION FORM

---

Entry # \_\_\_\_\_

The following comments indicate, by category, why the judges had to change the point score based upon the guidelines for scoring as indicated in the handbook. We hope that this will guide your chapter in preparing next year's submission.

CHAPTER: \_\_\_\_\_

REGION: \_\_\_\_\_

AWARD SUBMITTED: \_\_\_\_\_

AWARD RECEIVED: \_\_\_\_\_

Section	Item	Submitted Score	Adjustment +/-	Revised Score
<i>Evaluator's Comments:</i>				

Section	Item	Submitted Score	Adjustment +/-	Revised Score
<i>Evaluator's Comments:</i>				

Section	Item	Submitted Score	Adjustment +/-	Revised Score
<i>Evaluator's Comments:</i>				

### APP3. SAMPLE OF COMPLETED EVALUATION FORM

Entry # \_\_\_\_\_

The following comments indicate, by category, why the judges had to change the point score based upon the guidelines for scoring as indicated in the handbook. We hope that this will guide your chapter in preparing next year's submission.

CHAPTER: *Awards University* \_\_\_\_\_ REGION: \_\_\_\_\_ 3 \_\_\_\_\_

AWARD SUBMITTED: *Gold* \_\_\_\_\_ AWARD RECEIVED: \_\_\_\_\_ *Gold* \_\_\_\_\_

Section	Item	Submitted Score	Adjustment +/-	Revised Score
1	5	20	-5	15
<i>Evaluator's Comments:</i> Minutes did not indicate that the academic advisor or parent chapter representative attended the meeting as required for the additional 5 points. Minutes only include meeting with outgoing and incoming officers. However, good informative minutes				

Section	Item	Submitted Score	Adjustment +/-	Revised Score
3	6	10	-10	0
<i>Evaluator's Comments:</i> Found no copy of meeting announcement and agenda				

Section	Item	Submitted Score	Adjustment +/-	Revised Score
<i>Evaluator's Comments:</i>				

## APP4. APICS STUDENT CHAPTER OFFICER ROSTER FORM

With the introduction of **MY CHAPTER**, student chapter presidents/academic advisors have the ability to manage most of the student chapter officer roster process online in real time. **It is the responsibility of parent chapters to ensure that information is provided to headquarters and incorporated into MY CHAPTER** in a timely manner from the designated student chapter representative (student chapter president/academic advisor/parent chapter president). The roster process is now a two-step process:

1. **Designated Student Chapter Representatives** must complete and submit the APICS Student Chapter Officer Roster Form to headquarters when elected.
2. **Designated Student Chapter Representatives** must verify/update key sections of **MY CHAPTER** (Locator/Events; Board Management; Chapter Billing; and Chapter Address).

### Important Notes:

- Only student chapter presidents identified in the volunteer database have immediate access to MY CHAPTER. Other student chapter officers must be granted access by the student chapter's president under the Board Management function before they see the MY CHAPTER option on the screen.
- Learn more about MY CHAPTER via the Volunteer Resources section of the APICS Web site.

Today's Date: \_\_\_/\_\_\_/\_\_\_ Term (month/day/year) From: \_\_\_/\_\_\_/\_\_\_ To: \_\_\_/\_\_\_/\_\_\_

Student Chapter's Name (University/College): \_\_\_\_\_ Student Chapter Code: S\_\_\_

Parent Chapter's Name: \_\_\_\_\_

### Student Chapter President's

APICS ID: \_\_\_\_\_

Name: \_\_\_\_\_

E-mail: \_\_\_\_\_

### Academic Advisor's

APICS ID: \_\_\_\_\_

Name: \_\_\_\_\_

E-mail: \_\_\_\_\_

### Nontraditional Leadership Roles (If applicable):

Designate a board/region staff officer as key contact if no one on the board serves as student chapter president:

Acting Student Chapter President's

APICS ID: \_\_\_\_\_

Name: \_\_\_\_\_

E-mail: \_\_\_\_\_

Designate a board/region staff officer as key contact if no one on the board serves as student chapter academic advisor:

Acting Academic Advisor's

APICS ID: \_\_\_\_\_

Name: \_\_\_\_\_

E-mail: \_\_\_\_\_

### **Return completed form to:**

Attn: APICS Chapter Relations  
E-mail: chaprel@apicshq.org  
Fax: (703) 354-8662  
5301 Shawnee Road  
Alexandria, VA 22312  
Phone: (800) 444-2742 or (703) 354-8851

## **APP5. STUDENT CHAPTER TRANSITION MEETING CHECKLIST**

*Student Chapter Name:* \_\_\_\_\_

*Parent Chapter Name:* \_\_\_\_\_

*For Year Beginning:* \_\_\_\_\_ *to* \_\_\_\_\_

<b>Function</b>	<b>Typical Documents/Records</b>	<b>Rec'd</b>	<b>Partial Rec'd</b>	<b>Not Available</b>
President	Chapter Leadership Handbooks (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	President's files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Chapter charter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Bylaws and/or constitution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vice President	Vice president's file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Previous year award entry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Secretary	Secretary's files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Board meeting minutes and agendas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Officers' roster	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Treasurer	Treasurer's files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Budget\	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Financial statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education	Education files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Seminars/workshops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Student activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Certification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Books/reprints/publications catalog	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Programs	Program files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Programs planned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Meeting notices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Speaker roster	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Inventory of equipment and materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Membership	Membership files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Rosters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	New member campaign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	New chapter activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Promotional material*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public Relations	Public relations files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Press releases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Newsletters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Major contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Historian	Historian's files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**\*Refer to the Student Chapter Management Materials for list**

*Outgoing Student Chapter President:* \_\_\_\_\_ *Date:* \_\_\_\_\_

*Incoming Student Chapter President:* \_\_\_\_\_ *Date:* \_\_\_\_\_

*Academic Advisor:* \_\_\_\_\_ *Date:* \_\_\_\_\_

*Parent Chapter President:* \_\_\_\_\_ *Date:* \_\_\_\_\_

## APP6. STUDENT CHAPTER MANAGEMENT PROGRAM COMMENT SHEET

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*Awards Year* \_\_\_\_\_

1. What do you like about this program?

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2. What do you dislike about this program?

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3. How would you like us to change the program?  
(Additional sheets or copies of this form may be used.)

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**Check the section in which you are claiming 10 extra points.**

Administration     Education     Programs     Membership     Public

Relations The evaluator may reallocate the extra points if needed.

***Include this form with your submission.***

## **APP7. STUDENT CHAPTER MANAGEMENT MATERIALS**

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### **INFORMATION FLOW**

The dissemination of the information that you receive from APICS is an essential student chapter function. The primary communication vehicles between APICS and the APICS leadership are the APICS Volunteer Resources section, *Leadership Central* newsletter, and Leadership Central announcement list.

#### ***APICS Volunteer Resources Section—[www.apics.org](http://www.apics.org)***

APICS Headquarters produces many resources that can help you during your term of office. The Volunteer Resources\* section, reserved exclusively for chapter and region officers, contains a wealth of chapter management tools including link to: Marketing Tool Kits, Leadership Central, MY CHAPTER, Volunteer Training, Chapter Support Materials, Chapter Development Committee (CDC), and Governance.

#### ***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, CDC news, and other relevant information.

#### ***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, student chapter, and region 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.

### **CHAPTER LEADERSHIP HANDBOOKS**

Electronic copies of the handbooks listed below are available online for no charge in the Volunteer Resources section of the APICS Web site (Training). The electronic format facilitates greater volunteer usage and enables increased flexibility in updating content. Chapter officers are encouraged to use the online resources for the most up-to-date information; however, stock numbers are provided to afford chapter officers the opportunity to order printed handbooks through the APICS Bookstore at [www.apics.org](http://www.apics.org) or APICS Customer Support for a fee of \$15.00 each.

#### **President & President-Elect Chapter Leadership Handbook (Stock #01011) \$15.00**

A hands-on guide for the new and continuing chapter president. It touches on topics related to the role and responsibilities of chapter president, overseeing chapter activities, managing chapter affairs, presiding over meetings of the board of directors, upholding chapter bylaws, membership reporting, recognition, and much more.

**Finance/Treasurer Chapter Leadership Handbook (Stock #01003) \$15.00**

Developed by financial professionals for not-for-profit organizations, this handbook describes basic financial tools and techniques that can help APICS chapters responsibly manage chapter funds. Using this handbook as a guide, a chapter can implement financial management guidelines and controls that are consistent with standard accounting practices.

**Education Chapter Leadership Handbook (Stock #01018) \$15.00**

A guide to planning and executing successful chapter education programs. Topics include guidelines, templates, sample procedures, and a collection of ideas that chapters can use to develop and fine tune their professional development programs.

**Newsletter Chapter Leadership Handbook (stock #01026) \$15.00**

A step-by-step guide to newsletter production for chapter newsletter writers and editors.

**Strategic Planning Chapter Leadership Handbook (Stock # 01029) \$15.00**

A step-by-step guide for developing, implementing, and updating a strategic plan. Includes strategic plan worksheets to help walk your chapter through the strategic planning process.

**Coming 4<sup>th</sup> Quarter 2006:****Membership Chapter Leadership Handbook (Stock #01021) \$15.00**

Contains job functions, sample plans, sample scripts, and sample letters in addition to key information for the chapter membership director.

To order visit APICS Bookstore at [www.apics.org](http://www.apics.org) or Contact APICS Customer Support at (800) 444-2742 or (703) 354-8851.

**EDUCATION RESOURCES****The Donald W. Fogarty (DWF) International Student Paper Competition**

The DWF actively encourages the professional development of students interested in the field of operations management. Full-time or part-time undergraduate and graduate students submit original, relevant, and timely research papers on topics related to the field of operations management. Participants must submit papers to their local APICS chapter. Papers may be written on any operations management topic. A detailed explanation of the program can be found on the APICS Web site at <http://www.apics.org/Education/ERFoundation/Competitions/dwf.htm>.

**Certification Brochure—stock #09058**

Designed to communicate the benefits of becoming Certified in Production and Inventory Management (CPIM) or Certified in Integrated Resource Management (CIRM) to the individual candidate.

**CSCP Brochure—stock #04036**

The Certified Supply Chain Professional (CSCP) program is a new industry educational and certification program created to meet the rapidly changing needs of the supply chain management field.

**CPIM Registration Bulletin—stock #09053**

Contains complete information on how to schedule a CPIM exam appointment.

**CIRM Registration Bulletin—stock #09016**

Contains complete information on how to schedule a CIRM exam appointment.

**CSCP Registration Bulletin**

Contains CSCP registration form and information on registration fees, exam dates, locations, and policies and procedures for exam administration in North America. For program details visit <http://www.apics.org/certification/CSCP/default.htm>.

**CPIM Exam Content Manual—stock #09001**

A complete guide to all certification examinations, containing information about the topics important to each of the certification modules, common bibliographic study references, exam structure, scoring, and test-taking advice.

**CIRM Exam Content Manual—stock #09015**

A complete guide to all five CIRM certification examinations, containing information about the topics important to each of the CIRM modules, common bibliographic study references, exam structure, scoring, and test-taking advice.

**APICS Educational Resources Catalog—stock #01041**

A descriptive compilation of available APICS publications. Includes prices and ordering information for reference, general interest, and state-of-the-art publications: case studies, reprints, periodicals, proceedings, and training materials/courses.

To order visit APICS Bookstore at [www.apics.org](http://www.apics.org) or Contact APICS Customer Support at (800) 444-2742 or (703) 354-8851.

**MEMBERSHIP RESOURCES****Student Membership Brochure/Application—stock #82025**

Introduces APICS student membership benefits, services, and publications.

**Membership Recommendation Cards—stock #82011**

Postage-paid (domestic U.S.) cards for address changes or membership transfer.

**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.

To order visit APICS Bookstore at [www.apics.org](http://www.apics.org) or Contact APICS Customer Support at (800) 444-2742 or (703) 354-8851.







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