

ACADEMY

Preparing Your Leaders  
for a Successful Year:  
Building a Leadership  
Bootcamp

NIGP  
**LEADERSHIP  
SUMMIT**2024





# Poll Question:

Has your Chapter developed a structured leadership onboarding strategy?

- a. Yes, formal focused event
- b. Yes, informal of part of another event
- c. No
- d. Haven't considered it, but interested in the concept

# What is Officer Bootcamp?

Officer Bootcamp is a **structured** leadership onboarding strategy designed to provide Chapter Officers with the essential support and resources needed to understand and be successful in their roles.

It focuses on **equipping Officers with the knowledge and tools necessary to lead effectively** and achieve organizational goals.



# Where It All Started....

2016





# Onboarding Strategy Benefits

- Intentional **structured** investment in your Chapter's leaders
- Prepare officers for a successful term
- Establish expectations for their leadership roles



# Onboarding Strategy Benefits

- Opportunity for team building among officers
- Avoid assumptions of governance knowledge
- Create a safe space for open dialogue





**What is the length of your Chapter  
Officer's term of office?**





**What is your Chapters structure  
for line of succession?**



# Program Considerations

# Program Parameters



Establishing a formal program (commitment)

When to convey the attendance expectation?

- candidacy
- post-election



Program frequency

Funding and format



# Facilitation

Who will facilitate the bootcamp?

Consider Past Leaders, Subject Matter Experts

Great way to keep them engaged

Tap into their experience with chapter governance



*“Facilitation is about creating a space for dialogue, connection, and collective wisdom to emerge”*

# Meeting Logistics

Scheduling and duration

In person or hybrid

Centralized location

Meals and materials



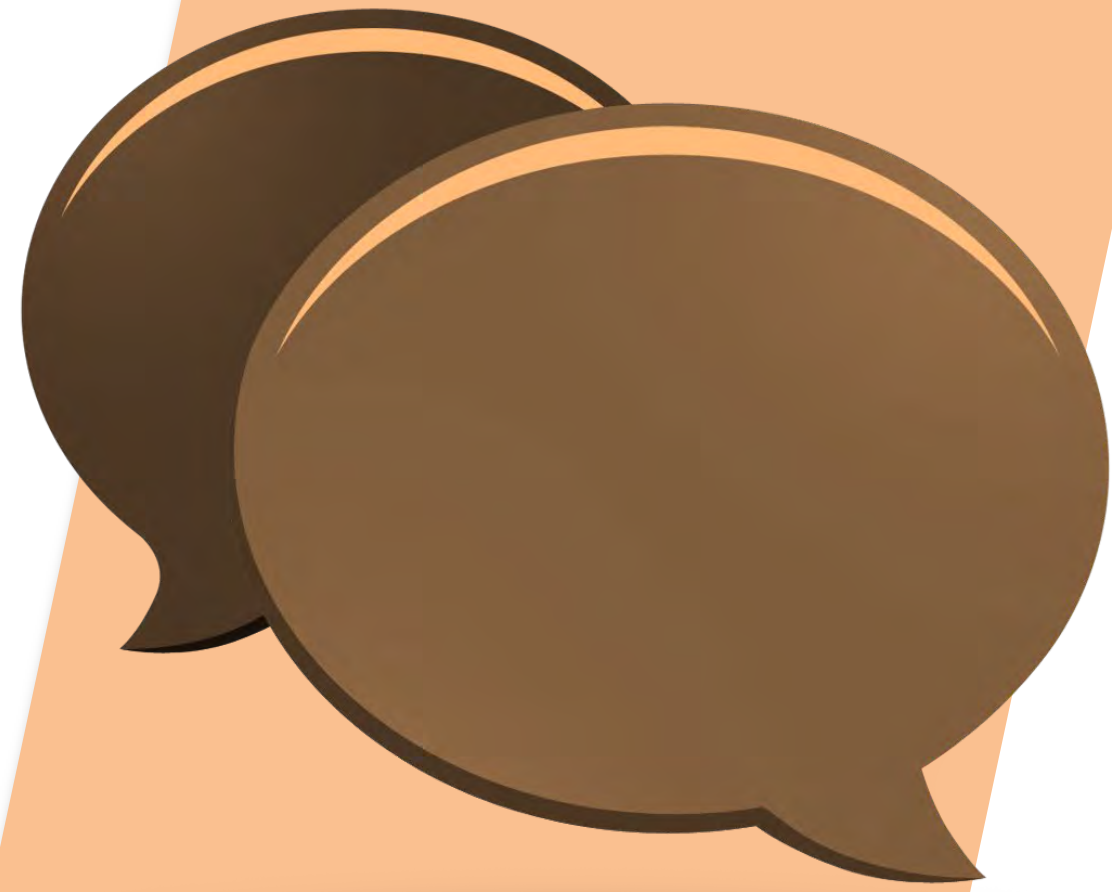


# Preparation

Allow sufficient time for facilitator(s) to prepare

- Seek input in advance from attendees
- Compilation of resources (hard copy; electronic; slide deck)
- Create a safe learning environment
- Structure to foster discussion
- Set the tone!





**What would have been helpful  
for you to know as you began  
your service as a Chapter  
Officer?**

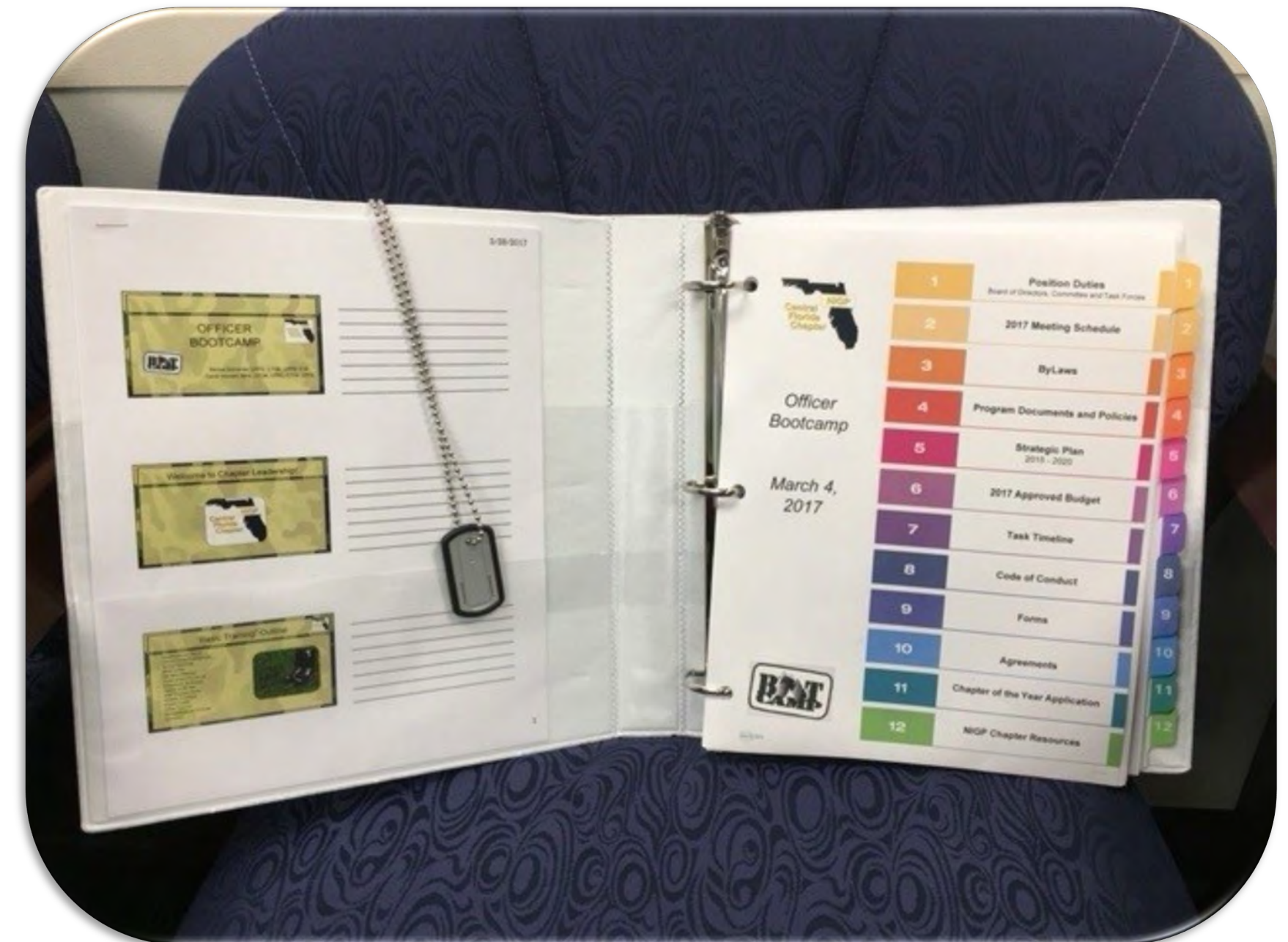


# What's In YOUR Binder?

What is relevant?

What is new?

What is critical?



# Chapter Governance



## Comprehensive overview of governance documents

- By-Laws
- Standard operating procedures
- Program documents and policies
- Strategic plan
- Code of Conduct

## Procedural requirements

- Robert's Rules of Order
- Meeting protocols
- Facilitating the voting process



# By-Laws

Central Florida Chapter of NIGP



Budget Documents

Forms

Agreements

Program Documents



Templates

Key Dates

Timelines

Legacy Documents

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## PROGRAM DOCUMENTS & POLICIES

Central Florida Chapter of NIGP



Approved September 23, 2016



# Roles and Responsibilities

## PRESIDENT'S DUTIES

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

## VICE PRESIDENT'S DUTIES

- Assist the President and acts in his/her stead when they are unavailable to make meetings.
- Coordinate all speakers for each regular Chapter Meeting/Workshops.
- Verify all applications for scholarships and forward a check request to the Treasurer for payment/reimbursement.
- Coordinates all payments for the professional development committee.
- Coordinates all registrations and travel payments.
- Maintains scholarship log and uploads updates monthly to the Chapter website; Processes all scholarship redemption requests in coordination with Treasurer. Processes all deferment requests.
- Prepare annual State of the Chapter Address for presentation at final annual Chapter meeting.
- Creates certificates to be handed out or sent electronically in March of each year for member attendance, committee participation and special recognition.
- Orders plaques, [awards](#) and certificates for Chapter use.
- Prepares submittal for each newsletter.
- Performs all duties in accordance with the Chapter Bylaws.
- Other duties as assigned by the President.

### Transitional Requirements:

- Attend New Officer Orientation Meeting
- Mentor successive Vice-President.
- Transmit all documents to successive Vice-President.

## SECRETARY'S DUTIES

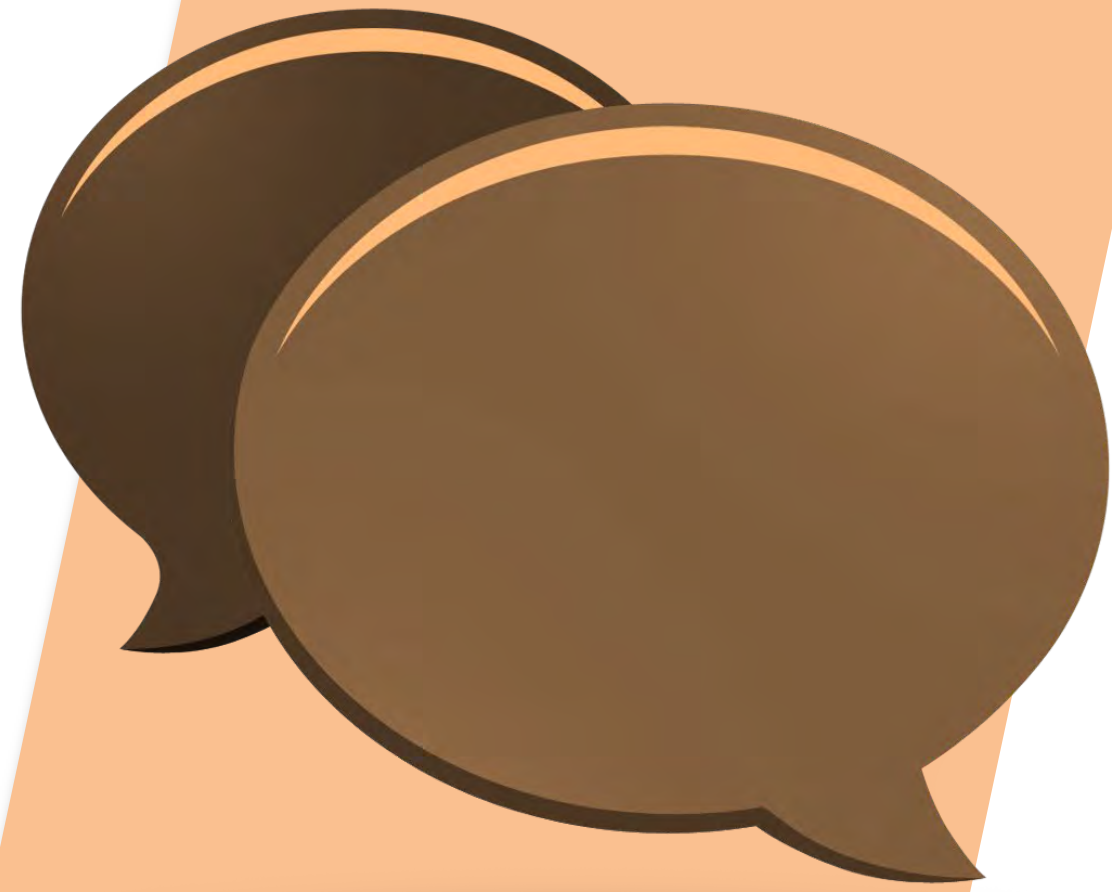
- Records minutes from each meeting
- Uploads agendas, minutes, [documentation](#) and newsletters to the chapter website.
- Maintains Chapter Documents on the Website Back-End (Visible & Non-Visible)
- Create newsletter on a bi-monthly basis and submit to Board of Directors or President before dissemination.
- Prepare and submit Chapter information to NIGP for inclusion on the national website.
- Collects annual acknowledgement forms from all Officers and Committee Chairs.
- Solicits bi-monthly updates & newsletter contributions from all Committee Chairman.
- Assists president with tracking committee progress on a bi-monthly basis.
- Maintains an accurate log of Member Participation.
- Prepares contribution for each newsletter.
- Performs all duties in accordance with the Chapter Bylaws
- Other duties as assigned by the President

## TREASURER'S DUTIES

- Recommends the banking facility and location to the Board of Directors, arranges for signature cards, and when approved, deposits money into investments for future use.
- Manages the finances of the Chapter to include depositing money, writing checks, balancing the general [ledger](#) and providing financial and other statements to the Chapter and to the National NIGP office.
- Coordinates all IRS filings with the Chapter's Contracted CPA Firm.
- Ensures two-part approval process, ratifies single approvals through a second Board Member.
- Works with the Finance and Audit committee who verifies and audits the Chapter books.
- Provide Monthly Reconciled Bank Statements & Budget v. Actuals Reports to Chapter President.
- Maintains the membership file and updates the website as necessary with new or changed information. Notifies the Welcoming committee of all new members.
- Provides the sign-in sheet at each meeting, performs all registration activities at each meeting.
- Updates meeting attendance to Chapter Website within 5 days of each event.
- Track meeting attendance.
- Prepares contribution for each newsletter.
- Performs all duties in accordance with the Chapter Bylaws.
- Other duties as assigned by the President.

### Transitional Requirements:

- Attend New Officer Orientation Meeting
- Mentor successive Treasurer.
- Closes bookkeeping for Chapter Year
- Transmit all documents to successive Treasurer



**What is a unique aspect of your Chapter that would be helpful to introduce in the orientation of your officers?**



# NIGP Resources

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RESOURCES FOR OUR CHAPTER LEADERS

Chapter Resource Library

Library Pages

- Library Home
- Governance
- Financial Management
- Membership
- Legal, Taxes & Insurance
- Events and Conferences
- Marketing
- Webinars
- NSite Community



Chapter Ambassadors By Area

Meet your local chapter ambassadors, who are each assigned to a specific regional area of the country.

AREA 1	AREA 2	AREA 3	AREA 4	AREA 5
AREA 6	AREA 7	AREA 8	AREA 9	AT LARGE

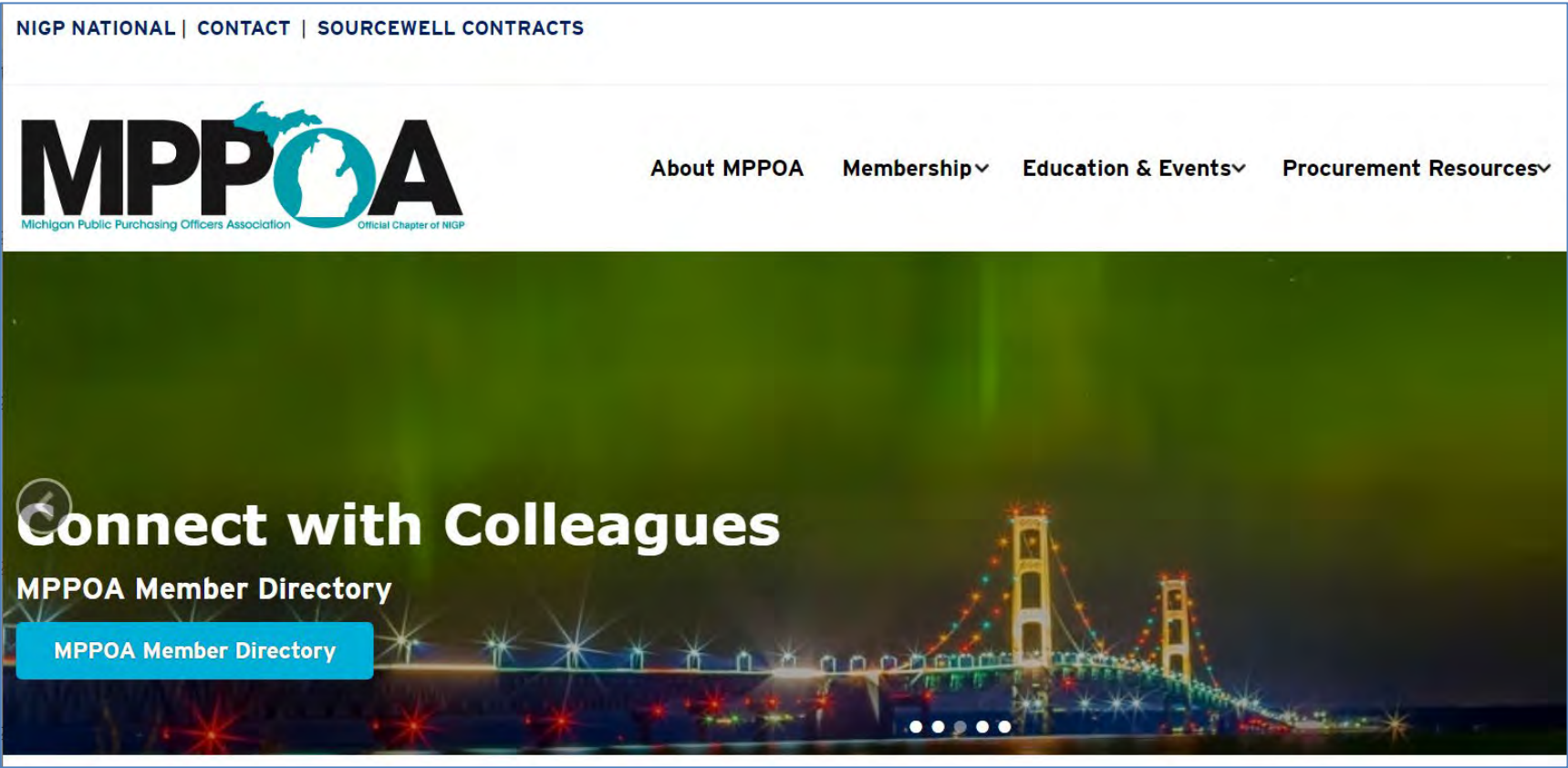
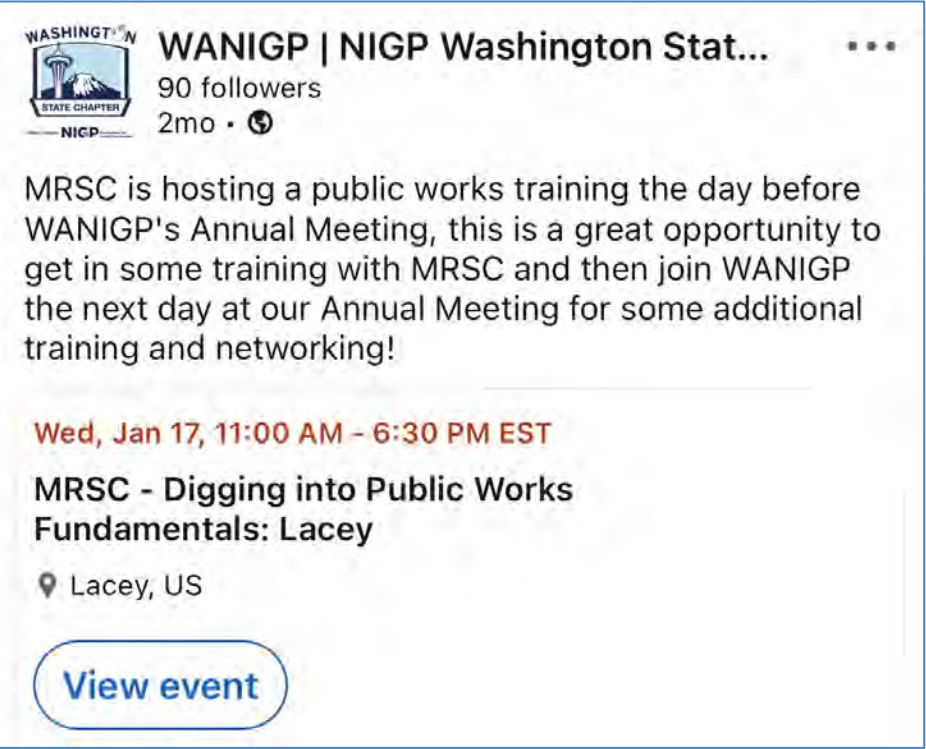
Leaders in the Loop and Chapter Huddles



# Chapter Resources



## NIGP LEADERSHIP SUMMIT 2024



Connect with us





# Open Dialogue

Build in sufficient time for open dialogue

Facilitators should be skilled and prepared to spark discussion

Critical to building team cohesiveness





# Get Creative!





# Communication Plan



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Begins when commitment expectation is established


*Save the Date* messaging, designed to build anticipation

Provide critical documents in advance









# Communication Strategy


## Officer Bootcamp Preparations





Woodell, Carrie

To  diane.wetherington@cityoforlando.net;  Mike Thornton;  Tabatha Freedman <tfreedman@volusia.org> (tfreedman@volusia.org);  
 Lisa Kesecker (keseckel@osceola.k12.fl.us)

Cc  Millan, Zulay V;  Denise Schneider

 First Adoption - Policies and Procedures 2016 Rev.pdf .pdf File

 bylaws.pdf .pdf File

 strategic-plan-for-cfc-nigp-2015-2020.pdf .pdf File

Reply

Reply All

Forward

...

Tue 2/21/2017 7:42 AM

Good morning. Final preparations are underway for Officer Bootcamp which will be held on March 4th at the GOAA Purchasing Office. Please plan to arrive by 8:30 so there is time for you to settle in before our 9am start time. Our schedule is as follows:

- 8:30am – 9am Breakfast
- 9am – noon Bootcamp Training (we will take breaks during this time)
- Noon – 1pm Lunch
- 1pm – 3:30pm Bootcamp Training

Please review the attached ByLaws, Program Documents & Policies and Strategic Plan prior to our training session and come prepared with any specific questions you have concerning either document. This will allow for a more efficient dialogue so we can adhere to the training timeframe established above.

Breakfast and lunch will be provided. The link below will provide you directions to the meeting location. I look forward to seeing you all soon!

<https://www.google.com/maps/place/8652+Casa+Verde+Rd,+Orlando,+FL+32827/@28.4429789,-81.3015663,18z/data=!4m2!3m1!1s0x88e7630220db7cfd:0x68427c3e9050f138?force=lite&hl=en-US>





# What's Next?

# Post-Bootcamp Actions



Acknowledgement of Duties

Certificates of Participation

Feedback from participants

Adjust based on feedback





OFFICER AND VOLUNTEER  
ACKNOWLEDGEMENT OF DUTIES

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

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

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

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

CONFLICT OF INTEREST DISCLOSURE

I, \_\_\_\_\_, do hereby declare that, as representative of CFC-NIGP, I occupy a position of trust and that I am in good faith and with loyalty to CFC-NIGP. I declare that if any private individual or entity with whom I have a significant relationship, conflicts my responsibilities to CFC-NIGP, I shall voluntarily disclose that conflict in Exhibit A, Conflict of Interest policy, attached hereto. I certify that, to the best of my knowledge, no aspect of my current personal or professional circumstances places me in a position of conflict of interest with any interest of CFC-NIGP, or with CFC-NIGP.

\_\_\_\_\_  
Officer's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Officer's Name (please print)

PLEASE SUBMIT FORM TO [SECRETARY@CFCNIGP.ORG](mailto:SECRETARY@CFCNIGP.ORG)

nigp.org/leadershipsummit

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# Program Evolution

Formalized attendance commitment in roles and responsibilities document

Added content as program offerings expanded

Adjusted format based on participant's feedback

The key is to optimize to ensure participants expectations are being met



# Wrap Up

# Key Principles

1. Comprehensive Orientation
2. Clear Communication Channels
3. Resource Accessibility
4. Mentorship and Support Network
5. Role-Specific Training and Skill Building
6. Nurturing Cohesiveness





Carrie Mathes, NIGP Governing Board Chair and Bootcamp Survivor

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