



Florida Government Finance Officers Association Educational Programs Committee Policies and Procedures Manual

I. Membership Structure

- A. Membership should reflect a cross-section of FGFOA, including representation from state, county, city, special purpose governments, public schools, and other relevant entities.
- B. The Committee shall consist of at least ten (10) active members, excluding the Chairperson(s).
- C. The Chairperson is appointed by the President and serves as the overall Committee coordinator.
- D. The Chairperson shall appoint a Co-Chairperson and, if necessary, subcommittee leaders for major areas of responsibility.

II. Purpose, Goals, and Action Plan

A. Purpose

To plan educational webinars and other training opportunities, as directed by the Board, including a minimum of ten (10) webinars per twelve (12)-month period, by identifying relevant topics and scheduling qualified speakers.

B. Long-Range Goal

To improve the quality of financial management in government through education and professional development.

C. Short-Range Goals

1. Provide engaging educational and training opportunities for government finance professionals.
2. Provide low-cost Continuing Professional Education (CPE) to FGFOA members.

D. Action Plan

1. Webinar Program Development

- a. The Committee will convene annually to establish the webinar framework and solicit topic ideas.

b. Members will propose topics based on member needs, industry trends, and prior feedback.

c. The Committee will compile and prioritize a recommended list of topics.

d. The recommended topics will be submitted to the FGFOA Board of Directors for approval.

2. Webinar Coordination

a. Upon Board approval, a coordinator will be assigned to each webinar.

b. The coordinator is responsible for:

1. Identifying and recommending qualified speakers

2. Contacting and confirming speakers

3. Coordinating content, materials, and logistics

4. Serving as the primary point of contact

5. Coordinating with moderators to ensure alignment on delivery

3. Webinar Moderation and Delivery

a. Webinars are typically scheduled on the third Thursday of each month from 2:00 PM to 3:40 PM (EST).

b. Each webinar will have a moderation team consisting of:

1. One (1) Lead Moderator

2. One (1) or two (2) Backup Moderators

c. The Chair and Co-Chair will serve as Lead Moderators unless a Committee member:

1. Has previously served as a Backup Moderator; and

2. Has been approved by the Chair and Co-Chair

d. When a Committee member serves as Lead Moderator, the Chair or Co-Chair will serve as a Backup Moderator.

e. Backup Moderators will manage questions, assist with logistics, and handle coordination.

f. Committee members must serve as a Backup Moderator prior to serving as a Lead Moderator.

g. Associate members may serve as Lead Moderator for no more than one (1) webinar per calendar year.

h. Priority for Lead Moderator roles will be given to Active/Government members when feasible.

i. Members are encouraged to volunteer as Backup Moderators to gain experience.

j. All moderators will receive Moderator Guidelines outlining roles and expectations.

III. Member Responsibilities

A. Chairperson

1. Coordinates all aspects of Committee operations, including meetings, agendas, and minutes.
2. Committee meetings may be held in person or virtually.
3. Assigns responsibilities and engages Committee members.
4. Reports Committee activities and progress.
5. Prepares and presents reports for Board meetings.
6. Submits updates for the FGFOA newsletter.
7. Prepares an annual summary for the conference.
8. Assists with leadership transitions.
9. Solicits volunteers and communicates key deadlines.
10. Only Active/Government, Retiree, or Student members may serve as Chair or Co-Chair.

B. Co-Chairperson

1. Assists the Chairperson and Committee members.
2. Moderates webinars as assigned.
3. Participates in Committee meetings.
4. Coordinates with FLC regarding speaker resources.

C. Members

Includes Active, Associate, Retiree, and Student members of FGFOA.

1. Definitions

- a. Active/Government: Public-sector finance professionals in Florida.
- b. Associate: Individuals interested in governmental finance.
- c. Retiree: Former Active members now retired.
- d. Student: Full-time students pursuing relevant business degrees.

2. Responsibilities

- a. Assist in identifying relevant webinar topics.
- b. Provide at least ten (10) webinars annually and avoid conflicts with FGFOA events.
- c. Support additional programs as directed by the Board.
- d. Participate in moderation as part of succession planning.
- e. Attend meetings and participate as required.
- f. Assist with speaker coordination.
- g. Members are appointed for at least one (1) year.
- h. A committee application must be submitted annually.

IV. Budget

- A. The annual budget supports meeting-related expenses.
- B. Presenters are generally volunteers; exceptions require Board approval.

V. Timeline

- A. Hold the organizational meeting at the Annual Conference.
- B. Develop the webinar schedule by July.
- C. Schedule should cover September through August.
- D. Avoid conflicts with FGFOA events.

VI. Transition Plan

A. Leadership will meet to ensure a smooth transition.

B. The Committee manual will be updated prior to the Annual Conference.