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 it’s 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

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.
- Oversees 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 is the glue that ties a commitment to results”

- Bob Proctor
  Proctor Gallagher Institute
Accountability

Are you accountable?

Central Florida Chapter of NIGP

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

NIGP Webinar: Chapter Engagement
Accountability

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

- Denis Waitley
  The Waitley Institute
# Accountability

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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
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

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
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 stores, thoughts, concerns will be communicated to the elected Member Council of NIGP. Two-way communication between the Institute and its chapters at its best.

EACH CHAPTER WILL BE ELIGIBLE FOR ONE VISIT EVERY OTHER YEAR

VISIT REQUEST FORM

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

REQUEST YOUR VISIT

Jennifer Steffan
Chapter Relations Manager
Email: jsteffan@nigp.org
Phone: 703-736-8900, x232
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

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

CFC NIGP Board of Directors

- Teleconference
  - CFC NIGP Board of Directors > NOVEMBER
  - 14 Nov
  - 163 Days
- Teleconference
  - CFC NIGP Board of Directors > NOVEMBER
  - 7 Nov
  - 163 Days
- Teleconference
  - CFC NIGP Board of Directors > OCTOBER
  - 10 Oct
  - 163 Days
- Issue Newsletter
  - CFC NIGP Board of Directors > SEPTEMBER
  - 9 Sep
  - 36 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

NIGP Webinar: Chapter Engagement
Task Management

NIGP Webinar: Chapter Engagement
Task Management
# Task Management

## 2017 Task Management Table

<table>
<thead>
<tr>
<th>EVENT</th>
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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