



From Planning to Execution

Building Your Chapter's Officer Bootcamp

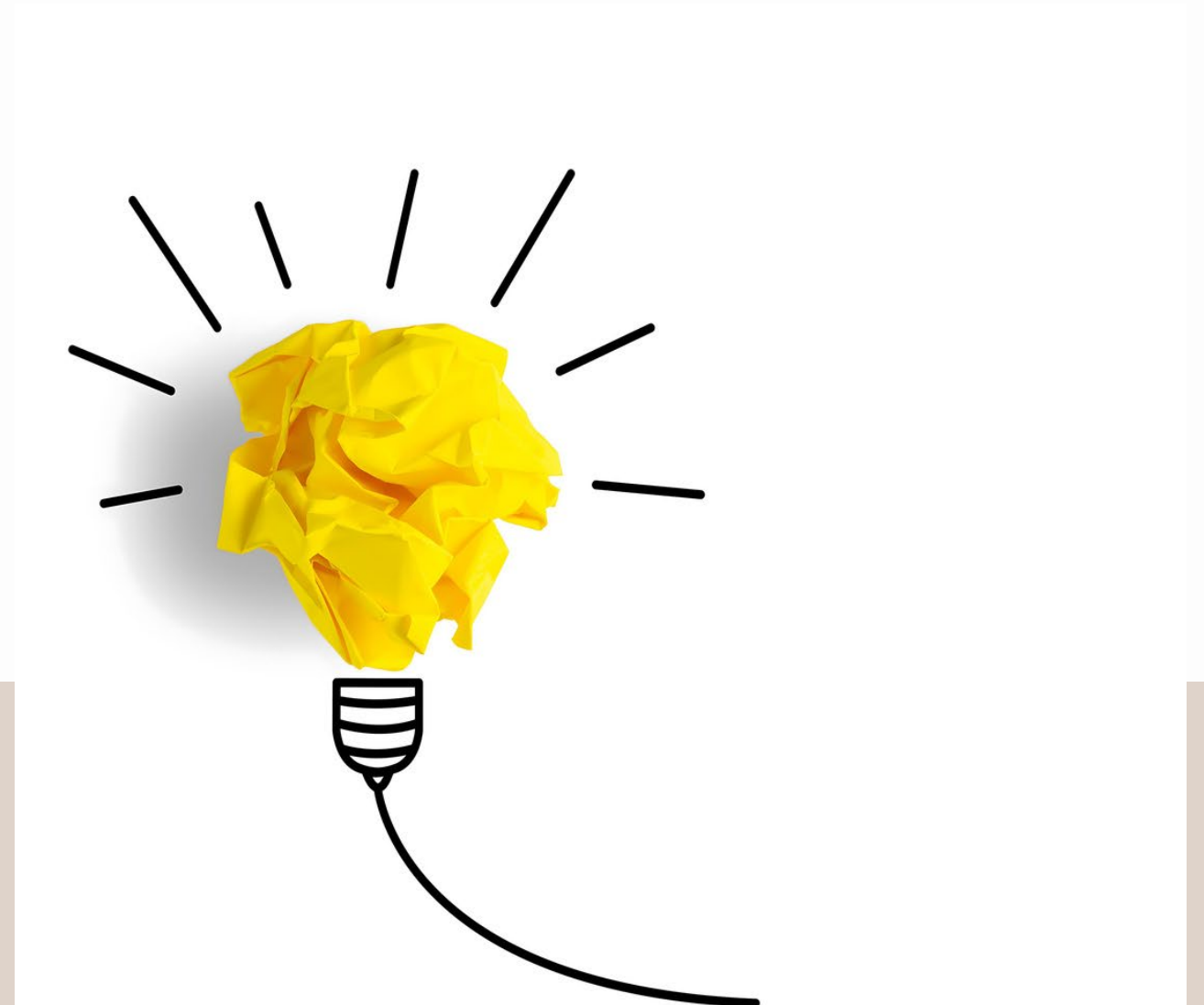
Carrie Mathes, MPA, CFCM, NIGP-CPP, CPPO,
C.P.M., CPPB, APP



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.



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



Program Principles

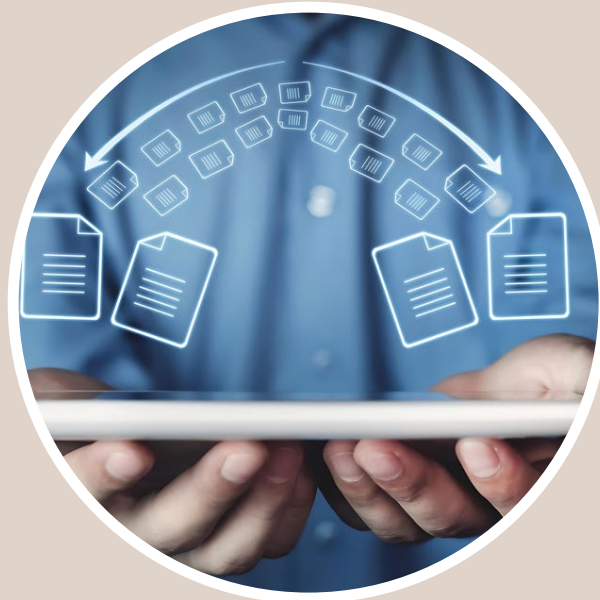
Nurturing Cohesiveness



Comprehensive
Orientation



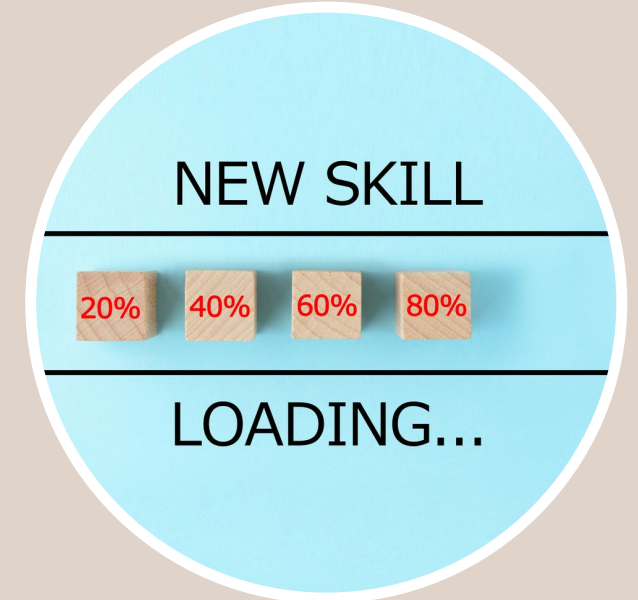
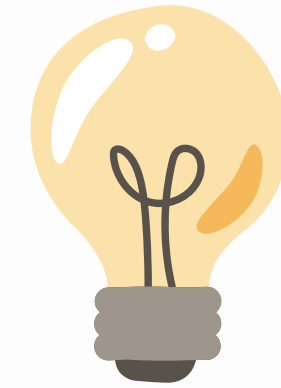
Clear
Communication
Channels



Resource
Accessibility



Mentorship and
Support Network

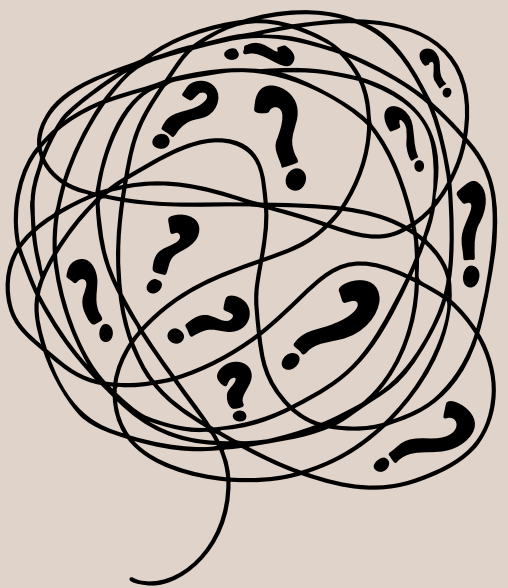


Role-Specific Training
and Skill Building

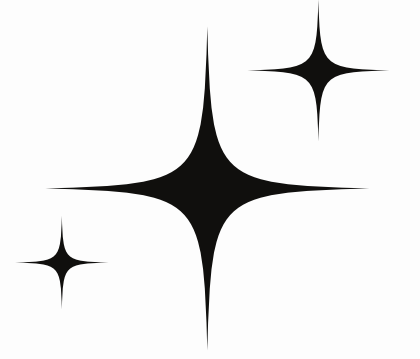


How.

How do I start ?



Things to Consider



Establish an event budget?



Will event attendance be a mandatory requirement embedded in each officer's position description?



What is the appropriate time to market this event? Prior to nominations? Or post-election?



Will the event be held in person, virtual or hybrid?

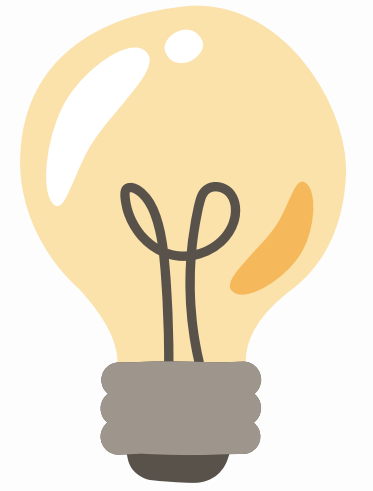


Timing and duration of event.
Weekday? Weekend? How long?





Program Management



Logistics



Consider factors such as scheduling, location, technology, resources to provide a structured and distraction-free environment for engagement.

Facilitation



Identify an experienced facilitator(s) to bring expertise and insight, with ability to engage participants and manage discussions.

Preparation



Establish a comprehensive training strategy that is relevant and engaging to officers.

Post-Event



Create an action plan for post-event activities to close the program and obtain feedback to consider for program enhancement.

Logistics

The coordination and management of all actions necessary to ensure the smooth execution and success of an event.



Logistics Checklist

- ✓ Select a location that is central to attendees; conducive to learning and collaboration
- ✓ Consider technology needs
- ✓ Coordinate for snacks, meals, beverages
- ✓ Identify resources relevant to the bootcamp



Facilitation

“A process of helping groups or individuals achieve their goals through effective communication, problem-solving, and decision-making techniques.”

- Dale Hunter, The Art of Facilitation



Facilitation Checklist

- ✓ Identify skilled facilitator(s), who is knowledgeable about chapter operations
- ✓ Engage them early in the planning process
- ✓ Establish expectation for successful outcomes



Preparation

“Before anything else, preparation is the key to success.”

- Alexander Graham Bell



Preparation Checklist

- ✓ Establish a communication plan
- ✓ Seek input in advance from attendees
- ✓ Compilation of relevant resources
- ✓ Distribution of key documents in advance



Communication Plan

Begin when commitment expectation is established



Create “Save the Date” messaging



Build anticipation



At least two weeks prior to event, send finalized event details with any relevant documents to review prior to attendance



Save the Date

Message

Good morning. As an officer of the Central Florida Chapter of NIGP, you are hereby invited to attend the 2021 Officer Bootcamp. Details of the Bootcamp are as follows:

Date: Saturday, February 10, 2021

Location: Greater Orlando Aviation Authority – Purchasing Office
8652 Casa Verde Road, Building 811
Orlando, FL 32827

Time: 8:30am –4:00pm

Facilitators: Carrie Mathes, Zulay Millan

Please arrive 15 minutes prior to our start time and be prepared to stay for the duration of the training session. Copies of the training materials will be provided.

We look forward to seeing you soon!

SAVE
-THE-
DATE-

Pre-Event Message

Good morning. Final preparations are underway for Officer Bootcamp which will be held on February 10th 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 – 4:pm	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. There is no need to print a copy, you will receive a full binder of materials the morning of the training.

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!

Relevant Documents



Identify all documents relevant to your Chapter operations
Create and maintain a centralized repository



Governance



Budget



Agreements



Program Docs



Forms



Key Dates



Timelines



Legacy Docs

1	Position Duties Board of Directors, Committees and Task Forces
2	2022 Meeting Schedule
3	By-Laws
4	Program Documents and Policies
5	Strategic Plan 2021 - 2023
6	2022 Approved Budget
7	Task Timeline
8	Code of Conduct
9	Forms
10	Agreements
11	Chapter Awards
12	NIGP Chapter Resources

Avery 11073 Template

Presentation

OFFICER BOOTCAMP



Carrie Mathes, MPA, CFCM, NIGP-CPP, CPPO, C.P.M, CPPB, A.P.P.
Zulay Millan, NIGP-CPP, CPPO, CPPB



Expectations as Officers

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



Parliamentary Procedures

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

"Motion, Second, Discussion, Vote"



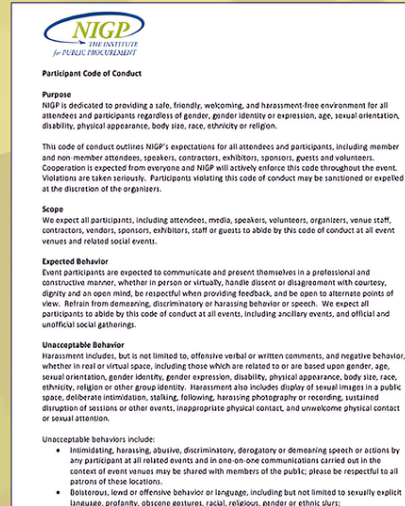
Ethics/Code of Conduct

Core Values: Ethics, Integrity, Professionalism, Diversity, Education and Professional Growth, Service to Stakeholders

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



Code of conduct



NIGP Required Forms

- Due **January 31**
 - Chapter Leadership Reporting Form
 - Chapter Member Data Form
- Due **March 1**
 - Chapter Financial Form
 - Group Exemption Update Form
- Due **May 15 or November 15**
 - Email Chapter's 990 or 990N to chapters@nigp.org
- Due **June 30**
 - Chapter Seminar Agreement
 - Addendum to Chapter-Hosted Course Agreement



Post-Event Actions

Fosters continuous improvement by gathering feedback, assessing effectiveness, and adjusting for enhancing future events.



Post-Event Checklist

- ✓ Acknowledgement of Duties
- ✓ Issue Certificates of Completion
- ✓ Solicit feedback from participants
- ✓ Adjust based on feedback



Post Event Documents





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 hereby acknowledge that, as representative of CFC-NIGP, I occupy a position of trust and that I am expected to act in good faith and with loyalty to CFC-NIGP. I declare that if any private interest of mine, or of any individual or entity with whom I have a significant relationship, conflicts with my duties and responsibilities to CFC-NIGP, I shall voluntarily disclose that conflict in accordance with 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 the position of having a private interest which is in conflict with any interest of CFC-NIGP, or with my obligations to CFC-NIGP.

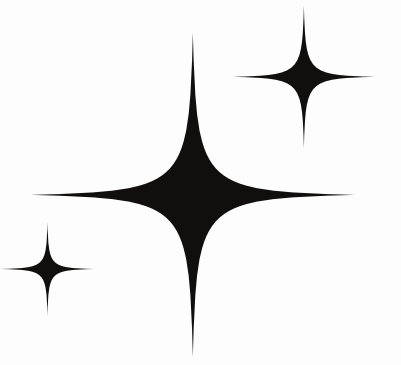
Officer/ Volunteer's Signature

Date

Officer/ Volunteer's Name (please print)

PLEASE SUBMIT FORM TO SECRETARY@CFCNIGP.ORG

Post Event Survey



How would you rate the Bootcamp training materials?



Would you recommend any enhancements to the training materials?



Did the training help to prepare you for success as a Chapter Officer?

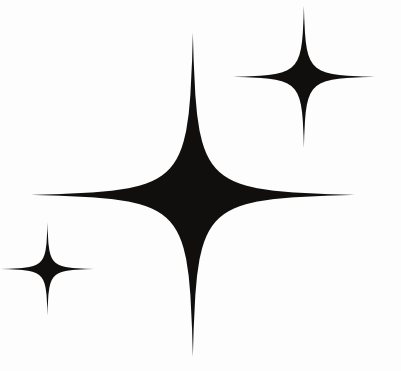


As an Officer, did you find the training to be valuable?



Was the time sufficient to cover the material?

Post Event Survey



How would you rate the Officer Bootcamp facilitator(s)?



How would you rate the facilities where Officer Bootcamp was held?



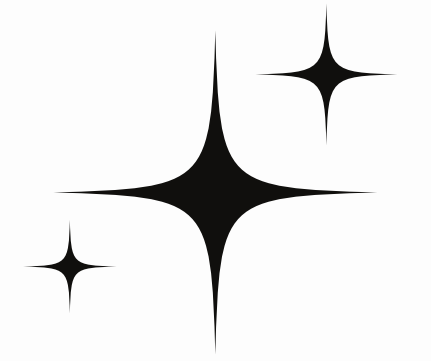
How would you rate the food provided during Officer Bootcamp?



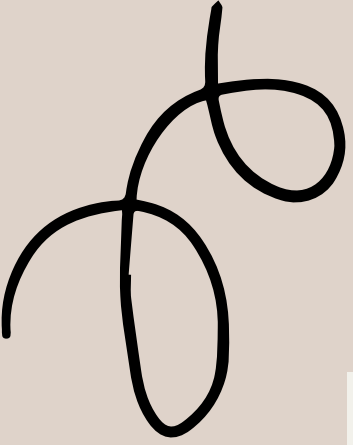
Please provide any suggestions to improve Officer Bootcamp.



Please provide your overall thoughts of the Officer Bootcamp.



Questions



Templates

Certificate of Completion

Officer and Volunteer Acknowledgement
of Duties

Task Timeline

