

CHAPTER OPERATIONS MANUAL

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I. FORMAL INFORMATION

A. INTRODUCTION

This manual is provided to chapter officers as a guide in the operation of a chapter of APMI International. The purpose is to help each chapter function as efficiently as possible; to ensure a smooth transition in the change of officers, to assist officers in carrying out their duties and responsibilities; to help with the coordination of chapter meetings; to help promote new membership; to increase cooperation and assistance from Headquarters and to make the running and operation of each chapter a valuable and rewarding experience.

In order to effectively function as a chapter officer, you need to convey the goals and objectives of APMI International to the membership. Many members do not understand the difference between APMI and the Metal Power Industries Federation (MPIF). Contrary to popular belief, the two organizations are indeed separate and serve two distinct purposes for their members within the powder metallurgy industry.

APMI International is a non-profit **professional society** formed to promote the advancement of powder metallurgy as a science. Its purpose is to provide for the dissemination and exchange of information pertaining to powder metallurgy and particulate materials through publications, conferences, and chapter meetings. ***Membership in APMI is on an individual basis.*** Corporate or company memberships are not available. Members include materials, metallurgical, mechanical and process engineers, teachers, students, businessmen and anyone else whose job requires them to keep up-to-date with new developments and advances in materials technology and engineering applications. Benefits of membership include:

- Subscription to the *International Journal of Powder Metallurgy*
- Annual *Who's Who in PM* membership directory
- Participation in chapter meetings
- Reduced rates for registering at technical conferences, short courses, seminars, etc.
- Discounts on all powder metallurgy publications
- Employment assistance
- Information on the Powder Metallurgy Technologist (PMT) certification program

MPIF is a not-for-profit **trade association** formed by the PM industry to promote the advancement of the metal powder producing and consuming industries. It is a federation of trade associations all concerned with some aspect of powder metallurgy, metal powders or particulate materials.

Membership in any of the associations is on a company or "corporate" basis – individuals are ineligible to belong. Some benefits of membership in any of the MPIF trade associations (Powder Metallurgy Parts Association, Metal Powder Producers Association, Refractory Metals Association, Powder Metallurgy Equipment Association, Advanced Particulate Materials Association and Metal Injection Molding Association) are:

- Participate and influence the activities of the federated associations
- Receive confidential information prepared by and for the federated associations, i.e. statistics, survey reports, etc.
- Receive all federation publications such as standards, conference proceedings, technical books, etc. at substantially reduced rates
- Participate in PM short courses/seminars at reduced rates

- Organize and serve on federation committees
- Attend the federation's annual management conference
- Exhibit at the federation's trade shows at a substantial reduction in space rental
- Represented in various government agencies

APMI recognizes that conditions vary and completely uniform operational procedures may not be feasible or desirable. Dinner meetings, for example, are common and recommended, but may not be practical for all chapters. Annual golf outings may be popular in some areas, but not in others. It is not the purpose of this manual to "regiment" chapters, or deprive them of their unique local characteristics, but rather to offer guidance and helpful suggestions. The extent to which the ideas and suggestions in this guide are adopted is entirely up to the chapter governing body. Headquarters does, however, request that the timetable for submitting lists of new officers, meeting schedules, progress, meeting and financial reports be adhered to.

B. MISSION STATEMENT OF APMI INTERNATIONAL

APMI International is the premier international professional society related to powder metallurgy and particulate materials. The society provides a forum for the interchange of information among individuals in the science, engineering, and practice of powder metallurgy and particulate materials through:

1. fostering professionalism
2. educational activities
3. membership and services

C. APMI INTERNATIONAL BYLAWS



**Bylaws of
APMI International, Incorporated
(adopted 1970, amended 1978, 1980, 1988, 1991, 1993, 1994, 1998, 2001, 2004)**

Article I
NAME

The name of this corporation shall be APMI International, Incorporated, hereinafter referred to as APMI.

Article II
SCOPE AND PURPOSES

APMI is a membership corporation, formed pursuant to the Membership Corporations Law of the State of New York, the scope and purposes of which shall be:

1. To engage exclusively in scientific, literary and technological information activities directed toward the advancement of the science of powder metallurgy and the related arts and sciences.

2. To hold meetings for the reading and discussion of scientific and technical papers.
3. To publish and circulate works of literature, science and art which pertain or are related to the science of powder metallurgy.
4. To engage in any other activities necessary, suitable and proper for the fulfillment of the scientific, literary and technological informational scope and purposes of APMI, within such limitations as are provided by law.

Article III
MEMBERSHIP

1. Any individual interested in the science of powder metallurgy and related activities shall be eligible for membership in APMI.
2. A charter member shall be any member who joined the predecessor organization, American Powder Metallurgy Institute, prior to April 25, 1960.

Article IV
CHAPTERS

1. Chapters of APMI may be established by members of APMI wherever the interest in powder metallurgy and related activities is sufficient to support group activities at the local level.
2. A Chapter of APMI shall be formed by contacting APMI's headquarters and requesting a petition. The founding or charter members of the Chapter shall be those individuals who signed the Chapter's founding petition. The petition shall be reviewed and acceptance voted on by the Board of Directors.
3. The membership of Chapters shall consist of regular members.
4. A regular member of a Chapter shall be a member of APMI and shall be entitled to all rights and privileges accorded to such members. He shall be eligible to vote in Chapter activities and to hold office therein. Members may participate in the activities of one or more Chapters.
5. Activities of Chapters shall be in accordance with the scope and purposes and the Bylaws of APMI.
6. Founder or charter members of a Chapter shall be those individuals who signed the Chapter's founding petition.

Article V
MANAGEMENT

1. The management of APMI shall be vested in a Board of Directors which shall consist of the President of APMI, the Executive Director of APMI, the President of the Metal Powder Industries Federation, ("MPIF"), an appointed representative from the MPIF Board and five members elected from the membership of APMI. All board members shall serve a two-year term, no more than two consecutive two-year terms may be served. The Board of Directors shall serve without compensation.
2. The Board of Directors shall meet at least once each year at the Annual Meeting of APMI. It shall be held during the second half of each year on a date to be determined by the Board of Directors, usually coinciding with the annual MPIF Presidents' Conference. At which time, in addition to taking such actions as may be necessary to carry out the activities of APMI, it shall appoint an Executive Director and Treasurer, each of whom may succeed himself in this position. The same individual may serve in both capacities.
3. For the election of APMI President and five elected directors, a nominating committee shall be appointed and chaired by the incumbent President if he is ineligible to succeed himself or by the immediate past president of APMI. The committee shall consist of the Executive Director of APMI, the incumbent President of the MPIF, and if available, two past presidents of APMI.
 - a. This committee shall recommend its nomination for President in a ballot mailed to the MPIF Board of Governors, at least 30 days prior to the Annual Presidents' Conference. Upon approval of the nominations for President by the MPIF Board, the President nominated by the nominating committee, shall be submitted to the membership for election by letter ballot. The President of APMI shall serve as Chairman of the Board. The President may succeed himself, however, for no more than one additional two-year term. The President's term of office begins at the conclusion of the MPIF Annual Meeting.
 - b. The nomination for the elected director positions shall be submitted to the membership for election by letter ballot. All terms of office begin at the conclusion of the MPIF Annual Meeting.
4. In the event of the inability of the President or the Executive Director and Treasurer to serve, a successor or successors shall be appointed within sixty (60) days by the Board of Directors to fill the remaining portion of the

unexpired term. In the event of the inability of a member or members of the Board to serve, an election or elections shall be held as soon as possible to fill the vacancy or vacancies for the remaining portion of the unexpired term; provided, however, that if a vacancy remains unfilled for six (6) months after it occurs, the Board may appoint a replacement.

5. The Executive Director, under the direction of the Board of Directors, shall be the chief administrative officer of APMI. He shall be in general charge of APMI, its operating staff and all its activities. He or such members of the staff of APMI as he from time to time may designate, shall act as Administrative Director of APMI.

6. A majority of the entire Board of Directors shall constitute a quorum.

7. a. The general membership of APMI shall vote by letter ballot in elections for President and/or Directors of APMI, and on special issues deemed appropriate by the Board of Directors. At least thirty (30) days shall be allowed for the return of ballots. In all cases a majority of the ballots cast shall be required for passage of any issue.

b. The Board of Directors shall have authority to vote on all matters on behalf of the membership of APMI with the exception of elections as noted above. Passage of any issue will be by a majority vote of the entire Board of Directors.

Article VI **MEETINGS**

1. A meeting of the officers of each Chapter as duly elected representatives of the membership of APMI shall be convoked at least once annually for the transaction of any activities of APMI; provided, however, that if it's not feasible to assemble in a particular year, the activities of the annual meeting may be conducted by letter ballot.

2. At least thirty (30) days written notice shall be provided to call an annual meeting or for voting on a letter ballot. A majority of the entire membership of APMI shall constitute a quorum for any vote taken among the members of APMI; provided, however, that in any vote taken by letter ballot, members not recording their votes within the voting period shall be deemed to have voted in the affirmative.

3. Such other special meetings of the members of APMI as may be necessary to carry out the activities of APMI may be held from time to time upon at least ten (10) days written notice. Special meetings may be called by the Board of Directors or by the members of APMI to cast ten (10) percent of the votes of the membership of APMI.

Article VII **COMMITTEES**

The Board of Directors may create regular or special committees from among the members of APMI as may be necessary to carry out the activities of APMI. The members of such committees may be appointed by the President or its Executive Director. A quorum of any such committee shall be a majority of its members.

Article VIII **DUES**

1. The annual dues for members shall be determined by the Board of Directors and subject to annual review by the Board and the Executive Director.

2. Membership shall become effective upon payment of annual dues.

3. All services and privileges of membership shall be suspended for members whose dues are not paid within sixty (60) days of the issuance of statements by APMI.

4. The dues may be revised by the Board of Directors but such revisions shall not apply retroactively or to any application submitted prior to the adoption of any revision.

5. In addition to regular dues, overseas members shall pay a fee to defray the cost of providing member services. The fee shall be determined by the Board of Directors and shall be subject to review.

6. Full time students may join APMI at a reduced rate, as determined by the Board of Directors.

7. Retired persons, no longer gainfully employed who have been regular members may become members at annual dues as determined periodically by the Board of Directors.

Article IX **DISSOLUTION**

In the event of dissolution of APMI, the Board of Directors shall dispose of its net assets, exclusively for the purposes of APMI in such manner and to such publicly supported organizations organized and operated exclusively

for charitable, educational or scientific purposes as are described in Section 501(c)3 of the Internal Revenue Code. The determination of the Board of Directors shall be subject to the approval and order of a Justice of the Supreme Court of the State of New York.

Article X
FISCAL YEAR

The fiscal year of APMI shall be the calendar year.

Article XI
AMENDMENTS

These Bylaws may be altered, amended, or repealed, in whole or in part, and new ones adopted, by a vote of three-fourths of the entire Board of Directors. In each case, at least thirty (30) days written notice of the proposed changes, or repeal shall be given.

D. MODEL CHAPTER BYLAWS

Model Bylaws for Chapters Of APMI International

ARTICLE I LIMITATIONS

1. CHARTER

[insert full name of organization] (hereinafter referred to as The Chapter) shall operate only under the charter granted to it by APMI International, Incorporated (hereinafter referred to as APMI), giving it authority to carry on the work of APMI, subject to the rights, privileges, and obligations provided for in the Bylaws of APMI.

2. INCOME

No part of the net income of The Chapter shall inure to the benefit of any private individual or company.

3. POWER

The Chapter shall not at any time possess powers, exercise authority or engage in activities, which are not permitted to be possessed, exercised or engaged in by an organization exempt from Federal Income Tax.

4. BYLAWS

The activities of The Chapter shall be in accordance with the scope and purposes of the APMI Bylaws.

ARTICLE II MEMBERSHIP

1. CHAPTER MEMBERS

Members of The Chapter shall be those individuals meeting the requirements of APMI who have been assigned to The Chapter, either at their own request or by APMI for geographical reasons. Categories of membership shall be those stated in ARTICLE IV of the APMI Bylaws.

ARTICLE III DUES

1. DUES

The annual dues for members of The Chapter shall be those established by the APMI Board of Directors for various membership categories.

ARTICLE IV BOARD OF DIRECTORS

1. AUTHORITY; ELECTION AND TERM OF OFFICE

The affairs of The Chapter shall be directed by a board of directors consisting of the chairman, vice chairman, secretary and treasurer of the Chapter and any other persons chosen to serve as a member of the board of the directors by the members of the Chapter, and in any event, a minimum of three directors. The three most recent past chairmen may be ex-officio members of the board of directors. The Chapter chairman will serve as chairman of the board of directors. Election to serve as chairman, vice chairman, secretary or treasurer shall be deemed election to the board of directors without the need for any separate vote of the members; provided, that any person proposed by the members to serve as a director who is not also proposed to serve as an officer shall be elected by a majority of the members in attendance at the meeting called for such election. All directors shall serve a term coextensive with the term that they are then serving as an officer of The Chapter, or if not an officer of The Chapter, then of at least one year, and in either event until their successors have been appointed or elected. All directors shall surrender to their successors all records and properties belonging to The Chapter.

2. QUORUM

A majority of the membership of the Board of Directors shall constitute a quorum at any of its meetings.

3. MEETINGS; ACTION WITHOUT MEETING

The Board of Directors shall meet a minimum of two (2) times each year, at such times and places as it shall decide. Any action required or permitted to be taken by the board or by any of its committees may be taken without a meeting if all members of the board or the committee consent in writing to the adoption of a resolution authorizing the action. The resolution and written consents shall be filed with the minutes of the proceedings of the board or committee. Participation of one or more directors by conference telephone or similar equipment allowing all persons participating in the meeting to hear each other at the same time shall constitute presence at a meeting.

4. COMMITTEES

The board of directors may appoint such committees as it deems necessary or appropriate to conduct the business of The Chapter.

5. RECEIPT AND PAYMENT OF MONEY

The treasurer, as financial officer of The Chapter, is authorized to receive and disburse monies under the direction of the board of directors. All checks and other instruments for the payment of monies of The Chapter shall be drawn in the name of The Chapter and shall be signed by the treasurer or chairman or the vice-chairman.

ARTICLE V OFFICERS

1. ELECTED OFFICERS

The elected officers of The Chapter shall be the chairman, vice-chairman, second vice-chairman, treasurer and secretary (recording and/or corresponding). Other officers may be appointed by the board of directors. Any officers so appointed shall not become members of the board of directors unless later elected to an office of the Chapter and/or the board of directors by vote of the members.

2. DUTIES

The duties of each officer of The Chapter shall be those described in the "APMI CHAPTER OPERATIONS MANUAL".

3. TERM OF OFFICE

All officers shall serve a term of at least one year or until their successors have been appointed or elected. All officers shall surrender to their successors all records and properties belonging to The Chapter.

4. FILLING OF VACANCIES

- A. If the office of chairman becomes vacant for any reason during the elected term, the vice-chairman shall become chairman for the remainder of the unexpired term. This will not affect his eligibility for the office of chairman for a full term.
- B. If an elected office other than that of chairman becomes vacant, the board of directors shall fill the vacancy by simple majority vote at an board of directors meeting for which all members of the board of directors shall receive at least ten (10) days notice.

ARTICLE VI NOMINATION AND ELECTION

1. NOMINATING COMMITTEE

At the first meeting of The Chapter in any fiscal year, a nominating committee shall be appointed by The Chapter chairman. This committee shall consist of a chairman and at least two other Chapter members. Past chairmen of The Chapter shall be eligible to serve on the nominating committee.

2. DUTIES OF NOMINATING COMMITTEE

The nominating committee shall nominate at least one candidate for each office. Before reporting the nominees to the secretary of The Chapter, the nominating committee chairman shall determine that each nominee:

- 1) Is a member (in good standing) of APMI;
- 2) Is eligible to serve; and

- 3) Has indicated his understanding of the duties required, his availability, and his willingness to serve (if elected) in the position for which he is to be nominated.

3. ANNOUNCEMENT OF NOMINEES

The Chapter secretary shall mail to The Chapter membership, with the regular announcement for the final meeting of The Chapter in the then current fiscal year, the names of the nominees selected by the nominating committee.

4. ADDITIONAL NOMINEES

At the final meeting of The Chapter, additional nominations may be made from the floor.

5. ELECTION

Officers of The Chapter shall be elected at the annual business meeting of The Chapter by majority vote of The Chapter members present and shall take office on the first day of the new fiscal year. If no more than one candidate is nominated for any office, election may be by acclamation. APMI shall be advised of the election results in writing the day after the annual business meeting.

ARTICLE VII CHAPTER MEETINGS AND FISCAL YEAR

1. LOCATION AND DATES

- A. Chapter meetings shall be held at such times and places as the board of directors shall determine.
- B. A complete schedule of the year's meeting's shall be filed with APMI at least 30 days prior to the first meeting of the fiscal year.

2. ANNUAL MEETING

The annual business meeting of The Chapter shall be held on a date no later than May 31 of each year, and in a place decided upon by the board of directors.

3. FISCAL YEAR

The fiscal year of The Chapter shall begin January 1 and end December 31.

ARTICLE VIII AMENDMENTS

1. PROPOSALS

Amendments to these bylaws may be proposed by a member of the board of directors or by a written petition filed with the secretary and signed by at least five (5) members of The Chapter. Notice of such proposed amendments must be sent to APMI at least sixty (60) days prior to the time of voting and must be approved by the APMI Board.

2. ADOPTION

After notification and approval by the APMI Board, amendments to these Bylaws may be adopted by a two-thirds affirmative vote of the total membership of the board of

directors, at a regular or special meeting of the board of directors. Amendments may also be adopted by letter ballot sent to members of the board of directors. Notice of the vote on the amendment shall be given at least ten (10) days in advance of the board of directors meeting at which action is to be taken or the date fixed for return of the letter ballots.

ARTICLE IX DISSOLUTION

If The Chapter should return its charter to APMI for any reason, or should have its charter revoked, the affairs of The Chapter shall be terminated immediately under the supervision of the APMI Board, and all funds or other property remaining After payment of debts and obligations of The Chapter shall be transferred to and paid to APMI or, if APMI no longer qualifies as an organization exempt from Federal Income Tax, to an organization that does so qualify and that has as its purpose advancing scientific, engineering, technical and practical knowledge, especially, if possible, in the field of powder metallurgy and particulate materials.

ARTICLE X EFFECTIVE DATE

These original bylaws shall become effective immediately after they have been adopted by two-thirds affirmative vote of the total membership of the board of directors at a regular or special meeting of the board of directors, have been reviewed and accepted by APMI, and have been issued to all members of The Chapter.

E. INCORPORATION

In April 1999, the Board of Directors of APMI carried a motion to incorporate all chapters of APMI International. The following is some general information relative to incorporation.

General Considerations

Generally speaking, some of the features of incorporated associations include that they are organized as follows:

- a. to provide continuity of existence;
- b. to limit the liability of individual members and officers; and
- c. to establish a generally recognized legal structure

Continuity of Organization: Unlike unincorporated associations, corporations can exist in perpetuity unless the corporate existence is revoked by the organization through voluntary dissolution or revoked by the state due to a violation of state law. Perpetual existence permits an incorporated organization to carry on its activities from year to year as a single legal entity without regard to the identity of the members, officers or directors at any given time.

Limitation of Individual Liability: In general, there are two types of liability to be considered:

- a) *Contract Liability:* Contracts properly entered into by a corporation are the obligation of the corporation, not its officers, directors or members. Consequently, incorporation is the primary means to avoid personal liability for individuals contracting on behalf of an organization. Once a chapter is incorporated, its officers (and when authorized, directors and employees as well) should be careful always to sign documents and agreements in their respective capacity, clearly identifying the incorporated chapter as the principal, and the signing representative as its agent.
- b) *Tort Liability:* Torts (personal wrongs) such as negligent conduct, libel or other actions causing personal injury are often the subject of law suits. Incorporation protects the officers and members of the corporation from personal liability for the actions of the corporation and its agents, but incorporation will most likely not protect the individual agent of the corporation who is personally at fault. For example, if an incorporated chapter publishes a libelous statement made by one of its officers, both the officer as an individual and the incorporated chapter may be sued and each may be legally liable for the tort. The individual is legally liable as the wrong doer, but the chapter may also be vicariously liable under the legal doctrine of respondeat superior; i.e., the employer is legally responsible for the wrongs of its agents. Incorporation also does not provide protection for individuals who exceed the scope of their authority as a corporate agent.

Legal Formality: Incorporation is given legal recognition by states and courts and in the tax laws and is a generally recognized and accepted form of doing business.

Corporations have become so commonplace that it is often expected by banks, insurance companies, vendors and consumers that organization are incorporated. The corporate structure can enhance the credibility of the organization and therefore its ability to contract and perform other functions.

Place of Incorporation

All US chapters of APMI International will be incorporated in the state of New York.

Advantages of Incorporation

The primary advantages of incorporation are legal and financial protection for individuals, most particularly officers who make corporate decisions and enter into contracts on behalf of the chapter. Keep in mind, however, that incorporation may not protect individuals who have personally taken action beyond the scope of their corporate authority. Incorporation also provides a permanent organizational framework that is generally recognized and oftentimes it is easier for corporations to obtain insurance, secure accounting services and obtain other services that unincorporated associations cannot so easily acquire.

II. CHAPTER EXECUTIVE COMMITTEE

The executive committee is the backbone of every chapter organization.

The executive committee sets chapter policy. Through its elected officers and appointed committees, it directs and guides all financial, educational and technical activities and programs. The committee works closely with national headquarters and APMI officers and staff.

The executive committee should review and monitor regularly the plans and accomplishments of all chapter committees.

A. COMPOSITION

The executive committee usually consists of six elected members, depending upon the size of the chapter. Typically, the committee will include a chairman, vice chairman, second vice chairman, secretary, treasurer, and the immediate past chairman. Ideally, members of the executive committee should represent the full range of technical, corporate and geographical interests of the local membership.

Although on occasion it might be necessary to again call upon members who previously served on the executive committee, the best interests of the chapter will be met by involving new people. Observation of how individuals serve on working committees will provide the best candidates for executive committee positions.

Often, members of the executive committee also serve as chairmen of other chapter committees. Although there is merit in this system from the standpoint of control, it defeats the objective of involving the optimum number of members actively in chapter affairs.

B. EXECUTIVE COMMITTEE MEETINGS

Because ongoing communication is so important to the success of the chapter, it is customary for the chairman to hold regularly scheduled meetings, preferably just prior to regular membership meetings.

C. COMMITTEE ASSIGNMENTS

The executive committee assists the chairman in establishing and selecting members to serve on the working committees of the chapter. Members of these committees should be appointed by the Committee chairman and may be subject to confirmation by the executive committee. The executive committee may create new or special committees and task forces as necessary and define their duties and responsibilities.

D. GENERAL COMMITTEE MEETING INFORMATION

1. Meeting Objectives

Committees meet in order to accomplish certain objectives.

People working together in groups are more successful when clear goals or objectives are known. The time spent by your committee in defining the objectives of the group can eliminate confusion and increase the quality of the committee's ultimate goals.

2. The Agenda

The agenda represents the plan for the meeting by listing subjects to be discussed. A well prepared agenda forces the chairman or presiding officer to follow a clearly defined set of topics. It will help keep discussion "on track".

The structure of a meeting must be kept open and flexible. Adhering to the agenda is important but it should not become so firm that it denies flexibility and the opportunity for discussing topics.

Meetings can be a few minutes long or last several hours. As a general rule, always strive for brevity. Try to cover all topics quickly but efficiently. The responsibility of time at a meeting rests with the chairman. "Control" of time is the key to an effective, productive meeting.

3. Parliamentary Procedure

Parliamentary law is the procedure used during meetings which allows for the accomplishment of business by involving the maximum number of members in the discussion.

It is simple in principle, being based on common sense and courtesy. However, at times it can be very complex because of the special vocabulary used. Review a copy of *Robert's Rules of Order* for conducting meetings and put it into practice. You'll find that your meetings will run smoother and more efficiently.

4. Post Meeting Follow-up

Meeting minutes should be written and distributed by the secretary to committee members and, in the case of executive committee meetings, minutes should be sent to APMI headquarters.

III. CHAPTER OFFICER DUTIES AND RESPONSIBILITIES

A. CHAIRMAN

The chairman oversees all the activities of the chapter within the limitations of the bylaws and the policies authorized by the executive committee.

He presides at general membership meetings of chapter members and at all meetings of the executive committee.

Specific Responsibilities:

- To be ex-officio voting member of all chapter committees except the nominating committee
- To solicit candidates for appointment to the nominating committee
- To fill by appointment all vacancies on committees subject to approval of the executive committee
- To appoint ad hoc committees at his or her discretion
- To serve as the liaison between the chapter and APMI headquarters
- To represent the chapter at official functions
- To call meetings of the executive committee as necessary
- To prepare the agenda for executive committee meetings
- To oversee and monitor the chapter's financial stability
- To appoint chairpersons for committees and task forces
- To report to members on chapter activities and operation through speeches, letters or other printed communications
- To oversee the perpetuation of chapter historical files
- To submit a year-end chapter activities report to headquarters

B. VICE CHAIRMAN

The vice chairman performs the duties of the chairman in the absence of the chairman or the inability of the chairman to act.

The vice chairman often serves as program chairman for the chapter and coordinates all program arrangements by providing speakers for chapter meetings.

Specific Responsibilities:

- To be knowledgeable about chapter activities in order to succeed the chairman
- To keep current with the work of all committees
- To help identify future leaders
- To organize the meeting program and secure speakers
- To supply secretary (corresponding) with information on speakers for preparation of meeting notices

- To be responsible for all aspects and coordination of local meetings
- To introduce speakers and run technical programs
- To correspond with speakers before and after the meeting

C. SECOND VICE CHAIRMAN

The second vice chairman usually serves as chairman of the membership committee and is responsible for membership promotion and maintenance.

Specific Responsibilities:

- To identify and maintain current lists of non-members
- To welcome and introduce new members or visitors at chapter meetings
- To consider programs to increase attendance at chapter meetings
- To determine reasons why some members do not attend chapter functions
- To follow up on member cancellations reported by national headquarters

D. TREASURER

The treasurer is responsible for administering financial practices and maintaining ongoing control of chapter finances.

Specific Responsibilities:

- To maintain checking and savings accounts for chapter funds
- To keep complete records and be responsible for all moneys received and dispersed by or on the behalf of the chapter
- To report financial condition of the chapter to the executive committee and to the membership
- To prepare, with the help of the chairman, an annual budget
- To present for approval an annual budget to the executive committee
- To comply with all state and local tax regulations (if any)
- To develop a budget and prepare a financial summary of each meeting
- To prepare and submit at the end of the chapter year, a financial statement of activities to APMI headquarters (see example sheet and blank report form in section 6)

E. SECRETARY

The secretary is responsible for the proper and legal mailings of notices to members and maintaining the administrative minutes files and policies of the chapter and the executive committee meeting.

NOTE: Larger chapters may wish to divide the secretarial responsibility into two positions: recording secretary and corresponding secretary.

Specific Responsibilities:

1. Corresponding

- To handle all official correspondence
- To coordinate all announcements and mailings to members
- To order mailing labels or electronic membership lists from national headquarters before each meeting
- To maintain a current membership list
- To keep headquarters notified of specific activities including meeting dates, programs and election results
- To order supplies such as letterhead, meeting notices and name badges

2. Recording

- To record minutes of the executive committee meetings
- To maintain proper files
- To remind officers of their legal obligation
- To record all orders, votes and resolutions
- To keep and maintain chapter historical files including past chapter officers, financial reports, copy of chapter charter, meeting minutes, copies of meeting notices, report forms, etc

F. IMMEDIATE PAST CHAIRMAN

The immediate past chairman serves as chairman of the nominating committee for the following year's slate of officers and shall, when called upon, offer advice and counsel to the executive committee.

The immediate past chairman may serve as chairman of the chapter's past chairman's council.

IV. CHAPTER OPERATIONS CALENDAR

Boxed items indicate reports to be submitted to headquarters

Fiscal Year: January 1 - December 31

Meeting Season: September 1 – June 30

JULY Submit ***New Officers Form*** to headquarters (see example)

New chapter year begins.

Officers assume duties

Plan meeting dates and locations for upcoming season.

Recommend members for special committees

Order badges, meeting notices, letterhead and any other supplies needed from headquarters (see ***Chapter Supplies Order Form*** in section 7).

AUGUST

Finalize meeting dates and locations for new year.

Finalize program (speakers & topics for meetings through December or as far in advance as feasible)

Appoint committees

Plan membership activities and campaign for new year

Report schedule of meetings to headquarters for publication in the *International Journal of Powder Metallurgy* and on the APMI website. Include speakers and topics on first few meetings if known. Provide actual meeting dates for entire season.

SEPTEMBER

New meeting season begins

Review all plans for chapter year by executive committee

DECEMBER

Develop annual budget for next year

Provide headquarters with chapter income statement (use official forms in section VI)

APRIL

Appoint nominating committee to present slate of chapter officers for following season

MAY

Submit nominations of new officers to total membership prior to last meeting of season.

Elect new officers at last meeting

JUNE

Annual chapter meeting and election of officers

Attend annual chapter officers meeting held during the annual technical conference

Provide headquarters with list of new officers (name, address, telephone, fax, e-mail)

**APMI INTERNATIONAL
OUTSTANDING SERVICE
TO A LOCAL CHAPTER AWARD**

(Information to be used for publication in APMI News Online.)

Date: _____

Chapter: _____

Name of Nominee: _____

Positions held in chapter: _____

Suffix:(i.e. Ph.D., PEC, PMT, etc) _____ Retired? _____

Title: _____

Company: _____

Address: _____

Reason for nomination: _____

Your name: _____ Position in Chapter: _____

Company: _____

Address: _____

Phone: _____ Fax: _____

E-mail: _____

Important: Submit to headquarters following notice to recipient.

SUGGESTED CRITERIA FOR THE OUTSTANDING LOCAL CHAPTER SERVICE AWARD

1. Nominees are to be active members of their chapter. Length of membership is not important, although it can be considered as part of the reason for nomination.
2. "Active members" should be defined as those who hold a current membership in APMI International, support the activities of the chapter by regular attendance at the chapter meetings and chapter activities.
3. "Outstanding Service" should be interpreted as actions promoting the purposes of the chapter and APMI International as described in Article II of the Bylaws.
4. The Award should be for outstanding service, which has a direct impact on the Chapter. Business, personal, and/or civic achievements may be recognized at the presentation of an award, but should not be considered as part of a nomination unless they follow the criteria contained in the definition of "Outstanding Service".

Examples are:

- A. Outstanding performance, support or participation in activities within the Chapter.
 - B. Outstanding service in the planning, setup or operation of a particular or "special" Chapter event.
 - C. "Remarkable" ongoing service to the chapter.
 - D. Embodiment of the spirit and qualities of leadership in APMI International.
5. Nominations will be made by the executive committee of the chapter. Nominations are then accepted by the chapter chairman and submitted to headquarters. If chapter chairman is nominated for the award, then acceptance of the nomination should be made by vice chairman.
 6. Successful conformance to the criteria and designation of the award is to be made jointly by the Chapter Chairman and the APMI executive staff.
 7. Recipients of the award will be recognized through:
Formal announcement in the next *APMI News Online*. Presentation of the award will be made by the chairman at the chapter awards ceremony.
 8. If an Outstanding Service Award nomination is not accepted by the chapter chairman, the reason(s) for refusal, if requested, are to be discussed privately between the Chapter Chairman and the nominator only. Nominees not selected may be reconsidered after a period of one year from the date of nomination.

Return completed form following notice to recipients:

APMI International
105 College Road East
Princeton, New Jersey 08540-6692
FAX: 609-987-8523

NEW OFFICERS FORM



APMI Chapter: _____

MEETING SEASON _____

Submitted by: _____

Date: _____

Office	Name (Full) Company Address Include Zip	Telephone # (inc. area code) Fax # (inc. area code) E-Mail Address
CHAIRMAN		
1st VICE CHAIRMAN		
2nd VICE CHAIRMAN		
TREASURER		
CORRESPONDING SECRETARY		
RECORDING SECRETARY		

RETURN BY JULY 31
APMI International ■ Fax: 609-987-8523

V. PROGRAM MEETING ARRANGEMENTS

The executive committee is responsible for the development of a well-run meeting program. Chapters may appoint one member of the committee, usually the vice chairman to serve as program chairman and be responsible for all meeting arrangements such as menu, speakers, etc. Others may prefer joint responsibility.

A. MEETING DATE

Meeting dates should be chosen, with consideration to possible conflicts with:

1. Other society meetings in the area
2. Neighboring APMI chapter meetings.
3. MPIF/APMI annual conference, seminars and events
4. Holidays

B. LOCATION

Meeting sites should be chosen with member convenience in mind. The range of menu selection, pricing and guarantee policies between different sites should be explored prior to making the final decision. Book meeting dates and sites as early as possible and consider rotating the meeting location in different areas of your chapter to please a greater number of members.

C. MEETING NOTICES AND PROMOTION

Standard Meeting Notice stationary is available from headquarters imprinted with your chapter name (see example).

The appearance and content of the meeting notice can affect attendance. The notice should contain a short, pertinent biography of the speaker and a brief description of the subject. It should be written to encourage attendance, and should include the following information:

- Day, date and time of the meeting
- Prices (member and non-member)
- Place (including full address and telephone number)
- Directions (you may wish to include a map on the opposite side of the notice)
- Speaker's name, title and affiliation
- Topic
- Person to contact for further information
- Date of next meeting

E-mail Meeting Notice

Chapters wishing to e-mail meeting notices should send the meeting notices to headquarters **four weeks** before the meeting date. Headquarters will send the e-mail to the members for your chapter. For those members who do not have e-mail addresses, the local chapter may request mailing labels from headquarters.

D. ATTENDANCE FACTORS

Every chapter officer should be interested in improving attendance, not only at technical meetings, but also at social gatherings, committee meetings. And other special events.

The major factor influencing attendance is competition for a member's time. Meetings should be designed to make it worthwhile for a majority of members to attend.

Ways to attract attendance:

1. Interesting and informative technical programs

There is no question that the subject and speaker are major factors in meeting attendance. Subjects should be chosen to appeal to a large segment of the membership. The executive committee should keep in close contact with APMI national headquarters, other chapters, and allied groups for information on quality speakers.

2. Social programs and special activities

Special programs can be planned to appeal to your membership. Examples are a Student Night, Committee Night, Golf Outings, Social Night, etc.

3. Assign members to committees

Membership on a committee provides a reason for attending meetings and enhances membership development. Keeping members involved is the best way of keeping them interested and active in chapter activities.

Attendance Committee

To help get members out to meetings, your chapter may wish to appoint an attendance committee. Following are several ways this committee can help increase attendance:

- Telephone members in advance of meeting.
- Assign a member to each company to talk about upcoming events
- Sponsor contests to see which company has the highest attendance
- Personal contacts by key company members
- Personal calls to non-members that may be interested in the program
- Personal calls to new members to make them feel welcome and wanted.
- Meeting notices on local company bulletin boards
- Meeting notices published in other local technical societies' calendar of events
- Announcements in local technical publications

E. THE MEETING BUDGET

A meeting budget should be established for each program. Chapters should run technical meetings at break-even or slightly above in order to generate a modest surplus. Prices should be set to encourage meeting attendance without depleting chapter funds. Adequate budgeting and proper cost control is essential. Estimated expenses and income must be determined in advance in order to determine meeting fees.

Expenses may be either fixed or variable. Fixed expenses include meeting room charges, audio visual equipment rental, printing and promotional costs, postage and speaker expenses. Variable expenses are principally meal costs.

To determine program meeting fees, divide the total fixed expenses by the expected number of paying guests and add this amount to the cost of each meal. If your total fixed expenses are \$200 and you expected 40 people, then add \$5 to the meal cost (after tax and gratuity) to recover your fixed costs. If the meal costs are \$12, your total meeting fee should be at least \$17.

The fee charged may be increased if your chapter's overall budget requires additional funds to be used elsewhere. The fee may be decreased if you wish to subsidize program costs out of your general treasury. Subsidizing meal cost may be risky however, and is suggested only in special cases.

Continued business with a certain restaurant or meeting facility can be helpful in eliminating some fixed costs. If the facility knows it can count on continued business, meeting room charges and equipment rentals may be reduced or even eliminated.

Fees to Non-APMI Members

APMI members should not pay the same fee as non-members. Non-members are not entitled to a free ride and should be charged more for program fees. Lower meeting fees are one of the benefits of being a member of the society. Regular APMI members, including members from other chapters, should pay lower fees. A \$5 difference is acceptable in most cases for dinner meetings and more for special programs and seminars.

Consideration should also be given to subsidizing students. Reduced rates enable interested students to participate and make your chapter look good.

F. THE MEAL GUARANTEE

Giving the guarantee is serious business. You will pay for the meals you guarantee, or more if additional meals are served, regardless of whether or not they are consumed. Too low a guarantee could cause too few meals for meeting participants, while too high a figure will waste meals and money.

To provide a reasonable meal guarantee, first determine the number of people expected including meeting participants, speakers and guests. Find out what percentage the facility will be prepared to serve over your guarantee (usually 3-5%). If 40 persons are expected you then guarantee 38 meals. This will be covered by the 3-5% extra for which the facility will provide meals as part of the guarantee.

Important

This number should amount to the total advance reservations plus late (at door) registrants, less a “no-show” factor based on attendance history. Some chapters guarantee the total number of advance reservations as their final expected count since past history indicates that late at door reservations equal no-shows. Generally it is wise to guarantee about 5% less than the total expected number of attendees.

Billing and Gratuities

Advise the facility in advance as to who is authorized to sign for charges. The final bill should be carefully reviewed. Don't be forced to sign and/or pay on the spot, particularly during the meal or the program. Pre-arrange to review the bill after the meeting. If you must review the bill during the meeting, do it in private with the facility manager or banquet captain, not in front of guests.

Gratuities (sometimes called service charges) vary from one facility to another. Sometimes gratuities are added to your bill automatically. The standard 18% does apply to large as well as small meetings.

Sales Taxes

Local state sales tax will likely be added to your bill. In some states it is customary to add tax after service charges. US Chapters of APMI International are exempt from federal tax.

G. SPEAKERS

1. Sources

Good speakers are not hard to find. Several sources of speakers on powder metallurgy are:

- A. APMI Chapter Speaker Directory – Updated regularly, the speaker directory lists many highly qualified individuals who are available to speak at chapter meetings.
- B. Other Technical Societies – Other technical societies in your area may be a good source for speakers.
- C. Local Contacts – Look around your own area, especially among local companies and your own members. There is bound to be someone who might be willing to address the group on new developments in the industry.

2. Working With Speakers

Contact speakers far in advance to be sure that the date in question is available.

Explain why you want this person to address your meeting. It might be because of a fine reputation, a recommendation from someone who has already heard him speak, or a contribution to the meeting he is particularly qualified to make.

Provide the speaker with plenty of details. If necessary, describe APMI, the makeup of your chapter, the meeting and its importance. Be sure to include the following:

- date, exact time of talk, city and place
- what the meeting is about and the meeting objectives
- the subject to be covered
- general make-up of the audience
- time allotted for the presentation, including a question and answer period
- other speakers on the program (if any) and their topics
- fee and expense (if any)

Once the speaker accepts your invitation, you will need additional information. Make sure you have a brief biography on the speaker with full name, title, educational background and business experience as well as the title and length of his talk. Ask for this material and an abstract of the talk for advance publicity. Find out if any special audio visual equipment is needed.

Use the ***APMI Speaker Checklist*** (exhibit) to help you plan the speaker's presentation.

After preliminary arrangements have been made, confirm them by letter including date, time, place and directions. Follow up by calling the speaker the week before to remind them of the meeting date. Be sure they are sent a copy of the meeting notice.

Advise the speaker who will introduce them and what will be said. Of course, speakers are considered the chapter's "guest" and the meal should be provided complimentary. One of the officers should be assigned to "host" the speaker. He or she should introduce the speaker to everyone and make him or her feel comfortable.

Most chapters also provide speakers with gifts or mementos as a token of appreciation. Speaker gifts should, if possible, be personalized with the name of the chapter and/or be an item unique to the chapter area.

H. MEETING LOGISTICS/ARRANGEMENTS

1. Outside the Meeting Room

- A. Proper facilities to check coats
- B. Standard 6' skirted tables, chairs and a cash box
- C. Supply of APMI membership brochures for non-members
- D. Supply of APMI member and guest badges
- E. Felt tip marker for badges

2. Inside the Meeting Room

- A. Screen, projector stand and projector(s) should be positioned and ready to operate. Make sure someone is responsible for projection equipment. Predetermine location of light switches, wall outlets and slides and/or films prior to the meeting (with the speaker present)
- B. Seating arrangements for the head table (if any)
- C. A table lectern should be available at the head table and possible floor podium elsewhere, if desired by the speaker. Lecterns should be individually lighted.
- D. The audio system should be tested for proper sound level and microphones placed at each lectern before the meeting. A lavalier (lapel) microphone is recommended for the speaker.
- E. Whiteboard, markers, erasers, easel and pointer should be available if requested by the speaker.
- F. Ice water and glasses provided for the speaker
- G. Consider a smoking/non-smoking section or specify tables accordingly.

I. MEETING EVALUATION

An evaluation of your meeting should be conducted following each meeting.

A meeting critique will provide you with feedback from attendees about the quality of the program, speaker, site, etc. This information is extremely useful in analyzing and planning future programs. (See sample form)

1. Evaluation of Speakers

How well prepared was the speaker? Did he know the subject matter inside and out?
How well was the interest of the audience maintained throughout the session?

How well did the speaker communicate? Were slides clear?

2. Evaluation of Overall Program

How well did the overall program succeed? What were the highlights? What suggestions would you have for improving the program?

3. Meeting Follow-up

Following each meeting the *APMI Chapter Meeting Report Form* (see sample) should be completed and mailed to headquarters.

Information provided will be used to rate speakers for future consideration by other chapters.

4. Financial Summary

The treasurer should prepare a financial statement on the meeting following the event with significant variations from the budget noted and brought to the attention of the executive committee.

5. Question and Answer Session

Following the speaker's presentation, a period for questions and answers is common.

The program chairman and committee members can avoid an awkward pause by asking the first questions and giving the audience time to think.

Do not ignore the speaker following the talk. See that there is a graceful exit from the meeting and treat your speaker as a guest with courtesy, hospitality and gratitude.

J. SPEAKER CHECKLIST

APMI SPEAKER CHECK LIST

Meeting Date: _____

Name of Speaker: _____

Topic: _____

Date Invited: _____

Date Accepted: _____

Information Received:

- Biographical Information
- Special Equipment
- Desired Accommodations
- Copy of Abstract

Spouse and/or Guest:

Name(s): _____

Arrival Date: _____ Time: _____ Departure Date: _____

- Accommodations arranged (if necessary)
- Presentations (plaque, citation, or gift on hand)
- Thank you letter sent Date: _____

K. CHAPTER MEETING REPORT FORM

APMI CHAPTER MEETING REPORT FORM (return copy to National Headquarters)

Chapter: _____

Meeting Date: _____

Meeting Place: _____

Number of members attending: _____

Number of non-members attending _____

Total Attendance _____

Speaker: _____

Topic: _____

Please rate the speaker in the following areas:

	<u>Excellent</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>
Technical content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of slide/overheads	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to communicate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Covered topic sufficiently	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Would you recommend speaker to another APMI chapter?

Yes No If no, why? _____

Comments: _____

(Attach copy of meeting notice)

Return to: APMI International
 105 College Road East
 Princeton, NJ 08540
 Fax: 609-987-8523

L. CHAPTER MEETING CRITIQUE

APMI CHAPTER MEETING CRITIQUE

We would appreciate your completing and returning this critique form. Your comments will help us plan future chapter meetings.

Meeting Date: _____

1. Overall do you feel that you have benefited from this program?
 Yes No
2. Was the technical program...
 too basic too advanced about right
3. What subjects were not covered that you believe should have been? _____

4. Please rate the speaker in the following areas:

	<u>Excellent</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>
Technical content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of slide/overheads	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to communicate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Covered topic sufficiently	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. Please rate the meeting for:

	<u>Excellent</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>
Quality of overall program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Facility and location	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cost value for complete prog.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. What subjects would you like to see covered at future meetings? _____

7. Please add any other comments you have regarding chapter activities? _____

VI. CHAPTER FINANCES

A. ESTABLISHING A BUDGET

The executive committee is responsible for establishing the financial policy of the chapter. Under the committee's guidance, budgets are developed and the financial activities of the chapter are carefully monitored.

The annual budget should be established before the calendar year begins.

The executive committee, with the treasurer, should prepare estimates of chapter revenues for the year ahead. Forecasts from the program committee chairman should be reviewed.

During the year, actual financial activity should be compared to the budget with annual projections provided. In this way, danger signals can be detected and immediate steps taken to bring income and expenses into proper relationship.

Important

In order to make financial reporting to headquarters easier at the end of the meeting year, use the forms at the end of this section to record meeting finances, etc. during each meeting. End of the year reporting will be much easier and less time consuming if financial details are recorded on a regular basis.

B. SURPLUS FUNDS

Some chapters are fortunate to have annual surpluses and reserve balances in their treasuries. This could pose tax problems since APMI International and its chapters are organized "not for profit". Here are some suggestions:

1. Spend it. But if you do, make sure it's for the benefit of everyone in the chapter. For example, consider the purchase of A/V equipment (slide projector, screen, etc.) Sponsor or help subsidize a social outing at the end of the meeting season.
2. Subsidize. Reduce the cost of the dinner to the members. Have a "Student Night" and invite them and their instructors to attend as your guests.
3. Contribute it. The national office, through the Center for PM Technology, has established an educational fund to help pay for films, books and other education material contributed to colleges as a means of encouraging student interest in powder metallurgy. Some chapters create a scholarship fund of their own to help finance local students' PM education. When donations are made, headquarters will acknowledge and credit the source.

C. ANNUAL CHAPTER INCOME STATEMENT

The ***Chapter Income Statement*** (see exhibit on next page, p.38) should be completed and a copy sent to headquarters at the end of every year. This document is the official summary of all financial activity for the chapter, and is among the chapter treasurer's final business responsibilities for the year (see operations calendar on p. 22).

CHAPTER _____

FOR THE PERIOD OF JANUARY 1, 20____ THROUGH DECEMBER 31, 20____

REVENUE:

Income from Meetings (from Meetings Record)

Other income (please list) _____



\$

TOTAL REVENUE:

EXPENSES:

Meeting Expenses (from Meetings Record)

Executive Committee, Section Office expenses

Other expenses (please list) _____



\$

TOTAL EXPENSES:

NET INCOME (LOSS) FOR YEAR

\$

ADD:

Cash Beginning Period (January 1)

Cash Balance End of Period (December 31)

\$

\$

SUBMITTED BY: _____

DATE: _____

VII. NATIONAL OFFICE SERVICES TO CHAPTERS

A. SUPPLIES

The following supplies are available free of charge for chapter use from APMI headquarters:

- Chapter stationary
- Chapter meeting notices
- Chapter mailing labels
- APMI membership brochures and application forms

To order supplies, fax the Chapter Supplies Order Form (exhibit) or call Bonnie Kessler at APMI 609-452-7700 and your order will be processed immediately.

Notes on Mailing Labels

Chapters must order mailing labels only as needed. APMI processes new members and makes changes to the membership database on a daily basis. In order to ensure you are using the most complete and accurate mailing list, you must request mailing labels only when needed for each mailing.

Included in your chapter mailing labels may be members of other chapter who have requested to be put on your mailing list to receive information on your meetings and activities.

B. NEW AND CANCELED CHAPTER MEMBERS

Chapters will receive a list of new and canceled members for their chapters from headquarters. This will be sent quarterly to allow officers to keep track of membership activity.

1. New Members – should be welcomed to your chapter either by a form letter, telephone call and/or personal welcome at the next meeting.
2. Canceled Members – should be contacted to determine reason for cancellation. Hopefully, the member may choose to renew.