HANDBOOK FOR OFFICERS, BOARD MEMBERS AND COMMITTEE CHAIRPERSONS
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APPENDIX A    History of Officers, Directors and Committee Chairpersons  
APPENDIX B    History of Awardees
## Section 1
### AFFILIATE OFFICERS – 2019

<table>
<thead>
<tr>
<th><strong>Utah Chapter NIGP Affiliate Officers 2019</strong></th>
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</table>
| **President**                                 | Colette Brown  
Senior Buyer  
University of Utah  
PH: 801-585-1959  
cbrown@purchasing.utah.edu |
| **Vice President**                            | Zac Christensen  
Director of Purchasing & Contracts  
Buyer  
Utah State Board of Education  
PH: 801-583-7538  
zac.christensen@schools.utah.gov |
| **Secretary**                                 | Gayle Christensen  
Senior Buyer  
Canyons School District  
PH: 801-826-5413  
gayle.christensen@canyonsdistrict.org |
| **Treasurer**                                 | Brandon Thomas  
Director of Purchasing & AP  
Salt Lake Community College  
PH: 801-957-4255  
brandon.thomas@slcc.edu  
Brandon T |
| **Immediate Past President**                  | Jason Steinmann  
Purchasing Agent  
Granite School District  
PH: 385-646-4552  
jsteinmann@graniteschools.org |
| **S. Utah Chapter Coordinator**               | Vacant |

### Board of Directors

| **3rd Year**  
Kurt Prusse, CPPB  
Director  
Jordan School District  
PH: 801-567-8710  
kurt.prusse@jordandistrict.org |
| **2nd Year**  
Nancy Webb, C.P.M., CPPO  
Senior Buyer  
Canyons School District  
PH: 801-826-5418  
nancy.webb@canyonsdistrict.org |
| **1st Year**  
Vicki Woodward  
Buyer  
Davis School District  
PH: 801-402-7810  
vwoodward@dsmail.net |
### Community Involvement

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<tr>
<th>Name</th>
<th>Position</th>
<th>Organization</th>
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<tbody>
<tr>
<td>Rosemary Frenchwood</td>
<td>Buyer</td>
<td>Jordan School District</td>
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### Education

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### Historical

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<tbody>
<tr>
<td>Julie Fisher</td>
<td>Buyer</td>
<td>Granite School District</td>
<td>385-646-4309</td>
<td><a href="mailto:jlfisher@graniteschools.org">jlfisher@graniteschools.org</a></td>
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### Honors & Awards

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### Membership

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<th>Position</th>
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<tbody>
<tr>
<td>Erica Langenfass</td>
<td>Purchasing Agent</td>
<td>Sandy City</td>
<td>801-707-5174</td>
<td><a href="mailto:elangenfass@sandy.utah.gov">elangenfass@sandy.utah.gov</a></td>
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### Nominating

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### Public Relations & Marketing

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<tr>
<td>(vacant) - Chair</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tonya Hodges, CPPB</td>
<td>Buyer</td>
<td>Salt Lake City School District</td>
<td>801-578-8261</td>
<td><a href="mailto:tonya.hodges@slcschools.org">tonya.hodges@slcschools.org</a></td>
</tr>
<tr>
<td>Jared Gardner, CPPO, C.P.M.</td>
<td>Director</td>
<td>Granite School District</td>
<td>385-646-4561</td>
<td><a href="mailto:jbgardner@graniteschools.org">jbgardner@graniteschools.org</a></td>
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Section 2
INTRODUCTION AND HISTORY

This handbook has been created to establish written guidelines for consistent operations of the National Institute of Governmental Purchasing (NIGP), Utah Chapter. It is a tool and a reference guide to be used by present and future members of the NIGP Utah Chapter who are elected or appointed to conduct the business of the chapter. While this guide will provide a basis for the conduct of business, it will take the user’s experience, knowledge and judgment to make it work most effectively. It is also intended to be reviewed periodically and updated to meet the changing needs of the times and the organization.

HISTORY OF THE UTAH CHAPTER

In late 2003, a number of public purchasing professionals met with Rick Grimm the Chief Executive Officer of NIGP. Several of them were members of NAPM Utah and were looking for an organization which would better meet the need of the group. Other individuals were members of the National NIGP organization and wanted to have a local chapter. That initial meeting was held in the Holiday Inn Downtown in Salt Lake City, UT. Grimm’s presentation focused on what NIGP had to offer professionally and what was required to organize a chapter. After the meeting, Greg Maynard from the Salt Lake City School District contacted National NIGP to find out if anyone from their records might be interested in spearheading the organization of a local chapter. He was referred to Tracey Stevens of Salt Lake City Corporation and Carol Heales of Murray City.

The trio began meeting in a Subway Restaurant, in early 2004 to discuss how to get started in meeting the outlined requirements. It was decided that Tracey would serve as the formation committee chair, Greg would serve as vice chair and Carol would be secretary. They were joined from time to time by Brent Davidson of Murray City. After months of reviewing samples of by-laws and communicating with National, the official paperwork was submitted to form a Utah chapter.

On the 25th of May 2005, Ron Watkins, the National NIGP President, presented the charter and swore in the new chapter officers who were: Greg Maynard, President; Susan Swensen of St. George City, Vice President; Carol Heales, Secretary and Marlin McKinney of Alpine School District as Treasurer. It was decided to hold meetings every other month from September to May with the summer months for the new officers to meet and plan the next year’s activities. Meetings were held in the Murray City Board room, 5025 South State Street. Accomplishments of that first year included:

- Registration with the State as a non-profit organization
- Selection of the chapter logo
- Setting up the chapter’s bank account
- Securing a PO Box address
- Initializing a joint sponsorship with NAPM Utah (ISM) of the Governor’s proclamation of March as Purchasing Month

The initial Utah Chapter meeting was held on September 21, 2005 in a conference room of the Salt Lake City School District and featured as guest speaker Douglas Richins, the Director of State Purchasing. Meetings followed in November, January, March and May. The May meeting was a mini-workshop held in the board room of St. George City. The theme was Emergency Procurement and Legal Issues. By the end of the first year, over 50 individuals had joined the chapter.

The challenge for the following year was to build on the successes of the first year and find ways to get more members involved, as less than half of the membership participated in the meetings and the workshop that first year due to distance or other conflicts.
Purpose and Objective

The purpose for organizing the chapter as defined by the formation committee was as follows: Promote ethical, efficient and cost-effective public purchasing.

- Provide educational programs, products and services.
- Provide a location and ambiance where purchasing professionals can share ideas.
- Facilitate the conduct of purchasing activities by public agencies.

The objective was to promote the quality and stature of public purchasing and to advance individual professionalism through training, networking and certification.

Mission Statement

The Utah Chapter aspires to benefit both its members’ personal growth and their employers by including best practices of the profession and increasing each member’s value to their respective organizations through education, networking and extended services and activities.
Section 3
POLICY AND PROCEDURES

Fund Disbursements Policy

- No funds over $50 shall be expended or committed without prior approval, except in the case of emergency. The treasurer shall be notified as soon as possible of all the expenditure details. Any purchase over $50 not previously approved by the Board shall be followed up with a written approval and shall include any other appropriate backup documentation for the file.

Approvals

- Prior approval must be obtained from the Board on all un-budgeted commitments.

- Where a combined or single expenditure has been budgeted and exceeds $200.00, the appropriate officer, Chapter President or Vice-President, and Executive Board must approve it prior to purchase.

- Requests for expenditures for Special Events, Seminars, Workshops, and other applicable activities should be approved by the President and the Executive Board at least 30 days prior to the event.

- Consolidated income and expenses will be shown on the Chapter Financial Statement.

- All expenditures must be supported by proper documentation, and approved by the Treasurer.

- Any requests that do not adhere to this policy must be presented to the Chapter Executive Board for approval.

- Any expenditure submitted more than 30 days after commitment must be submitted for Chapter Executive Board approval.

- For any commitment of Chapter funds in excess of $50.00, the Treasurer must be notified by the Friday preceding the Chapter Executive Board meeting.

- All expenditures must have prior approval of the responsible officer. Each officer will be held responsible for his or her committee members adhering to this policy.

- Any expenditure in excess of $200 or 20% of the current treasury balance, whichever is less, shall require the approval of the Executive Board.
Section 4

OFFICERS AND DIRECTORS

General

The President shall 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 perform all duties incident to the office of the President. The President shall be responsible for authorizing expenditure or commitment of Chapter funds, and may counter-sign checks issued on behalf of the Chapter. In the event the President is not available to sign, the Vice President may sign on their behalf.

Duties and Responsibilities

1. Chair all Board Meetings and participate in discussions and decision making of Chapter issues.

2. Set and publish an agenda for all Board meetings and oversee the order, discussion and committee reports of the meetings.

3. Submit such reports to the membership as prescribed in the Chapter By-Laws.

4. Annually renew the “Not for Profit” status of the chapter with the State of Utah prior to the end of the current year. A mailed notification will come giving information on how to renew on-line.

5. Serve as a facilitator for all Chapter workshops and meetings, introduce all guests, speakers and other attendees.

6. Serve as a representative to the National Institute of Governmental Purchasing for issues on behalf of the Chapter.

7. In the event of a tie vote within the Board, cast the deciding vote.

8. Assign duties to Officers and Committee Chairs that are in the best interest of the organization and appoint special committees to perform Chapter business as needed.

9. Represent the Chapter in a professional manner at all times

10. Select and award a recipient the Annual President’s Award.

11. Work to train new Officers and Committee Chairs in order to facilitate a smooth transition when there is turnover in the Board.

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

The Vice President shall develop and administer program content, selection criteria, nomination and selection criteria pertaining to annual awards and scholarships, ensure that an audit of financial records is performed, and perform such duties as assigned by the President. The Vice President is authorized to sign or counter-sign Chapter checks in the temporary absence of the President or Treasurer.

Duties and Responsibilities

1. Serve as an active member of the Educational Committee assisting the committee chair person in developing and scheduling the workshops, and/or meetings.

2. Attend Board Meetings and workshops.

3. Participate in discussion and voting on organizational issues.

4. Responsible for coordinating annual “Chapter of the Year” application to NIGP.

5. Assist with the planning and preparation of special Chapter events.

6. Serve as an active member of the Honors and Awards (Scholarship) Committee.

7. Accept special assignments from the President or Board.

8. Give committee reports to the Board in the absence of the chairperson.

9. Assist newly elected Officers and Board members when needed.

10. Be familiar with and perform the duties of the President in the absence of the President.

11. Represent the Chapter in professional manner.

12. Attend the NIGP Annual Forum on behalf of the Chapter if able.
General

The Treasurer shall be responsible for the accounting of the funds of the Chapter, shall maintain a complete record of receipts and disbursements, and shall render a true and complete report relative to the affairs of the Chapter at each meeting. The Treasurer shall prepare and sign all Chapter checks and deliver to the President or Vice President for counter-signature.

Duties and Responsibilities

1. Maintain a complete and accurate record of all Chapter receipts, expenditures, and reimbursements.

2. Prepare a quarterly financial report and distribute to each board member. The report shall consist of all expenditures and revenues as well as current fund balances.

3. Prepare and sign all Chapter checks or arrange to designate this duty to the President or Vice President if the Treasurer is unavailable.

4. Maintain responsibility for the Chapter checking and savings accounts, keeping them balanced and in a secure place.

5. Pay all Chapter invoices as needed after verifying that the payment is appropriate.

6. Prepare and pay annual expenses, including: PO Box rental fee due in December of each year and annual renewal of Non-Profit license with the State of Utah due May of each year.

7. Attend and participate in monthly Board meetings, workshops, and business meetings, paying for all meeting expenses with the Chapter checkbook. The President shall act in the stead of the Treasurer should he/she not be able to attend.

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

9. Investigate banking issues for the checking and savings accounts as directed by the President or the Board.

10. Prepare the annual financial report to NIGP National at the beginning of the calendar year.

11. Send out annual membership invoices at the beginning of January each year. Forward copies of returned chapter membership applications to the Membership Committee Chair for coordination and tracking purposes.

12. Read and be knowledgeable with NIGP Chapter Financial Management Guidelines. See NIGP website.

13. Monitor the PO Box and distribute the mail to the appropriate person.

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

15. Represent the Chapter in a professional manner.

General

The Secretary shall maintain a written record of the proceedings of all meetings of the Executive Board and of the Chapter, oversee the mailing or e-mailing all notices of meetings and affairs of the Chapter to the members of the Chapter or as appropriate, to NIGP, and perform such other duties assigned by the President or Executive Board.

Duties and Responsibilities

1. Attend Board and Chapter meetings taking minutes of the proceedings and recording all actions voted on by the Board.

2. Distribute at each Board and Chapter meeting the minutes of the prior meeting. Minutes may be posted on the Chapter website.

3. Participate in discussion of Chapter affairs and business, casting a vote on issues.

4. Participate in committee assignments as volunteered for or assigned by the President or Board.

5. Assist with the preparation and distribution of workshop flyers and Chapter newsletters.

6. Perform other duties as required and directed by the President or Board.

7. Keep the Bylaws of the NIGP Utah Chapter up to date and current. Keep copies where they are readily available.

8. Represent the Chapter in a professional manner.

9. Attend Annual Forum when possible.
General

The Immediate Past President serves in an advisory capacity to the current officers and Board and assists with the management of the Chapter's business. He/she reports to the President.

Duties and Responsibilities

1. Attend all Board meetings and participate in the discussions and vote on matters of business.

2. Advise the President and Board on issues, questions, and problems.

3. Help perpetuate the primary objectives and purposes of the Chapter as applicable and practical.

4. Deliver to the succeeding president all books, records, documents and other Chapter property that are important for continuation of the office.

5. Advise the incoming president on matters of unfinished business, offer recommendations and suggestions appropriate to perpetuation of the Chapter’s primary objectives, goals and purposes.

6. Perform other duties as assigned by the President or Board.

7. Represent the Chapter in a professional manner.
General (Directors)

The Directors shall perform duties as assigned by the President, and shall be elected to serve for a term of three years. They have over-watch responsibility for the physical properties of the Chapter, i.e. the charter, library books, checking account, etc.

Duties

1. Attend Board meetings and workshops and participate in discussion and voting on organizational issues.

2. Directors shall actively serve on Chapter committees as appointed by the President or the Board.

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

4. Accept special assignments from the President when called upon to do so.
   • Library – keeping the books & magazines: checking them out & tracking them
   • History – Keeping track of photos and other items important to the history of the Chapter

5. Assist newly elected officers and directors when needed.

6. Represent the Chapter in a professional manner

7. Committee Assignments: 3rd Year Director is on the Finance Committee, 2nd Year Director is on the Membership Committees, 1st Year member is on the Education Committee.
Section 5
COMMITTEE CHAIRPERSONS

General

The Nominating Committee Chair shall be the Past President and the committee shall consist of not less than three (3) national members in good standing. He / She should focus the committee on recruiting candidates to fill the many positions of service within the Chapter, especially the officers, Board and chairman positions.

Duties and Responsibilities

1. Survey and nominate from the membership a slate of officer and Board member candidates to be recommended to the general membership for their vote at the November Chapter meeting.

2. Announce the slate of candidates by mail or e-mail to the membership thirty (30) days prior to the November meeting.

3. Responsible for conducting the nominating and voting portion of the November meeting in accordance with the procedures established in the Chapter Bylaws.

4. Take additional candidate nominations from the floor for the offices for which voting will take place.

5. Prepare regular and absentee ballots to be used in the voting process.

6. Send absentee ballots with the November newsletter so those who wish to vote, but will not be in attendance at the November meeting, will be able to submit an absentee ballot.

7. Tally all votes and announce the new elected officers and board members.

8. Induct the new board members to their positions.
General

The Finance Committee Chair shall be responsible for coordination of the annual review of the Chapter’s financial records and preparation of the draft budget for the upcoming fiscal year. The committee shall consist of not less than two (2) national members in good standing, including the 3rd Year Director. The Treasurer shall be an ex-officio member of the Committee. He / She should focus the committee on keeping the chapter fiscally sound and out of financial troubles.

Duties and Responsibilities

1. Review past year’s Treasurer’s records of the Chapter’s income and expenses and verify the accuracy of the records.
2. Prepare and report the findings to the membership for the Chapter at the next meeting.
3. Prepare a draft budget prior to the end of the fiscal year.
4. Present the draft budget to the Board for approval prior to the next regular meeting.
5. Present the Board approved budget to the general membership for approval.
6. Assist the Treasurer, if necessary, in the preparation of the annual financial report to National.
7. The Committee’s Chair shall make periodic reports to the President on the status of their activities.
General

The Education Committee Chair shall be responsible for the oversight of the committee and any sub-committees whose purpose is to plan, establish, and coordinate educational programs and workshops, subject to approval by the Board, which further the knowledge, expertise, and professionalism of the membership. The committee shall consist of not less than three (3) national members in good standing, including the 1st Year Director. He / She should focus the committee on providing members with educational opportunities which lead to certification and/or professional knowledge.

Duties and Responsibilities

1. Attend Board meetings and report on the status of program and workshop schedules and topics.
2. Recommend the appointment of additional committee members to assist with the duties of the committee or sub-committees, i.e. Workshops and Seminars.
3. Survey and gather training topics from the general membership through formal and informal means.
4. Attend committee meeting and facilitate discussion and planning.
5. Present proposed training agenda to the Board for approval.
6. Investigate potential meeting and conference facilities.
7. Work directly with the NIGP National office to schedule and arrange for instructors.
8. Coordinate workshop and seminar needs for audio visual and other needs, i.e. refreshments or lunch.
9. Keep records of all expenses related to the workshops and seminars and prepare a report for the Board.
10. Arrange for the printing, distribution or publishing on the web site of all workshop and seminar flyers consistent with NIGP standards.
11. Coordinate and track all workshop and seminar fees paid with NIGP funds by Chapter Treasurer.
12. Monitor and track registrations for the workshops and seminars.
13. Create and have available at the event a sign-in roster of all workshop or seminar attendees.
14. Collect and publish trainer and speaker biographies prior to the event.
15. Create and distribute a survey sheet to obtain input from the attendees on the value of the event.
16. Submit a calendar of events to the Chapter newsletter editor for timely publication.
17. Shall keep records and report to NIGP all continuing education points earned by the membership during the current year.
18. Shall issue to each member a certificate of the annual continuing education points earned by them during the current year.
19. Represent the Chapter in a professional manner.
20. Perform other related duties as directed by the President or the Board.
General

The Membership Committee Chair shall be responsible for maintaining and managing the Chapter membership roster for both local and national memberships and for coordinating with the Educational Committee chair on the certification status of each member. Membership Committee shall consist of not less than two (2) national members in good standing, including the 2nd Year Director. He / She should focus the committee on the retention of current members and establishing a recruitment program to attract new members and a mentoring program to provide for new member orientation and mentoring.

Duties and Responsibilities

1. Attend Board meeting and report on the current membership status, i.e. dues paid and number of members.

2. Maintain a current membership directory, listing the following: Name, Certification, Chapter Position, Work Position, Employer, Work/Home Addresses, Work/Home Phone Numbers, E-mail Address, National &/or Local Membership.

3. Provide information as requested by persons interested in joining the Chapter and National. This information shall include a letter from the Chapter President or Membership Chair.

4. Review membership applications for completeness and approval and notify applicant of approval.

5. Coordinate with and send all new membership application fees to the Treasurer.

6. Provide all new members upon payment of dues with a certificate of membership in the Chapter.

7. Coordinate with the Treasurer for the sending out of membership dues invoices each January and delinquent notices when necessary.

8. Provide the Board and the membership, as requested, a listing of all members as listed in #2 above. Mark the listing confidential.

9. Prepare and send the annual membership report to NIGP National.

10. Organize an effective recruiting program in conjunction with the Public Relations committee.

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

12. Represent the Chapter in a professional manner.
General

The Public Relations and Marketing Committee chair is responsible for communication with the Chapter membership and the community. The committee shall consist of not less than two (2) national members in good standing, including the 3 Year Director. He / She should focus the committee on keeping the membership and outside community informed of what is happening within the chapter and what individual members are contributing to the community.

Duties and Responsibilities

1. Attend Board meetings and record relevant information for the Chapter Newsletter and report on progress.

2. Work with the Chapter Newsletter editor on the editing, submitting of articles and the publication of the newsletter 15 to 30 days prior to the bi-monthly meetings.

3. Encourage member input and submission of articles.

4. Utilize member’s e-mail addresses to distribute the newsletter.

5. Coordinate with the Membership Chair to ensure that the membership e-mail information is current.

6. Manage the development, content and maintenance of the Chapter website and e-mail address.

7. Keep web site information current, develop new uses for the website as appropriate and provide the Board with regular updates on any proposed changes for their approval.

8. Develop policies and procedures for the use of e-mail based communications tools and serve as the system administrator.

9. Provide information on the NIGP and the Utah Chapter of NIGP to cities, governments, us

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

11. Represent the Chapter in a professional manner.
General

The Honors and Awards (Scholarship) Committee Chair shall be responsible for the development and administration of procedures, award selection criteria, and final selection of recipients for the Professional Public Buyer of the Year Award and Professional Public Purchasing Manager of the Year Award.

He / she should focus the committee on selecting the most qualified nominees for these awards as well as creating, as appropriate, other awards to recognize members for their outstanding service or contribution to the chapter and the profession. Likewise, scholarships may be established to encourage higher education students to select procurement as a profession.

The Vice President shall direct the Honors and Awards (Scholarship) Committee. The Honors and Awards (Scholarship) Committee shall consist of the following four Members:

Vice President, Chairperson; Chairperson of the Education Committee; Chairperson of the Membership Committee; Member-at-large from Chapter membership, nominated by the President and approved by the Executive Board.

Duties and Responsibilities

1. Review procedures and criteria used in selecting recipients of the Chapter's Purchasing Manager of the Year Award and Professional Buyer of the Year Award, and submit any recommended changes for approval to the membership no later than the second month of the Chapter's fiscal year. Any recommended changes shall be submitted to the membership, in writing, at least thirty (30) days prior to the next Chapter meeting in order to vote on the recommendation at that meeting. Upon approval by the membership, the President shall submit any changes to NIGP for approval. If no changes are deemed necessary, the Committee shall report this to the membership by the second month of the Chapter's fiscal year.

2. Notify all members of the procedures and deadlines for submitting nominations.

3. Coordinate submission of the NIGP Chapter of the Year, nomination for the National Professional Public Buyer of the Year, and nomination for the National Professional Purchasing Manager of the Year Awards to NIGP, which are due to National by April of each year.

4. Oversee the nomination and selection of the Chapter's annual awards using the criteria outlined in Section 8 of the handbook.

5. Prepare and give the annual awards to the recipients at an annual meeting.

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

7. Represent the Chapter in a professional manner.
General

The Historical Committee Chair is responsible for collecting data, information, photos and other items deemed appropriate for the historical records of the Chapter and for maintaining the information in perpetual files. He / She should focus the committee on maintaining an accurate record of the chapter’s history and preserving artifacts and memorabilia.

Duties and Responsibilities

1. Attend Board meeting when invited and report on the progress or needs of the committee.
2. Recruit members to serve on the committee and assist in carrying out the duties of the committee.
3. Establish criteria for the types of information and artifacts to be included, e.g. photos, annual summaries of activities, awards, membership rosters, etc.
4. Verify the information and data that will be made a matter of record for the Chapter’s history, to the extent possible and making note to the fact when the information could not be authenticated.
5. Collect, catalog and file the information for future Chapter purposes.
6. Keep the local Chapter’s Facebook page up to date.
7. Coordinate with other Chapter committees as appropriate in the gathering of information or providing information to support a program or activity.
8. Turn over to the succeeding chairperson Chapter archives, records and material relating to the committee’s work and responsibilities.
9. Represent the Chapter in a professional manner.
General

The Community Involvement Chair is responsible for coordinating volunteer and/or service opportunities for the chapter membership.

Duties and Responsibilities

1. Attend Board meeting when invited and report on the progress or needs of the committee.
2. Recruit members to serve on the committee and assist in carrying out the duties of the committee.
3. Become familiar with local volunteer and/or service organizations.
4. Coordinate one volunteer and/or service event per year for the chapter membership.
5. Communicate to Chapter members any volunteer and/or service opportunities throughout the year that may not be sponsored by NIGP.
Section 6
WORKSHOPS AND MEETINGS

Half-day workshops or meetings are scheduled for January, March, May, September and November. Workshops are usually scheduled between 9 a.m. and 12:00 noon, but may be scheduled to meet the needs of the membership or to accommodate the topics being presented. Special all-day workshops may be conducted from time to time as needed or deemed appropriate.

Workshop Topics

Topics are tailored to the day-to-day needs and concerns of public procurement professionals. A sample of the topics to be addressed include, but are not limited to, the following:
- Legislation Affecting Public Purchasing
- Benchmarking
- Recycling
- Surplus Property Disposal
- Material Management
- Writing Effective Specifications
- Using Current Technologies
- Sourcing Products
- Bid and Proposal Methods
- Emergency Procurement
- Certification Training
- Other pertinent topics
- Special Programs

Workshop Costs

The fees for regular meeting workshops will be free to current Chapter members and $10 for non-Chapter members or former members. Perspective Chapter members may attend one workshop without being charged the $10 fee. Full-day workshops costs will be kept to a minimum as determined by the cost of the event to include speaker fees, location rentals, meals, snacks, handouts and training material.

Special Workshops

Occasionally, special workshops may be scheduled in conjunction with other organizations in order to take advantage of all training opportunities that may prove beneficial to the membership. Such workshops are subject to Board approval.
Section 7

ANNUAL AWARDS

Types of Awards

The chapter may present the following awards on an annual basis.

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

Professional Buyer of the Year

This award may be presented to a Chapter member from the rank and file of buyer or purchaser, as directed by the Honors and Awards Committee. It shall be awarded to the individual who demonstrates outstanding professionalism and has contributed significantly to the field of public purchasing, and the Chapter during the fiscal year. See Attached Professional Buyer of the Year check list.

Professional Purchasing Manager of the Year

This award may be presented to a Chapter member from the rank and file of purchasing manager or supervisor, as selected by the Honors and Awards Committee. It shall be awarded to the individual who demonstrates outstanding professionalism and has contributed significantly to the field of public purchasing, and the chapter during the fiscal year. See Attached Professional Purchasing Manager of the Year check list.

President’s Award

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

Nominations for Buyer and Manager of the Year

The Honors and Awards Committee may solicit and accept nominations for the above awards until February 1st of each year. Any member or officer may submit nominations. Members may submit written nominations to the committee members consisting of the nominee’s name and agency. The committee will then contact the nominees and request detailed information regarding their past year’s activities based upon the NIGP criteria.

Selection of Buyer and Manager of the Year

The committee will evaluate and score all nominations received and select one person for each award. The evaluation and selection shall be based on the latest NIGP scoring criteria. See the attached listing of criteria for the Buyer and Manager of the Year Awards. The award winners will be announced to the Board members in the March Board meeting. Official announcement via the Chapter newsletter shall be made at the March meeting.

The President may present the Buyer and Manager of the Year awards at an annual meeting. If the President is one of the award winners, then the Vice President or other officer shall make the presentation. The award shall consist of an engraved plaque with the winner’s name and agency, and shall be consistent in quality and appearance to past awards.
National Awards
The chapter may forward its Buyer and Manager of the Year award winners to NIGP for consideration for national recognition. Each nomination submitted shall be in a complete and professional format. Manager of the Year and Buyer of the Year need to be turned into National NIGP no later than April 1 of each year.

Local Recognition
The Chapter Buyer and Manager of Year award winners shall be recognized in the next issue of the Chapter newsletter. Inform the Newsletter Editor of the awards so they can be announced in the newsletter.

Professional Buyer of the Year
The candidate has made significant contributions to the governmental entity served as demonstrated by:

A. Initiating procurement concept that will lead to Excellence in Public Procurement (5 points)
B. Enacted policies or practices that have enhanced the efficiency and effectiveness of their agency and/or end users - 1 point per policy or practice (5 points)
C. Developing or directing the development or revision of Standard Operating procedures for procurement personnel and end users (4 points)
D. Developing or directing the development or revision of a manual for vendors (4 points)
E. Serving on a committee or task force involved in developing, implementing, or revising procurement procedures -1 point per interest group activity (3 points)
F. Serving as a member of a working group, board, committee or task force on procurement-related subjects (3 points)
G. Serving a governmental group, civic organization, or association, not procurement-related, such as a Mayor's Committee on Safety, Government Employees Credit Union, United Way, Diversity, Employee Recognition Committee, etc. (2 points)
H. Service award recipient or recognition nominee (non-Chapter related award), please specify (2 points per award, 4 points max)

The candidate has made significant contributions to the Chapter as demonstrated by:

A. Serving as an Officer of the Chapter (3 points per year, 6 points max)
B. Serving as a Committee member of the Chapter (2 points per year, 4 points max)
C. Serving as an instructor for a Chapter training session (3 points)
D. Serving as a Training Coordinator for the local Chapter, (3 points)
E. Serving as a Chapter Webmaster or Website Administrator (2 points)
F. Serving as a mentor for the NIGP Distance Learning Program (1 point per student, 2 points max)
G. Serving as an instructor for UPPCC certification review sessions (2 points)
H. Publishing articles on purchasing or purchasing-related topics in professional publications, local Chapter newsletter, Chapter Network or other purchasing-related publications (1 point per article, 5 points max)
I. Serving as a Chapter special assignment volunteer, vendor show or expo coordinator or conference coordinator(2 points per year, 4 points max)
J. Developing a special survey, study, or report for the Chapter (2 points)
K. Other Chapter volunteer-related activity, please specify (2 points)

Notes:
Professional Purchasing Manager of the Year

The candidate has made significant contributions to the governmental entity served as demonstrated by:

A. ☐ Enacted policies or practices that have enhanced the efficiency and effectiveness of their agency and/or end users (5 points)
B. ☐ Demonstrated efforts to recruit and retain professional purchasing staff (2 points)
C. ☐ Establishment of a staff development program including internal, external training (3 points)
D. ☐ Developing, recommending, implementing, reviewing, and managing a budget (including funds for staff training and certification). (5 points)
E. ☐ Developing or directing the development or revision of a manual for procurement personnel, users, or vendors (4 points)
F. ☐ Serving on a committee or task force involved in developing, implementing, or revising new procurement procedures (3 points)
G. ☐ Service award recipient or recognition nominee (non-Chapter related awards), please specify (1 point per award - 4 points maximum)
H. ☐ An example of an Innovative Bid Call produced by Manager (4 points)

The candidate has made significant contributions to the Chapter as demonstrated by:

A. ☐ Serving as an Officer of the Chapter (3 points per year, 6 points max)
B. ☐ Serving as a committee member of the Chapter (2 points per year, 4 points max)
C. ☐ Serving as an instructor for a Chapter training session (3 points)
D. ☐ Serving as a Training Coordinator for the local Chapter, (3 points)
E. ☐ Serving as a Chapter Webmaster or Website Administrator (2 points)
F. ☐ Serving as a mentor for the NIGP Distance Learning Program (1 point per student, 2 points max)
G. ☐ Serving as an instructor for UPPCC certification review sessions (2 points)
H. ☐ Publishing articles on purchasing or purchasing-related topics in professional publications, local Chapter newsletter, Chapter Network or other purchasing-related publications (1 point per article, 5 points max)
I. ☐ Serving as a Chapter special assignment volunteer (2 points per year, 4 points max)
J. ☐ Developing a special survey, study, or report for the Chapter (2 points)
K. ☐ Other Chapter volunteer-related activity, please specify (2 points)

Notes
Section 8
WEBSITE AND PROTOCOL

The chapter website is located at www.nigputah.org.

Annual costs for website use shall be paid to the current web hosting service. As of January 2019, the Chapter is using Weebly.

Pricing may change yearly.
Section 9

NIGP CODE OF ETHICS

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

Each member:
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 that might influence or appear to influence purchasing decisions.

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

Resists encroachment upon, or control of personnel in order to preserve integrity as a professional manager. Handles all personnel matters on a merit basis. Politics, religion, ethnicity, gender and age carry no weight in personnel administration in the agency being directed or served.

Neither seeks nor dispenses 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.
APPENDIX A

HISTORY OF OFFICERS, DIRECTORS AND COMMITTEE CHAIRPERSONS

2005-2006 Officers and Committee Chairpersons

President  Gregory Maynard, CPM  Salt Lake City School District  
Vice President  Susan Swensen, CPPO  Saint George City  
Secretary  Carol Heales  Murray City  
Treasurer  Marlin McKinney  Alpine School District

Committee Chairpersons

Finance   Gary Hansen, C.P.M.  Granite School District  
Membership  Marie Guarascio  West Valley City  
Professional Development  Merlene Wixom &  Weber School District   
                             Dean Pope, C.P.M., CPPB Granite School District  
Newsletter   Mindi Bos  Sandy City

2006-07 Officers, Directors and Committee Chairpersons

President  Gregory Maynard, CPM, CPPO  Salt Lake City School District  
Vice President  Merlene Wixom  Weber School District  
Secretary  Mindi Bos  Sandy City  
Treasurer  Rosemary Frenchwood  State of UT Dept of Human Svc

Committee Chairpersons

Audit/ Budget  
Awards  
Communications  
Historian  
Membership  
Nominating  
Education   Dean Pope, C.P.M., CPPB  Granite School District  
Program
# 2008 Officers, Directors and Committee Chairpersons

<table>
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<th>Position</th>
<th>Name</th>
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<tr>
<td>President</td>
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<td>David Bryan</td>
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<td>LaDonna Haslam</td>
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## Committee Chairpersons

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# 2009 Officers, Directors and Committee Chairpersons

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<td>Past President</td>
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## Committee Chairpersons

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<td>Tiffany Sorenson, CPSM</td>
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2010 Officers, Directors and Committee Chairpersons

President       Glendon Mitchell C.P.M. CPPO  Salt Lake County
Vice President  Tiffany Sorensen, CPSM  Salt Lake City
Secretary       Michael Rigby  State of Utah Purchasing
Treasurer       Gayle Gayler  Salt Lake County
1 Year Director Jared Gardner CPPO, CPM, MBA  Granite School District
2 Year Director Carol Heales  Murray City
3 Year Director George Brinkerhoff  Salt Lake County
Past President  Paul Mash  State of Utah Purchasing

Committee Chairpersons

Honors & Awards  Tonya Hodges, CPPB  Salt Lake City School District
Financial       Mindi Bos  Sandy City
Membership      Stephen Elms  Draper City
Nominating      Greg Maynard CPPO, CPM, MBA  Salt Lake City School District
Public Relations & Market Tracie Montano CPPB  Utah Dept of Transportation
Education      Tracie Montano CPPB  Utah Dept of Transportation

2011 Officers, Directors and Committee Chairpersons

President       Jared Gardner CPM, CPPO, MBA  Granite School District
Vice President  Kurt Prusse  Weber School District
Secretary       Kay Healey  Alpine School District
Treasurer       Mark Parry  State of Utah Purchasing
1 Year Director Adrian Ruger CPM  State of Utah Purchasing
2 Year Director George Brinkerhoff  Salt Lake City Corporation
3 Year Director Greg Maynard  Salt Lake City School District
Past President  Glendon Mitchell, CPM, CPPO  Salt Lake County

Committee Chairpersons

Honors & Awards  Tonya Hodges, CPPB  Salt Lake City School District
Financial       Mary Parry  State of Utah Purchasing
Historian       Kate Fotsch  University of Utah
Membership      Steve Elms  Draper City
Nominating      Trever Ward  Utah Dept of Transportation
Public Relations & Market Tracie Montano, CPPB  Utah Dept of Transportation
Education      Tracie Montano, CPPB  Utah Dept of Transportation
## 2012 Officers, Directors and Committee Chairpersons

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## Committee Chairpersons

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## 2013 Officers, Directors and Committee Chairpersons

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<td>Polly Alles</td>
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<tr>
<td>Past President</td>
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## Committee Chairpersons

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<td>Mike Smith</td>
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2014 Officers, Directors and Committee Chairpersons

President            Trever Ward            Utah Dept. of Transportation
Vice President       Jennifer Porter       State of Utah Purchasing
Secretary            Nikki Sanchez         State of Utah Purchasing
Treasurer            Tyler Barnes          State of Utah Purchasing
1 Year Director      Tracie Montano, CPPB  Utah Dept of Transportation
2 Year Director      Polly Alles           University of Utah
3 Year Director      Mike Smith            University of Utah
Past President       Adrian Ruger CPM, CPPB State of Utah Purchasing

Committee Chairpersons

Honors & Awards       Jennifer Porter       State of Utah Purchasing
Newsletter            Tonya Hodges, CPPB    Salt Lake City School District
Financial            Garrett Johnston       State of Utah Purchasing
Historian             Denice Smith          State of Utah Public Safety
Membership            Sharon Pierce         University of Utah
Nominating            Adrian Ruger CPM, CPPB State of Utah Purchasing
Public Relations & Market Glendon Mitchell State of Utah Purchasing
Education            Debbie Smith           Granite School District

2015 Officers, Directors and Committee Chairpersons

President            Jennifer Salts CPPB   State of Utah Purchasing
Vice President       Polly Alles           University of Utah
Secretary            Nikki Sanchez         State of Utah Purchasing
Treasurer            Sharon Pierce         Salt Lake County
1 Year Director      Randi Ruff            University of Utah
2 Year Director      Debbie Smith          Granite School District
3 Year Director      Lori Peterson, CPM, CPPO, Davis School District
Past Director        Trever Ward            Utah Dept of Transportation

Committee Chairpersons

Honors & Awards       Polly Alles            University of Utah
Newsletter            Tonya Hodges, CPPB    Salt Lake City School District
Financial            Adrian Ruger CPM, CPPB State of Utah Purchasing
Historian             Joan Tuttle, CPPB      Davis School District
Membership            Jerilyn Midthun        Salt Lake City
Nominating            Trever Ward            Utah Dept of Transportation
Public Relations & Market Glendon Mitchell CPM, CPPO University of Utah
Education            Eileen Boswell         Salt Lake Community College
### 2016 Officers, Directors and Committee Chairpersons

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<tr>
<td>President</td>
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<tr>
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</tr>
<tr>
<td>1 Year Director</td>
<td>Debbie Smith</td>
<td>Granite School District</td>
</tr>
<tr>
<td>2 Year Director</td>
<td>Lori Peterson, CPM, CPPO,</td>
<td>Davis School District</td>
</tr>
<tr>
<td>3 Year Director</td>
<td>Jason Steinmann</td>
<td>Granite School District</td>
</tr>
<tr>
<td>Past President</td>
<td>Jennifer Salts CPPB</td>
<td>State of Utah Purchasing</td>
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### Committee Chairpersons

<table>
<thead>
<tr>
<th>Committee</th>
<th>Name</th>
<th>Institution</th>
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<tbody>
<tr>
<td>Honors &amp; Awards</td>
<td>Joan Tuttle CPPB</td>
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</tr>
<tr>
<td>Newsletter</td>
<td>Tonya Hodges CPPB</td>
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<td>Financial</td>
<td>Adrian Ruger CPM CPPB</td>
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<tr>
<td>Historian</td>
<td>Skip Foster</td>
<td>Granite School District</td>
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<tr>
<td>Membership</td>
<td>Jerilyn Midthun</td>
<td>Salt Lake City</td>
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<tr>
<td>Nominating</td>
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<td>State of Utah Purchasing</td>
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<tr>
<td>Public Relations &amp; Market</td>
<td>Glendon Mitchell CPM, CPPO</td>
<td>University of Utah</td>
</tr>
<tr>
<td>Education</td>
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### 2017 Officers, Directors and Committee Chairpersons

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>Institution</th>
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</thead>
<tbody>
<tr>
<td>President</td>
<td>Polly Alles</td>
<td>University of Utah</td>
</tr>
<tr>
<td>Vice President</td>
<td>Joan Tuttle, CPPB</td>
<td>Davis School District</td>
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<tr>
<td>Secretary</td>
<td>Limher Montoya</td>
<td>University of Utah</td>
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<tr>
<td>Treasurer</td>
<td>Gayle Christensen</td>
<td>Canyons School District</td>
</tr>
<tr>
<td>1 Year Director</td>
<td>Lori Peterson, CPM, CPPO,</td>
<td>Davis School District</td>
</tr>
<tr>
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</tr>
<tr>
<td>3 Year Director</td>
<td>Kurt Prusse</td>
<td>Jordan School District</td>
</tr>
<tr>
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<td>Jared Gardner</td>
<td>Granite School District</td>
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<tr>
<td>Education</td>
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<td>Jordan School District</td>
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</table>
APPENDIX B

HISTORY OF Awardees

2010

Professional Buyer of the Year
Tonya Hodges, CPPB
Salt Lake City School District

Manager of the Year
Paul Kikuchi, CPPB
Utah Department of Transportation

2012

Professional Buyer of the Year - Posthumously:
Dan Reisner, State of Utah Purchasing
Philip Johnson, Granite School District

Manager of the Year
Kay Healey
Alpine School District

2013

Professional Buyer of the Year
Debbie Smith
Granite School District

Manager of the Year
Nancy Orton
State of Utah

2014

Professional Buyer of the Year
Dean Pope
Granite School District

Manager of the Year
Gary Hansen
Canyons School District
2015

**Professional Buyer of the Year**
Joan Tuttle
Davis School District

**Manager of the Year**
Glendon Mitchell
University of Utah

**President’s Award**
Polly Alles
University of Utah

2016

**Professional Buyer of the Year**
Nancy Webb
Canyons School District

**Manager of the Year**
Lori Peterson
Davis School District

**President’s Award**
Skip Foster
Granite School District

2017

**Professional Buyer of the Year**

**Manager of the Year**

**President’s Award**
Gayle Christensen
Canyons School District

2018

**Professional Buyer of the Year**
Stacey Smith
Weber School District
Manager of the Year
Brandon Thomas
Salt Lake Community College

President’s Award
Colette Brown
University of Utah