



# Regional Representatives Procedures Manual

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Updated January 2018



Greetings from the Grant Professionals Association Headquarters! I am glad that you have taken the time to learn more about one of the most important volunteer service positions with the GPA: Regional Representative.

The GPA Headquarters staff is focused on providing an exceptional level of service to GPA members and the profession. This includes supporting the GPA chapters which are the local “face” of GPA to members across the world. The Regional Representatives serve as an extension of GPA staff to support the growth, expansion and strengthening of GPA chapters.

This Procedures Manual provides information to help guide the work of the eight Regional Representatives. It explains the purpose of these volunteer positions, describes the work to be done, and provides the structure for naming individuals to the roles. In addition, the manual sets goals and expectations for Regional Representatives which align to the strategic goals set by the Board of Directors for the Association. This manual is subject to change as deemed appropriate and to reflect updates to the GPA Strategic Plan.

We encourage you to review the manual with an eye toward applying for a position as a Regional Representative or as a review of how best to use the services of your region’s Representative in your chapter. Should you have any questions about the role of the Regional Representatives, feel free to contact GPA Headquarters or your own Regional Representative.

Sincerely,

A handwritten signature in black ink that reads 'Mike C.'.

Mike Chamberlain, MBA, CAE  
Chief Executive Officer

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## Section 1

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### **Purpose of the Regional Representatives Procedures Manual**

The purpose of the Regional Representatives Procedures Manual is to support Regional Representatives as they develop and assist state and regional chapters of GPA, a 501(c)(6) professional organization. Each section has been prepared with the needs of the Regional Representatives and chapters in mind, based on feedback provided by GPA's Chapter Advisory Committee, chapter members, and the work and input of the Regional Representatives themselves.

The Regional Representatives Procedure Manual is a "living document" with updates, additions, and/or deletions made accordingly and in a timely manner by the GPA headquarters office. Suggestions and inquiries about the Regional Representatives Procedures Manual may be directed to the GPA headquarters office via email: [staff@grantprofessionals.org](mailto:staff@grantprofessionals.org).

## Section 2

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### The Grant Professionals Association: A brief overview

#### The Purpose of GPA

In 1998, five people with ideas about shaping the future of their profession organized their thoughts and their peers to form the Grant Professionals Association (GPA). GPA is the first organization focused solely on the advancement of grantsmanship as a profession through the support of its practitioners.

Since its inception in 1998, GPA has grown rapidly. With more than 2,600 current members internationally, the opportunities and benefits of membership continue to attract people from all over the globe.

#### History of Success

GPA's growth from 5 to 26400+ members in less than two decades has been accomplished at the local level. In the spring of 2004, Birmingham, Alabama, became the first city to form a local chapter. In the year following, additional chapters were formed. This process of local involvement and self-determination is a critical component of the organization's success and sustainability; it is the heart of membership growth and individual member support.

Today, more than 40 chapters exist, including chapters in nearly every state. Like GPA, chapters provide professional learning and networking through face-to-face and online formats—but on the local and regional level to address the local and regional needs of chapter members. This includes regional one- and two-day conferences, networking sessions that include funders' panels or skill-building sessions, lunch-time events that provide collegial interaction with peers, and more. From researching funding opportunities to building relationships to collaborative grant development to grammar, these sessions provide a key resource at an economical and accessible level.

While attending the GPA Annual Conference each year remains a popular option for GPA members, chapters provide training and resources locally that employers and consultants find economical and effective. Therefore, the success and expansion of each chapter lies at the heart of the overall success of GPA. Simply put, GPA is an association made up of members; and, members make up GPA chapters.

#### The Mission of GPA

The Grant Professionals Association builds and supports a community of grant professionals committed to serving the greater public good.

**Governance**

GPA is governed by an 11-member Board of Directors. Each member is elected by the membership as set forth in the association’s bylaws. The Board oversees the GPA Chief Executive Officer who leads a professional staff to manage and administer the strategic initiatives set forth by the GPA Board. This includes the coordination of committees and volunteers as well as contracted individuals and agencies.

Regional Representatives are highly-qualified and carefully selected GPA members, carrying out the Board’s specific initiatives relative to chapter formation, support and growth. Regional Representatives serve as an extension of the GPA Headquarters staff to support the specific needs of chapters at the local and regional level.

Regional Representatives report to GPA’s Chief Executive Officer (CEO) through the Chapter Relations Manager. The following Organizational Chart demonstrates the position of the Regional Representative team to GPA staff members.



Notes:

- (1) Staff Liaison for Board of Directors, Executive Committee, Bylaws Committee, Ethics Committee, Finance Committee and Chapter Advisory Committee
- (2) Staff Liaison for Finance Committee
- (3) Staff Liaison for Pioneer Award, Publications Committee, Social Media Task Force, and International Grant Professionals Day Task Force.
- (4) Staff Liaison for Nominating Committee, Professional Growth & Development Committee, and Mentoring Task Force
- (5) Staff Liaison for Regional Representatives



### **Commitment to Volunteerism and the Connection to Regional Representation**

Like most small associations, GPA was once totally operated by volunteers. Today, hundreds of GPA members volunteer each year, and the numbers keep growing. They work alongside GPA staff members to implement the strategic initiatives of the association. In 2016, more than 350 individuals will have worked to support the association in one or more areas. These numbers are **in addition to** the many members who help coordinate and implement the GPA Annual Conference or who work at the local chapter level.

This consistent and ever-increasing commitment to volunteerism is born from both a dedication to fellow members and through the employment cultures from which members come. Most members work in education, municipalities, non-profits or other service-related organizations—agencies that themselves rely on volunteers.

In addition, the GPA Headquarters Office and Board of Directors have created a volunteer-friendly framework that engages, enables and supports volunteers in their tasks. Four primary ways GPA engages volunteers to serve the organization are through Committees, Task Forces, Special Interest Groups and Regional Representatives.

**GPA Committees** are set forth in the GPA Bylaws (i.e., Bylaws Committee) or established by the GPA President to accomplish the work of the GPA (i.e., Professional Growth and Development Committee). Most GPA committees have seven members along with a Board Member Liaison who is assigned by the GPA President as well as a GPA Staff Liaison who is assigned by the GPA Chief Executive Officer. GPA committees may form subcommittees to assist the committee in the timely completion of its objectives. Individuals may serve on either the committee or on a subcommittee.

Similarly, a **GPA Task Force** is a group formed by GPA to accomplish a specific task in a specific time frame. These are time-limited commitments for members and generally will last one to two years. **Special Interest Groups** (SIGs) are led by a Chair to coordinate discussions and learning interests of a specific group and are designated for a specific period of time.

**Regional Representatives** are volunteers as well and are supported by the GPA Headquarters Office through the Chapter Relations Manager and the Chapter Advisory Committee. The Chapter Advisory Committee's purpose is to provide advice to the CEO on matters relevant and important to GPA Chapters. Regional Representatives assist in the support and development of GPA chapters.

## Section 3

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### Regional Representatives Supporting Members

#### The Role of Regional Representatives

Regional Representatives are liaisons between the GPA Headquarters office and potential and existing GPA Chapters within a defined geographic area. Regional Representatives work with the headquarters office to ensure chapters have the support and assistance needed to start up, to succeed, and to grow. The Representatives collegially share best practices to ensure each region has the tools needed to support members.

In addition to chapter formation, Regional Representatives provide counsel to chapter leaders as issues arise. In recent years, this has included leadership succession planning, meeting formats and schedules, programming suggestions for meetings and conferences, and recruitment and attendance. In each case, it is the role of the Regional Representative to bring his/her expertise to the table, to share the many methods and activities that have worked in different areas of the country.

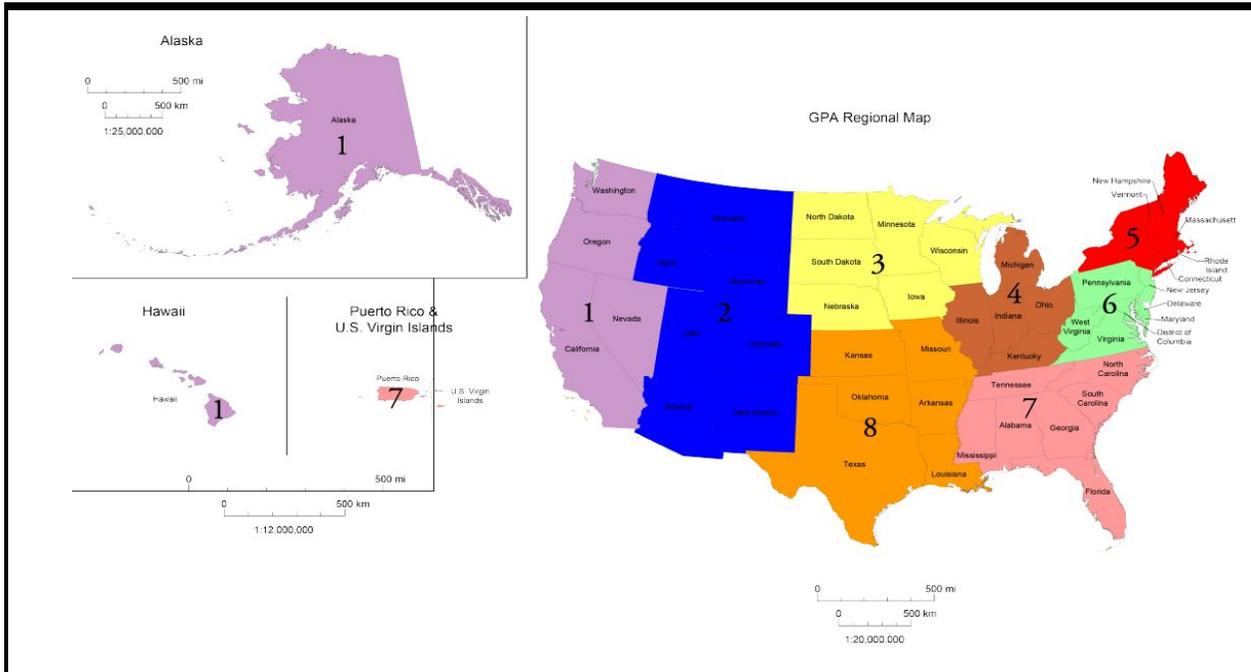
Simply put, that is the role of the Regional Representative: to keep chapters moving forward by providing them with the ideas and tools they need to do so.

#### GPA Regions

For more than a decade, GPA has used a “regional” approach in collectively grouping activities and supports for GPA members. However, the initial regional map was intended not for chapter support but for national conference location selection; the conference has moved each year from region to region.

In 2016, the GPA Board of Directors approved a **revision to the national regions** to—in part—more accurately present the distribution of existing chapters and members. Rather than a tool for conference site selection, the revised regional map distributes chapters and geography to support Regional Representatives in their work. This map, seen below, will be updated at least annually to provide current numbers of members and chapters within each region.

It should also be noted that redesigning the map aligns to the responsibilities of Regional Representatives (outlined on page 14+) regarding face-to-face meetings, supportive contacts, and more. Currently, the eight regions are distributed geographically, as seen in the chart below.



Region 1	Alaska, California, Hawaii, Nevada, Oregon, Washington	Region 5	Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island, Vermont
Region 2	Arizona, Colorado, Idaho, Montana, New Mexico, Utah, Wyoming	Region 6	Delaware, Maryland, New Jersey, Pennsylvania, Virginia, Washington DC, West Virginia
Region 3	Iowa, Minnesota, Nebraska, North Dakota, South Dakota, Wisconsin	Region 7	Alabama, Florida, Georgia, Mississippi, North Carolina, South Carolina, Tennessee
Region 4	Illinois, Indiana, Kentucky, Michigan, Ohio	Region 8	Arkansas, Kansas, Louisiana, Missouri, Oklahoma, Texas

### Key Activities: Establishing and Supporting Chapters

As a membership association, GPA must constantly seek out new and support existing members. Chapters are at the heart of that work, and Regional Representatives are a critical part of the process. In fact, the core duties of Regional Representatives may be divided into those two clear categories: to establish new chapters and to support existing chapters.

► **Establishing a chapter.**

Chapters afford our membership an opportunity to be a part of GPA at the local level. The Regional Representative can assist a group of grant professionals in a defined area as they

work to establish a new GPA chapter. The Representative can provide a list of all local GPA members for inclusion into a chapter, assist with technicalities of chapter formation, provide resources from the Chapter Toolkit to set up chapter operations, and provide mentoring support for the newly formed group. The Regional Representative often attends the initial chapter formation meeting to both coordinate and celebrate the efforts of those local members. As outlined below, the Regional Representative takes much of the burden of chapter formation off local members, allowing them to concentrate on other issues, including programming, networking, recruitment and more.

1. Minimum requirements. To form a new state, regional or local chapter, the organizers must have at least:
  - 10 GPA members in good standing who agree to serve as the charter members and to pay any established local dues set by that chapter.
  - Chapter officers elected by the charter members.
  - Adoption of GPA Chapter Bylaws.
  - Agreement to meet a minimum of four times per year.
  - Submittal of minutes of the first meeting as well as signed Chapter Charter Application form, and officer contact form.
2. Preparing for the chapter formation meeting. Regional Representatives provide support for chapter formation meetings by email, conference call or in person prior to the final chapter formation meeting. Should the Regional Representative not be available during a chapter's formation process, a Regional Representative from a neighboring region, a GPA Board Member, or a GPA staff member may serve in the Representative's place.

Each confirmed attendee should receive a Chapter Formation meeting agenda and a copy of the GPA Chapter Bylaws in advance of the meeting. The Regional Representative is responsible for providing the Membership Forms and Chapter Charter Application at the meeting as well as coordinating with Headquarters to complete the GPA financial procedure for Chapter Formation and Chapter Dues. Forms are available online at the GPA Resource Center, in the Chapter Toolkit or from the Chapter Relations Manager. The Regional Representative also may request guest speakers from the headquarters office.

3. Conducting the Chapter formation meeting. The Regional Representative will organize a meeting of current GPA members and others in the geographic area who have expressed interest in forming a chapter. Upon scheduling the meeting, the Regional Representative will notify the GPA Headquarters Office. The Regional Representative will preside over the meeting and call for approval to organize as a chapter. The

following items must be addressed:

- Adoption of the GPA Chapter Bylaws (provided by the Regional Representative)
- Chapter dues amount
- Agree to meet a minimum of four times per year
- Officer elections
- Signing the Chapter Charter Application

In addition, the Regional Representative will support chapter members as they confirm their membership in the national organization; specifically, the Representative can provide a current list of GPA members in the geographic area to determine individual member anniversary dates. This will help current members establish the prorated amount of chapter dues they need to submit (i.e., the balance of a year's local dues to create a single dues anniversary date for each member). For example, a GPA member who has three months remaining on his/her association dues would only pay chapter dues to cover that three-month period.

Each member will also complete a membership application either on paper or online so the GPA Headquarters can record a member's chapter affiliation. Thereafter, both GPA and chapter dues will be billed annually on the individual's anniversary of joining. Individuals who join GPA and the chapter at the chapter formation meeting will either send in one membership form or complete the online application for credit card payment or to be invoiced, as well as coordinate with Headquarters and any payment for GPA and chapter dues at the time the chapter submits the chapter charter application.

After the meeting, the Regional Representative will send a complete chapter formation package to the GPA Headquarters that includes the following:

- Signed Chapter Charter Application
- Officer contact information form
- Membership forms
- Signed Chapter Bylaws
- Minutes of the chapter formation meeting

When the completed package is received, the GPA Headquarters will send a copy of the

chapter charter to the Regional Representative or Chapter President (see #4, following).

4. Conducting the first chapter meeting. Within 60 days, the chapter must hold its first meeting. After that meeting, the GPA Regional Representative must ensure that one copy of the original charter and the minutes from the first chapter meeting get sent to the GPA Headquarters to complete the chapter formation process.

► ***Assisting Established Chapters***

1. Communication with established Chapters. The Regional Representative will serve as the liaison between the GPA Headquarters and each established chapter in his/her assigned region. The Representative is responsible for communicating with each chapter to ensure that the chapter's needs are met. As noted in Section 4, the Regional Representative should communicate with each chapter annually and in multiple formats (phone, email, face-to-face, online, etc.).
2. Maintaining Chapter compliance with the Association. The Regional Representative will work with the GPA Headquarters to ensure chapters meet association standards, such as:
  - Keeping a current Chapter Leadership Roster.
  - Maintaining chapter pages on the GPA website as supported by the GPA Headquarters, including regular updating of content.
  - Ensuring Chapters are completing and submitting financial records on a timely basis, based on organizational requirements.

The GPA Headquarters or chapter leadership may ask the Regional Representative to assist with other matters a chapter may be experiencing.

3. Member recruitment and retention. The Regional Representative will help each chapter in their region with recruiting and retaining members through various strategies and resources. Initially, that will include introducing new chapter leaders to forms and letters in the Chapter Toolkit, membership benefits, and volunteer management strategies. The Representative will help market and monitor the Member-Get-A-Member Campaign.

The Regional Representative will work with the GPA Headquarters and fellow Representatives to be familiar with various strategies for engaging local members; key engagement issues relate to programming, geography, effective meeting times, and leadership succession. Representatives—supported by the Chapter Relations Manager and other GPA Headquarters staff—will talk frequently to share their successes and



challenges. Individual Representatives will then be armed with ideas for what works in various chapters and can share those ideas in formal and informal ways in their regions.

4. Chapter leadership assistance. To support Chapter Leaders, the Regional Representative should be familiar with specific resources available to them, such as Presidents' Calls, Leadership Webinars, the Chapter Toolkit, and preconference leadership workshops at the GPA Annual Conference. Regional Representatives can help by sharing best practices from other chapters, monitoring chapter activity and attendance, and acting as a support system for new chapter officers.

To be pro-active, Representatives should monitor chapter meeting dates and frequency as well as meeting attendance; these can provide the Representative with significant data concerning the vitality of a chapter. In addition, they can work with chapters to create chapter committees. Through a committee structure, chapters encourage and nurture new leaders—members who are ready to support the organization beyond simple meeting attendance.

5. Local and regional conference support. In recent years, the role of the Regional Representative has extended to support local and regional GPA events. This has included various activities including brainstorming of program elements and speakers, formats used in other similar GPA events, and more. Work in this area has not been formalized across the Regional Representatives but is on a case by case basis as needed by chapters and their event teams. The Regional Representative often serves as a sounding board, helping to assure Chapter Leaders they are on the right path.
6. Other. There is no magic formula for serving as a Regional Representative. But, if there were one critical skill, it might be the ability to respond as needed to a myriad of questions, issues, challenges and successes. Representatives are the boots on the ground for the GPA Headquarters and Board Members. Whenever possible, Representatives serve as first line responders within a region. And, while each Chapter is unique, their challenges are often similar, including, for example:
  - Succession planning (or a lack thereof)
  - Declining membership
  - Holding meetings “remotely”
  - Creating an engaging meeting
  - Recruiting a variety of members (from different types of organizations)
  - And much more

It is the Representative's role to help build a framework for professional rapport that reaches from peer to peer at the local level and across the Association.

## Section 4

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### Regional Representative Responsibilities

#### General Overview

Regional Representatives are selected from applicants as vacancies occur within a region or regions. Applicants must be GPA members in good standing with a minimum of two years of active membership. In addition, Regional Representatives may not serve as a GPA Board Member or an officer of a local Chapter while serving as a Representative.

Regional Representatives are volunteers; however, they operate as an extension of the GPA Headquarters. Each has a set of goals and expectations to complete annually. Each Representative reports directly to a supervisor within the GPA Headquarters (Chapter Relations Manager).

#### ► ***Application process***

When a vacancy occurs in a region, the GPA Headquarters will present a Call for Applicants through social media, online newsletters, regional and national GPA events, etc. The application period will be open for two- to four-weeks, as deemed appropriate by the GPA Headquarters in consultation with the Chapter Advisory Committee. GPA members interested in serving as a Regional Representative must submit a completed application to the GPA Headquarters as outlined in the Call for Applicants. A copy of the Regional Representative Application form is attached (Appendix) and may also be found on the GPA website: <http://www.grantprofessionals.org/regionalrepresentatives>

As noted above, candidates will be reviewed by the Chapter Advisory Committee, Chapter Relations Manager and the Chief Executive Officer following a standardized review process. For practical purposes, Regional Representatives will likely represent a region in which they live or work; however, that is not a requirement. Rather, the GPA Headquarters will be responsible for choosing the best candidates for a specific position.

As a final step in the process, the GPA Headquarters will recommend to the GPA Board President a specific candidate(s) for the vacancy(ies). The GPA Headquarters informs the candidate of the results.

#### ► ***Regional Representative qualifications***

Regional Representatives serve the needs of members across the country, working to build and support chapters in nearly every state. Therefore, it is critical for Representatives to meet the following **minimum** qualifications:

- Be an active member in GPA; a minimum of two years preferred

- Be a member in a chapter; experience in chapter leadership preferred
- Have a minimum of three years' experience in the grants profession; GPC preferred
- Consistently demonstrate a commitment to uphold and promote the GPA Code of Ethics and appropriate codes of professional behavior
- Commit to fulfill the responsibilities of the Regional Representative position
- Possess the flexibility to travel within the assigned region, as needed
- Have experience in bringing together and working with people of diverse backgrounds and experiences
- Demonstrate excellent presentation and communication skills

### **Goals and expectations**

Regional Representatives are delegates of the Association, the GPA Board, and the GPA Headquarters. Simply put, they are sent out with great deliberation to provide local, member-to-member expertise in the field—expertise it would not be practical to provide directly through GPA Headquarters staff. As such, they are treated as an extension of the GPA Headquarters and are expected to meet specific goals and expectations.

Beginning in 2017, the GPA Headquarters has established the following quantifiable measures and will provide support to that end.

**Goal:** Each Regional Representative will strive to travel to and meet face-to-face with each chapter in his/her region, attending either a chapter meeting or GPA event hosted by the local group

**Goal:** Each Regional Representative will strive to establish at least one new chapter annually

**Expectation:** Each Regional Representative will have substantive contact with the chapters within the assigned region, including face-to-face, online, phone and other contact/communication

**Expectation:** Each Regional Representative will attend the GPA Annual Conference and serve as a visible member of the GPA team and actively interact with members, emphasizing and facilitating communication with members from his/her assigned region

**Expectation:** Each Regional Representative will work with the GPA Headquarters to identify, alleviate and monitor challenges in the field as they arise

## **Management structure and reporting**

As noted above, the job of the Regional Representative is, in effect, a field-based extension of the GPA Headquarters staff. As such, it is important to specifically outline the reporting structure for these key volunteer staff members.

### ▶ ***The role of the Chapter Advisory Committee***

The work of Regional Representatives was first envisioned by the GPA Board in conjunction with the Chapter Advisory Committee. The Committee is charged with ensuring the establishment and strength of chapters. The Committee accomplishes this through ongoing input related to the structure and work of chapters; specifically, the Committee advises the CEO on the needs of chapters throughout the year via regular conference calls.

With the 2016 addition of a Chapter Relations Manager, the Association now dedicates a full-time, professional staff member to support the expectations of the Chapter Advisory Committee and the chapters. Regional Representatives will report directly to the Chapter Relations Manager and, by extension, the Chief Executive Officer.

### ▶ ***The role of the GPA Headquarters staff***

The Chapter Relations Manager will be the first point of contact for Regional Representatives at the GPA Headquarters. S/He will coordinate the work of the Regional Representatives and monitor their achievement of goals and expectations. The Chapter Relations Manager will review data from the field, including meeting frequency and attendance, elections, finances, and more. The Chapter Relations Manager will supervise and support the work of the eight Regional Representatives to ensure every chapter has the resources it needs to succeed.

Representative supports will include regularly scheduled phone calls to facilitate inter-regional sharing of successes, strategies, and challenges. In addition, the Manager will work with Representatives regarding their travel schedules based on their expectations and approved budgets.

## **Training and orientation**

Regional Representatives will receive support from the GPA Headquarters through the Chapter Relations Manager, who will coordinate an orientation for new Regional Representatives. While the orientation may vary from year to year, it is likely to include:

- Review of the goals and expectations of the position
- Ongoing conversations with other Representatives
- Assignment of a Representative Mentor to guide the newly appointed Representative in his/her duties

In addition, Regional Representatives will participate in professional learning alongside Chapter Leaders at the GPA Annual Conference. These sessions are typically provided as preconference workshops prior to the conference and have been key to networking as well as learning with leaders from across the country.

### **Time and travel commitment**

Regional Representatives will likely live or work in their assigned regions, making it more convenient to interact with Chapters at their meetings or state/regional conferences. This requires a commitment of time, however, for each Representative. As noted above, it is the goal of each Representative to physically meet with each chapter during the calendar year.

The GPA budgets funds each year for this purpose, estimating the costs for fly-to and drive-to chapter meetings. But each Regional Representative must carefully consider the visits to be made and their own professional obligations prior to accepting this role. Currently, as many as eight chapters exist in each region requiring mostly-regional travel to at least eight locations per year.

### **Other duties**

In addition, Regional Representatives fulfill the following duties:

- Submit Regional Representative reports to the GPA Headquarters on a schedule established by the Chapter Relations Manager and the CEO, to document activities leading to chapter formation as well as Representative support provided to established chapters. Reports may also be used to alert GPA Headquarters staff to specific concerns.
- Plan and execute travel to chapters as outlined in the goals and expectations and in the Regional Representatives' approved travel budgets. Follow established reimbursement policies for expense payment each month.
- Participate in Regional Representative conference calls, hosted by GPA Headquarters staff.
- Participate in the Regional Representative and Chapter Leaders communities in GrantZone to amass and share effective strategies with each other and Chapter Leaders.
- Attend the GPA Annual Conference.
- Attend and represent the Association at partner and Association-supported events as requested by the GPA Headquarters.

### **Term limits and succession/transition support**

The term limits for Regional Representatives are similar to those of other volunteer leaders within GPA. Terms are limited to two-years; however, Regional Representatives may serve three consecutive terms for a total of six years. After six consecutive years, individuals may serve again after a hiatus of two years.

New Regional Representatives recruited and assigned to a specific region will also receive support during the transition. Whenever possible, the exiting Representative will mentor and support the new Representative to ensure a positive and supportive transition. While this will vary based on the individuals involved, the collegial support of one professional to another is anticipated for at least the first year of the apprentice Representative's term.

### **Benefits and value of service**

Regional Representatives are unpaid volunteers reporting to the GPA Headquarters, specifically to the Chapter Relations Manager. As such, they receive no direct monetary benefits for their service.

However, the Board of Directors each year sets aside funding to support the costs associated with their work. Covered expenses include but may not be limited to:

- Travel to Chapters located within the region
- Travel to orientation or training events designed for Regional Representatives
- Attendance at the GPA Annual Conference not to exceed an annually determined maximum. In 2016, each Representative was allocated up to \$1,000 in reimbursement for travel and registration costs.

In addition to national recognition, each Regional Representative receives ongoing professional learning and networking on behalf of themselves and the organizations that employ them, such as:

- Places them in a high-profile position, gaining visibility for their organization
- Ability to speak to a national audience
- Smaller organizations get represented at the national conference
- Project management and mediation skills
- Access to general leadership training content from conferences, webinars and other seminars
- Allows them to give back to the organization
- Gives them a direct impact on the industry as a whole
- Keeps them engaged professionally
- Allows them to share their knowledge as a mentor to others in the field



## Section 5

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### Nuts & Bolts

#### Standard of behavior and appearance

Regional Representatives exemplify the profession and must possess the characteristics and traits of its members. Each Representative is a mentor to others; as they work with Chapter Leaders to expand membership, develop programs and serve local members, they are creating the very networking opportunities craved by Association members at every level.

In addition, Representatives work with GPA Headquarters staff as designees. While conflicts may arise between a Representative and an Association member, it is the role of the Representative to seek help—working confidentially with GPA Headquarters staff and other Regional Representatives as appropriate to resolve the issue.

It is essential for each Representative to maintain a professional presence in all communications and interactions. While this may encompass an array of specific attitudes and actions, the Representative's professional demeanor must support the standards of the Board of Directors and the GPA Headquarters. This includes but is not limited to:

- A commitment to uphold and promote the GPA Code of Ethics and appropriate codes of professional behavior
- Avoidance of specific unprofessional conduct, such as the use of offensive or derogatory comments or jokes, including epithets or slurs; yelling, intimidation or threats, either in writing or in verbal form; inappropriate physical contact; inappropriate questioning
- A failure to respect Association members, their views and the roles they play in serving the greater good (GPA's mission)
- A failure to hold confidential matters shared by Association members and Chapter Leaders, Board Members and GPA Headquarters staff members

Actions that fail to meet these and other standards set for GPA staff and volunteers may result in termination of the Representative's term. GPA Headquarters staff will address these issues on an individual basis as needed.

In addition, the attire of all GPA representatives—paid and unpaid—reflects upon the reputation of the Association and its membership. Therefore, Regional Representatives must be appropriately attired for the meeting, conference, activity, etc. GPA is not in the business of explaining what that means; for example, blue jeans may be perfectly appropriate for setting up or taking down a conference booth while business casual attire is needed for meetings with chapters. Regional Representatives are charged with making their professional decisions in that regard.

### **Attendance, absenteeism and inactivity**

Regional Representatives are free to set their own schedules so as to meet both the requirements of their professional work/employment and their volunteer commitment to GPA. Meeting the goals and expectations noted on page 15 will require good time management as well as a commitment to punctuality and attendance.

To that end, it is the expectation of the GPA Headquarters that Regional Representatives attend required events and conference calls as well as meetings set between the Representatives and Chapter members/leaders. The Chapter Relations Manager will work directly with Representatives who fail to maintain a professional standard for attendance. Excessive absenteeism, general inactivity or a failure to complete assigned duties may be cause for dismissal.

### **Confidentiality**

Regional Representatives work closely with GPA Headquarters staff and Association members on a regular basis. Most of the time, this work will entail cordial and collaborative activities and conversations. However, there are times when confidential information comes to the fore. For example, Chapters may struggle with recruitment or leadership succession, founder's syndrome, or personality conflicts. Regional Representatives are often called upon to facilitate solutions and must maintain any information garnered as confidential.

Other areas where confidentiality is key regards information learned through work with the GPA Headquarters and Board of Directors. Release of new processes and programs must be kept confidential to ensure appropriate preparation for roll out and marketing.

Therefore, each Regional Representative must sign and comply with the Association's confidentiality policy—the same policy signed by the Board of Directors.

### **Travel and involvement**

The Association has set a goal for each Regional Representative to meet face-to-face with each chapter in his/her region annually. Representatives can drive to many of these meetings but may need to fly to some. Regardless of the travel method, each Representative is charged with determining an appropriate timeframe for the travel and is given an estimated annual budget with which to make those travel arrangements. (See page 15, Goals and Expectations).

Among the decisions each Representative will make is whether to attend a Chapter meeting or some other state/regional event; the types of support needed for Chapter growth; and the areas of specific supports local Chapter Leaders need to succeed (committee formation, programming, leader succession, etc.). Representatives will also work with the GPA Headquarters to identify and nurture potential new chapters. Chapter chartering meetings will also be needed to engage, encourage and establish new Chapters in each region.

Other involvement includes but is not limited to the GPA Annual Conference and other GPA events. Regional Representatives should be seen and heard at such events to ensure Chapters recognize the immediate, capable support provided to them. This may include the development of specific conference sessions and networking for Chapter Leaders, supporting GPA Headquarters staff with conference coordination, and more.

### **Reimbursement in regards to travel for chapter business**

When calculating reimbursement for chapter travel, Representatives will follow the GPA Reimbursement Policies as outlined in the GPA Financial Policies and Procedures Manual. GPA will reimburse at the Standard Business Mileage Rates set by the IRS when Representatives employ the use of their own car.

If choosing to travel by car over plane to a destination with regular domestic airline flights, GPA will reimburse at a maximum of what a reasonable flight would cost to that destination, so as not to exceed the allotted mileage budget. For example, mileage from Kansas City to Dallas would cost around \$270, but if a flight at that time runs \$190 then that is the amount that would be reimbursed. A detailed table of reimbursable expenses is available in the GPA Financial Policies and Procedures Manual.

When attending a GPA-hosted event (i.e. Annual Conference or Regional Conference) where hotel booking minimums must be met, Representatives must make their reservation in the GPA room block at the official hotel(s).

### **Reassignment and resignation procedures**

The Regional Representative program was established by the GPA's Board of Directors in conjunction with the Chapter Advisory Committee. It is the intent of this volunteer program to provide capable, professional individuals to support new and established chapters. Regional Representatives are just that: representatives of the GPA Headquarters and Board of Directors.

It is the responsibility of the GPA Headquarters to monitor and support Representatives in their work. Action will be taken by the Chapter Relations Manager and CEO as needed to ensure every success is possible for each Representative. At the same time, they will remain aware of challenges that may arise with individual Representatives as they work with chapters. While no formal dismissal policies are currently in place, the GPA Headquarters may implement procedures to reassign a region to a new or existing Representative as needed to ensure the most positive support available for chapters within a region. To that end:

- A region may be reassigned to a current Representative—perhaps one who works in a neighboring region—to ensure continuing Chapter support. GPA Headquarters staff may also pick up any slack during an absence in a specific area.
- In the case of a vacancy, the GPA Headquarters may open the application process or pull

from existing Regional Representative applications as appropriate.

The resignation of a Regional Representative will be accepted by the GPA Headquarters and a plan for replacement will be initiated. As part of its own succession planning, it is the intent of the Regional Representative program that each existing Representative provide a minimum of three months' notice, and remain available for mentoring and support of new Representatives. This will become more formalized in coming years.

### **Problem-solving procedures**

Problems do arise—between individuals in Chapters, between Representatives and Association members, etc. When this occurs, it is the responsibility of the Representative to determine the extent of the problem and work with the Chapter Relation Manager to reach resolution. The Association reserves the right to provide direct resolution steps through the GPA Headquarters as appropriate.

### **Communication and social media**

GPA has in place standardized methods for ongoing communication with members that will be accepted and utilized as appropriate by each Representative. The use of social media will be—whenever possible—coordinated with GPA Headquarters efforts. Representatives will take great care to be respectful and appropriate in all communications, including online, verbal, and written messaging. From time to time, the GPA Headquarters may request specific participation in online messaging, including upcoming regional or national events (e.g., International Grant Professional Week/Day, National Conference, etc.).

### **The GPA Headquarters**

The relationship of the Regional Representatives to the GPA Headquarters staff is one of mutual support. To that end, each should be direct resources to be called upon as needed.

#### ▶ ***The GPA Headquarters.***

The Headquarters of GPA is responsible for:

- Receiving Regional Representative applications and maintaining Regional Representatives' files.
- Notifying the Regional Representative of member activity in their geographical area by state through a monthly report of all new, renewing, or lapsed members.
- Providing for a Chapter Relations Manager to further develop and maintain support systems for chapters.
- Approving and reimbursing requests for travel and lodging.
- Providing marketing materials and avenues for social marketing upon request.

In addition, Regional Representatives file periodic reports with the GPA Headquarters,



which are shared with Board Members and the Chapter Advisory Committee. Beginning in 2017, Regional Representatives will also begin to track their progress toward the goals and expectations outlined above. These directly align to the overall expectations of the GPA Headquarters in terms of chapter growth and support.

► ***GPA contact information***

GPA Headquarters contact information:

Grant Professionals Association  
10881 Lowell Avenue, Suite 190  
Overland Park, KS 66210  
Phone: (913) 788-3000  
Fax: (913) 788-3398  
E-mail: [staff@GrantProfessionals.org](mailto:staff@GrantProfessionals.org)  
Website: [www.grantprofessionals.org](http://www.grantprofessionals.org)

## Section 6

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### Frequently Asked Questions

1. *What is the timeline for starting a chapter?*

There are no specific models for establishing a chapter. Some chapters may have two or three informational meetings before initiating a chapter formation meeting. Some have simply sent out emails to people who have expressed interest, and the chapter formation process is completed at the first meeting.

2. *Can Regional Representatives serve as an officer for a chapter?*

No.

3. *How may I access the GPA logo to personalize correspondence?*

GPA logo files are provided in the members-only section of the Resource Center of the GPA website, at: [www.grantprofessionals.org/resources.asp](http://www.grantprofessionals.org/resources.asp) or in the Chapter Leader Community Library in GrantZone. If you have additional questions, please contact the GPA Chapter Relations Manager.

4. *How do I obtain membership lists for my geographic area?*

The Chapter Relations Manager at the GPA Headquarters will provide a membership list to Regional Representatives monthly.

5. *Are press releases available?*

A sample press release is included on the GPA Website under Resource Center. If you have additional questions, please contact the Chapter Relations Manager.

6. *What support services does the national organization provide to Regional Representatives?*

- Administrative Support,
- Monthly listings of active and inactive members in their geographic area,
- GPA marketing items,
- Training, and
- Preapproved travel expenses.

7. *Where are all the documents located that a Regional Representative will need?*

All documents are located either in the GPA Chapter Toolkit or on the GPA website under



Resource Center, then Chapter Resources. You must be logged in to the GPA website to view the documents.

8. *What are the perks of volunteering to serve as a Regional Representative for GPA?*

- Regional Representatives are eligible for travel and lodging reimbursements when representing GPA at official events.
- Costs to attend the GPA National Conference are reimbursed at a level set annually by the CEO and Board of Directors. While the amount may vary from year to year, the allotment ensures conference registration and a portion of travel and lodging expenses are covered for each Representative.
- Regional Representatives are visible members of the GPA and, as such, have access to a number of training and networking opportunities.

## Appendix

### Application for Regional Representative

The Grant Professionals Association (GPA) will entertain applications for the volunteer position of Regional Representative from members with these qualifications:

- Be an active member of GPA; a minimum of two years preferred
- Be a member of a chapter; experience in chapter leadership preferred
- Have a minimum of three years’ experience in the grants profession
- Consistently demonstrate a commitment to uphold and promote the GPA Code of Ethics and appropriate codes of professional behavior
- Commit to fulfill the responsibilities of the Regional Representative position
- Possess the flexibility to travel within the assigned region, as needed
- Have experience in bringing together and working with people of diverse backgrounds and experiences
- Demonstrates excellent presentation and communication skills

GPA is organization into eight regions. For practical purposes, Regional Representatives will likely represent a region in which they live or work; however, that is not a requirement. The eight regions include the following. Please indicate the region in which you live or work as indicated below.

Region 1: Alaska, California, Hawaii, Nevada, Oregon, Washington

Region 2: Arizona, Colorado, Idaho, Montana, New Mexico, Utah, Wyoming

Region 3: Iowa, Minnesota, Nebraska, North Dakota, South Dakota, Wisconsin

Region 4: Illinois, Indiana, Kentucky, Michigan, Ohio

Region 5: Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island, Vermont

Region 6: Delaware, Maryland, New Jersey, Pennsylvania, Virginia, Washington DC, West Virginia

Region 7: Alabama, Florida, Georgia, Mississippi, North Carolina, South Carolina, Tennessee

Region 8: Arkansas, Kansas, Louisiana, Missouri, Oklahoma, Texas

#### Contact Information

Name:	
Title:	
Organization:	
Address:	
City, State, Zip:	
Telephone:	Email:

I am interested in serving as a Regional representative for Region \_\_\_\_.



### **Application Narrative Instructions**

Please respond briefly to the following two sets of criteria. Please append any attachments at the end of the document and submit your application as a single PDF file to the address listed below.

#### **Professional History and Background**

1. Indicate your professional qualifications, highlighting your experience in the grants field, educational background, and professional memberships, if any. Attach a copy of your most recent resume.
2. Summarize your involvement with membership associations, including GPA. Include examples of volunteer work and leadership positions held.
3. Provide examples highlighting your experience with the following:
  - Managing meetings and groups
  - Bringing together and working with people of diverse backgrounds and experiences
  - Communicating and presenting at meetings or workshops
  - Marketing and public relations
  - Leadership and peer-to-peer support

#### **Chapter Support and Development Questions**

1. Describe your current efforts with your local GPA chapter.
2. Why would you like to serve as a Regional Representative?
3. What are some of the challenges facing the grant professionals community in your Region? How can and does a GPA chapter assist with these challenges?
4. What is your plan for developing chapters and/or assisting existing chapters to grow and develop? Please provide specifics, including any plans for travel, meetings, and working with chapter leadership.

#### **Certification**

I, \_\_\_\_\_, certify that the information submitted with this application is true and that I am a member in good standing of the Grant Professionals Association. I also certify that I will uphold and promote the GPA Code of Ethics and Standards of Professional Practice. I am willing and able to serve as a regional representative and accept the responsibilities of this position.

Name (print or type): \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Submit an electronic copy of application and attachments as a single document to  
[staff@grantprofessionals.org](mailto:staff@grantprofessionals.org)

## **GPA Confidentiality and Conflict of Interest Disclosure**

### **Confidentiality**

It is the policy of GPA that certain business and professional affairs of the organization are considered confidential and, as such, the Regional Representatives shall not discuss information concerning the activities or operations of the organization with persons who are not employees, consultants or other Regional Representatives at any time. This policy includes confidential information that is not generally known about GPA regarding its operating procedures, finances and databases, as well as its members, employees and suppliers. Failure to comply with this requirement will result in termination as a Regional Representative.

### **Conflict of Interest Statement**

The GPA Regional Representative adheres to a strict conflict of interest code that supports current law and ethical practices. It is the responsibility of each Regional Representative to notify the President or Chapter Relations Manager or CEO in writing should an actual or potential conflict of interest arise with respect to any subject requiring action by the Regional Representatives of GPA, any of its committees or task forces. Moreover, Regional Representatives shall not participate in the deliberations nor vote on any subject in which an actual or potential conflict of interest is perceived.

### **Ethical Conduct**

The GPA Board of Directors adheres to a strict code of ethics that is publicly promulgated by the organization. Moreover, the GPA Regional Representatives adhere to the bylaws of the organization. All Regional Representatives are expected to publicly and privately promote the GPA Code of Ethics at all times.

Regional Representatives may not, while serving or thereafter, use any information obtained during his or her tenure as a Regional Representative for personal, commercial or financial gain. Regional Representatives may not, while serving on the Board or thereafter, use the GPA name, logo or image for personal, commercial or financial gain.

Regional Representatives are expected to engage in behavior becoming a representative of a national professional organization. Regional Representatives will follow common rules of courtesy, including active listening; active and civil participation in discussions; acknowledging the value of other's ideas, even when discussing controversial issues; seeking consensus, agreement, and/or agreement-to-disagree; and avoiding sarcasm, coercion, insult or expressions of anger or other negatively affected behaviors. These common rules of courtesy will be followed and in all interactions with members of GPA for the good of the organization. Failure to adhere to common rules of courtesy is grounds for removal as a Regional Representative.