

NCIDC Council Member Orientation and Training

January 14, 2022

1) Overview of iPad technology and paperless distribution system for Council

2) The Council Handbook:

- Chapter 1 - Welcome to the Board
- Chapter 2 - Relating to the Administrator & Staff
- Chapter 3 - Is it Policy or Is It Management?
- Chapter 4 - Planning Stimulates Future Success
- Chapter 5 - Your Guide to Finance
- Chapter 6 - The Business of the Board
- Chapter 7 - Making Your Board the Best it Can Be

3) Council Policies:

- Fiscal Policies
 - Accounting System
 - Accounts Payable
 - Audit & Audit Finding Resolution
 - Banking & Bank Reconciliations
 - Budgets & Budget Modifications
 - Cash Management
 - Closeouts
 - Cost Allocation Plan
 - Financial Reporting
 - Internal Controls
 - Payroll
 - Procurement Standards
 - Record Retention
 - Staff Duties & Responsibilities
 - Travel & Per Diem
- Personnel Policy & Procedures
- NCIDC Eligibility Policy
- NCIDC Organizational Standards Policies
- PII and Data Security Policy

4) Council Plans and Documents:

- Agency Bylaws and Articles of Incorporation
- Agency Mission and Vision Statement
- Executive Director Succession Plan
- Most Recent Agency Audited Financial Statements
- Most Recent Agency IRS 990
- Community Action Plan
- Strategic Plan and Plan updates

- Risk Assessment
- Current Council Roster
- Organizational Chart
- Member Organizations Resolution
- Definition of NCIDC Acronyms
- Summary of Roberts Rules

5) Council Forms:

- Council Member Code of Ethics
- Council Member Pledge
- iPad Checkout Agreement

5) NCIDC Website for Agency Info: ncidc.org