

2010-11

FBLA-PBL National Officer

Candidate Guide



2010-11 NATIONAL OFFICER CANDIDATE GUIDE

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Congratulations! You have taken the first step towards serving as a national officer of Future Business Leaders of America–Phi Beta Lambda. Being a national officer is one of the most challenging and rewarding experiences that a student can have as a member of FBLA–PBL. It takes commitment and responsibility, but it’s also a lot of fun.

National Officer Candidate Schedule

National officer candidates will receive a detailed candidate schedule prior to the National Leadership Conference.

Candidate Qualifications

Only active members are eligible to hold national office. Dues must be paid by March 1 (FBLA) or April 15 (PBL).

- A candidate must have at least one full year remaining in his/her business program.
- A candidate must hold or have held an elective office in his/her local or state chapter.
- For PBL, candidates must hold or have held an elective office in his/her local chapter corresponding to or higher than the one that they are applying for.
- A candidate must be present at the NLC and officially certified by the Officer Screening Committee to be eligible to campaign.

Candidates for National Secretary

Candidates for secretary must possess the ability to take minutes and have completed one year of typewriting/keyboarding instruction by the time of their election at the NLC.

Candidates for National Treasurer

Candidates for treasurer must have completed one year of accounting, bookkeeping, or recordkeeping by the time of their election at the NLC.

Candidates for National Parliamentarian

Each state may nominate any member of the parliamentary procedures team representing them at the National Leadership Conference, or the individual who scored the highest on the written parliamentary procedures test at their State Leadership Conference, as a candidate for National Parliamentarian.

Candidates for the office of National Parliamentarian must:

- File the National Officer Application Form by May 15.
- Attend the National Officer Candidate Briefings Session.
- Take the written parliamentary procedures exam.

Candidates for National Parliamentarian do not participate in the National Officer Candidate Interviews at the National Leadership Conference.

Campaign Policies and Procedures for Candidates for Elected Offices

National Officer Candidates **may not**:

- Contact members from other states prior to the NLC.
- Post the candidate’s intent to run for national office on Web pages, including state Web sites, on state and national message boards, My Space, Facebook, Twitter, other social media sources, or in e-mail messages.
- Create a campaign Web site.
- Current national officers cannot endorse or support the campaign for any candidate, including serving as a campaign manager.

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Official campaigning for the offices of president, secretary, and treasurer may begin immediately following the National Officer Candidate Campaign Rally which is held after the Opening General Session.

- Campaigning is strictly prohibited before or during the session with the exception of each candidate's speech.
- No material may be placed on chairs and signs may not be displayed until after the close of the Campaign Rally.
- Candidates and campaign staff may display signs and distribute literature at the back of the room as delegates leave the Campaign Rally.
- Once the room is empty, signs must be covered again and no literature may be handed out until the campaign booths open.

Campaigning for the offices of the five regional vice presidents may first begin on the opening day of the campaign booths in the campaign hall.

- Regional vice presidents may place campaign materials on chairs before the Regional Campaign Rallies begin.
- No material can be posted inside this room, but hand-held campaign signs can be used.
- Campaign signs must be attached to wooden sticks – wire hangers cannot be used.
- Regional vice president candidates and their campaign staff may hand out campaign literature at doors both as students and advisers enter or leave the Regional Campaign Rallies.

Candidate and Materials Pre-Screening. The following items will be pre-screened prior to the National Leadership Conference. (All candidates will receive a copy of the pre-screening results with copies being sent to the local and state adviser via e-mail).

- National officer applications (**Due: May 15**)
- Draft copies of the campaign brochure, financial statement, and campaign speech (**Due: June 2**) will be pre-screened prior to the National Leadership Conference.
- Any concerns will be communicated with the candidate.
- The preliminary review will give candidates reasonable certainty that they have complied with all campaign rules and regulations and can proceed with a fully developed campaign.

Institute for Leaders. National officer candidates are not required to attend the Institute for Leaders; however, attendance is strongly recommended.

Candidate Briefings. The NLC Candidate Briefings Session will take place at 7:30 p.m. (PBL–July 8 and FBLA–July 13).

- Each candidate's campaign manager (for elected office) and local and/or state adviser/chair should attend.
- A roll call will be taken at this session. Any candidate that is not present at this meeting will be disqualified unless prior arrangements have been made.
- Current national officers will conduct the Candidate Briefing Session.
- Campaign guidelines will be reviewed.
- Campaign booth assignments will be discussed.
- Handouts of campaign rules will be distributed.

Candidate Financial Statement. A candidate may not spend or have received donated materials (at "fair market" value) and/or money totaling more than \$2,000 in the campaign for a national office. Substantiated documentation for donations and receipts for all campaign materials must accompany the financial statement.

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Audio–visual equipment rented or loaned to the candidate should be reported at either the actual rental rate or “fair market” estimation.

- Income plus Donations must equal Expenses.
 - For example, if you have \$700 income and \$800 in donations, the total expenses must also equal \$1500. Any additional income must be returned to whoever donated it.

Please use the financial reporting form. Electronic copies may be obtained by e–mailing membershipdir@fbla.org.

FBLA–PBL National Officer Candidate Financial Reporting Form

REVENUE (Cash)

Source	Amount	
1.	\$	
2.	\$	
3.	\$	
4.	\$	
5.	\$	
6.	\$	\$

DONATED ITEMS (Material Items)

Item	Amount	
1.	\$	
2.	\$	
3.	\$	
4.	\$	
5.	\$	
6.	\$	\$

EXPENSES

Item with Receipt	Amount	
1.	\$	
2.	\$	
3.	\$	
4.	\$	
5.	\$	
6.	\$	\$

Candidate Signature

Local Adviser Signature

NOTE: This report outline can be tailored to meet the candidate’s needs. It is intended to serve as a guide for reporting procedures. Include a receipt for each purpose and a record of each donation . If a receipt is not obtainable, a copy or statement will suffice. Applicants should attach a description of any audio–visual aids and include equipment costs (if any) in the financial report. Please place a copy of this form and all receipts/documentation in a three–ringer binder to be turned in at the National Officer Candidate Briefings. Keep a copy of this completed form only to place on the lower right hand corner of your campaign booth.

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Campaign Materials. All campaign materials must be approved by the on-site campaign materials screening committee.

The following campaign materials are required to be submitted for review at the Candidate Briefings Session (in the order below) in a **portfolio holder or three ring binder or notebook with a cover page that includes the candidate's name, state, and office sought**:

- Final copy of campaign speech.
- Final copy of campaign brochure/data sheet.
- One each of any campaign items and literature (stickers, flyers, sample design of campaign signs, etc.) These items must be properly identified with the name of the candidate and office sought. Community or state literature, buttons, or bumper stickers that do not endorse or reference the candidate do not need to be personalized or submitted.
- Candidates must include a description of any items, which will be given away at the campaign booth to generate name recognition. In addition, candidates must provide a written or geographical description of any banners, posters, or other decorations in the campaign hall. Please remember that items may not be pinned, taped, tacked, or in any way adhered to walls, floors, ceiling, or furniture. Items such as stickers may be distributed only if adhered to a personal item (i.e. name badge) prior to leaving a candidate's booth area. Money, alcohol, tobacco, and helium-filled balloons may not be distributed. Any food items that are distributed must be professionally sealed and packaged.
- A written description of any audio-visuals that are planned to be used must be included with the campaign material. It is the responsibility of the candidate to bring or rent his or her own equipment. Equipment costs (rental service, electrical access, etc.), if any, must be listed on the financial report. Remember, rental of AV equipment through the hotel's in-house AV provider can be very expensive (approximate cost of a VCR with a monitor can be as much as \$200 per day). In all cases, access to electrical outlets will require a payment of a service charge.

Officer Candidate Interviews. All applicants for elected offices will complete an interview with the officer screening committee at the National Leadership Conference.

- Interviews will begin at 2:15 p.m. (PBL-July 9 and FBLA-July 14). Each candidate interview will last approximately 15 minutes.
- Candidates, their local advisers, their state advisers, and their campaign managers should arrive at least 15 minutes prior to their interview time.
- The screening committee will consist of members of the national board of directors and current national officers.
- If a current national officer is running for national office again, he or she will not participate as part of the screening committee.
- Candidates will not have to bring in any samples of campaign materials. The committee will have the candidate's portfolio that was collected at the National Officer Candidates' Briefings session as well as the final copy of the financial statement and individual receipts.
- Candidates must bring their local adviser, their campaign manager, and their state adviser to the officer candidate interview.
- Business attire is required. Please review the official dress code below:

http://www.fbla-pbl.org/docs/DRESS%20CODE_revised_1_09_2009.pdf

- Only candidates that are certified by the officer screening committee become official candidates and are eligible to run for elected office.

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- **Candidates for the office of National Parliamentarian do not participate in candidate interviews.**

Campaign Speeches. Candidates for national offices (president, secretary, treasurer) will deliver their speeches during the Campaign Rally immediately following the Opening General Session. Candidates for vice president will deliver their campaign speeches during the Regional Campaign Rallies.

All campaign speeches are limited to a total of two minutes.

- The time is monitored and strictly enforced.
- No audio-visual equipment may be used during campaign speeches.
- Business attire must be worn.
- **Only the national officer candidate may participate in the campaign speech** (i.e. no introductions, skits, or props).

Campaign Literature, Materials, and Campaign Booths. National officer candidates, their adviser(s), and their campaign staff may set up their campaign booth at 7:00 a.m. (PBL–July 10 and FBLA–July 15).

The exhibit hall will open at 9:00 a.m.–4:00 p.m. (PBL–July 10 and FBLA–July 15) and from 9:00 a.m. – 2:00 p.m. (PBL–July 11 and FBLA–July 15). All candidates and their campaign staff are responsible for maintaining a clean and orderly campaign hall.

Candidates should remember that the campaign booths are located in the conference exhibit hall and share space with commercial (paying) exhibitors. As you plan your campaign area, please remember to be courteous to the other exhibitors and do not plan activities in the campaign hall that would be disruptive to their ability to conduct their business.

National officer candidates may dismantle their booths from 2:00 p.m.–4:00 p.m. (PBL–July 11 and FBLA–July 16).

- Candidates will be assigned to an area in the campaign hall for their campaign booths.
- Candidates will not be notified of their booth assignment until the Candidate Briefings Session.
- PBL candidate booths are table top only – 6' by 30" table and two chairs.
- The PBL candidate area will not be draped. FBLA candidate booths are 10' x 10' with an 8' drape behind and a 3' drape on the sides. Included are a skirted and draped 6' x 30" table, two chairs, and a trash can. **Candidates may only use the space that falls within the booth dimensions.**
- **Candidates and campaign staff may only campaign in their own booth area in the campaign hall. Any campaigning in the hall outside of this area is prohibited.**
- All candidates and campaign staff in the campaign hall must be dressed in business attire.
- Candidates and campaign staff are not allowed to wear costumes, aprons, t-shirts, hats, etc. in the campaign booth area, campaign hall, or conference sessions (workshops, meetings, general sessions, Candidate Q&A, etc.).
- Candidates should make sure that they store or take to their room items of high value when they are not in use at the booth. **FBLA–PBL is not responsible for any items that may disappear from the campaign booths.**

National Officer Candidate Q & A. For the offices of president, secretary, and treasurer, the Q & A Session (not to total more than 15 minutes in length for each office) will occur on the morning of the third day of the NLC (PBL–July 11 and FBLA–July 16).

For the offices of the regional vice presidents, a brief Q & A Session (not to total more than 15 minutes in length) will be conducted immediately following the campaign speeches during the Regional Campaign Rallies.

Business attire is required for both sessions.

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National and Regional Voting Sessions. No campaigning is allowed on the day of the National and Regional Voting Session.

Voting

National officer elections will take place on the final day of the National Leadership Conference. Voting for national president, national secretary, and national treasurer candidates will take place during the National Voting Delegate Session.

Voting for regional vice presidents will take place during the Regional Voting and Recognition Sessions.

- Voting will be done by ballot.
- A majority vote is required for election.
- If a majority is not reached, the teller's report will be read prior to re-voting.
- If no candidate receives a majority vote on the third ballot, the candidate receiving the lowest number of votes for that ballot will be dropped from the fourth ballot.
- If necessary, the candidate receiving the lowest number of votes shall be dropped from each subsequent ballot until one candidate receives a majority of votes.

Candidates are members and are not disqualified from assuming the roles of state or local voting delegates. However, keep in mind that campaign-related events cannot be rescheduled to accommodate other commitments including participating in individual, team, or chapter competitive events.

No two FBLA national officers may be elected from the same state chapter.

No two PBL national officers may be elected from the same state chapter. With the exception of the regional vice president, no more than two PBL national officers may be elected from the same region. Unopposed PBL national officer candidates will not be eliminated because of these restrictions.

The office of national parliamentarian is an appointed position. According to the National Bylaws, the candidate scoring the highest on the Parliamentary Procedures written test at the National Leadership Conference will be appointed to the position of national parliamentarian. This candidate must have filed a National Officer Application.

Election Results

Election results will be announced during the Awards of Excellence Ceremony. There will be no rehearsal for the officer installation.

Newly Elected National Officer Breakfast

There will be a mandatory breakfast meeting for all newly elected National Officers, their state advisers, and local advisers from 7:00 a.m.–8:00 a.m. the morning following the Awards of Excellence Ceremony. (PBL–July 13 and FBLA–July 18).

National Officer Training

National Officer Training is required of all newly-elected national officers.

- There are no exceptions to this requirement.
- **This year's training session will be held at the end of July or during the first week of August. Dates to be determined.**

Submitting the Application

Applications must be certified by the candidate's local chapter adviser and state adviser or state chair.

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- If the FBLA or PBL candidate is under the age of 18, a parent or guardian must also sign the application.
- **If no applicants file for a specific office by the May 15 deadline, notice will be sent to those states eligible to run a candidate for that office.**
- **In this event, the deadline for the application will be extended to June 15. If there are still no applicants for a specific office by the June 15 deadline, individuals may apply for office at the NLC.**
 - In order to submit an application at the NLC, potential candidates must report, with their state and local adviser, to the National Officer Candidates' Briefing Session.
 - Potential candidates must bring copies of all of the materials that they will use in their campaign and a copy of the financial statement, all original receipts, and a portfolio of campaign materials in three ring binder.
 - Potential candidates will be required to comply with the interview requirements and all other guidelines expected of national officer candidates.

Duties of the National Officers

The National President shall:

- Serve as chair of the FBLA National Officer Team;
- Preside over the business meetings of the FBLA National Officer Team;
- Serve as member of the Board of Directors;
- Appoint appropriate committees and committee chairmen;
- Serve as an ex-officio, non-voting member of all committees;
- Perform other duties for the promotion and development of local, state, and national FBLA-PBL.

The Vice Presidents shall:

- Assist the president in the promotion and development of FBLA-PBL in the regions which elected them;
- Assist in planning the National Fall Leadership Conferences;

The Secretary shall:

- Keep an accurate record of all business meetings of the National Leadership Conference and the National Officer Team.
- Supply promptly at least one copy of the minutes and substantiating reports to the FBLA or PBL national president and the association president and chief executive officer;
- Initiate communication with state officers to promote quality articles for national publications.

The Treasurer shall:

- Assist the national office in keeping an accurate record of national officer travel expenses and disbursements, and in planning national officer travel;

The Parliamentarian shall:

- Advise the president of the orderly conduct of business in accordance with the FBLA-PBL Bylaws and *Robert's Rules of Order-Newly Revised*.
- Serve as an ex-officio member of the National Officer Team.

These officers shall serve on the National Officer Team, perform the duties described in the bylaws, and perform such other duties as directed by the FBLA or PBL national president and the association president and chief executive officer that are not inconsistent with bylaws or other rules adopted by FBLA-PBL.

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NATIONAL FBLA/PBL OFFICER APPLICATION

Directions: Submit one copy of the items below in the order specified: (Please do not staple this copy. Paper-clip application form and supporting documentation and submit in manila folder labeled with the candidate name, candidate state, and office sought). Make sure to keep a copy of this application form for yourself.

If you have any questions please e-mail Lisa Smothers (membershipdir@fbla.org).

National Officer Candidate Submission Check List

To be forwarded by your State Adviser or State Chair so that it is received at the National Center by May 15.

Completed Officer Application Forms

- Applicant Fact Sheet
- Applicant Autobiography (signed by applicant and parent if applicable)
- Candidate Writing Assignment
- FBLA-PBL National Officer Code of Conduct
- Rules and Regulations for Internet Sites
- Commitment Statements
- Certification Form

In addition, the following must be attached behind the application:

- Letter of recommendation from your local chapter adviser
- Letter of recommendation from your state adviser

APPLICANT FACT SHEET

Office Sought

FBLA PBL

Applicant Information

Name _____

FBLA/PBL Chapter _____

Home Address _____

City _____ State _____ Zip _____

Home Phone _____ E-mail _____

Cell Phone _____

School Class for next school year: *Sophomore Junior Senior Other*

Polo Shirt Size _____

Parent/Guardian Information (Required for Applicants 18 years, or younger)

Name(s) _____

Place(s) of Employment _____

Work Number(s) _____

E-mail _____

Adviser Information

Name(s) _____

Home Address _____

City _____ State _____ Zip _____

Home Phone _____ Work Phone _____

E-mail _____

APPLICANT AUTOBIOGRAPHY

Name _____ Nickname _____

Birthday _____ Favorite Holiday _____

Number of Years in FBLA _____ PBL _____ FBLA-ML _____

(Attach a separate sheet if necessary—This form may be recreated on your computer)

FBLA/PBL Offices Held & Term of Office:

Business Courses Taken or Currently Enrolled:

Awards & Honors:

Special Recognition & Achievement:

Interests & Hobbies:

Leadership Positions Held:

Career Goals/Aspirations Other Items of Interest about You:

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FBLA–PBL National Officer Code of Conduct

1. National officers will conduct themselves in a courteous and respectful manner, refraining from language and actions that might bring discredit to the association.
2. National officers must participate fully in all appropriate activities, conferences, workshops, business meetings, etc. for which they have responsibility.
3. National officers must abide by the requirements of the national office and association dress code.
4. National officers must be willing to take and follow instructions as directed by those responsible for them.
5. National officers shall avoid places and actions which, in any way, could raise questions as to character or conduct.
6. National officers must treat all members equally.
7. National officers participating in FBLA–PBL assignments must not damage or deface property. Damages to any property or furnishing in hotel rooms, private accommodations and/or buildings will be the responsibility of national officers.
8. National officers shall communicate to appropriate conference personnel any circumstances preventing them from carrying out predetermined plans at assigned conferences.
9. National officers are not permitted to wear any campaign materials at the National Leadership Conference, nor are they allowed to campaign for a candidate or serve as a campaign manager, except when campaigning for oneself.
10. National officers shall not violate any state or federal laws.

National officers who violate any of the above subject themselves to:

1. Being removed from the FBLA–PBL conference and/or activity and sent home at their own expense by their local/state chapter adviser in consultation, when appropriate, with the FBLA–PBL chair of the board of directors and/or the president/CEO, and/or National Officers Advisers, and/or conference director.
2. Have any honors or offices withdrawn.

As a national officer, I agree that I will abide by the above prescribed code of conduct.

Signature: _____ Date: _____

Approved by the FBLA–PBL, Inc. Board of Directors July 8 ,1989

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COMMITMENT STATEMENTS/CERTIFICATIONS

Name _____

Office Seeking _____

Directions: Serving as a successful FBLA–PBL national officer is a unique commitment that requires a strong partnership between the officer, the local adviser, school officials, and the state adviser or state chair. This form is to be completed and signed by each party.

Applicant

If elected or appointed in the case of the national parliamentarian to serve FBLA–PBL as a member of the National Officer Team I agree to:

Place an "x" in each box and sign

- Remain committed to my education and family obligations
Make FBLA–PBL national service my top priority after my education and family responsibilities
Follow the FBLA–PBL Handbook rules, guidelines, and responsibilities
Cooperate with my school, adviser, local chapter, state chapter, and national association throughout the year
Attend all required meetings, activities, and events
Perform all assigned officer responsibilities
Keep my school administration, local adviser, state adviser, and national officer liaisons informed of all activities
Maintain the highest degree of personal honor, integrity, and ethics

Signature _____

Chapter Adviser

If _____ is elected or appointed to FBLA–PBL national office, I agree to:

Place an "x" in each box and sign

- Support this officer
Ensure that all school policies regarding travel and absences are communicated to the National Center and that they are followed
Ensure that school officials are appropriately informed of officer activities
Assist the officer in making appropriate travel arrangements
Monitor the officer's academic program and communicate potential challenges to the National Center
Assist the officer with the successful performance of his/her duties and responsibilities
Communicate with FBLA–PBL National Center regarding any officer performance issues

Signature _____

School Administrator (required for all FBLA candidates and for any PBL applicant under the age of 18)

If _____ is elected or appointed to FBLA–PBL state office, I agree to:

Place an "x" in each box and sign

- Support this officer
Support the adviser's role throughout the year and attendance at required events
Enable the officer to attend events required of a national officer
The National Center does not provide for funding for local advisers to accompany national officers on their official assignments. Only national officer expenses are funded.

Signature _____ Title/Position _____

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The information presented in this application is true and my own work.

Applicant Signature _____ Date _____

As the parent/guardian to _____, I agree to support his/her candidacy and, if elected, term as an FBLA–PBL national officer.

Parent Signature _____ Date _____
(If applicant under 18)

Certification by State Adviser or State Chair (required)

To the best of my knowledge, _____ meets the qualifications for the office sought. We endorse and support his/her application.

State Adviser/Chair's Signature _____ Date _____

*Applications must be received at the National Center by **May 15**. State Chairs/State Advisers – send application to:*

National Officer Application
FBLA–PBL, Inc.
Attn. Jean Buckley, President and CEO
1912 Association Drive
Reston, VA 20191–1591