

Membership Checklist June 2014

	Activity	Frequency	Timing
1	Get new member information from APICS Partner Connect	at least once a month	
	- Send new members a Welcome E-Mail - sample in Dir Membership files		
	- Get next PDE info from our website		
	- E-Mail new members a Member Survey (sample in Dir Membership files)		
	- Forward any responses to the Director of Marketing		
2	Preparation for PDE & BoD	Monthly	at least 24 hrs before PDE
	- Take a screenshot of Mid-Florida Chapter Stats from APICS Partner Connect		
	- Draw off membership list from APICS Partner Connect		
	- Sort by membership type & dues paid through date		
	- Prepare Membership Chart by Member Type		
	- E-Mail chart to whomever will run PDE		at least 24 hrs before PDE
	- Update if necessary for BoD Meeting - E-Mail to all BoD Members		at least 24 hrs before BoD
	- Prepare Member Churn by Dues Paid Through Date - E-Mail to all BoD Members		at least 24 hrs before BoD
	- Re-sort membership list by member name		
	- Prepare New/Lost Member Chart - E-Mail to all BoD Members		at least 24 hrs before BoD
3	Membership Budget	Annually	prior to Annual Strategic Planning Meeting
	- Estimate number of Certificates, Covers, Pins, & gifts that will be needed		
	- Using last year's budget (in Dir Membership files), revise numbers, save with new name		
	o Print out for BoD review		
4	Member Recognition Night	Annually	prior to first meeting in program year
	- Using latest membership list from APICS, sort by Original Join Date		
	- Calculate the number of years from each member's Original Join Date to June 30th of this year		
	- Order enough certificates for 1, 5, 10, 15, 20, 25, 30, 35, 40 year members		at least 2 weeks prior to meeting
	- Order enough pins for 5, 10, 15, 20, 25, 30, 35, 40 year members		at least 2 weeks prior to meeting
	- Prepare Certificates for 1,5,10,15,20,25,30,35,40 year members		
	- Purchase \$25 gift cards for 20, 25, 30, 35, 40 year members		
	- Purchase ≥\$25 gift for any 30, 35, 40 year members		

5	CPA/C-Bar	Annually	As Requested
	- Complete Membership Data as requested		