

Important Deadlines, Dates & Requests

June 1

- Chapter budgets for upcoming fiscal year (July 1 – June 30) due to National Treasurer for their review, prior to Finance Committee meeting review at National Symposium.

June 15

- Deadline for members who have not paid past years' dues to renew, otherwise they are dropped at the July National board meeting.
- Deadline for CEU renewals (Accredited: once every 5 years; CFD: once every 3 years)

July

- Incoming Chapter Treasurers to attend National Finance Committee Meeting at Symposium to go over any questions/comments National Treasurer has on chapter budgets.
- Hold annual chapter member meeting and chapter board meeting at Symposium (Chapter Treasurers need to have chapter budgets approved at the chapter board meeting, and give a high-level financial overview at the chapter member meeting).
- Receive information from Headquarters about how to post Chapter events on the AIFD Calendar of Events on AIFD website.

August 1

- Final Chapter budgets due to National Treasurer.
- All minutes for the year to be turned in to headquarters/ED(Including minutes from annual meeting held at Symposium)
- Chapter members contact list, including emails, provided to each Regional Chapter President from Headquarters.

September 15

- AIFD sends money for chapters dues portion.

November 15

- Chapter Nominations, condensed bios, and Secretary minutes showing Board review and approval, due to National Past-President/Nominations Chair. (documents are online)

February 15

- AIFD National sends money to each region, for the regional portion of any dues collected between September 15 and February 15.

Focal Points Blog Chapter President's message due by:

September 1 | November 1 | January 1 | March 1 | May 1 | July 1

*Send to chair of Focal Points Blog

National website (www.aifd.org):

Send bi-monthly or quarterly updates on chapter happenings, events, etc. to headquarters (info@aifd.org)

Social Media – send to Lisa Erisman at lerisman@stringfellowgroup.net, and also share and post your chapter social media to the national social media Facebook/Instagram, etc.

Foundation – Your Regional Representative to the National Board has the **option** of being a Foundation trustee, it is not an AIFD® Board member requirement.

Important Policies & Procedures:

It is the responsibility of each Regional Chapter President to review, be familiar with, and understand all AIFD Policies & Procedures. Some of the most important Policies & Procedures as they relate to Regional Chapters have been included here for your attention:

POLICIES & PROCEDURES MAINTENANCE:

7. The Executive Director shall see that a copy of current Policies and Procedures shall be distributed each year to: National Officers and Directors, National Standing Committee Chairpersons and Regional Chapter Presidents.

ELECTIONS AND VOTING:

- 1A. The Nominating Committee shall present the names of precisely four (4) candidates for the two (2) positions of Director-At-Large to be elected each year, and in regard to the nominations for the National Director representing a specific Regional Chapter, when a Regional Chapter is subject to presenting such nominations the Regional Chapter will submit the names of precisely two (2) candidates. (3/95)
- 2A. Directors who have successfully completed a first term on the Board shall be automatically asked by the Nominating Committee if they wish to run again for the position (regional or at-large) which they occupy.
4. The Regional Nominations Chairperson(s) shall provide to the National Nominations Chairperson, a bio of approximately 50 words for each nominee, stating their credentials and why they want to be elected to a regional position for AIFD. The full slate of nominees for each region, including bios, shall be sent with a copy of the minutes taken by each regional Secretary showing that the full slate of nominees was voted on and accepted by their respective Regional Board, and will be due to the National Nominations Chairperson no later than November 15 in order for the ballots to be distributed in a timely manner. (*April 12, 2003*) All candidates for any National or Regional Chapter office or board of directors must be a current Accredited Member of the Institute.

If a nominee for a National or Regional position has not provided a bio to the National Nominations Chairperson by the due date, then the Executive Director shall be instructed to list the candidates name on the slate, with the words “No bio provided” listed after their name. (*April 12, 2003*)

It shall be the responsibility of the Nominations Chairperson to review and proofread all bios that are sent to the Executive Director to ensure that they are within the guidelines accepted by the National Board. (*April 12, 2003*)

Should a Regional Chapter fail to provide names of candidates for the position of Regional Chapter Representative to the National Board in a timely manner (November 15), it shall become the responsibility of the National Nominating Committee to

recommend candidates for said election. All information and ballot names for the regional chapter elections must be submitted to the National Nominations Chairperson by not later than November 15th. If the deadline is not met by a regional chapter, said chapter shall incur any administrative time costs (at the standard contract rate) for any time spent by the administrative office in securing a final report and in preparing the ballot for said chapter.

5. The Regional Chapter Representative to the AIFD National Board of Directors, while serving in a liaison position, shall nonetheless be considered a voting member of the Chapter Board and Executive Committee. (6/15 – Also see “Board of Directors 12)

BOARD OF DIRECTORS

2. AIFD will reimburse up to \$900.00 for travel/lodging (*October, 2009*) to each member of the Board attending a duly scheduled meeting of the Board or Executive Committee (Except those associated with the meetings held in conjunction with the National Symposium). No other expenses outside of those outlined on the Travel Expense Reimbursement Form will be incurred by the Institute for the directors’ attendance. The Institute will pay for appropriate table flowers and appropriate food and beverage as contracted with the host facility. Further, it shall be the policy of AIFD that the travel allowance for any committee that meets more than twice a year, excluding any meetings held in conjunction with the National Symposium, shall also be a travel/lodging reimbursement of up to \$900.00, and that the travel/lodging reimbursement allowance for all other travel shall be up to \$750.00. (10/01) Further, to reimburse the Presidents-Elect of the respective Regional Chapters to attend the Spring Board and Leadership meeting based on a sliding scale in which those attending from the same geographically vertical chapters as the site of the meeting, i.e. North East and Southern should the meeting be in one of those areas, receive up to 1/3 of the amount provided for a Director, and up to an additional 1/3 for each additional geographic vertical allocation, i.e., Central chapter would receive up to 2/3 and Western Chapters would receive up to 3/3. Noting further, that in order for the Regional Chapter Presidents-Elect to be eligible to receive the above reference travel reimbursement, they must be present for the entire orientation meeting for Presidents-Elect and the National Board of Directors meeting. In order to receive a reimbursement for travel as stated above, all receipts must be turned into Headquarters within 14 days of the close of the meeting and with appropriate cover sheet as distributed. There will be no reimbursements for any expenses without a receipt.
11. The National Board of Directors shall set policies for Chapters and determine all functions.
12. Regional Boards shall be considered committees of AIFD and shall follow the following guidelines as *Moved from Bylaws Section 9.5 June 2013*)

Section 12.1 – The selection of the Regional Board of Directors shall be from the Active Members with a term of three (3) years.

Section 12.2 – The terms of office for regional directors shall be staggered so a like number is elected each year.

Section 12.3 – A Regional Board member shall not serve more than two (2) consecutive terms.

Section 12.4 – Nomination to the Regional Board shall be by a nominating committee, consisting of five (5) people appointed by the President, one of which will be the Past President who will be chairperson.

Section 12.6 – The Regional Nominating Committee will select three (3) or more members to be elected each year to the Board. Provisions will be made for write-in candidates.

Section 12.7 The Regional Nominating Committee will select the slate of officers from members of the board who have served at least one year prior to election of office, or from former members of the board.

Section 12.8 – Election of the regional officers and the board will be by the chapter membership in a ballot process that will accompany that of the National Board election of Directors (not officers).

Section 12.9 – Chapter elections will be completed prior to the National Annual Meeting and installation of the officers will occur at the Regional Chapter meetings held in conjunction with the National Symposium.

Section 12.9.1 – The duties of the regional officers shall be those prescribed by the Board of Directors and shall include:

Section 12.9.2 – The regional president shall preside at all meetings.

Section 12.9.3 – The regional president shall appoint all chairpersons of all committees and shall serve ex officio on all committees.

Section 12.9.4 -- The regional president shall assume all duties of management as prescribed by the Board of Directors.

Section 12.9.5 -- The regional president shall not serve more than two (2) consecutive terms.

Section 12.9.6 -- CFD designers shall be eligible to serve on Regional Chapter committees, but not as a chairperson or member of the board.

13. The Regional Chapter Representative to the AIFD National Board of Directors, while serving in a liaison position, shall nonetheless be considered a voting member of the Chapter Board and Executive Committee. *(6/15 – Also see “Elections and Voting 5a”)*
14. The Executive Director, in conjunction with the President-Elect, shall be responsible for the scheduling a meeting of the Presidents-Elects of the Regional Chapters to be held in

conjunction with the Spring Meeting of Board of Directors.

OFFICERS

11. Whenever a Regional Chapter Representative to the National Board shall be installed as Vice President of the National Board, he or she shall immediately resign his or her position as a Regional Chapter Representative to the National Board, and The President of the Board shall, after having discussed the matter with the Board of Directors of the respective Regional Chapter, appoint a duly qualified member to fill the remainder of his or her term as a Regional Chapter Representative to the National Board. (7/00)

GENERAL MEMBERSHIP

86. AIFD will provide an email blast to its members to any Partner in good standing for a fee of \$250.00. Such blast shall be limited to three per Partner. The same shall apply to Regional Chapters when requesting an email to its members and area CFDS, except that there shall be no fee excluding administrative charges for time spent in providing such services.

Each Regional Chapter President may request an electronic mailing list of their respective regional chapter Accredited members, CFDS, Candidates, and Inductees, including email addresses and phone numbers, once annually on August 1, strictly for the purpose of regional chapter communications. (10/17)

MEMBER COMMUNICATIONS

5. Student and Regional Chapters shall be encouraged to submit articles for inclusion in the newsletter. (10/01)
9. AIFD Regional Chapter Web Sites -- Any Regional Chapter of the American Institute of Floral Designers (AIFD) wishing to have a regional website must adhere to the following rules: a) it can only be accessed and hosted through the AIFD.org website, b) the Regional Chapter can write, change and submit copy but it will be edited and approved by AIFD, c) it is the responsibility of the Regional Chapter to design, construct and update its site, and d) AIFD reserves the right to change or cancel a regional website and/or its content in accordance with AIFD's Policies, Procedures and Board of Directors decisions. (Jan. 28, 2006)

MARKETING

22. The President shall be the official spokesperson of AIFD. When appropriate, the Executive Director may also serve as the official spokesperson. Again, where appropriate, the Executive Director may ask various leaders to serve as a spokesperson when the leader's area of responsibility corresponds to a specific area of concern, i.e., Membership Chairperson announcing PFDE results, Symposium Coordinator discussing Symposium. Other officers/directors/ committee chairs/general members should not act as a spokesperson for AIFD unless they have been duly authorized to do so. As to matters associated specifically to a

Regional Chapter, only the Regional Chapter President should be the official spokesperson. Lastly, all requests to comment on issues from any media should be referred immediately to the National President or Executive Director.

BUDGET AND FINANCE

6. Initial dues reimbursements to Regional Chapters shall be based on membership as of September 1st. The Executive Director shall be responsible for seeing that appropriate reimbursements are transferred to each Region by the Fall Board of Directors meeting. The Executive Director shall provide with the reimbursements a list of all those members from each chapter whose dues have been paid. (10/1/94). A second and final chapter dues reimbursement will be prepared for the winter meeting of the Board and shall be based on any chapter members who shall have paid their membership fees between September 1st and January 1st. (1/07)
13. Regional Chapters shall be required to submit to the National Treasurer by June 1 of each year a copy of their budget for the upcoming fiscal year for review. The Finance Committee shall annually at the time of the National Symposium review the budgets of the various regional chapters with the incoming chapter Treasurers to help assure that they are remaining fiscally sound (10/13)
14. Regional Chapters shall be required to submit to the National Office by August 1 of each year a copy of their chapter's minutes for all meetings held during the most recently completed fiscal year. There shall be a \$100 per month late fee assessed to any Chapter that does not comply, and further that a Chapter's dues reimbursement funds will not be transferred to Chapter's account (10/10) until such reports are duly received. (3/00)
- 15a. Regional Chapters shall submit to the Finance Committee by August 1st of each year of a final copy of their annual operating budget.
- 15b. Policy – Regional Chapters, which are, in fact, uniquely funded committees of AIFD, shall have a separate fund maintained for them, respectively, by the AIFD Management Company with a detailed accounting of which shall be provided by AIFD to each Chapter Treasurer annually. The income, expense and balance of each account shall be reflected on the AIFD Statement of Financial Position and Statement of Financial Activities. (6/15)
- 15c. Regional Chapter funds shall be expended by the AIFD Treasurer (or staff Financial Manager) on the direction of the Chapter provided an approved expense authorization document has been given to the Financial Manager in a timely manner. Funds will be deposited by the financial manager when the checks are sent with the deposit authorization form. When necessary, any Chapter may request that the credit card used for various AIFD expenses be also used to pay approved Chapter expenses, except to the extent that such use of the credit card be limited to a minimum of \$250 per incident. (6/15)

STAFF



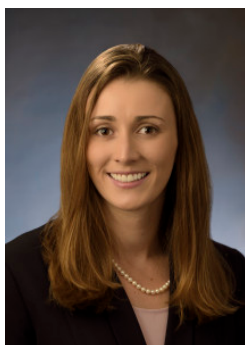
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