OFFICER BOOTCAMP

Denise Schneider, CPPO, C.P.M., CPPB, C.M.
Carrie Woodell, MPA, CFCM, CPPO, C.P.M, CPPB
Welcome to Chapter Leadership!
“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
Expectations as Officers

• Officer Duties
• Code of Conduct
• Mandatory Participation for all scheduled meetings
• Bylaws require 24 hours notice if unable to attend
• Utilization of scholarship money to offset chapter travel expenses before any chapter funds are used
Mandatory Meetings*

2017 Chapter Meeting Dates

- January 20: Membership Meeting
- March 24: Spring Workshop
- May 5: Chapter Meeting/Speed Buying
- July 21: Membership Meeting
- September 15: Fall Workshop
- December 8: Holiday Membership Meeting

Board meeting will be held prior to each Chapter Meetings

2017 Board Teleconferences and Other Event Dates

- February 23-25: NIGP Leadership Symposium
- March 12: Family Day
- August 27-30: NIGP Forum
- November 1: Reverse Trade Show
- December 2 or 9: VIP, Mentee, Mentor Appreciation Dinner

*Other meetings called by the President
Parliamentary Procedures

• Officers are not able to make a motion on the item they are presenting to membership.
• Motions require that a second member of the group agrees to consider the proposal.
• Without a second, the motion will die.
• If seconded, initiate discussion on the issue.
• Once the group has had a chance to speak in favor or against the motion, the Chairman will lead a vote.

“Motion, Second, Discussion, Vote”
Tactical Resources

CENTRAL FLORIDA CHAPTER
OF NIGP

Strategic Plan
2015 - 2020

• Vision: To be the leading chapter of NIGP: The Institute for Public Procurement by promoting the development of public procurement professionals throughout Central Florida.

• Mission: Provide our chapter members with opportunities for professional development and the exchange of best practices.

• Core Values: Ethics, Integrity, Professionalism, Diversity, Education and Professional Growth, Service to Stakeholders
## Tactical Resources

### 2017 Task Timeline

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<th>POSITION</th>
<th>TASK</th>
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<td>Annual Chapter Reporting Forms</td>
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<td>Scholarship</td>
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<td>President</td>
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**August**
- President: RTS Committee Appointments
- Board: Teleconference
- Secretary: Issue Newsletter

**September**
- Board: Board Meeting
- Chapter: Fall workshop
- Treasurer: Issue Newsletter
- Secretary: Issue Newsletter

**October**
- Board: Teleconference
- Secretary: Issue Newsletter
- Treasurer: Issue Newsletter

**November**
- Board: Teleconference
- Treasurer: Issue Newsletter
- Secretary: Issue Newsletter

**December**
- Board: Teleconference
- Treasurer: Issue Newsletter
- Secretary: Issue Newsletter

**2017 Events**
- President: RTS Committee Appointments
- Treasurer: Issue Newsletter
- Secretary: Issue Newsletter
- Vice President: State of the Chapter Address
- Scholarship: Scholarship Redemption deadline

**2017 Deadlines**
- 1/31/2017
- 10/20/2017
- 10/31/2017
- 11/31/2017
- 12/31/2017

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[www.fppt.info](http://www.fppt.info)
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

GOVERNANCE
- Chapter Bylaws
- Chapter Officer Installation
- Sample Script
- Chapter Operations/Procedures/Policy Manuals
- Chapter Officer/ Volunteer
- Job Descriptions
- Chapter Strategic Planning
- Chapter Succession Planning Toolkit
- Code of Ethics
- Cultivating NIGP Volunteers

MEMBERSHIP/MARKETING
- Social Media for Your Chapter
  - Social Media Policy – SCAPO
  - Social Media Policy – Central Florida
  - Let’s get Social! Integrating Social Media Into Your Chapter – Forum 2015
  - Certificate of Membership Template
  - Benefits of Chapter Membership Flyer
  - NIGP Member Benefits Brochure
  - Incorporating Student Memberships into Your Chapter
  - Chapter Membership Recruitment
  - Public Relations 101
  - Sample Press Release
  - Mentorship Program

RESOURCES
- Listing of National Chapter Services
- 2016 Chapter Year-at-a-Glance
- Chapter Visits
- Chapter Leader Community
- Chapter Leadership Orientation
- Chapter Awards Program
- Local Chapter Award Winners
  - Local Chapter Award Nomination Form
- FREE Chapter Leaders Webinars
- Speed Buying Event
  - Marketing
  - Proclamation
  - Trademark

http://www.nigp.org/home/membership/chapters/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.

2015 WEBINARS

- Let's Get #Social! Integrating Social Media into your Chapter Webinar

To view the Chapter Leaders Webinar recording you'll need to download Real Player to your computer

2014 WEBINARS

- Chapter Leaders Orientation Webinar
  February 28th, 2014

To view the Chapter Leaders Webinar recording you'll need to download Real Player to your computer

2013 WEBINARS

- Chapter Tax and Legal Issues November 5, 2013

To view the Chapter Leaders Webinar recording you'll need to download Real Player to your computer
Tactical Resources

February 23-25, 2017

Washington Dulles Airport Marriott, Dulles, VA

Keynote Speakers

Dr. Steve Swafford, Balance Warrior, has worked for nearly 30 years for and with organizations in areas of strategy, leadership development, communication, membership and executive management. Read More

Jill McCrory, Ringleader, brings a background of interactive training, teambuilding, and leadership training to the Leadership Outfitters team. Read More
Tactical Resources
Allied Forces

CHARTERS

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

http://www.nigp.org/home/about-nigp/contact/staff-directory

CAN’T FIND SOMETHING?

Let us know what you’d like to see included and we will have it added.
Contact chapters@nigp.org
Allied Forces

Governing Board: Denise Schneider; Carrie Woodell (July ‘17)
Member Council: Denise Schneider (Chair); Zulay Millan
Talent Council: Carrie Woodell (Incoming Chair)

Board Policy Committee: Ray Hooper (Vice Chair), Tabatha Freedman
Knowledge Committee: Christine Rewis; Kristine Rodriguez, Mike Thornton
UPPCC Board of Examiners (CPPO): Carrie Woodell
Allied Forces

- Chapter Ambassadors: David Nash, Mina Kaeding

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

David Nash, CPPC, CPPB
Chapter Ambassador
Retired, City of Fort Lauderdale, FL
9026 NW 44 Court
Sunrise, Florida 33351-5336
Phone: (954) 749-5291
amarinash@bellsouth.net

Mina Kaeding, CPPC, CPPB, PhD, FCMC
Chapter Ambassador
Hillsborough County Public Schools
ROSSAC 3rd Floor, Procurement
901 E. Kennedy Blvd.
Tampa, Florida 33601
Phone: (813) 272-4236
Fax: (813) 272-4390
mina.kaeding@sdhc.k12.fl.us

ELIGIBLE CHAPTERS

will be notified:
- At the beginning of the fiscal year (July 1)
- In January as many new chapter officers take place
- Or will be contacted by NIGP staff or the Chapter Ambassador in your area throughout the year
Core Values: Ethics, Integrity, Professionalism, Diversity, Education and Professional Growth, Service to Stakeholders

- Your actions are representative of the chapter
- It is incumbent upon each officer to conduct themselves in a professional manner at all times, regardless of social setting
Chapter of the Year

- Winner 2012 – Medium Chapter of the Year
- Winner 2014 – Medium Chapter of the Year
- Winner 2015 – Large Chapter of the Year
- Winner 2016 – Large Chapter of the Year

- Large Chapter (201-350 members)

- Application due **May 23, 2017**

- *Excellence in Chapter Operations*
- Excellence in Membership Recruitment, Retention and Engagement
- Excellence in Education and Professional Development
- Excellence in Advocacy for Members and the Profession
- Excellence in Inspiring Procurement for the Future
NIGP Required Forms

• Due January 31
  – Chapter Leadership Reporting Form
  – Chapter Member Data Form
• Due March 1
  – Chapter Financial Form
  – Group Exemption Update Form
• Due May 15 or November 15
  – Email Chapter’s 990 or 990N to chapters@nigp.org
Chapter Events

- Speed Buying
- Reverse Trade Show
Officer Transition

- President: Zulay to Diane
- Vice President: Diane to Mike
Acknowledgement of Duties

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.
- Oversees the Chair’s Strategic Plan.
- Develops and assigns Officer’s Business Details annually in accordance with the Bylaws.
- Maintains the current organizational structure in accordance with the Chapter’s Strategic Plan and supports committee chairs and co-chairs for all current committees.
- Develops and maintains the Chapter budget.
- Prepares agenda(s) for all chapter-related meetings.
- Prepares the Chapter’s Annual Report with the Florida Department of State Division of Corporations.
- Prepares and submits the Annual Report to NIGP.
- Maintains regular communication with the membership via email, newsletter, and official meetings.
- Attends Chapter Meeting dates and locations.
- Approves Awards Committee to give out the nominations for Super and Manager of the Year Chapter Awards.
- Performs responsibilities in accordance with the Chapter Bylaws.
- Delegates by-laws amendments on an as-needed basis.

TRANSITIONAL REQUIREMENTS:
- Attend New Officer Orientation Meeting.
- Mentor successful President and provide orientation to new Board members for 12 months.
- Transmit all documents to successor President.
- Serve as President-Elect (SPE) member upon request of successor/President. Duties as assigned.

VICE PRESIDENT’S DUTIES
- Assist the President and act in his/her stead when he/she is unavailable to make meetings.
- Coordinate all questions for each specific Chapter meeting.
- Verify all applications for scholarships and forward a request to the Treasurer for payment reimbursement.
- Coordinate all payments for the certification development committee.
- Coordinate all registrations and travel payments.
- Maintains and makes travel payments on and/or payments monthly to the Chapter website.
- Preps an annual State of the Chapter Address for presentation to the annual Chapter meeting.
- Creates certificates to be handed out in March of each year for member attendance, committee participation, and special recognition.
- Orders plaques, awards, and certificates for Chapter use.
- Prepares monthly newsletter.
- Performs all duties in accordance with the Chapter Bylaws.
- Other duties as assigned by the President.

TRANSITIONAL REQUIREMENTS:
- Attend New Officer Orientation Meeting.
- Mentor successful Vice-President.
- Transmit all documents to successor Vice-President.

2017 BOARD OF DIRECTORS: POSITION DUTIES

SECRETARY’S DUTIES
- Maintains records and minutes from each meeting.
- Upgrades agendas, minutes, documentation, and website to the chapter website.
- Maintains Chapter Documents on the Florida Based (Normal and Online).
- Creates minutes for each monthly board meeting and submits to Board of Directors before examinations.
- Preps and submits Chapter information to NIGP for inclusion on the national website.
- Collects annual acknowledgments from all Officers and Committee Chairs.
- Solicits monthly updates & newsletter contributions from all Committee Chairs.
- Assists President in tracking committee progress on a bi-monthly basis.
- Maintains an accurate log of member participation.
- Preps for contribution for each newsletter.
- Performs all duties in accordance with the Chapter Bylaws.
- Other duties as assigned by the President.

TREASURER’S DUTIES
- Provides monthly budget and recommends the Board for the next meeting, annually increasing the general ledger and providing financial and other statements to the Board.
- Coordinates all funding from the Chapter to ensure funds are available for the President and the Board of Directors.
- Attends all meetings and provides financial reports at each meeting.
- Keeps minutes of all meetings.
- Maintains membership files, and updates the website as necessary with new or changed information.
- Notifies all remaining board members of financial status.
- Provides the bank statement at each meeting, performs all necessary audits at each meeting.
- Updates meeting attendance in the Chapter website within 3 days of each event.
- Tracks meeting attendance.
- Prepares contribution for each newsletter.
- Performs all duties in accordance with the Board Bylaws.
- Other duties as assigned by the President.

TRANSITIONAL REQUIREMENTS:
- Attend New Officer Orientation Meeting.
- Mentor successful Treasurer.
- Other duties as assigned by the President.

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

Volunteer Duties

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.

Futher understanding 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 deadlines 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: ____________

Volunteer’s Name (please print): __________________________

PLEASE SUBMIT FORM TO secretary@cfncigp.org
Open Discussion