HANDBOOK for Officers, Board Members, and Committee Chairpersons
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## SECTION 1
### 2015/16 OFFICERS, DIRECTORS, & COMMITTEE CHAIRPERSONS

### Officers and Directors

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>Location</th>
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<tbody>
<tr>
<td>President</td>
<td>Christine Moody, CPPO, CPPB</td>
<td>City of Portland</td>
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<tr>
<td>Vice President</td>
<td>Gail L. Carter, CPPB, OPBC</td>
<td>Oregon Dept of Admin Services</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Diane Murzynski, CPPB, OPBC</td>
<td>City of Albany</td>
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<tr>
<td>Secretary</td>
<td>Eric Wicks, CPPB</td>
<td>Tualatin Valley Fire and Rescue</td>
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<tr>
<td>1-Year Board Director</td>
<td>Sussanna Ramus</td>
<td>Oregon Youth Authority</td>
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<tr>
<td>2-Year Board Director</td>
<td>Jennifer Jolley, CPPB, OPBC</td>
<td>Oregon Dept of Admin Services</td>
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<tr>
<td>2-Year Board Director</td>
<td>Gretchen Harold, CPPB</td>
<td>Port of Portland</td>
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<tr>
<td>3-Year Board Director</td>
<td>Melody Waight, CPPB, CDT</td>
<td>Oregon State Lottery</td>
</tr>
<tr>
<td>3-Year Board Director</td>
<td>Larry Pelatt, CPPB, CPPB</td>
<td>City of Portland</td>
</tr>
<tr>
<td>Immediate Past President</td>
<td>Linda Lichty, CPPB</td>
<td>Oregon Secretary of State</td>
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### Committee Chairpersons

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<tr>
<th>Committee</th>
<th>Chairperson</th>
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<tr>
<td>Branding</td>
<td>Greg James, CPPB</td>
<td>Springfield School District</td>
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<tr>
<td>Chapter Liaison</td>
<td>Rob Rickard, CPPO, OPBC</td>
<td>Retired</td>
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<tr>
<td>Community Involvement</td>
<td>Dori Palmer,</td>
<td>City of Eugene</td>
</tr>
<tr>
<td>Diversity</td>
<td>Debbie Janke, CPPB, OPBC, OCAC</td>
<td>Department of Education</td>
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<tr>
<td>Historian</td>
<td>Kevin Yin, CPPO, CPPB</td>
<td>City of Vancouver</td>
</tr>
<tr>
<td>Legislative</td>
<td>Brian Smith, CPPO</td>
<td>Multnomah County</td>
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<td>Membership</td>
<td>Connie Lelack, CPPO, CPPB</td>
<td>Oregon Dept of Transportation</td>
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<tr>
<td>Mentorship</td>
<td>Sarah Roth, CPPO, CPPB, OPBC</td>
<td>Oregon Secretary of State</td>
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<td>Merchandise</td>
<td>Elaine Baker, CPPO</td>
<td>City of Hillsboro</td>
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<td>Newsletter</td>
<td>Toby Giddings, CPPO, CPPB, OPBC</td>
<td>Oregon Dept of Admin Services</td>
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<td>NIGP Liaison</td>
<td>Rob Rickard, CPPO, OPBC</td>
<td>Retired</td>
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<tr>
<td>Professional Development</td>
<td>Kaliska King, CPPB, OPBC</td>
<td>Oregon Dept of Admin Services</td>
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<td>Professional Outreach</td>
<td>Adam Helvey</td>
<td>Oregon Dept of Admin Services</td>
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<td>Program</td>
<td>Kim Hankins, CPPO, CPPB, OPBC</td>
<td>Oregon Dept of Admin Services</td>
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<td>Scholarship</td>
<td>Diane Murzynski, CPPB, OPBC</td>
<td>City of Albany</td>
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<tr>
<td>Website</td>
<td>Tom Riel</td>
<td>Business Oregon</td>
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SECTION 2
INTRODUCTION AND HISTORY OF OPPA

This handbook was produced upon direction from the Oregon Public Purchasing Association (OPPA) Board of Directors in order to establish a written guide for consistent operations of the organization.

The handbook is a tool and a reference guide to be used by present and future members of OPPA who are elected or appointed to conduct our business. While this guide provides a good base, it will certainly take the knowledge, experience, and judgment of professionals in order to make it work. Also, as our organization changes over time, so will the responsibilities of its Board of Directors. This manual is intended to be periodically reviewed and updated to reflect those changes.

Purpose

To increase public purchasing knowledge, improve techniques, and provide intergovernmental cooperation through cooperative purchasing.

Principal Objectives

To promote the quality and stature of public purchasing, and to advance this profession through established programs.

OPPA Code of Ethics

1. To give first consideration to the objectives and policies of my public agency.
2. To conduct business with competence, integrity, and dignity and to encourage such conduct by other members.
3. Pursue the maximum value of each dollar of expenditure of public funds while complying with all public contracting statutes, rules and regulations.
4. To decline all personal gifts and gratuities.
5. To grant all organizations (bidders, proposers) fair consideration, to regard each transaction on its own merits; to foster and promote fair, ethical and legal trade practices.
6. To accord a prompt and courteous reception in so far as conditions permit to all who call to conduct legitimate business.
7. To demand honesty in sales representation whether offered through verbal or written statement, an advertisement, or a sample of the product.
8. To foster the development of professional standards among colleagues in his or her public agency and in other member agencies.
9. To prohibit the unauthorized distribution of the OPPA membership mailing list.
10. To counsel and cooperate with OPPA members and to promote a spirit of unity.
General duties of OPPA Officers and Directors:

All OPPA Officers and Directors shall perform the following duties:

1. Be OPPA members in good standing and represent the Chapter in a professional manner at all times

2. Counsel and cooperate with OPPA members and promote a spirit of unity

3. Attend Board meetings and:
   a. Promote a spirit of unity among the Board
   b. Conduct Chapter business with competence, integrity, and dignity, and encourage such conduct by other Board members
   c. Control and manage the finances of the Chapter while applying the fiduciary responsibilities commensurate with the position
   d. Discuss Chapter business, vote on organizational issues, and take action that will serve the best interest of the Chapter
   e. Provide the Board with monthly updates on relevant information;

4. Attend conferences, workshops, and other Chapter related events

5. Assist with:
   a. The coordination and preparation of NIGP's annual "Chapter of the Year" application
   b. Updating the “Handbook for Officers, Board members and Chairpersons”
   c. Welcome and transition in new Board members, Committee and Task Force Chairs
   d. Recruiting and train new Committee Chairs
   e. Planning and preparing for conferences, workshops, and other Chapter related events

6. Forward any signed Agreements or Amendments by OPPA to the Historian.

7. Forward the OPPA Insurance Policy to the Historian.

8. Perform the specific duties for each position described in further sections of this handbook.
9. Perform other duties as related and directed by the President.

**Committee Chairs shall:**

1. Be OPPA members in good standing and represent the Chapter in a professional manner at all times

2. Counsel and cooperate with OPPA members and promote a spirit of unity

3. Be responsible for oversight and coordination and completion of duties assigned to the committee as described further in this Handbook.

4. Conduct committee business with competence, integrity, and dignity, and encourage such conduct by other committee members

5. Attend conferences, workshops, and other Chapter related events as needed or required

6. Submit income and expense projections for the annual budget

7. Provide the Board with monthly updates on relevant information. If there is no new activity to report send the report stating: “No new activity to report”.

8. Maintain relevant documentation for submittal of annual NIGP Chapter of the Year award application

9. Maintain the committee webpage

10. Assist with:

   a. Recruiting and training new committee members

   b. Updating the “Handbook for Officers, Board members and Chairpersons”

   c. Planning and preparing for conferences, workshops, and other Chapter related events

11. Perform other duties as related and directed by the President or the Board

**Taskforce Chairs shall:**

1. Be OPPA members in good standing and represent the Chapter in a professional manner at all times

2. Counsel and cooperate with OPPA members and promote a spirit of unity
3. Be appointed by the President or the President’s designee

4. Report directly to the President or the President’s designee

5. Be responsible for oversight and coordination and completion of duties assigned to the committee as described further in this Handbook.

6. Conduct taskforce business with competence, integrity, and dignity, and encourage such conduct by other taskforce members

7. Provide the Board with monthly updates on relevant information;

**History of OPPA**

OPPA was formed in 1969 by a group of purchasing agents from a variety of public agencies who met to discuss common purchasing concerns over dinner. The dinner meetings became routine and attendance at the meetings grew. The need for more structured meetings became apparent and Officers and Board members were elected. In 1982, the dinner meetings were changed to full day workshops to provide more time for training and discussions.

On May 9, 1991, OPPA became a chartered Chapter of NIGP The Institute for Public Procurement (NIGP). This affiliation is the finest governmental purchasing association in the world and provides many outstanding benefits for OPPA members, including professional certification, informational resources, and training.

Today the OPPA Chapter of NIGP boasts over 400 members from agencies throughout Oregon and southwestern Washington. OPPA promotes professional public purchasing through training and cooperative interaction. Workshops are structured to meet the ever changing needs of public purchasing professionals.
SECTION 3
IMMEDIATE PAST PRESIDENT

General Duties and Responsibilities

1. Advise and assist the President, perform all duties incidental to the office of the Immediate Past President.

2. Chair the Compliance Audit Task Force and Budget Task Force.
SECTION 4
PRESIDENT

General Duties and Responsibilities

1. Exercise general supervision over the affairs of the Chapter, preside over all meetings of the Chapter, be a member ex-officio of all committees, and Task Forces, perform all duties incidental to the office of the President.

2. Chair all Board Meetings and participate in discussion and decision making of Chapter issues.

3. Set and publish an agenda for all Board Meetings. Oversee the order, discussion, Committee and Task Force reports of the meetings.


5. Host Chapter workshops, introducing guests, speakers, and other attendees as needed.

6. Host the President's reception at Fall and Spring Conferences, ensuring all members are welcomed to the function.

7. Serve as a representative to the NIGP the Institute for Public Procurement (NIGP) for issues on behalf of the Chapter, and update OPPA members on new issues and programs.

8. In the event of a tie vote within the Board, President shall cast the deciding vote.

9. Assign duties to Officers, Committees, and Task Forces that are in the best interest of the organization and appoint Task Forces to perform OPPA business as needed.

10. Attend the NIGP Annual Forum on behalf of the Chapter. In the event that the President is unable to attend, the opportunity will move down the rank of the Officers and Board members.

11. Serve as an alternate/additional signer on the Chapter bank accounts.

12. Select and award a recipient of the Annual President's Award at the Spring Conference.

13. Coordinate with Department of Administrative Services on the recommendation to the Governor's Office for designating March as Purchasing Month in the State of Oregon and post proclamation on OPPA website.

14. Submit local chapter award winners’ names to NIGP for publication.

15. Coordinate a Board review of the OPPA Handbook between June – August each year. Update the Handbook and distribute to Board.

16. Coordinate with the Board and membership on approval of revisions to the ByLaws as needed.
SECTION 5
VICE PRESIDENT

General Duties and Responsibilities

1. Assist in the preparation of the upcoming, proposed budget.

2. Advise Chapter Committees and Task Forces as needed.

3. Perform the duties of President in the absence of the President.

4. Assist with planning and preparation of special Chapter events.

5. Accept assignments from President when called upon to do so.

6. Assist newly elected Officers and Directors when needed.

7. Attend the NIGP Annual Forum on behalf of the Chapter. In the event that the Vice President is unable to attend, the opportunity will move down the rank of the Officers and Board members.

8. Coordinate and submit annual “Chapter of the Year” application to NIGP.
SECTION 6  
TREASURER

General Duties and Responsibilities

1. Maintain a complete and accurate record of all Chapter receipts, expenditures, and reimbursements using the Board approved Accounting software program on the OPPA Treasurer laptop. Back up the files when prompted by the accounting software on the OPPA Treasurer USB drive.

2. Prepare invoices as appropriate.

3. Keep the anti-virus and spyware protection up to date on the OPPA Treasurer Laptop.

4. Prepare a current financial report and distribute at each Board meeting. The reports shall consist of all expenditures and revenues as well as current fund balances.

5. Prepare and sign all Chapter checks, or arrange to designate this duty to the President if Treasurer will be unavailable.

6. Maintain responsibility for Chapter checking funds, keeping them balanced and in a secure place.

7. Pay all Chapter invoices as needed. Prior to paying invoices, Treasurer shall verify that payment is appropriate.

9. Maintain the annual budget and alert Board when expenditures are inconsistent with budget goals.

10. Reimburse Officers and Board members for OPPA approved expenses.

11. Review payment request form and charge appropriate budget categories when paying Chapter expenses.

12. Prepare and file the yearly tax return with the IRS.

13. Investigate banking issues for checking and savings account at the direction of the Board.

14. Receive chapter mail and forward to appropriate Board and Committee Chair Members.

15. Train the incoming Treasurer on using Board approved Accounting Software programs. Transfer custody of Laptop, USB Drive and other treasurer files to incoming Treasurer.

16. Maintain audit records by month; each file shall include a copy of the treasurer report, the bank statement, and receipts or documentation of each transaction.
17. Perform other duties as related and directed by the President or Board.

18. Coordinate NIGP group registration and gather agency payments and individual registrations to provide OPPA Forum Group Registration and payment to NIGP.
SECTION 7
SECRETARY

General Duties and Responsibilities

1. Maintain a written record of all Board meetings and Membership meetings.

2. Maintain a record of all electronic voting by the Board and include in the monthly minutes of when the vote occurred.

3. Distribute one week prior to, each Board Meeting, the minutes of the prior Board meeting.

4. Perform duties of Treasurer for the Reverse Vendor Trade Show.

5. Ensure approved minutes on OPPA website monthly.
SECTION 8
DIRECTORS

General Duties and Responsibilities

1. Serve for a term of three years.

2. Share responsibility for the following:
   (a) Assist the Vice President with coordination and preparation of NIGP's annual "Chapter of the Year" application
   (b) Update the “Handbook for Officers, Board members and Chairpersons”

3. Assist in the administration of their committees including but not limited to:
   (a) Creating a yearly work plan for your assigned section.
   (b) Coordinate the Committees efforts with those of other Committees
   (c) Work with the President to find new Committee Chairs or members as needed
   (d) Train and guide Committee Chairs

5 Director Positions:

Director of Professional Outreach
   (a) Membership
   (b) Mentorship
   (c) Diversity
   (d) Professional Outreach

Director of Communication
   (a) Newsletter
   (b) Website
   (c) Legislative Committee

Director of Education
   (a) Program
   (b) Pro-D

Director of Marketing
   (a) Community Involvement
   (b) Branding
   (c) Merchandise

Director of Chapter Relations
   (a) Chapter Liaison
   (b) NIGP Liaison
   (c) Historian
   (d) Scholarship
SECTION 9
BRANDING COMMITTEE

General Duties and Responsibilities

1. Responsible for marketing and strengthening the OPPA brand.

2. The committee shall:

   a. Develop and standardize OPPA business documents, certificates, and promotional materials;
   b. Create standards for use of the OPPA brand on the website;
   c. Assist with the development of OPPA branded merchandise and promotional materials;
   d. Assist with the sale and distribution of OPPA branded merchandise;
   e. Maintain a branding manual;
   f. Provide a minimum of one newsletter article per year on the subject of branding.

SECTION 10
CHAPTER LIAISON COMMITTEE

General Duties and Responsibilities

1. Act as a liaison with other chapters of NIGP.

2. The committee shall:

   a. Enhance the flow of information between Chapters including information on training schedules and Chapter events;
   b. Provide a minimum of one newsletter article per year on the subject of Chapters of NIGP;
   c. Coordinate annual review of Inter Chapter Agreement(s) with current Chapter Presidents.
   d. Participate on the planning committee for the Reverse Vendor Trade Show.
SECTION 11
COMMUNITY INVOLVEMENT COMMITTEE

General Duties and Responsibilities

1. Responsible for increasing OPPA awareness and involvement in community charity and volunteer opportunities.

2. The committee shall:
   a. Host at least one major charitable fundraiser/year for a non-profit entity at the annual Spring Conference;
   b. Identify a charity and liaison with the organization, participate at a charity booth, provide merchandise sales including website sales, advertise, solicit donations, and obtain an event speaker from the organization;
   c. Provide OPPA members an opportunity to be involved in one community project per year, identify the organization, liaison with the organization, advertise the project, and schedule member participation;
   d. Optional: Host a charity fundraiser for a non-profit entity at the annual Fall Conference;
   e. Provide a minimum of one newsletter article per year on the subject of community involvement.

SECTION 12
DIVERSITY COMMITTEE

General Duties and Responsibilities

1. The committee shall:

   Encourage a safe and supportive environment within the Chapter that honors and respects individuals with varied demographic, cultural, human, intellectual, and philosophical differences.

   a. Sponsor a Diversity Essay Contest and coordinate with Newsletter Chair. (OPPA members will select the winner).
   b. Provide website posts on varying aspects of diversity in the workplace;
   c. Work with Program Committee to provide potential diversity educational options, inclusive of cultural and supplier-related subjects;
   d. Provide a minimum of one newsletter article per year on the subject of diversity.
SECTION 13
HISTORIAN COMMITTEE

General Duties and Responsibilities

1. Responsible for advising and maintaining the Chapter's records retention policy and schedule, as it pertains to the care, control, destruction, retention and disposition of records.

2. The committee shall:
   a. Retain documents and records in accordance with the Chapter Records Retention Schedule;
   b. Safeguard sensitive data that is under the care and control of OPPA;
   c. Store archived items at a location mutually agreed upon by the Historian and the Board;
   d. Avoid undue accumulation of records and documents.

SECTION 14
LEGISLATIVE COMMITTEE

General Duties and Responsibilities

1. Responsible for providing relevant and educational information with regards to proposed and/or enacted legislation to the membership.

2. The committee shall:
   a. Maintain a bill tracking system throughout legislative sessions;
   b. Provide updates on the progress of pertinent National, State, and Local Government legislation;
   c. Provide tools and resources for member legislative research;
   d. Provide a minimum of one newsletter article per year on the subject of procurement issues currently before the Legislature.
SECTION 15
MEMBERSHIP COMMITTEE

General Duties and Responsibilities
1. Manage the membership application and renewal process, maintain the Chapter membership roster, and provide information and outreach to new and prospective members.

2. The committee shall:
   a. Maintain a current membership directory by electronic or other means and make available the directory to the Board and general membership.
   b. Provide Chapter Member data form to NIGP no later than January 31.
   c. Provide information to prospective members including a letter from the President or Membership Committee chairperson;
   d. Accept and review new member applications, notify applicants of approval or denial, inform the Board of new members monthly;
   e. Provide newly approved members with an acceptance letter, membership certificate, and invoice if required;
   f. Add new members to membership database/roster, alert the Website Committee and the Newsletter Committee of new members;
   g. Issue membership renewal notices and invoices for the following calendar year beginning in October; if dues are received from a non-member, send application to that person;
   h. Coordinate event tasks with committee chairpersons which include providing a sign-in roster and name tags, staffing the registration table, accepting fees, and issuing receipts;
   i. Provide a minimum of one newsletter article per year on the subject of membership benefits.
SECTION 16
MENTORSHIP COMMITTEE

General Duties and Responsibilities

1. Provide career development opportunities for members seeking the betterment of public procurement through mentorship and the transference of knowledge and experience from learned members.

2. The committee shall:
   a. Develop strategies to promote and deliver the mentorship program;
   b. Research, develop and update mentorship program curriculum;
   c. Ensure program applications are available on the website;
   d. Collect and evaluate applications, match mentors and mentees, and provide mentorship materials to program participants;
   e. Provide a minimum of one newsletter article per year on the subject of mentorship benefits.

SECTION 17
MERCHANDISE COMMITTEE

General Duties and Responsibilities

1. Market and strengthen the OPPA brand through the purchase, sale, and distribution of branded merchandise.

2. The committee shall:
   a. Assist with the development and acquisition of OPPA branded merchandise;
   b. Provide merchandise for sales opportunities at OPPA events, and relevant professional and community events;
   c. Distribute OPPA merchandise to committees for use in the accomplishment of their goals;
   d. Maintain OPPA Online Store;
   e. Submit income and expense projections for annual budget;
   f. Coordinate with Program Committee regarding the Spring Conference attendee registration packet contents;
   g. Maintain inventory of all OPPA merchandise.
SECTION 18
NEWSLETTER COMMITTEE

General Duties and Responsibilities

1. Provide a relevant and educational newsletter to the membership.

2. The committee shall:

   a. Provide the membership an electronic newsletter on a quarterly basis, provide newsletter to the Website Committee;
   b. Provide content containing relevant procurement related information and upcoming professional development opportunities;
   c. Maintain a professional looking format that follows the branding guidelines;
   d. Recruit members to provide articles and provide a quarterly editorial column;
   e. Photograph events. Event photographs will reflect the professional, ethical and positive image of the Chapter.

SECTION 19
NIGP LIAISON COMMITTEE

General Duties and Responsibilities

1. Responsible for liaison functions with NIGP.

2. The committee shall:

   a. Facilitate the flow of information between the Chapter and NIGP;
   b. Provide a minimum of one newsletter article per year on the subject of NIGP.
SECTION 20
PROFESSIONAL DEVELOPMENT COMMITTEE

General Duties and Responsibilities

1. Coordinate and plan all NIGP seminars sponsored by the Chapter.

2. The committee shall:

   a. Monitor UPPCC certification requirements, provide certification information, and assist members with the certification application process;
   b. Annually, in cooperation with Columbia Chapter Professional Development chairperson, develop a calendar of available NIGP courses containing relevant procurement related information and certification reviews;
   c. Release training information to OPPA and Columbia Chapter, submit a calendar of events to newsletter editor and the Website Committee;
   d. Work directly with NIGP to schedule seminars and certification reviews, and arrange for instructors to provide courses;
   e. Prepare and submit NIGP Logistic forms early enough to meet early registration dates;
   f. Liaison with the instructors prior to the beginning of courses, and introduce instructors at the event;
   g. Coordinate the seminar logistics including obtaining a training site, providing a sign in sheet, classroom equipment, NIGP training materials, meals or snacks, site visits at the beginning of class, at lunch, and at the end of the day, and evaluations;
   h. Gather and submit required paperwork to NIGP, maintain NIGP reports for seminar attendees;
   i. Maintain an expense report for each seminar, coordinate the income and expense payments with the Treasurer;
   j. Provide a minimum of one newsletter article per year on the subject of NIGP professional development.
SECTION 21
PROFESSIONAL OUTREACH COMMITTEE

General Duties and Responsibilities

1. Develop relationships with professional organizations, community based organizations, and public entities.

2. The committee shall:
   a. Represent OPPA at government meetings;
   b. Build relationships with colleges and universities;
   c. Attend and provide information at career/employment fairs and the Reverse Vendor Trade Show;
   d. Submit a calendar of events to the Website Committee;
   e. Provide a minimum of one newsletter article per year on the subject of community involvement.
   f. Coordinate with the Awards Task Force to issue press releases to one or more local papers including a photo if available; generally NIGP, the Daily Journal of Commerce, and a newspaper near the recipient’s hometown are notified of each award.
SECTION 22
PROGRAM COMMITTEE

General Duties and Responsibilities

1. Coordinate and plan all OPPA workshops and conferences.

2. The committee shall:
   
   a. Secure educational facilities that are fiscally responsible, as conveniently located as possible, and provide maximum service and benefits to members, by applying and administering an RFP process for event sites;
   
   b. Review/sign contracts with the host site and provide status reports to the Board;
   
   c. Provide courses containing relevant procurement related information that provides professional development opportunities;
   
   d. Maintain a current list of topics requested by the membership;
   
   e. Annually develop a calendar of events, advertise events, provide schedule to the Website Committee, the Newsletter Committee, the Columbia Chapter, and NIGP;
   
   f. Coordinate the training site logistics including providing agendas, an onsite coordinator, classroom set-up, classroom equipment, training materials, meals and/or snacks (if applicable), entertainment (if applicable), and certificates of participation;
   
   g. Liaison with the speakers including collecting biographies, coordinating travel, lodging, and transportation, and providing thank you notes and speaker honorariums;
   
   h. Provide electronic evaluations and collect responses, report results to the Board;
   
   i. Maintain an expense report for each event, coordinate the income and expense payments with the Treasurer;
   
   j. Provide a minimum of one newsletter article per year on the subject of OPPA training.
SECTION 23
SCHOLARSHIP COMMITTEE

General Duties and Responsibilities

1. Provide scholarships to members who have a desire to further their knowledge and expertise in public procurement through continuing education.

2. The committee shall:
   a. Maintain the Scholarship Application;
   b. Accept scholarship applications, as submitted, and distribute to committee members for evaluation;
   c. Evaluate applications using the criteria set forth in Section 33 of this Handbook and provide award/denial letters to applicants;
   d. Maintain an expense report and coordinate the income and expense payments with the Treasurer;
   e. Annually review the scholarship award criteria and submit proposed revisions to the Board;
   f. Provide a minimum of one newsletter article per year on the subject of the Scholarship Program.
SECTION 24
WEBSITE COMMITTEE

General Duties and Responsibilities

1. Develop, manage, and maintain the content of the Chapter website.

2. The committee shall:
   
   a. Market and strengthen the OPPA brand by maintaining a professional looking format that follows the branding guidelines;
   b. Advertise relevant procurement related information and upcoming professional development opportunities;
   c. Post membership information, OPPA business documents and forms, the Handbook, the Strategic Plan, newsletters, the event calendar and event information, the membership directory, and other relevant, appropriate information, documents, and photographs;
   d. Ensure functionality of event registration and money collection tools;
   e. Ensure functionality of Blog and List Serve;
   f. Offer guidance to committees on the content and formatting of individual committee web pages;
   g. Research and develop new web applications;
   h. Provide a minimum of one newsletter article per year on the subject of the website.
   i. Monitor the OPPA Chapter email address and forward emails to the appropriate Board or Committee Chairs;
   j. Monitors and initiates domain name registration/renewal.
SECTION 25
AUDIT TASKFORCE

General Duties and Responsibilities

1. Coordinate the annual review of the Chapter’s financial records.

2. It may be helpful to appoint the incoming Secretary to the taskforce so the new Officer may become acquainted with the organization of the Chapter’s finance records.

3. The taskforce shall:
   
   a. Collect documentation needed to perform the compliance audit from the Treasurer;
   
   b. Review past year’s Treasurer’s records of Chapter income and expenses and verify accuracy of records;
   
   c. Prepare a compliance audit report, the report will give a statement of accounts based upon actual income and expenses;
   
   d. Prior to the next regular membership meeting, present the audit report to the Board for approval;
   
   e. President will present the Board approved audit report to the membership at the next regular membership meeting;
   
   f. After the report has been presented to the membership, forward it to the Website Committee for posting to the website.
SECTION 26
AWARDS TASKFORCE

General Duties and Responsibilities

1. Oversee the Chapter award nominations and selection of award recipients as per Sections 31 and 32 of this Handbook.

2. The taskforce shall:

   a. Prepare and distribute Award Nominations News Release with the Award Nomination Forms by the end of January;
   b. Communicate with the committee chairpersons regarding the eligibility of their committee members;
   c. Coordinate the Volunteer of the Year and President’s Awards with the President;
   d. Distribute award nomination deadline reminders, collect nominations by mid-February;
   e. Evaluate award nominations;
   f. Present taskforce recommendations to the Board at the regular March meeting;
   g. Upon Board approval, communicate with Buyer and Manager of the Year awardees; prepare a cover letter to NIGP for successful candidates;
   h. Develop final list of awards & awardees for the vendor, proof spelling, and awardees certifications, and submit to award vendor;
   i. Maintain an expense report and coordinate the vendor payments with the Treasurer;
   j. Coordinate receipt and transportation of awards to Spring Conference;
   k. Coordinate presentation of awards and presenters with the President;
   l. Coordinate with Professional Outreach Committee to issue press releases to one or more local papers including a photo if available; generally NIGP, the Daily Journal of Commerce, and a newspaper near the recipient’s hometown are notified of each award.
SECTION 27
BUDGET TASKFORCE

General Duties and Responsibilities

1. Preparation the draft budget for the upcoming fiscal year.

2. It may be helpful to appoint the incoming Secretary to the taskforce so the new Officer may become acquainted with the organization of the Chapter’s budget.

3. The taskforce shall:
   a. Collect documentation from the committee expense/income reports;
   b. Based on historical data and the anticipated Chapter income and expenses, prepare and distribute a draft budget to the Board and committee chairpersons;
   c. Discuss committee recommendations with Directors;
   d. Based committee recommendations and Director input, prepare and distribute a 2nd draft budget to the Board;
   e. Based on Board input create a final draft budget and submit to the Board for approval;
   f. Post Board approved final draft budget to the website for member review and input;
   g. Assist President with the budget presentation to be presented at the Annual Meeting, generally held the Fall Conference.
SECTION 28
ELECTIONS TASKFORCE

General Duties and Responsibilities

1. Conduct the annual election of Officers in accordance with the procedures set forth in ARTICLE V - NOMINATIONS AND ELECTIONS of the Chapter Bylaws.

2. The taskforce chairperson shall:
   a. Communicate with President regarding the nominations and election schedule in January;
   b. Electronically distribute Nomination News Release notifying members nominations will be accepted for open OPPA Board positions; nominations will be open a minimum of be two weeks;
   c. Collect nominations and immediately notify nominees; send an OPPA Board Nomination Information Form with the notification. Nominees will have until two weeks, or until the end of the nomination period, the lesser of the two, to complete and return the form to the chairperson;
   d. Collect completed forms and post to the website;
   e. Set up the election using Survey Monkey or a comparable electronic method;
   f. Create a temporary Login and Password for use during the election period and be the only member with access to this information;
   g. Electronically distribute instructions on the voting procedure and how to access the nominee information; the election period shall be a minimum of two weeks.
   h. Send a voting reminder to the membership one week prior to the closing of the election period;
   i. Print election results and forward to Historian and delete the survey from the system; restore original Login and Password;
   j. Share election results with the Board;
   k. Electronically share the election results with the membership within five business days after the election closes. Election results shall include winning candidate’s name and the total number of members who voted.
   l. Detailed election results with candidates names and number of votes candidates received are available upon request.
SECTION 29
CHAPTER AWARDS

Types of Awards

The association shall present the following awards on an annual basis:

- Professional Buyer of the Year
- Professional Purchasing Manager of the Year
- President’s Award
- Mentor of the Year
- Volunteer of the Year

Manager and Buyer of the Year Awards

These are annual awards presented to OPPA members who have demonstrated outstanding professionalism and contributed significantly to the advancement of the public procurement profession and professional development during the past calendar year.

For the purposes of this award, the definition of Manager is limited to those public procurement professionals who have supervisory and/or management responsibilities in their organization.

For the purposes of this award, the definition of Buyer is limited to those professional public buyers who have little or no supervisory or management responsibilities in their organization.

NIGP Manager and Buyer of the Year award criteria shall serve as a guideline for the OPPA award criteria.

Nominations

Candidates for these awards will be selected from nominations submitted by OPPA members or a Public Entity management professional.

The nomination period shall be held sometime within the first two (2) calendar months of each year. The Awards Taskforce will notify the membership of the nomination period via OPPA-Link and a general posting on the OPPA Website. The notification will include, at a minimum, the procedures and deadlines for submitting nominations and access to the award nomination forms. The membership shall have, at a minimum, 2 weeks to submit nominations. Nominations will be submitted on award nomination forms; multiple nominations are allowed.
The Awards Taskforce will contact award nominees and request they complete the OPPA Manager of the Year or OPPA Buyer of the Year Scoring form. The nominee may request assistance with the completion of these forms from the taskforce.

Selection

The Awards Taskforce will evaluate and score each scoring form returned by a nominee. The scoring shall be based on the scored criteria outlined in the scoring form. A nominee must receive a minimum of fifteen (15) points in the “CONTRIBUTIONS TO OPPA” section and a minimum of fifteen (15) points in the “CONTRIBUTIONS TO THE ENTITY NOMINEE SERVES” section to be eligible to receive the award.

Only one (1) nominee may be selected for each award. In the event of a tie score, the tie shall be resolved by giving precedence in the following order:

1. Points earned in “CONTRIBUTIONS TO OPPA”
2. Points earned in “CONTRIBUTIONS TO THE ENTITY NOMINEE SERVES”
3. Points earned in “CONTRIBUTIONS TO NIGP/PROFESSION”

The awardees’ names will be provided to the President prior to the March Board Meeting. The President will present the awards at the annual Spring Conference. If the President is an awardee, the Vice President, or their Designee, will make that presentation. The award shall consist of a plaque engraved with the awardees’ name and their entity’s name and shall be consistent in quality and appearance to past awards.

National Award Eligibility

Awardees may choose to compete nationally for the NIGP Buyer or Manager of the Year Award. If so, past award winners and/or current Board members will be available to assist awardees with the preparation and submission of the NIGP Submission Form.

The awardees’ NIGP Submission Form will be complete, professional in appearance, and submitted in the then current format prescribed by NIGP. The submission shall include a Letter of Support from the Board on OPPA letterhead. The awardee will be the only OPPA member who receives a Letter of Support from the Board in that award category.

Attendance at the NIGP Annual Forum and Products Exposition

If an awardee exhibits a willingness to compete for the national award and submits a completed NIGP Forum Submission Form to NIGP, financial reimbursement toward attendance up to $1500.00 shall be provided to the awardee to assist with registration, transportation, and hotel expenses.

Allowable reimbursable expenses are limited to those identified in SECTION 37 OTHER OPPA PROVISION AND GUIDELINES of this Handbook under “reimbursements allowed for the
President’s and Vice President's attendance at the annual NIGP Forum”. Appropriate documentation shall be provided to the Treasurer to claim the reimbursement.

**Local and National Recognition**

Awardees will be recognized in the following manner:

The President will submit awardees names, in writing, to NIGP
The Website Committee will post the awardees’ names to the OPPA Website
The Newsletter Committee will announce the awardees’ names in the OPPA newsletter
The Awards Taskforce will issue a press release accompanied by photo of the awardee (if available) to one or more newspapers including a newspaper near the hometown of the awardee. Traditionally the Daily Journal of Commerce is also notified.

**President’s Award**

This award shall be presented to an OPPA member who demonstrated outstanding leadership and accomplishment in the field of professional public purchasing. The awardee shall be selected by the current OPPA President, and shall not require a specific criteria or application process. The awardee shall be honored at the Annual Spring Conference, with the name of the awardee being undisclosed until that time.

**Mentor of the Year**

This award recognizes an individual, who has been a mentor, formally or informally, to an OPPA member. *(Participation in OPPA’s Mentorship Program is not a requirement, and eligibility for award is not contingent upon recipient having met ALL of the criteria listed below.)* This award shall be presented to an OPPA member, who has demonstrated a commitment to OPPA, the development and success of another member’s career, and the public procurement profession. Selection shall be made by the designated committee, and the awardee shall be honored at the Annual Spring Conference, with the name of the awardee being undisclosed until that time. This individual shall be someone who:

- has generously and selflessly passed on his/her learned experience and knowledge; continuously promotes a sense of camaraderie within the profession;
- promotes team spirit within the individual’s agency, and facilitates positive communications;
- has demonstrated both the art and science of public purchasing within the public procurement arena;
- has shown the member how to navigate the politics within the member’s agency;
- has inspired the member to achieve professional goals and provides valuable assistance to the member in achieving those goals;
- is the go-to person for answers to especially vexing or perplexing problems;
- is someone who the member attributes to having gotten him/her started in public purchasing.
Volunteer of the Year Award

Selection shall be made by the designated committee, and the awardee shall be honored at the Annual Spring Conference, with the name of the awardee being undisclosed until that time. This award shall be presented to an OPPA member whose:

- Contributions provided a needed service to OPPA;
- Involvement with the organization exceeds expectations;
- Initiative was instrumental in the development of programs, ideas, or methods to solve problems and/or enhance OPPA’s strategic goals and objectives;
- Character has made a positive difference to the membership;
- Activity or service resulted in positive changes for the Chapter.

Questions

Any questions regarding the Awards can be directed to the OPPA Awards Chair or a member of the OPPA Board of Directors.
SECTION 30
HAROLD F. VAUGHAN SERVICE AWARD

1/10/1925 – 6/13/2007

Description

The Oregon Public Purchasing Association (OPPA) established the Harold F. Vaughan Service Award in 1998. The purpose of this award is to acknowledge and recognize professional purchasers who have provided exemplary service to OPPA over the course of their career.

This award was named after Harold F. Vaughan, CPPO, C.P.M., retired Purchasing Director from the City of Portland. Vaughan was a lifetime member of both NIGP Chapters in Oregon and a long-time member of NIGP. Vaughan played a critical role in advocating public purchasing, helped raise the level of professionalism in public purchasing in Oregon, and was a recipient of NIGP’s Distinguished Service Award.

Harold Frank Vaughan of Gladstone, Oregon, died June 13, 2007. He was born January 10, 1925, in Freeport, Illinois, as the second child to Joseph Grahame Vaughan and Edna Christen Vaughan. He graduated from Freeport High School as president of the class of 1942.

After his freshman year at Beloit College (Beloit, Wisconsin), he was drafted into military service in the U.S. Navy, where he was assigned to the Seabees and served in the American, European, and Pacific theatres. After receiving an honorable discharge, he returned to Beloit College where he earned a Bachelor of Arts in Liberal Arts in 1949.

Vaughan went to work for the Micro Switch Division of Minneapolis Honeywell and later Newell Manufacturing Company, both of Freeport. In 1974, he was assigned by Newell to serve as Vice President and General Manager of its Dorfile Manufacturing Company subsidiary, based in Milwaukie, Oregon. After leaving Newell in 1976, he served as Purchasing Manager for the City of Portland. He retired from the City in 1988.

Vaughan was national director of the National Institute of Government Purchasing (NIGP). He established the Columbia Chapter in the Pacific Northwest, was its first president, and was a charter member and past president of the Oregon Public Purchasing Association chapter. In 1999 he was awarded NIGP's Distinguished Service Award. The Oregon Public Purchasing Association honored Vaughan by naming its Distinguished Service Award the "Harold F Vaughan Distinguished Service Award."
Eligibility

A nominee must be a current or past member of OPPA, and not a current Board member. The person must be nominated by a peer and have extensive public purchasing experience. They need not be retired from public purchasing to be eligible for this award.

This is an award for outstanding long-term service in purchasing, and is intended to be an acknowledgement for individuals with distinguished careers in government procurement.

Nomination Process

Nominations are to be made in writing and submitted to the Awards Chairperson of the OPPA Board. The nomination must be made by a peer and clearly demonstrate the accomplishments of the person, consistent with the following criteria. Nominations must be submitted by March 31 of each year.

Nominations shall be submitted on the OPPA award form and should include, but not be limited to: a brief narrative, reference letters, articles, achievement certificates, program descriptions, etc. The nomination needs to clearly demonstrate the caliber and worthiness of the nominee.

Criteria

Nominees shall be professional purchasers who have contributed to OPPA and demonstrated outstanding professionalism in procurement. Nominees should be long term career public purchasing professionals.

Nominees shall have actively participated in chapter events and trainings, and have brought credibility and excellence to public purchasing. They shall have actively promoted OPPA and NIGP through their professionalism and support of professional development.

They shall have maintained high ethical standards in accordance with the NIGP Code of Ethics.

In short, the individual shall have made significant contributions to the profession over the course of many years.

Award Selection

The OPPA Board of Directors shall consider all nominations that are submitted. The Board shall review nominations, requesting additional information if needed, and decide on awardee by super-majority vote of at least 66% at a Board meeting prior to the Annual Spring Conference.

The award, if made, will be held in confidence and presented to the recipient at the Annual Spring Conference. Those nominees that are considered, but not selected, will also remain in confidence. Individuals may receive this award one time only, but they may be nominated more than once.
This award shall be made as appropriate, but not necessarily every year. Only when nominations are submitted, and a worthy candidate is selected by the Board, shall this award be bestowed. This award shall remain separate from the OPPA President’s Award.

Questions

Any questions regarding the Harold F. Vaughan Service Award can be directed to the OPPA Awards Chair or a member of the OPPA Board of Directors.
SECTION 31
SCHOLARSHIP PROGRAM

INTRODUCTION

The OPPA Scholarship Program provides scholarships to members, who have a desire to further their knowledge and expertise in public procurement through continuing education, are in good standing, and have made contributions to OPPA through serving on various committees to helping with workshops/events and promoting the value of membership in OPPA to public purchasers in the state.

1. SCHOLARSHIP PROGRAM

The Program provides scholarships for the following types of events:

- Attendance to the OPPA annual Spring Conference
- Attendance to the OPPA annual Fall Conference
- Attendance to an OPPA workshop
- Attendance to an NIGP sponsored workshop (TBD).
- Attendance to the NIGP National Forum*

*Note: If applying for a scholarship for attendance to the NIGP National Forum (Forum), OPPA will pay for up to 75% of the registration fee. In addition, the OPPA Board reserves the right to consider reimbursing up to 100% of registration, transportation, and lodging expenses of its scholarship recipient(s). Reimbursement will be based on GSA per diem schedules or other OPPA Board approved transportation and lodging expenses. Meals shall not be reimbursed. OPPA shall continue to support attendance to the NIGP National Forum as budget permits. When budget allows OPPA to reimburse its Forum scholarship recipient(s) for transportation and lodging expenses, the Scholarship Chair will announce this opportunity via electronic means advising the members of the Board's decision to pay for these additional expenses for that Forum year.

The types of workshops listed above are not all inclusive. This is a sample listing of the types of procurement related workshops OPPA considers for awarding scholarships.

Special Requests of funds for events not listed above that will be paid from the Scholarship Committee should be reasonable and procurement related. This type of request will be reviewed by the Committee and brought to the Board for approval. Awards for this type of event are capped at $500.00.
OPPA will pay up to 75% of the total cost of attendance to these workshops including transportation and lodging expenses (except National Forum- see note above*). Transportation and lodging for non-Forum conferences or workshops will be reimbursed at conference lodging rates for lodging or the current GSA per diem rates. Meals shall not be reimbursed. Any OPPA scholarship recipient who does not use scholarship funds awarded for its intended purpose shall be required to repay OPPA, within 45 days, the amount awarded. OPPA scholarship recipient shall provide a final reconciliation expense report with receipts within 45 days of the conclusion of the workshop/conference/event.

When applying for a scholarship, you must be a member in good standing. Scholarship requests must be for procurement related training or events. You may apply for any of the scholarships in this program, but cannot receive more than one scholarship within a 12-month period from the last date of the training or event for which the scholarship was awarded unless approved by the Board.

Selections will be based on the justification and merits of each application and in accordance with the criteria established below. Scholarships will be awarded throughout the year. Successful scholarship applicant(s) shall be notified in writing or electronic means of their selection as a scholarship recipient.

OPPA Board members and scholarship committee members are ineligible for scholarships in this program during their term in office.

The scholarship program will be promoted through the OPPA Newsletter, workshops, Chapter Manager email alerts, and the OPPA website.

2. SCHOLARSHIP COMMITTEE

A scholarship committee, consisting of three OPPA Board members, will be established and appointed by the President of OPPA.

The selection of scholarship recipients will be determined by the Scholarship Committee.

3. SCHOLARSHIP COMMITTEE GUIDELINES

Applications for scholarships shall be submitted to the Chair of the Scholarship Committee who will review applications received and ensure they are complete.

The Scholarship Chair will work with the Scholarship Committee to determine if any potential conflict of interest exists. No Committee member will rule on an application for which a conflict of interest exists.

Members of the Scholarship Committee may not sign scholarship applications as Managers, and will recuse themselves from discussion or voting on the applications of individuals who they recognize to be their subordinates.
Upon selection of scholarship recipient(s), the Scholarship Chair shall notify the President of OPPA of the results and the scholarship recipient(s). The Scholarship Chair will prepare notification letters and send them by mail or electronic means to the successful applicants. Notice will be provided to the Newsletter Chairperson for publication in the OPPA Newsletter.

4. SCHOLARSHIP SELECTION CRITERIA

The committee will review all scholarship requests and award points as outlined on the scholarship application. OPPA members applying for a scholarship should complete the entire application and score at least 60 points to be awarded a scholarship. Scholarships will be based on the following criteria:

1. OPPA Membership - The requestor will select between less than 5 years or more than 5 years.

2. Certifications – Does the requestor have any of the following certifications? OPBC, OPAC, CPM, CPPB, CPPO, or None. Any other procurement related certifications?

3. What you would like to accomplish by attending the class – Requestor will have an option to select one of the specified reasons or list their own.

   a. Contributions to the Procurement Profession- to be submitted by all applicants. The request should contain information that shows contributions the individual has made to the procurement profession. Examples of these contributions are, but not limited to:

      i. Attendance at OPPA Board Meetings
      ii. Attendance at OPPA or NIGP Workshops/Conferences
      iii. Serving on a task force, or committee related to public procurement
      iv. Writing articles for OPPA, Columbia Chapter or NIGP
      v. Serving as a speaker at a purchasing related function
      vi. Other procurement related contributions (list)

4. Contributions to your Entity as a primary or secondary resource – requestor will select all that apply or list under “Other contribution”

5. Requestor will be asked about their involvement in OPPA. Requestor will be asked to select one or more tasks that they will commit to participating in within 6 months if they receive the Scholarship.

6. Requestor will have the opportunity to provide more information that they would like the Scholarship committee to consider while reviewing their application.

7. Financial Need Statement (Pass/Fail Item)- The request shall provide a statement of the need for financial assistance. The Scholarship application has 3 different statements. The requestor must select the answer that best fits their situation or provide their own statement under “Other”.

Approved November 2012, Revised July 2015
8. In addition to the above criteria, the annual NIGP Forum scholarship(s) will require all applicants to provide a one-page response to the following question, “What would you like to accomplish by attending NIGP Forum and how would you incorporate and convey what you have learned into your procurement profession and OPPA?”

Supporting documentation for the criteria above should accompany any scholarship request.

NOTE: The Scholarship Committee’s decision will be made based on the above referenced criteria.

5. PAYMENT PROCESS

Scholarship disbursements may be made in two different ways:

a) Payment in advance of conference or workshop:

Scholarship recipients should submit a payment request to the OPPA Treasurer for registration costs, and travel and lodging expenses if applicable. This request should be submitted at least two (2) weeks in advance of the event. The Treasurer will issue payments directly to the workshop sponsor or lodging facility. If travel by means other than automobile is required, the recipient shall submit an explanation of special need travel needs. Travel shall be by the most economical means available.

b) Reimbursements after conference or workshop:

If the scholarship recipient has already made payment and is seeking reimbursement, receipts shall be submitted to the Treasurer with the reimbursement request. If a reimbursement request or portion of a request is not approved, an explanation will be provided to the requestor. The OPPA Scholarship Program does not reimburse meal expenses.

6. REPORTING

The Scholarship Chair shall report to the OPPA Board, at monthly Board meetings, all committee activity.

7. APPLICATION PROCESS

All applications for scholarships, other than the attendance at NIGP sponsored event(s), must be received by the Scholarship Chair at least 30 days in advance of the scheduled event for an OPPA workshop or conference, at least 60 days in advance of an NIGP training seminar, and at least 150 days in advance of NIGP Forum or by deadline determined by the Scholarship Committee. Scholarship deadlines shall be determined by the Scholarship Chair.

The Scholarship Chair will convene the Scholarship Committee to review and evaluate applications received. Scholarship recipients will be announced as soon as practicable after selection. The announcement will identify the scholarship type(s) and the recipient(s).
When submitting an application, the applicant must identify the specific title of the event for which they are requesting a scholarship.
SECTION 32
OPPA TRAINING SCHEDULE AND FEES

One-day workshops are usually scheduled for January and September, with a one and a half day workshop in May and November. Workshops are usually scheduled from 8 a.m. to 4 p.m., but times may change to accommodate topics. Workshops may be scheduled in alternative months to those listed above at the discretion of the Board, should scheduling conflicts arise.

Workshop Topics

Topics are tailored to the day-to-day needs and concerns of public purchasing professionals. A sample of related topics would be as follows:

- Legislation Affecting Public Purchasing
- Benchmarking and Performance Measures
- Sustainability
- Recycling
- Surplus Property Disposal
- Material Management
- Writing Effective Specifications
- Contract Management
- Use of Current Technologies
- Sourcing Products
- Bid and Proposals Methods
- Other Pertinent Topics

Suggestions for topics are always welcome.

Workshop Costs

The registration fee for workshops is kept low and affordable; the fee includes lunch/snacks (if applicable) and all handouts and training materials. Workshop fees may only be changed by vote of the OPPA Board.

One-day workshop costs are currently as follows:

- Members . . . . . . . . . . . . . . . . . . . . . . . . $ 65
- *Non-Members . . . . . . . . . . . . . . . . . . . . . $ 80

The one and a half day, spring and fall conference costs are currently as follows:

- Members . . . . . . . . . . . . . . . . . . . . . . . . $ 150
- *Non-Members . . . . . . . . . . . . . . . . . . . . . $ 170

Approved November 2012, Revised July 2015
Registration fees shall be waived for all Officers, Directors, Membership Committee Chair(s), and Program Committee Chair(s) to attend all workshops and conferences.

**Special Workshops**

Besides the normally scheduled workshop, occasionally special workshops will be sponsored by the organization, upon approval by the Board.
SECTION 33
MEMBERCONNECT PROTOCOL

What is MemberConnect?

Our MemberConnect service is a List Serve that automatically forwards email from you to members who have subscribed to the service. Replies are also distributed to subscribers; it's a great way to share ideas and learn how other purchasing professionals deal with challenging situations.

OPPA MEMBER PARTICIPATION

Subscription and participation in MemberConnect is limited to OPPA members only.

The opinions and information posted on MemberConnect are those of the originator. OPPA and its member institutions accept no responsibility for these messages. None of the opinions expressed by the membership should be considered as legal advice or counsel.

OPPA disclaims all warranties with regard to information posted on this site, whether posted by OPPA or any third party. This disclaimer includes all implied warranties of merchantability and fitness. In no event shall OPPA be liable for any special, indirect, or consequential damages, or any damages whatsoever resulting from loss of use, data or profits, arising out of, or in connection with, the use or performance of any information posted on this site.

OPPA board members and/or officers undertake no editorial control of postings or actively monitor the site for inappropriate postings. In the event that any inappropriate posting is brought to OPPA’s attention, OPPA may take appropriate action, which may include removal from MemberConnect.

POSTING RULES

Do not post any defamatory, abusive, profane, threatening, offensive or illegal materials. Individuals posting to OPPA MemberConnect should familiarize themselves with developing legal opinion regarding slander and libel.

Extreme behavior or continuance of regular disturbances will result in a formal complaint to the user's Internet Service Provider with a request for a cancellation of the user's account.

Do not post any information or other material protected by copyright without the permission of the copyright owner. By posting material, the posting party warrants and represents that it owns the copyright with respect to such material or has received permission from the copyright owner.
addition, the posting party grants OPPA and users of this list the non-exclusive right and license to display, copy, publish, distribute, transmit, print, and use such information or other material.

Do not use MemberConnect for the marketing of any product or service without first obtaining OPPA board approval. OPPA's board of directors will review special requests on a case-by-case basis (including training opportunities) to determine the benefit to the membership. The board will use the following criteria when reviewing requests:

- Is the organization a non-profit entity?
- Does the organization promote public purchasing?
- Will the majority of the membership benefit?

*OPPA reserves the right to terminate the access of any user who does not abide by these guidelines.*

**MemberConnect ETIQUETTE**

- Do not attack or criticize individuals, agencies or firms - be polite and professional.
- Remember the person behind the computer. A computer doesn't have feelings, but the person on the other end of your message does.
- Please do not use all CAPITAL LETTERS when composing messages. It is considered SHOUTING.
- Include a subject header that accurately reflects the message content.
- Be considerate of spelling limitations; it's the information and thoughts that are important.
- Respect your colleague's time and bandwidth - don't send "thank you" and "me too" responses to the whole group.
- To reply to a specific individual, type that individual's e-mail address in the "to" field. When you "reply" to an OPPA Link message, your message is delivered to the entire list. Summarize and post responses to surveys, or post information to all subscribers ONLY if you feel it is appropriate.
- Be clear in your message to reduce the risk of misinterpretation.
- Avoid using foul language; it has no place online.
- Don't send anything you wouldn't want repeated. Although e-mail may be deleted, it is still retained on servers and backups. It could come back to haunt you.
- Be ethical. Don't say or do anything you wouldn't in the workplace.
- Share the wealth. Discussion groups exist to benefit their users. If you've got good information, have just completed a successful project or learned of a great resource, share with your purchasing colleagues.

**Subscribing and Unsubscribing to MemberConnect**

Subscribing and Unsubscribing is a simple process. OPPA Members would just need to log in to their member profiles, choose the MemberConnect link from the OPPA home page, enter their email address...
in the appropriate field and choose subscribe or unsubscribe depending on the action needed. The member will receive email notification shortly thereafter confirming their subscription and ability to send emails through MemberConnect or an email confirmation that they have successfully unsubscribed.

**Sending Emails**

Once you have subscribed to MemberConnect, in order to send a message to other subscribers, just e-mail MemberConnect@list.oppaweb.org and the system will automatically distribute your message.
SECTION 34
RECORDS RETENTION SCHEDULE

POLICY
It is the policy of the Oregon Public Purchasing Association to avoid undue accumulation of records and/or documents, and to safeguard sensitive data that is under the care and control of the organization.

PURPOSE
Business records, especially voluminous and bulky ones, should be destroyed or disposed of as soon as they outlive their usefulness in accordance with the schedule and provisions outlined below.

DOCUMENT CARE, CONTROL, DISPOSITION, AND DESTRUCTION
a) Documents that do not contain personally identifiable information or other confidential information do not require special use, care, control, and/or disposition or destruction measures.

b) Documents that do contain personally identifiable information require specific use, care, control, retention, and destruction measures. Personally Identifiable Information (PII) includes, but is not limited to: addresses, phone numbers, bank and credit card information, social security numbers, alternate ID numbers, member ID numbers, passwords, etcetera. Names alone are not PII; however, if they are associated with any other information (data), such as listed above, they should be considered PII. (Examples of documents that may include personally identifiable information are registration forms, workshop registration lists, phone messages, credit card slips, e-mails, membership rosters, web reports, etc.)

1. The nature of the medium (e.g., electronic or tangible), does not lessen OPPA, its officers’, committee members’ or chairs’ responsibility to safeguard data that is considered to be personally identifiable information.

2. Tangible documents that contain PII or other confidential information should be shredded (crosscut), incinerated, or pulped. Electronic data should be expunged/cleared and/or reliably erased. Computer laptop users shall take responsibility for the security of the information stored on their laptops. PII must be controlled in a manner that ensures PII is not accidentally released or made accessible to those who do not have a right or need to know.

3. OPPA shall require contractors and/or their subcontractors to provide the same or better assurances with the safeguarding of PII that OPPA requires of its own officers, committee chairs, and/or committee members. Where regulations may prescribe more restrictive PII protections than those of OPPA, the more restrictive shall prevail.

FILES PLAN
A functional, decentralized files plan is designated for all of OPPA. Files generated within a committee or by an officer are the responsibility of the individual creating the file. Responsibility includes proper identification, safeguard, control, and maintenance. Safekeeping, disposition, and/or destruction of the
file after it becomes inactive are the responsibility of the current officer and/or committee chair. All files are the official property of OPPA and will not be destroyed or disposed of except as provided by these instructions.

*Prior to the destruction or disposal of documents, the chapter Historian shall be given the opportunity to review the information and determine the appropriate status of the record(s).*

**FILE IDENTIFICATION AND MAINTENANCE**

For ease of reference, search, retrieval, and/or subsequent disposition or destruction, all files should be properly identified at time of creation. Filing systems should be so simple that anyone can readily identify and use them.

**RECORDS RETENTION SCHEDULE**

The following pages list the major departments and/or functional files and their retention schedules. Not all records are identified. Items to be held for less than one year are not listed. Some items listed in this schedule may not currently apply to OPPA, but might be applicable in the future and are, therefore, expressly included in this schedule.

Recommendations for additions/deletions or modifications should be submitted to the President or Chapter Historian for further consideration.

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<th>Years of Retention</th>
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<td>Correspondence, general work papers,</td>
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<td>BOD Minutes &amp; Governance History</td>
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<td>Committee Minutes</td>
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<td>Policy Manuals</td>
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<td>Association Memos (except awards)</td>
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<tr>
<td>Accounts Payable Ledgers/Schedule (after audit)</td>
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<td>Accounts Payable Ledgers/Schedule (after payment)</td>
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<td>General Journal and Support</td>
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<td>General Ledger</td>
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<td>Negatives, Photo Masters</td>
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SECTION 35
OTHER OPPA PROVISIONS AND GUIDELINES

FORUM ATTENDANCE: The OPPA encourages the current President and Vice President to attend the NIGP Forum. Reimbursable expenses allowed for the President’s and Vice President's attendance at the annual NIGP Forum. (Appropriate documentation shall be provided to the Treasurer to claim the reimbursement.)

   a) Airfare and Airport Parking
   b) Forum Hotel Lodging Expenses
   c) Round trip transportation expenses to and from Airport and Forum Hotel
   d) Meals at current Per Diem Rate (Rate is same rate provided by President’s/Vice President's employer) for any meals that are NOT already included with the Forum registration.
   e) Forum registration fees
   f) Mileage to and from the airport at Per Diem Rate (Rate is same rate provided by President’s/Vice President's employer).

REIMBURSABLE EXPENSES FOR SPEAKERS: OPPA promotes and encourages speakers to provide their expertise, knowledge and services to OPPA membership. By providing these services reimbursable expenses are allowed for speakers attendance at the workshops and conferences. (Appropriate documentation shall be provided to the Treasurer to claim the reimbursement.)

   a) Airfare and Airport Parking, if applicable.
   b) Hotel Lodging Expenses, at hosted hotel.
   c) Round trip transportation expenses to and from Airport to hosted Hotel, if applicable.
   d) Meals at current Per Diem Rate (Rate is same rate provided by GSA rate) for any meals that are NOT already included with registration.
   e) Workshop or Conference registration fees
   f) Mileage to and from the airport at Per Diem Rate (Rate is same rate provided by GSA rate).
SECTION 36  
NIGP CODE OF ETHICS

The Institute believes, and it is a condition of membership, that the following ethical principles should govern the conduct of every person employed by a public sector procurement or materials management organization.

Seeks or accepts a position as head (or employee) only when fully in accord with the professional principles applicable thereto, and when confident of possessing the qualifications to serve under those principles to the advantage of the employing organization.

Believes in the dignity and worth of the service rendered by the organization and the societal responsibilities assumed as a trusted public servant.

Is governed by the highest ideals of honor and integrity in all public and personal relationships in order to merit the respect and inspire the confidence of the organization and the public being served.

Believes that personal aggrandizement or personal profit obtained through misuse of public or personal relationships is dishonest and not tolerable.

Identifies and eliminates participation of any individual in operational situations where a conflict of interest may be involved.

Believes that members of the Institute and its staff should at no time, or under any circumstances, accept directly or indirectly, gifts, gratuities, or other things of value from suppliers, which might influence or appear to influence purchasing decisions.

Keeps the governmental organization informed, through appropriate channels, on problems and progress of applicable operations by emphasizing the importance of the facts.

Resists encroachment on control of personnel in order to preserve integrity as a professional manager.

Handles all personnel matters on a merit basis, and in compliance with applicable laws prohibiting discrimination in employment on the basis of politics, religion, color, national origin, disability, gender, age, pregnancy and other protected characteristics.

Seeks or dispenses no personal favors. Handles each administrative problem objectively and emphatically, without discrimination.

Subscribes to and supports the professional aims and objectives of the National Institute of Governmental Purchasing, Inc.

Links
Guidelines to the NIGP Code of Ethics
Principals and Practices of Public Procurement

Approved November 2012, Revised July 2015
## APPENDIX A

### HISTORY OF OFFICERS,

#### BOARD MEMBERS, COMMITTEE CHAIRPERSONS,

#### & OPPA ANNUAL AWARDEES

### 2014/15

<table>
<thead>
<tr>
<th>Role</th>
<th>President</th>
<th>Vice President</th>
<th>Treasurer</th>
<th>Secretary</th>
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<tr>
<td></td>
<td>Linda Lichty, CPPB</td>
<td>Christine Moody, CPPO, CPPB</td>
<td>Gail L. Carter, CPPB, OPBC</td>
<td>Diane Murzynski, CPPB, OPBC</td>
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<tr>
<td>1-Year Board Director</td>
<td>Rob Rickard, CPPO, OPBC</td>
<td>Camber Schlag, CPPB</td>
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<tr>
<td>2-Year Board Director</td>
<td>Eric Wicks, CPPB</td>
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<tr>
<td>3-Year Board Director</td>
<td>Jennifer Jolley, CPPB, OPBC</td>
<td>Gretchen Harold, CPPB</td>
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<tr>
<td>Immediate Past President</td>
<td>Katie Shaw, CPPB</td>
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<td>Debbie Janke, CPPB</td>
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<td>Diversity</td>
<td>Brian Smith, CPPO</td>
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<td>Professional Outreach</td>
<td>Toby Giddings, CPPB</td>
<td>Susanna Ramus</td>
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<td>Newsletter</td>
<td>Jeff Morgan, CPPO, CPPB</td>
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<td>Program</td>
<td>Kim Hankins, CPPB, OPBC</td>
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<tr>
<td>Pro-D</td>
<td>Kaliska King, CPPB, OPBC</td>
<td>Donnell Fowler, CPPB</td>
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<td>Branding</td>
<td>Rob Rickard, CPPO, OPBC</td>
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<td>Merchandise</td>
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<td>Chapter Liaison</td>
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<tr>
<td>Awards Taskforce</td>
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*Oregon Secretary of State, City of Portland, Oregon Dept of Admin Svcs, City of Albany, Retired, Marion County, Tualatin Valley Fire/Rescue, Oregon Dept of Revenue, Port of Portland, Oregon State Lottery, Oregon State Treasury, Oregon Secretary of State, OR Dept of Education, Multnomah County, Oregon Dept of Admin Svcs, Oregon Youth Authority, Oregon Secretary of State Ofc., Oregon Dept of Admin Services, Oregon Dept of Transportation, Springfield Public Schools, City of Hillsboro, Retired, City of Vancouver, City of Albany, Tualatin Valley Fire & Rescue, City of Portland, Multnomah County, Oregon State Lottery, Oregon State Lottery, Oregon State Lottery.*
2013/14

President Katie Shaw, CPPB Oregon State Lottery
(replaced Tim Hay)
Vice President Linda Lichty, CPPB Oregon Secretary of State
Treasurer Christine Moody, CPPO, CPPB City of Portland
Secretary Gail L. Carter, CPPB, OPBC Oregon Dept of Admin Svcs
1-Year Board Director James Moering, CPPB, JD City of Portland
(replaced P. Kevin Walther)
1-Year Board Director Diane Wood, CPPB, OPBC City of Albany
(replaced P. Kevin Walther)
2-Year Board Director Camber Schlag, CPPB, OPBC Marion County
(replaced Rob Rickard)
2-Year Board Director Barry Zimmerman, CPPB Multnomah County
3-Year Board Director Eric Wicks, CPPB Tualatin Valley Fire/Rescue
Immediate Past President Rob Rickard, CPPO, OPBC Retired
(replaced Katie Shaw)
Membership Co-Chairs Stephanie Lehman, CPPO, CPPB Oregon Dept of Revenue
Sandra Kalin, OPBC Oregon Dept of Admin Services
Mentorship Sarah Roth, CPPO, CPPB Oregon Secretary of State Ofc.
Diversity Barbara Hall, CPPB Oregon Lottery
Professional Outreach Brian Smith, CPPO Multnomah County
Newsletter Toby Giddings, CPPB Oregon Dept of Admin Svcs
Website Gretchen Harold, CPPB Port of Portland
Legislative Jeff Morgan, CPPO, CPPB Oregon Secretary of State Ofc.
Program Barry Zimmerman, CPPB Multnomah County
Kim Hankins, CPPB, OPBC Oregon Dept of Admin Svcs
Pro-D Margie Becker Oregon Parks and Recreation Dept
Community Involvement Donnell Fowler, CPPB Oregon Dept of Transportation
Branding Greg James, CPPB Springfield Public Schools
Merchandise Marci Shelton City of Portland
Chapter Liaison Eric Wicks, CPPB Tualatin Valley Fire & Rescue
NIGP Liaison Rob Rickard, CPPO, OPBC Retired
Historian Kevin Yin, CPPO, CPPB City of Vancouver
Scholarship Diane Wood, CPPB, OPBC City of Albany
Buyer of the Year Jennifer Jolley, CPPB, OPBC Oregon Dept of Revenue
Manager of the Year Stephanie Lehman, CPPO, CPPB Oregon Dept of Revenue
President’s Award Linda Lichty, CPPB Oregon Secretary of State
Volunteer of the Year Gretchen Harold, CPPB Port of Portland
Mentor of the Year Jana Hart Oregon Dept of Admin Svcs
Harold F. Vaughan Award Keri Stocks, CPPB Oregon Dept of Corrections
Compliance Audit Taskforce Rob Rickard, CPPO, OPBC Retired
Awards Taskforce Rob Rickard, CPPO, OPBC Retired
Budget Taskforce Rob Rickard, CPPO, OPBC Retired
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<td>Gail L. Carter, CPPB</td>
<td>Oregon Dept. of Admin Serv.</td>
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<td>Community Involvement</td>
<td>Donnell Fowler, CPPB</td>
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<td>Branding</td>
<td>Greg James, CPPB</td>
<td>Springfield Public Schools</td>
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<tr>
<td>Merchandise</td>
<td>Eric Wicks, CPPB</td>
<td>Tualatin Valley Fire &amp; Rescue</td>
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<tr>
<td>Chapter Liaison</td>
<td>Rob Rickard, CPPO, OPBC</td>
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<td>NIGP Liaison</td>
<td>Rob Rickard, CPPO, OPBC</td>
<td>Retired</td>
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<tr>
<td>Historian</td>
<td>Kevin Yin, CPPO, CPPO</td>
<td>City of Vancouver</td>
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<tr>
<td>Scholarship</td>
<td>Katie Shaw, CPPB</td>
<td>Oregon Lottery</td>
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<tr>
<td>Buyer of the Year</td>
<td>Katie Shaw, CPPB</td>
<td>Oregon Lottery</td>
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<tr>
<td>Manager of the Year</td>
<td>Sarah Roth</td>
<td>Oregon Secretary of State</td>
</tr>
<tr>
<td>President’s Award</td>
<td>Tim Hay, CPPB, CGTP, OPAC,</td>
<td>Oregon Dept of Admin Svcs</td>
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<tr>
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<td>OPBC</td>
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<tr>
<td>Volunteer of the Year</td>
<td>Tim Hay, CPPB, CGTP, OPAC,</td>
<td>Oregon Dept of Admin Svcs</td>
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<tr>
<td>Volunteer of the Year</td>
<td>P. Kevin Walther, CPPB</td>
<td>Chemeketa Comm College</td>
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<td>Mentor of the Year</td>
<td>Stephanie Lehman, CPPB, OPBC</td>
<td>Oregon Dept of Revenue</td>
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<tr>
<td>Harold F. Vaughan Award</td>
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<td>Compliance Audit Taskforce</td>
<td>Kim Dunston, CPPB</td>
<td>Oregon Dept of Revenue</td>
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<td>Elections Taskforce</td>
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<td>Oregon Dept of Revenue</td>
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Approved November 2012, Revised July 2015
### 2011/12

**President**
Kim Dunston, CPPB  
Oregon Dept of Revenue

**Vice President**
Katie Shaw, CPPB  
Oregon Lottery

**Treasurer**
Tim Hay, CPPB, CGTP, OPAC, OPBC  
OPBC Oregon Dept of Admin Svcs

**Secretary**
Linda Lichty, CPPB  
Oregon Secretary of State

**1-Year Board Director**
Rob Rickard, CPPO, OPBC  
Retired

**1-Year Board Director**
Sandra Kalin, OPBC  
Oregon Dept of Admin Svcs

**2-Year Board Director**
Kathleen George  
Oregon Lottery

**3-Year Board Director**
P. Kevin Walther, CPPB  
Chemeeka Comm College

**3-Year Board Director**
Diane Wood, CPPB, OPBC  
City of Albany

**Immediate Past President**
Diane Seaton, CPPO, CPPB  
City of Portland

**Membership**
Craig Johnsen, CPPO, CPPB  
Oregon Secretary of State Ofc.

**Mentorship**
Sarah Roth  
Oregon Lottery

**Diversity**
Barbara Hall, CPPO  
Multnomah County

**Professional Outreach**
Brian Roth  
Oregon Housing & Comm Serv

**Newsletter**
Camber Schlag, CPPO  
Oregon Dept of Transportation

**Website**
Tara Anderson, CPPO  
Oregon Secretary of State Ofc.

**Legislative**
Jeff Morgan, CPPO, CPPB  
Multnomah County

**Program**
Barry Zimmerman, CPPO  
Oregon Dept. of Admin Serv.

**Pro-D**
Sandra Kalin, OPBC  
Oregon Dept of Transportation

**Community Involvement**
Diane Cannon, CPPO  
Springfield Public Schools

**Branding**
Glen James, CPPO  
Tualatin Valley Fire & Rescue

**Merchandise**
Eric Wicks, CPPO  
Retired

**Chapter Liaison**
Rob Rickard, CPPO, OPBC  
Retired

**NGIP Liaison**
Rob Rickard, CPPO, OPBC  
City of Albany

**Historian**
Kevin Yin, CPPO, CPPB  
City of Vancouver

**Scholarship**
Katie Shaw, CPPO  
Oregon Lottery

**Buyer of the Year**
Diane Wood, CPPO  
Multnomah County

**Manager of the Year**
Brian Smith, CPPO  
Oregon Lottery

**President’s Award**
Katie Shaw, CPPO  
Multnomah County

**Volunteer of the Year**
Barry Zimmerman, CPPO  
Oregon Secretary of State Ofc.

**Mentor of the Year**
Sarah Roth  
City of Portland

**Harold F. Vaughan Award**
Nancy Ahlbin  
Oregon Dept. of Admin Serv.

**Compliance Audit Taskforce**
Diane Seaton, CPPO, CPPB  
City of Portland

**Awards Taskforce**
Nathan Mosley, CPPB  
Portland Development

**Commission**
Diane Seaton, CPPO, CPPB  
Multnomah County

**Budget Taskforce**
Gerald Jelusich, CPPB  
City of Portland

**Elections Taskforce**


### 2010/11

**President**
Diane Seaton, CPPO, CPPB  
City of Portland

**Vice President**
Kim Dunston, CPPB  
OR Dept. of Transportation

**Treasurer**
Katie Shaw, CPPO  
Oregon Lottery

**Secretary**
Tim Hay, CPPB, CGTP, OPAC, OPBC  
OR Dept of Admin Svcs
1-Year Board Director Greg James, CPPB Springfield Public Schools
2-Year Board Director Sandra Kalin, OPBC OR Dept of Admin Svcs.
3-Year Board Director Kathleen George Oregon Lottery
Immediate Past President Tara Anderson, CPPB Oregon Dept of Transportation
Audit/Budget Tara Anderson, CPPB Oregon Dept of Transportation
Awards Tara Anderson, CPPB Oregon Dept of Transportation
Communication Camber Schlag, CPPB Oregon Housing & Comm Serv
Diversity Katie Shaw, CPPB Oregon Lottery
Historian Kevin Yin, CPPO, CPPB City of Portland
Legislative Jeff Morgan, CPPO, CPPB Oregon Secretary of State Ofc.
Marketing P. Kevin Walther Chemeketa Comm College
Membership Craig Johnsen, CPPO, CPPB Port of Portland
Mentorship Rob Rickard, CPPO, OPBC Oregon Secretary of State Ofc.
Nominating Rob Rickard, CPPO, OPBC Oregon Secretary of State Ofc.
OPPA/Columbia Chpt Liaison Sandra Kalin, OPBC OR Dept of Admin Serv.
Pro-D Barry Zimmerman, CPPB Multnomah County
Program Kim Dunston, CPPB City of Portland
RVTS Co-Chair Diane Seaton, CPPO, CPPB OR Dept of Transportation
Scholarship Tim Hay, CPPB, CGTP, OPAC,OPBC OR Dept of Admin Serv.
Buyer of the Year Sophia Cavalli Multnomah County
Manager of the Year Katie Shaw, CPPB Oregon Lottery
President’s Award Denna Coleman, CPPB Oregon Dept of Transportation
Volunteer of the Year Craig Johnsen, CPPO, CPPB Port of Portland
Mentor of the Year
Harold F. Vaughan Award

2009/10
President Tara Anderson, CPPB, OPBC OR Dept. of Trans
Vice President Diane Seaton, CPPO, CPPB City of Portland
Treasurer Kim Dunston, CPPB OR Dept. of Trans
Secretary Katie Shaw, CPPB Oregon Lottery
1-Year Board Director Mickey Kemper, CPPB OR Secretary of State Ofc.
2-Year Board Director Barbara Hall, CPPB Oregon Lottery
3-Year Board Director Sandra Kalin, OPBC OR Dept of Admin Svcs.
Immediate Past President Kevin Yin, CPPO, CPPB City of Portland
Audit/Budget Kevin Yin, CPPO, CPPB City of Portland
Awards Greg James, CPPB Springfield Public Schools
Communication Camber Schlag, CPPB OR Housing & Comm Serv
Diversity Julie Moiser Central OR Comm College
Historian Kevin Yin, CPPO, CPPB City of Portland
Legislative Jeff Morgan, CPPO, CPPB Oregon Secretary of State Ofc.
Marketing Co-Chair Barbara Hall, CPPB Oregon Lottery
Marketing Co-Chair Julie Schmoyer, CPPB Oregon Lottery
Membership Co-Chair Karin Jorgensen, OPBC OR Dept of Trans.
Membership Co-Chair Craig Johnsen, CPPO, CPPB City of Portland
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<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>Organization</th>
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<tr>
<td>Mentorship Co-Chair</td>
<td>Margaret Taylor, JD</td>
<td>Oregon Youth Authority</td>
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<td>Mentorship Co-Chair</td>
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<td>Springfield Public Schools</td>
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<td>Nominating</td>
<td>Greg James, CPPB</td>
<td>OR Secretary of State Ofc.</td>
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<td>OPPA/Columbia Chpt Liaison</td>
<td>Rob Rickard, CPPO, OPBC</td>
<td>OR Secretary of State Ofc.</td>
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<td>Pro-D Co-Chair</td>
<td>Mickey Kemper, CPPB</td>
<td>OR Dept. of Admin Serv.</td>
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<td>Pro-D Co-Chair</td>
<td>Sandra Kalin, OPBC</td>
<td>Oregon Lottery</td>
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<tr>
<td>Program</td>
<td>Kathleen George</td>
<td>City of Portland</td>
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<tr>
<td>RVTS Co-Chair</td>
<td>Diane Seaton, CPPO, CPPB</td>
<td>OR Dept. of Trans</td>
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<tr>
<td>Scholarship</td>
<td>Kim Dunston, CPPB</td>
<td>OR Housing &amp; Comm Serv</td>
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<tr>
<td>Buyer of the Year</td>
<td>Camber Schlag, CPPB</td>
<td>City of Portland</td>
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<tr>
<td>Manager of the Year</td>
<td>Christine Moody, CPPO</td>
<td>Chemeketa Comm College</td>
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<tr>
<td>President's Award</td>
<td>Kevin Walther, CPPB</td>
<td>Oregon Lottery</td>
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<tr>
<td>Volunteer of the Year</td>
<td>Kathleen George</td>
<td>Multnomah County</td>
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<td>Mentor of the Year</td>
<td>Gerald Jelusich, CPPB</td>
<td>Roseburg School District</td>
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<td>Bill Heller</td>
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**2008/09**

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<td>President</td>
<td>Kevin Yin, CPPO, CPPB</td>
<td>City of Portland</td>
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<tr>
<td>Vice President</td>
<td>Tara Anderson, CPPB, OPBC</td>
<td>Oregon Dept. of Transportation</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Diane Seaton, CPPB</td>
<td>City of Portland</td>
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<tr>
<td>Secretary</td>
<td>Kim Dunston, CPPB</td>
<td>Oregon Dept. of Transportation</td>
</tr>
<tr>
<td>1-Year Board Director</td>
<td>Katie Shaw, CPPB</td>
<td>Oregon Lottery</td>
</tr>
<tr>
<td>2-Year Board Director</td>
<td>Mickey Kemper, CPPB</td>
<td>Oregon Secretary of State Ofc.</td>
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<tr>
<td>3-Year Board Director</td>
<td>Barbara Hall, CPPB</td>
<td>Oregon Lottery</td>
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<tr>
<td>Immediate Past President</td>
<td>Christy Ellis</td>
<td>City of Dallas</td>
</tr>
<tr>
<td>Audit/Budget</td>
<td>Christy Ellis</td>
<td>City of Dallas</td>
</tr>
<tr>
<td>Awards</td>
<td>Greg James, CPPB</td>
<td>Springfield Public Schools</td>
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<tr>
<td>Communication</td>
<td>Katie Shaw, CPPB</td>
<td>Oregon Lottery</td>
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<tr>
<td>Diversity</td>
<td>Debra Janke, OPBC</td>
<td>Oregon Dept. of Transportation</td>
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<tr>
<td>Historian</td>
<td>Eileen Miller, CPPO, C.P.M.</td>
<td>Chemeketa Comm College</td>
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<td>Legislative</td>
<td>Jeff Morgan, CPPO, CPPB</td>
<td>Oregon Secretary of State Ofc.</td>
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<tr>
<td>Marketing</td>
<td>Gail Rubin, CPPO</td>
<td>Multnomah County</td>
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<td>Membership Co-Chair</td>
<td>Karin Jorgensen, OPBC</td>
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<td>City of Portland</td>
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<td>Margaret Taylor, JD</td>
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<td>Laura Hince, OPBC</td>
<td>Oregon Youth Authority</td>
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<tr>
<td>Nominating</td>
<td>Christy Ellis</td>
<td>City of Dallas</td>
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<tr>
<td>OPPA/Columbia Chapter Liaison</td>
<td>Rob Rickard, CPPO, OPBC</td>
<td>Oregon Secretary of State Ofc.</td>
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<td>Professional Development</td>
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<td>Oregon Secretary of State Ofc.</td>
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<td>Program Co-Chair</td>
<td>Brent Kibby, CPPB</td>
<td>Oregon Lottery</td>
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<td>Program Co-Chair</td>
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<td>City of Portland</td>
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<td>RVTS Co-Chair</td>
<td>Christine Moody, CPPO</td>
<td>Oregon Dept of Admin. Serv.</td>
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<td>RVTS Co-Chair</td>
<td>Nancy Ahlblin</td>
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<td>Scholarship</td>
<td>Kim Dunston, CPPB</td>
<td>Oregon Secretary of State Ofc.</td>
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<tr>
<td>Buyer of the Year</td>
<td>Linda Lichty, CPPB</td>
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Approved November 2012, Revised July 2015
Manager of the Year  Diane Seaton, CPPB  City of Portland
President’s Award  Greg James, CPPB  Springfield Public Schools
Volunteer of the Year  Katie Shaw, CPPB  Oregon Lottery
Mentor of the Year  Rob Rickard, CPPO, OPBC  Oregon Secretary of State Ofc.

**2007/08**
President  Christy Ellis  City of Dallas
Vice President  Kevin Yin, CPPO, CPPB  City of Portland
Treasurer  Tara Anderson  Oregon Dept. of Transportation
Secretary  Diane Seaton, CPPB  City of Portland
1-Year Board Director  Melissa Canfield, CPPB  DAS - State Procurement Ofc.
2-Year Board Director  Katie Shaw, CPPB  Oregon Lottery
3-Year Board Director  Mickey Kemper, CPPB  Oregon Secretary of State Ofc.
Immediate Past President  Brian Woodall, CPPB  Tri-Met
Audit/Budget  Brian Woodall, CPPB  Tri-Met
Awards  Greg James, CPPB  Springfield Public Schools
Communication  Katie Shaw, CPPB  Oregon Lottery
Diversity  Melissa Canfield, CPPB  Chemeketa Comm. College
Historian  Eileen Miller, CPPO, C.P.M.  Chemeketa Comm. College
Marketing  Nancy Ahlbin  Oregon Dept. of Transportation
Membership  Karin Jorgensen  Chemeketa Comm. College
Mentorship Co-Chair  Eileen Miller, CPPO, C.P.M.  Tri-Met
Mentorship Co-Chair  Brian Woodall, CPPB  Tri-Met
Nominating  Brian Woodall, CPPB  Oregon Secretary of State Ofc.
OPPA/Columbia Chapter Liaison  Rob Rickard, CPPO, OPBC  Oregon Secretary of State Ofc.
Professional Dev. Co-Chair  Mickey Kemper, CPPB  City of Portland
Professional Dev. Co-Chair  Kevin Yin, CPPO, CPPB  Oregon Dept. of Transportation
Program Co-Chair  Kim Dunston  Tualatin Valley Water District
Program Co-Chair  Wendy Burns, CPPB  DAS - State Procurement Ofc.
Scholarship  Melissa Canfield, CPPB  Multnomah County
Buyer of the Year  Warren Gray, CCA, CCCA, CDT  City of Dallas
Manager of the Year  Christy Ellis  Oregon Dept. of Transportation
President’s Award  Kim Dunston, CPPB  Oregon Dept. of Transportation
Volunteer of the Year  Tara Anderson, CPPB, OPBC  Washington County
Harold F. Vaughan Award  Leslie Johnson, CPPB  Chemeketa Comm. College
Harold F. Vaughan Award  Eileen Miller, CPPO, C.P.M.  Chemeketa Comm. College

**2006/07**
President  Brian Woodall, CPPB  Tri-Met
Vice President  Christy Ellis  City of Dallas
Treasurer  Kevin Yin, CPPO, CPPB  City of Portland
Secretary  Eileen Miller, CPPO, C.P.M.  Chemeketa Comm. College
1-Year Board Director  Nancy Ahlbin  DAS - State Procurement Ofc.
2-Year Board Director  Melissa Canfield, CPPB  DAS - State Procurement Ofc.
3-Year Board Director  Katie Shaw, CPPB  Oregon Lottery
Immediate Past President  Craig Johnsen, CPPO, CPPB
Audit/Budget  Craig Johnsen, CPPO, CPPB
Awards  Greg James, CPPB
Communication  Katie Shaw, CPPB
Diversity  Melissa Canfield, CPPB
Historian  Eileen Miller, CPPO, C.P.M.
Marketing  Nancy Ahlbin
Membership  Karin Jorgensen
Mentorship  Eileen Miller, CPPO, C.P.M.
Nominating  Keri Stocks, CPPB
OPPA/Col. Chapter Liaison  Rob Rickard, CPPO, OPBC
Professional Development  Bobbi Matthews, CPPO, CPPB
Program  Tara Anderson
Scholarship  Christy Ellis
Buyer of the Year  Leslie Johnson
Manager of the Year  Brian Woodall, CPPB
President’s Award  Nancy Ahlbin

2005/06
President  Craig Johnsen, CPPO, CPPB
Vice President  Brian Woodall, CPPB
Treasurer  Christy Ellis
Secretary  Kevin Yin, CPPO, CPPB
1-Year Board Director  Eileen Miller, C.P.M.
2-Year Board Director  Nancy Ahlbin
3-Year Board Director  Melissa Canfield
Immediate Past President  Keri Stocks, CPPB
Audit/Budget  Craig Johnsen, CPPO, CPPB
Awards  Greg James, CPPB
Communication  Eileen Miller, C.P.M.
Diversity  Melissa Canfield
Historian  Eileen Miller, C.P.M.
Membership  Karin Jorgensen
Mentorship  Eileen Miller, C.P.M.
Nominating  Keri Stocks, CPPB
OPPA/Columbia Chapter Liaison  Rob Rickard, CPPO, OPBC
Professional Development  Keri Stocks, CPPB
Program Co-Chair  Nancy Ahlbin
Program Co-Chair  Tara Anderson
Scholarship  Christy Ellis
Buyer of the Year  Eileen Miller, C.P.M.
Manager of the Year  Keri Stocks, CPPB
President’s Award  Christy Ellis
Harold F. Vaughan Award  Franna Hathaway, CPPO, CPPB

Port of Portland
Springfield Public Schools
Oregon Lottery
DAS – State Procurement Ofc.
Chemeketa Comm. College
DAS - State Procurement Ofc.
Oregon Dept. of Transportation
Chemeketa Comm. College
Oregon State Lottery
Oregon Secretary of State Ofc.
Port of Portland
Oregon Dept. of Transportation
City of Dallas
Washington County
Tri-Met
DAS - State Procurement Ofc.
### 2004/05

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<tr>
<td>President</td>
<td>Keri Stocks, CPPB</td>
<td>Oregon State Lottery</td>
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<tr>
<td>Vice President (June-Oct)</td>
<td>Celeste Wooldridge, CPPB</td>
<td>Rogue Comm. College</td>
</tr>
<tr>
<td>Vice President (Nov-May)</td>
<td>Craig Johnsen, CPPB</td>
<td>Port of Portland</td>
</tr>
<tr>
<td>Secretary</td>
<td>Brian Woodall, CPPB</td>
<td>Tri-Met</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Kevin Walther, CPPB, OPBC</td>
<td>Oregon Sec. State Ofc.</td>
</tr>
<tr>
<td>1-Year Board Director (June-Oct)</td>
<td>Craig Johnsen, CPPB, CPPO</td>
<td>Port of Portland</td>
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<tr>
<td>1-Year Board Director (Nov-May)</td>
<td>Jeff Baer, CPPO, CPPB</td>
<td>City of Portland</td>
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<tr>
<td>2-Year Board Director</td>
<td>Eileen Miller, C.P.M.</td>
<td>Chemeketa Comm. Coll</td>
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<tr>
<td>3-Year Board Director</td>
<td>Nancy Ahlbin</td>
<td>DAS - State Procurement Ofc.</td>
</tr>
<tr>
<td>Immediate Past President</td>
<td>Donnell Fowler, CPPB</td>
<td>Dept. of Transportation</td>
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<tr>
<td>Audit/Budget Chair</td>
<td>Keri Stocks, CPPB</td>
<td>Oregon State Lottery</td>
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<tr>
<td>Awards Chair</td>
<td>Greg James, CPPB</td>
<td>Springfield Public Schools.</td>
</tr>
<tr>
<td>Communication Chair</td>
<td>Eileen Miller, C.P.M.</td>
<td>Chemeketa Comm. College</td>
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<tr>
<td>Membership Chair</td>
<td>Christy Ellis</td>
<td>City of Dallas</td>
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<tr>
<td>Mentorship Chair</td>
<td>Eileen Miller, C.P.M.</td>
<td>Chemeketa Comm. College</td>
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<tr>
<td>Nominating Chair</td>
<td>Donnell Fowler, CPPB</td>
<td>Dept. of Transportation</td>
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<td>Professional Development Chair</td>
<td>Melissa Canfield, CPPB</td>
<td>DAS - State Procurement Ofc.</td>
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<td>Program Chair</td>
<td>Nancy Ahlbin</td>
<td>Dept. Of Transportation</td>
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<tr>
<td>Scholarship Chair</td>
<td>Craig Johnsen, CPPB</td>
<td>Port of Portland</td>
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<tr>
<td>Buyer of the Year</td>
<td>Mickey Kemper, CPPB</td>
<td>Oregon Sec. State Ofc.</td>
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<tr>
<td>Manager of the Year</td>
<td>Greg James, CPPB</td>
<td>Springfield Sch. Dst.</td>
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<td>President’s Award</td>
<td>Kevin Walther, CPPB, OPBC</td>
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<td>Harold F. Vaughan Award</td>
<td>Carlton Chayer</td>
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### 2003/04

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<td>Dept. of Transportation</td>
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Membership Chair  Denise Johnson  City of Portland
Professional Development  Linda Bidwell  City of Portland
Buyer of the Year  Eileen Miller  Chemeketa Comm. College
Manager of the Year  Rob Rickard  DAS - Purchasing

1996/97
President  Mike Hutchens  Portland Public Schools
Vice President  Rob Rickard  DAS - Purchasing
Secretary  Darin Matthews  DAS - Purchasing
Treasurer  Linda Bidwell  City of Portland
1-Year Board Director  Ben Rainboldt  Clackamas County
2-Year Board Director  Kip Gerke  Bend LaPine Schools
3-Year Board Director  Steve Evans  Lane Community College
Newsletter Chair  Lori LeVeaux  Oregon State Lottery
Membership Chair  Denise Johnson  City of Portland
Professional Development  Linda Bidwell  City of Portland
Buyer of the Year  Darin Matthews  DAS - Purchasing
Manager of the Year  Jan Harding  City of Gresham
Harold F. Vaughan Award  Carol Case  City of Eugene

1995/96
President  Jan Harding  City of Gresham
Vice President  Mike Hutchens  Portland Public Schools
Secretary  Denise Johnson  City of Portland
Treasurer  Rob Rickard  DAS - Purchasing
1-Year Board Director  Ed Case  Lane Community College
2-Year Board Director  Ben Rainboldt  Clackamas County
3-Year Board Director  Kip Gerke  Bend LaPine Schools
Newsletter Chair  Ed Case  Lane Community College
Membership Chair  Chuck Wallace  Lane County
Buyer of the Year  Ed Case  Lane Community College
Manager of the Year  Chuck Wallace  Lane County
Harold F. Vaughan Award  Roger Cardinal  Portland Community College

1994/95
President  Jan Harding  City of Gresham
Vice President  Mike Hutchens  Portland Public Schools
Secretary  Bill Heller  Roseburg Public Schools
Treasurer  Ruth Clayton  Josephine/4 Rivers SD
1-Year Board Director  Roger Cardinal  Washington County
2-Year Board Director  Ed Case  Lane Community College
3-Year Board Director  Rich Wiley  METRO
Newsletter Chair  Ed Case  Lane Community College
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Treasurer  Ted Parker  Oregon Workers Compensation
1-Year Board Director  Donna Francis  Washington County ESD
2-Year Board Director  Flor Matias  City of Eugene
3-Year Board Director  Charles Dallas

**1978/79**
President  Harold Vaughan  City of Portland
Secretary  Ed Euken (retired 12-31-78)  Dept. of Environmental Quality
Treasurer  Larry Kennedy  City of Corvallis
1-Year Board Director  Bernice Gilmour
2-Year Board Director  Donna Francis
3-Year Board Director  Flor Matias (filled in as sec.)  Washington County ESD

**1977/78**
President  Pat Grant  Lane Community College
Secretary  Stan Jones  Port of Portland
Treasurer  Shirley Carey  U of Oregon Health Sci Ctr
1-Year Board Director  Bernice Gilmour (replaced Pat Grant)
2-Year Board Director  Bob Albert  Oregon Dept. of General Serv.
3-Year Board Director  Donna Francis

**1976/77**
President  Lee Moore  Oregon Dept. of General Serv.
Secretary  Donna Francis  State Accident Insurance Fund
Treasurer  Ted Parker  Oregon Workers Compensation
1-Year Board Director  George Winand
2-Year Board Director  Pat Grant  Lane Community College
3-Year Board Director  Bob Albert  Oregon Dept. of General Serv.

**1975/76**
President  John Norton  Portland Community College
Secretary/Treasurer  Shirley Carey  U of Oregon Health Sci Ctr
1-Year Board Director  George Winand (replaced Charles Dallas)
2-Year Board Director  Pat Grant  Lane Community College
3-Year Board Director  Bob Albert  Oregon Dept. of General Serv.

**1974/75**
President  Joe Deutsch  Oregon Liquor Control Comm.
Secretary/Treasurer  Ray Barber (resigned Dec)  City of Portland
Dorothy Knutson  Chemeketa Comm. College
1-Year Board Director  Roger Goff  Multnomah County
2-Year Board Director  Floyd Jacox  City of Salem
3-Year Board Director  Charles Dallas  City of Eugene
<table>
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<tr>
<th>Year</th>
<th>President</th>
<th>Secretary/Treasurer</th>
<th>1-Year Board Director</th>
<th>2-Year Board Director</th>
<th>3-Year Board Director</th>
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<td>Stan Jones</td>
<td>Joe Deutsch</td>
<td>Mel Wells</td>
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<td>Floyd Jacox</td>
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<td>1972/73</td>
<td>Bob Albert</td>
<td>Derwood Smith</td>
<td>Lou Turk</td>
<td>Mel Wells</td>
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<td>Klamath Co. School District</td>
<td>Multnomah County</td>
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<td>1971/72</td>
<td>Tom Hill</td>
<td>Bob Albert</td>
<td>Erv Sunderlin</td>
<td>Lou Turk</td>
<td>Mel Wells</td>
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<td>1970/71</td>
<td>Charles Dallas</td>
<td>Tom Hill</td>
<td>Ray Damerell</td>
<td>Erv Sunderlin</td>
<td>Lou Turk</td>
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<td>Oregon Dept. of General Serv.</td>
<td>City of Eugene</td>
<td>Klamath Co. School District</td>
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<tr>
<td>1969/70</td>
<td>Bruce Lawson</td>
<td>Charles Dallas</td>
<td>Meritt Simmons</td>
<td>Ray Damerell</td>
<td>Erv Sunderlin</td>
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<td>City of Corvallis</td>
<td>City of Eugene</td>
<td>City of Portland</td>
<td>Depart. of General Services</td>
<td>Depart. of General Services</td>
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APPENDIX B
INTERCHAPTER AGREEMENT

NIGP INTER-CHAPTER AGREEMENT
BETWEEN
COLUMBIA CHAPTER OF NIGP
AND
OREGON PUBLIC PURCHASING ASSOCIATION

THIS IS an inter-chapter agreement (ICA) by and between the Columbia Chapter of NIGP (Columbia Chapter), and the Oregon Public Purchasing Association (OPPA), entered into this ______________ day of __________________, 2008 to provide for the collaborative partnership of efforts and events by both chapters for the benefit of each respective chapter members.

Recitals

WHEREAS, Columbia Chapter and OPPA are affiliate chapters in good standing of the National Institute of Governmental Purchasing, Inc. (NIGP).

WHEREAS, Columbia Chapter and OPPA wish to collaborate where possible to accomplish common educational, charitable, and professional purposes; and

WHEREAS, Columbia Chapter and OPPA wish to assist and support each chapters educational programs and professional networking and outreach opportunities; and

NOW THEREFORE, in consideration of the mutual promises and agreements hereinafter set forth, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged by Columbia Chapter and OPPA,

IT IS AGREED:

1. Columbia Chapter and OPPA will use their best efforts to cooperate in the provision of the Services and Events, as described in Agreement Exhibits.
2. This Agreement shall be effective on the date above written, and shall continue in effect until terminated pursuant to item 3.
3. Either Columbia Chapter or OPPPA may terminate this Agreement upon 30 days notice in writing to the other party.

IN WITNESS WHEREOF, the parties hereto have caused this Inter-chapter Agreement to be executed by their duly authorized representatives.

Columbia Chapter, NIGP

Oregon Public Purchasing Association

Approved November 2012, Revised July 2015
NIGP INTER-CHAPTER AGREEMENT
BETWEEN
COLUMBIA CHAPTER OF NIGP
AND
OREGON PUBLIC PURCHASING ASSOCIATION

EXHIBIT A

NIGP EDUCATION SEMINAR COLLABORATION

The Columbia Chapter and OPPA will publicize all jointly sponsored and scheduled NIGP education seminars to its respective members in an effort to promote the public procurement profession in a collaborative manner.

Seminars will be listed, published and promoted by each chapter, and each event will be stated as either “Columbia Chapter and OPPA present…” or “OPPA and Columbia Chapter present…”

NIGP education seminars publicized with Columbia Chapter named first indicate that Columbia Chapter will organize and facilitate the seminar and all revenues and expenses will be borne by Columbia Chapter.

NIGP seminars publicized with OPPA named first indicate that OPPA will organize and facilitate the seminar and all revenues and expenses will be borne by OPPA.

Columbia Chapter, NIGP       Oregon Public Purchasing Association

_____________________________    ________________________________
Chapter President                  Chapter President

_____________________________
Date                                  Date
INTER-CHAPTER AGREEMENT FOR JOINT CHAPTER EDUCATIONAL EVENT COLLABORATION

The Columbia Chapter of NIGP (Columbia Chapter) and the Oregon Public Purchasing Association (OPPA) hereby agree to the following:

1. Beginning in 2011 OPPA shall be responsible for hosting the Joint Chapter Educational Event (Event) during each odd numbered year

2. Beginning in 2012 Columbia Chapter shall be responsible for hosting the Event during each even numbered year

3. The Chapter hosting the Event shall be responsible for the following:
   a. Developing Event theme
   b. Securing Event presenters
   c. Securing an Event location for Chapter members that is:
      i. Centrally located (within a 30 mile radius of Portland and Salem)
      ii. Easily accessible (from I-5 corridor and/or public transportation)
      iii. Convenient
   d. Developing registration forms
   e. Developing announcements in written form and electronic form promoting the Event
      i. Written announcements shall begin with the following statement: “Columbia Chapter of NIGP and Oregon Public Purchasing Association present…”
      ii. There shall be a hyperlink posted to each Chapter website for electronic announcements
   f. Collecting registration fees
   g. Developing and collecting post-Event surveys
      i. Survey results shall be provided to Chapter Presidents
   h. Issuing Certificates of Attendance to attendees documenting contact hours towards UPPCC certification/recertification
      i. Provide attendees’ list to membership chair for both organizations
   i. Preparing final Event Financial Accounting Statements
      i. The Event Financial Accounting Statements shall be provided to Chapter Presidents

Approved November 2012, Revised July 2015
4. Chapter designees shall meet annually to develop and agree upon a budget for Event no later than September 30.

5. Chapter designees shall meet annually to discuss the Event theme and topics prior to November 30.

6. For each Event held the Chapters shall equally divide the following:
   
i. Event expenses
   ii. Event receipts

<table>
<thead>
<tr>
<th>Columbia Chapter</th>
<th>OPPA</th>
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<tbody>
<tr>
<td>President</td>
<td>President</td>
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