
Chapter Engagement: Preparing Leaders for Success



Presented by:

Denise Schneider, CPPO, C.P.M., CPPB, C.M.

Zulay Millan, CPPO, CPPB, FCCM

Carrie Woodell, MPA, CFCM, CPPO, C.P.M., CPPB, APP



Objectives

- Orient attendees on succession plan strategies
- Provide structure for outlining officer duties
- Establish framework for orientation training program

Discussion Items

- Increasing Accountability through Measurable Outcomes
- Officer Orientation / Officer Boot Camp
- Task Management Tools

Accountability

There's A **DIFFERENCE** BETWEEN
INTEREST AND COMMITMENT.

When you're **INTERESTED** in doing something,
you DO IT ONLY WHEN ITS CONVENIENT.

When you're **COMMITTED** to something,
you ACCEPT NO EXCUSES;
ONLY RESULTS.

Polling Question

Does your chapter have clear position descriptions?

- Yes for officers only
- Yes for officers and volunteers
- No

Accountability

- Increase Member Engagement
 - Clear Position Descriptions
 - Deliverables and Outcomes
 - Personal Accountability
 - Match effort to Results

Accountability

“Leadership is about taking responsibility, while others are making excuses”

- John C. Maxwell
The John Maxwell Co.

CENTRAL FLORIDA CHAPTER OF NIGP 2017 BOARD OF DIRECTORS: POSITION DUTIES

PRESIDENT'S DUTIES

- Oversees the day-to-day operations of the Chapter and the Board of Directors.
- Executes the Chapter's Strategic Plan.
- Develops and assigns Officer & Chairman Duties annually in accordance with the By-laws.
- Establishes the annual organizational structure in accordance with the Chapter's strategic plan and appoints committee chairs and co-chairs for all current committees.
- Develops and monitors the Chapter budget.
- Prepares agendas for all chapter related meetings.
- Files the Chapter's Annual Report with the Florida Department of State Division of Corporations.
- Prepare and submit New Chapter Officer Data Form for NIGP
- Maintains regular communication with the membership via email, newsletter and official meetings.
- Sets Chapter Meeting dates and locations.
- Appoints Awards Committees to go over the nominations for Buyer and Manager of the Year Chapter Awards.
- Performs all duties in accordance with the Chapter Bylaws.
- Oversee by-Laws amendments on an as needed basis.

Transitional Requirements:

- Attend New Officer Orientation Meeting
- Mentor successive President and provide orientation to new board members for 12 Months.
- Transmit all documents to successive President.
- Serve as Presidential Advisor (BOD Member) upon request of successive President. Duties as assigned.

Accountability

*You either make yourself **accountable** or you will be held accountable by your circumstances.*

2. PRESIDENT. The President shall exercise general supervision over the affairs of the Chapter, preside over all meetings of the Chapter and the Board of Directors, perform all duties incident to the Office of President, and shall adopt all other duties as described in NIGP: The Institute for Public Procurement By-Laws. The President shall perform all duties as from time to time may be assigned by the vote of the membership or the Board of Directors. The President shall maintain an accurate record of officer duties and committee duties and shall furnish a copy of these duties to all newly appointed/elected officers and chairman for acknowledgement. All policy documents outlining officer and chairman duties shall be accessible by the membership.

Accountability

“Accountability is the glue that ties a commitment to results”

- Bob Proctor
Proctor Gallagher Institute

MEMBER SERVICES COMMITTEES

Oversees the deliverables and outcomes of all subordinate task forces and sub-committees.

Required Outcome/Deliverable(s):

Executes at least one new program annually aimed at aligning member needs with member benefits.

Program Management

Ensures that all programs and initiatives have up-to-date formalization documents and continue to meet the needs of the membership. Draft program formalization documents for the approval of the Board of Directors.

Required Outcome/Deliverable(s): Attends a minimum of one (1) Board of Director's meeting or teleconference to take inventory of the Chapter's current programs. Ensures all program documentation is up-to-date.

Welcome Committee

Identifies new members at each Chapter Membership Meeting. Provides a short orientation of member benefits.

Required Outcome/Deliverable(s): Coordinates new member outreach via the registration table at all chapter meetings and events. Provides a Chapter Pin to all new members. Coordinates coverage with a volunteer when unable to perform duties.


Member Retention Committee


Promotes continued membership with the chapter. Works with the Program Management Committee to regularly deploy member benefit bulletins (email & newsletter) to the membership highlighting the chapter's offerings. Identifies non-renewals and promotes re-engagement with the Chapter.

Required Outcome/Deliverable(s): Provides outreach for non-renewing members. Executes an initiative, member benefit or campaign aimed at upholding the value of membership and retaining members. Survey's the membership to gauge member satisfaction and presents recommendations to the Board of Directors.

Accountability



 **Central Florida Chapter of NIGP**
WWW.CFCNIGP.ORG | WWW.NIGP.ORG



VOLUNTEER DUTIES ACKNOWLEDGEMENT FORM

I have received a copy of the duties for the following position(s):

I have reviewed the duties and I understand all my responsibilities. I am able to perform the essential functions as outlined. If I have any questions about duties not specified on this description I will discuss them with the Central Florida Chapter of NIGP Board of Directors.

I further understand that my eligibility for scholarship points is based on my ability to perform the duties and responsibilities and my effort to meet the outcomes and deliverables outlined for my position.

I have discussed any questions I may have had about this job description prior to signing this form.

Volunteer's Signature

Date

03/14/17

Accountability

The results you achieve will be in direct proportion to the effort you apply

- Denis Waitley
The Waitley Institute

Central Florida Chapter of NIGP Scholarship Application			
PROFESSIONAL VOLUNTEERISM			
CENTRAL FLORIDA CHAPTER OF NIGP LEADER/VOLUNTEER	POINTS EACH	POSITION(S) (QTY.)	APPLICANTS ELIGIBLE POINTS
Board of Directors.....	300 Points	0	0 Points
NIGP Council/ NIGP Officer.....	100 Points	0	0 Points
(Documentation Required)			
Position: <input type="text"/> Contribution: <input type="text"/>			
Position: <input type="text"/> Contribution: <input type="text"/>			
Committee Chairman/ Co-Chairman.....	75 Points	0	0 Points
Position: <input type="text"/> Contribution: <input type="text"/>			
Position: <input type="text"/> Contribution: <input type="text"/>			
Position: <input type="text"/> Contribution: <input type="text"/>			
Position: <input type="text"/> Contribution: <input type="text"/>			
Position: <input type="text"/> Contribution: <input type="text"/>			
Committee Member.....	25 Points	0	0 Points
Position: <input type="text"/> Contribution: <input type="text"/>			

Accountability

	Member	Points Earned 2015	Value of Scholarship Points	Amount of Scholarship	2014 Carry Forward	Total (Carry forward plus current)	Scholarship Used	Balance	Comments
57	Misconi, Juliet	285	\$ 3,295.80	\$ 939.30	\$ -	\$ 939.30		\$ 939.30	
58	Nazario, Damaris	355	\$ 3,295.80	\$ 1,170.01	\$ 90.12	\$ 1,260.13	\$ 560.70	\$ 699.43	Flight for forum, per diem forum
59	Nichols, Erin	45	\$ 3,295.80	\$ 148.31	\$ 300.40	\$ 448.71		\$ 448.71	
60	Olson, Cheryl	425	\$ 3,295.80	\$ 1,400.71	\$ 987.62	\$ 2,388.33	\$ 132.90	\$ 2,255.43	
61	Opreanu, Vlad	110	\$ 3,295.80	\$ 362.54	\$ -	\$ 362.54	\$ 350.00	\$ 12.54	FAPPO Regis, UPPCC
62	Pearison, Megan	140	\$ 3,295.80	\$ 461.41	\$ 76.35	\$ 537.76		\$ 537.76	
63	Pierson, Crystal	60	\$ 3,295.80	\$ 197.75		\$ 197.75		\$ 197.75	
64	Ramos, Nancy		\$ 3,295.80	\$ -	\$ 56.05	\$ 56.05		\$ 56.05	
65	Reed, Diane	315	\$ 3,295.80	\$ 1,038.18	\$ 374.49	\$ 1,412.67		\$ 1,412.67	
66	Richer, Dawn		\$ 3,295.80	\$ -	\$ 440.59	\$ 440.59	\$ 200.00	\$ 240.59	UPPCC recert
67	Rivas, Saul		\$ 3,295.80	\$ -	\$ 666.35	\$ 666.35		\$ 666.35	
68	Rivera, Melisa	115	\$ 3,295.80	\$ 379.02	\$ 497.88	\$ 876.90	\$ 300.00	\$ 576.90	NIGP intro class
69	Roberts, Tammy	185	\$ 3,295.80	\$ 609.72	\$ 367.07	\$ 976.79		\$ 976.79	
70	Rodriguez, Kristine	220	\$ 3,295.80	\$ 725.08	\$ 1,216.94	\$ 1,942.02		\$ 1,942.02	
71	Santana, Arima	70	\$ 3,295.80	\$ 230.71	\$ -	\$ 230.71		\$ 230.71	
72	Santiago, David	245	\$ 3,295.80	\$ 807.47	\$ -	\$ 807.47		\$ 807.47	

Questions?



Officer Boot Camp



Succession planning helps build the bench strength of an organization to ensure the long-term health, growth and stability.

Teala Wilson

Polling Question

Does your chapter provide leadership training?

- Yes, Officer Orientation
- Yes, Volunteer Orientation
- No

Program Development

- Trainers
- Intended Audience
- Logistics
- Packaging Materials
- Developing Content
- Training Timeframes
- Post Training Actions



Trainers



Intended Audience

- Who is your intended audience?
- Current vs. aspiring leaders
- Accountability and governance expectations



Polling Question

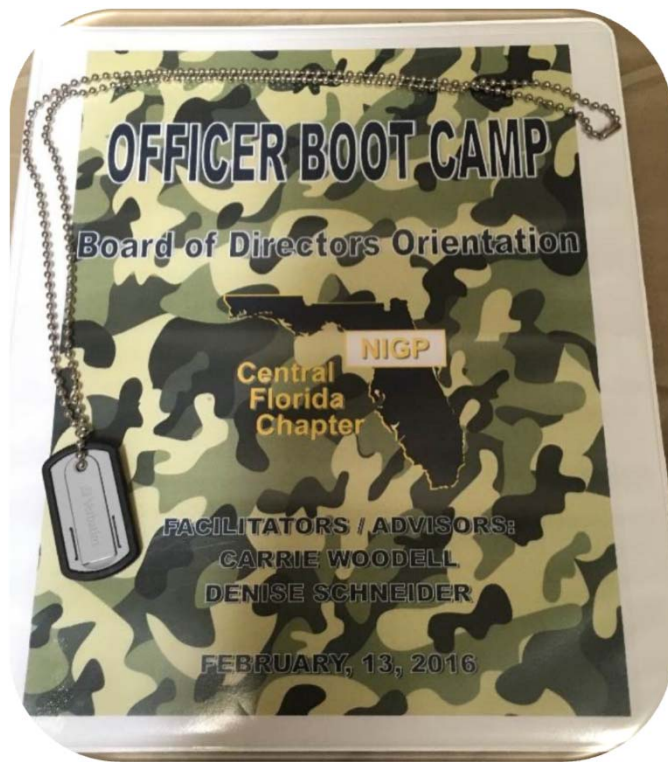
What is the size of your chapter board?

- Less than 5
- Between 5 and 10
- Greater than 10

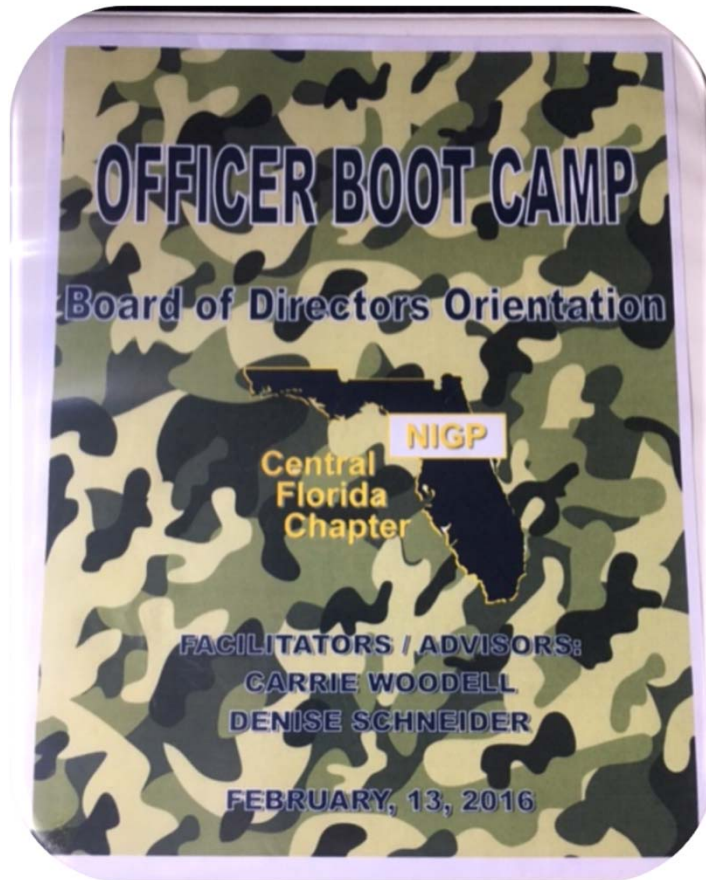
Logistics



Packaging Materials



Packaging Materials



1	Position Duties Board of Directors, Committes and Task Forces
2	2017 Meeting Schedule
3	ByLaws
4	Program Documents and Policies
5	Strategic Plan 2015 - 2020
6	2017 Approved Budget
7	Task Timeline
8	Code of Conduct
9	Forms
10	Agreements
11	Chapter of the Year Application
12	NIGP Chapter Resources

Developing Content

“Basic Training” Outline



- Expectations as Officers
- Special Forces Field Manuals
- Tactical Resources
- Allied Forces
- Mandatory Meetings
- Parliamentary Procedures
- Ethics/Code of Conduct
- Chapter of the Year
- NIGP Required Forms
- Website & Updates
- Chapter Events
- Officer Transition
- Acknowledgement of Duties
- Discussion

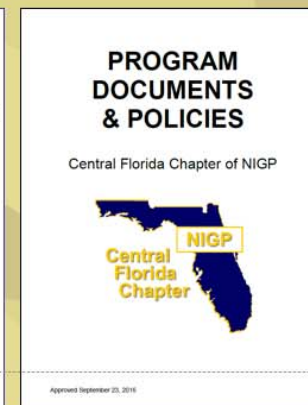
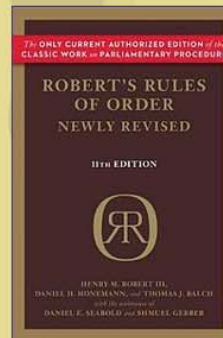


Developing Content

Special Forces Field Manuals

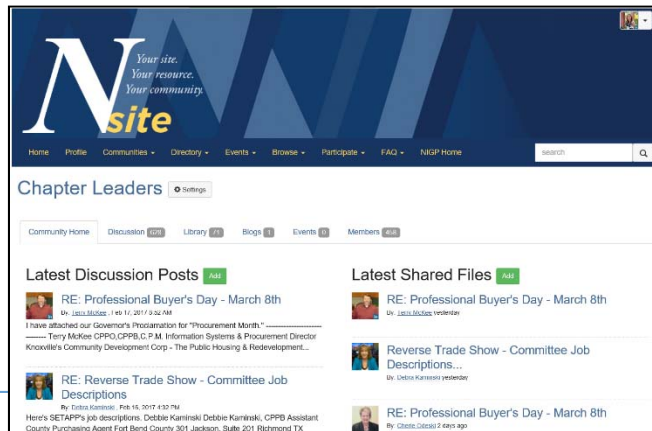


- ByLaws
- Program Documents & Policies
- Robert's Rules of Order



Developing Content

■ Tactical Resources



FINANCES

- Financial Management
- Chapter Banking
- Debit Card Procedures
- Sample Financial Documents
 - Cash Disbursement Policy
 - Chapter Cash Disbursement
 - Chapter Cash Receipt
 - Chapter Statement of Receipts and Disbursements
 - Chart of Account
 - Purchase Authorization
 - Check list for Treasurers
- Record Retention Schedule
- Internal Financial Controls Checklist

WEBINARS FOR CHAPTER OFFICERS

The NIGP Chapter Relations department offers a series of free annual Webinars intended to assist our chapter affiliates with leadership development, and to provide officers and program chairs with information regarding national resources, the Chapter Awards program, Hosting NIGP Seminars and Chapter Tax and Legal issues.



NIGP Webinar: Chapter Engagement

03/14/17

25

Developing Content

■ Allied Forces

VISITING CHAPTERS

BIENNIAL IN-PERSON VISITS BY NIGP AMBASSADORS TO THE CHAPTERS

To show our commitment to chapters, NIGP has appointed Ambassadors who will visit chapters throughout the year. This **face-to-face meeting** provides chapter members with an opportunity to hear the latest NIGP member benefits, educational opportunities, resources and tools as well as to ask questions of these individuals. Chapter leaders can share success stories, governance issues, etc. and all stories, thoughts, concerns will be communicated to the elected Member Council of NIGP.

Two way communication between the Institute and its chapters at it's best.



EACH CHAPTER WILL BE ELIGIBLE FOR ONE VISIT EVERY OTHER YEAR



CHAPTERS

Jennifer Steffan

Chapter Relations Manager

Email: jsteffan@nigp.org

Phone: 703-736-8900, x232

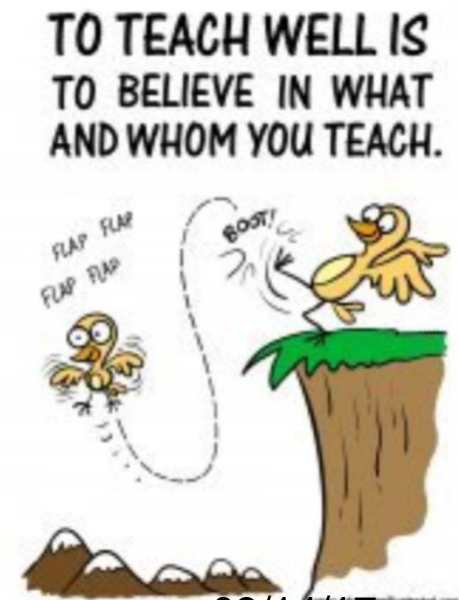
VISIT REQUEST FORM

Once request is received, coordination will begin between the Ambassador and the Chapter.

REQUEST YOUR VISIT ►

Training Timeframes

- Sufficient time to thoroughly cover content
- Consider establishing timeframe per topic
- Count on lots of discussion!



Post Training Actions

- Certification of Completion
- Post Training Survey

CENTRAL FLORIDA CHAPTER
OF THE NATIONAL INSTITUTE OF GOVERNMENTAL PROCUREMENT, INC

Presents this

Certificate of Completion

this 4th Day of March, 2017, acknowledging

Diane Wetherington, CPPB, FCCM

Completed 2017 Officer Bootcamp

Carrie Woodell, MPA, CFCM, CPPO, C.P.M., CPPB, APP
Program Trainer

Denise Schneider, CPPO, C.P.M., CPPB, C.M.
Program Trainer

Question #	Type	Question
1	Single	How would you rate the Bootcamp training materials?
2	Comment	Would you recommend any enhancements to the training materials? Please describe.
3	Single	Did the training help to prepare you for success as a Chapter Officer?
4	Single	As an Officer, did you find the training to be valuable?
5	Single	Do you feel there was sufficient time to cover the material?
6	Single	How would you rate the Officer Bootcamp instructors?
7	Single	How would you rate the facilities where Officer Bootcamp as held?
8	Single	How would you rate the food provided during Officer Bootcamp?
9	Comment	Please provide any suggestions to improve the Bootcamp training.
10	Comment	Please provide your overall thoughts of the Bootcamp training.

Questions?

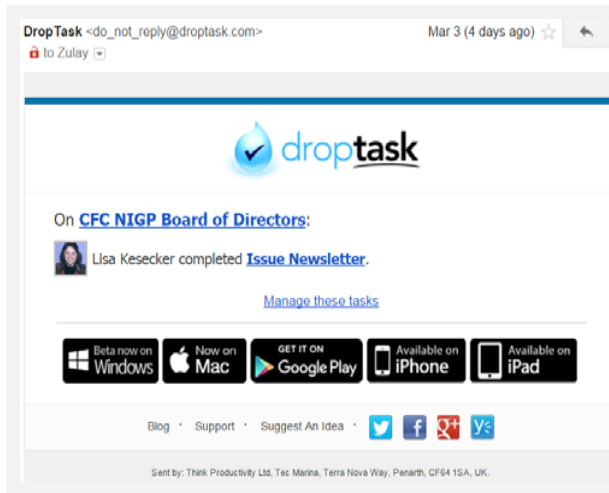



Polling Question





Have you been successful? How do you know?












- We are actively monitoring our strategic plan
- We discuss tasks at board meetings
- We regularly communicate to ensure tasks are completed in a timely fashion


Task Management








Projects Search tasks across all projects Help | Inbox | Notifications 25 

CFC NIGP Board of Directors    

-  **Teleconference**
CFC NIGP Board of Directors > NOVEMBER  14 Nov  For 163 Days
-  **Teleconference**
CFC NIGP Board of Directors > NOVEMBER  7 Nov  For 163 Days
-  **Teleconference**
CFC NIGP Board of Directors > OCTOBER 10 Oct  For 163 Days
- Issue Newsletter**
CFC NIGP Board of Directors > SEPTEMBER  9 Sep  For 38 Days  For 38 Days

Add High Urgency Task... 

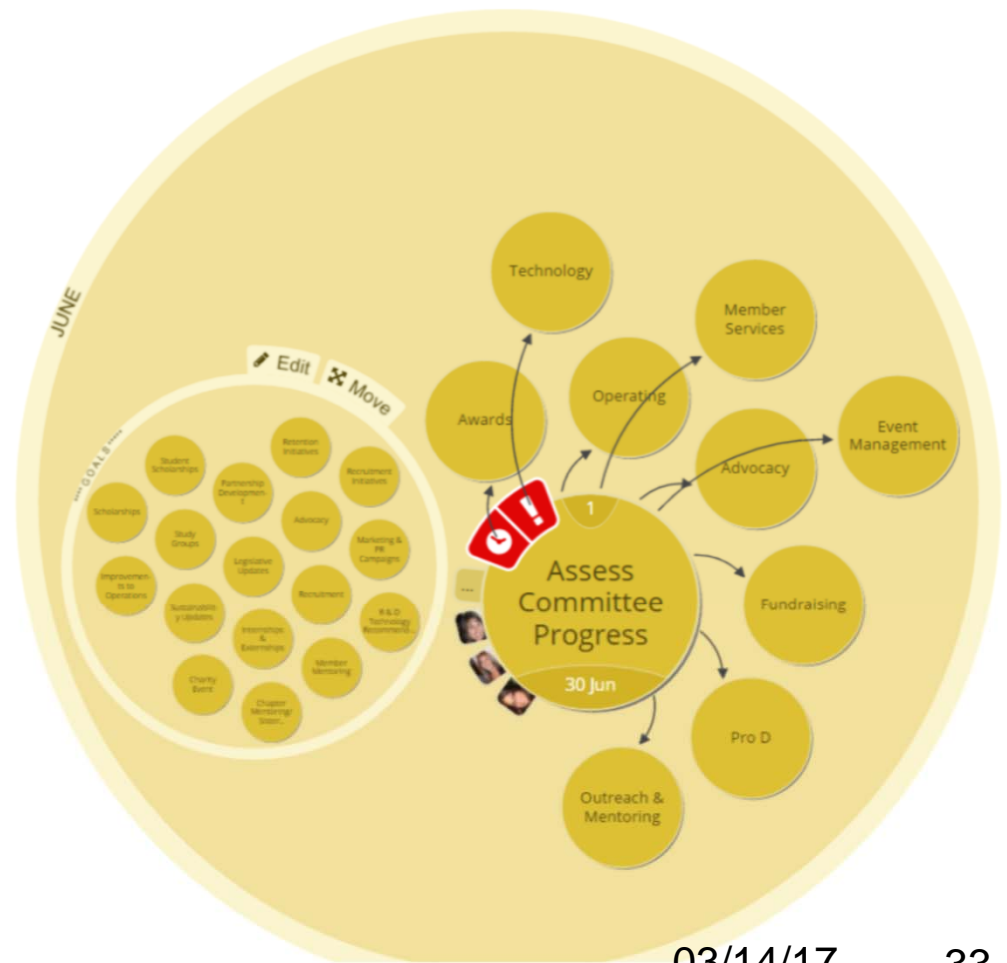
Normal Urgency

- Forum in National Harbor, MD**
CFC NIGP Board of Directors > AUGUST  21 Aug  For 616 Days
- State of the Chapter Address**
CFC NIGP Board of Directors > DECEMBER  9 Dec
- Reverse Trade Show Early Bird Registration Ends**
CFC NIGP Board of Directors > OCTOBER  18 Oct
- Dessert Contest**  9 Dec

Task Management

droptask PRO | Projects | Search tasks across all projects

CFC NIGP Board of Directors



Task Management

2017		CFC NIGP		TASK TIMELINE	
EVENT	POSITION	TASK	DEADLINE	COMPLETED	
January	Treasurer	Annual Chapter Reporting Forms		1/31/2017	
	Scholarship committee	Scholarship Application deadline	1/31/2017	1/31/2017	
	Secretary	Issue Newsletter			
	Vice President	Plan Programming			
	Treasurer	Bank Updates			
	President	Final Budget 2017	1/20/2017		
February	President	Committee Appointments			
	Treasurer	Insurance Policy Renewal			
	Treasurer	Plan Family Day			
	President	Buyer of the Year			
	President	Manager of the Year			
	Social Media	Website Updates			
	Treasurer	Chapter Audit Task Force			
	Board	Board Meeting			
	Chapter	Chapter Meeting			
	Board	New Officer orientation			
	Treasurer	Taxes IRS 990			
	Board/Committee	Begin COY Submission			
	Board	Teleconference			
	Board	Officer Shirts			
	Treasurer	Chapter Financial Forms			
	Vice President	Certificates and Awards			
March	Chapter	Spring conference			
	Secretary	Issue Newsletter			
	Vice President	Forum Group Registration			
April	Board	Teleconference			
May		Speed Buying			
June	Board	Assess Committee Progress			
	President	Teleconference			
		Outreach and Mentoring			
		Member Services			
		Pro D			
		Operating			
		Awards			
		Advocacy			
		Technology			
		Fundraising			
		Event Management			
July	Board	Board Meeting			
	chapter	Chapter meeting			
	Secretary	Issue Newsletter			

2017		CFC NIGP		TASK TIMELINE	
EVENT	POSITION	TASK	DEADLINE	COMPLETED	
		Strategic Plan Checkpoint			
	President	RTS Committee Appointments			
August	Board	Teleconference			
		Forum			
September	Board	Board Meeting			
	chapter	Fall workshop			
	Secretary	Issue Newsletter			
October	Board	teleconference			
		Reverse Trade Show Early Bird			
		Registrations Ends			
November		Reverse Trade Show			
	Board	Teleconference			
December	Board	Board Meeting			
		Chapter meeting			
		VIP dinner			
	Secretary	Issue Newsletter			
		Dessert Contest			
		New Officer installation			
	Vice President	State of the Chapter Address			
		Charitable Contributions			
		Scholarship Redemption deadline			

It's Rewarding!

- Preparing your volunteers for success
- Growing your volunteer base
- Scholarship eligibility
- Supports the succession plan for your chapter

Questions?

Contact Info:

Carrie Woodell - carrie.woodell@ocfl.net

Zulay Millan - Zulay.millan@ocfl.net

Denise Schneider - dschneider@goaa.org