



*Florida Sunshine Chapter*

**Meeting Date:**  
October 2, 2007

**Meeting Minutes Compiled by:**  
Joan C. Ford, Secretary

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## Date & Time of Meeting

**October 2, 2007  
4:00 to 5:00 EST**

## Attendees

**A total of 37 individuals attended our inaugural meeting; they were:**

Martha Bergweiler  
Betsy Blakney  
Sherry Bowles  
George Brown  
Shelley Claudin  
Annette Cooper  
Don Davenport  
Joan Ford  
Heather Gartman  
Kathy Gillis  
Jack Hales  
Charlie Hooper  
Elizabeth Jennings  
Chuck Keller  
Kari Lawrence  
BJ Lownie  
Linda Mahnke  
Steven Martin  
Bill Rogers

Dave Rudolph  
Jennifer Russell  
Alonzo Smith  
Amy Stourac  
Mike Summers  
Rosie Tillan-Pruitt  
Cal Vandivier  
Gerard Veshosky  
Michelle Woodward  
Dianne Keane  
Brooke Colello  
Mike Arnett  
Cynthia Smith  
Terry Clayton  
Var White  
Bobbie Lee Saccuzzo  
Kristen Stephens  
Connie Stanford

## Location

**Virtual via Webinar**

## Call to Order

**Chuck Keller, President, called the meeting to order and welcomed the nearly 40 attendees and our guest speakers.**

## President's Remarks

**Chuck extended special thanks to the interim officers and steering committee members for their hard work over the past six months in helping to launch our new chapter, the only one in Florida.**

**Chuck reminded everyone that you must affiliate with our chapter to be claimed as a FL member. At year-end, we get a 'rebate' for each active member. If you are not a member now, please join APMP!**

**Chuck then asked Connie Sanford and Cal Vandivier to talk about the chapter's membership drive and communications vehicles.**

## Membership Drive – Connie Sanford

*We have 80 APMP members in Florida, and we also track members in Louisiana and Mississippi. Our membership is spread out from Miami to Pensacola. After targeting a minimum number of chapter members, we exceeded that goal. We now have 38 new chapter members of potential 80 participants. We will work on growing that number.*

*Because we are diverse, would like to marry best of virtual chapter and local chapters; we plan to try lunch and learns and happy hours to have contact with nearby peers. These small gatherings will be an alternative to the large chapter meetings.*

*Connie encouraged making those local connections and offered to lend support. Members can contact Connie by email at [csanford@kforce.com](mailto:csanford@kforce.com) or by phone at 813.552.9533. Be sure to email Connie if you are interested in joining the FL chapter.*

## Communications/Web Site – Cal Vandivier

*Earlier in summer, we organized a communications team (Sherry Bowles, Kathy Kerns, and Cal) to tackle challenges in running a virtual chapter. We created a communications plan that tapped into resources of our members:*

- + Need a meeting place for virtual mtgs*
- + Private space for bulletin board, messaging, calendar*
- + Public space for Web and blog sites*

*Private space: We plan to create a Yahoo site called [APMP\\_Florida\\_Sunshine\\_Chapter](#). We also have a bulletin board, announcements, and calendar space.*

*Public space: We have secured main names for new chapter: [apmpflorida.com](#) and [apmpflorida.org](#). Also have a hosting package to support domain names over next few years. Our Web master will determine best way to host site.*

*Webmaster: We hired Bill Andre, who also supports GA chapter's Web site. Bill is evaluating templates, layouts, and design relative to site structure (no timeline)*

*Contact Cal with your suggestions.*

## Guest Speaker – BJ Lownie

*Mr. BJ Lownie, Director Strategic Proposals LLC  
APMP Professional Level Accreditation*

## Speaker's Remarks

### Background

*Honored to be our first presenter; he was a presenter at the first APMP conference in 1987; and a keynote speaker for the Northeast and U.K chapters when they started.*

*Lownie's consulting firm mentors and coaches organizations; has offices in U.S. (Boston/NH), London, Netherlands, and virtual office in Australia.*

*Been in business for 25 years; 1<sup>st</sup> proposal for Digital Equipment (pre-dating word processors and laser printers).*

**BJ has multi-industry experience – mostly in the commercial sector. He is a founding member of APMP, and is an APMP fellow (an honor bestowed based upon peer nominations).**

**He is co-author of a blog, “theproposalguys.com”, along with John Williams.**

## **Presentation**

**Title: “Oh the People You Will Meet”**

**You will work with Sales, Knowledge experts (legal, financial), and Proposal Support groups. These fall into two types:**

- + Those Who Get It (understand roles and responsibilities; have necessary skills; seek coaching; honor work/life balance; treat proposal work like a profession; have a champion; believe in accreditation)**
- + Those Who Don’t (generalists; no specific skills; brag about 80-hour weeks; are reactive; do not plan; do others’ work; have no identity; no APMP knowledge)**
- + Why Seek Accreditation? Organizations who employ accredited professionals win more business; demonstrate commitment to individual; improves retention; validates your competency; demonstrates you consider this a profession; acts as catalyst and is motivating to further develop your skills and improve your capabilities – want to go to next level of certification. And you get a stamp on your business card and looks good on resume! Improves marketability. Seek it because you earned it.**

## **The Process**

**Accreditation is about understanding your ability per specific competencies; assess learning on 3 levels:**

- + Skills and behaviors**
- + Capabilities**
- + Development of self and team over time**

## **3 Levels of Accreditation**

### **1) Foundation (based on exam)**

- + Min. 1 year experience; demonstrate basic knowledge of PM and best practices as defined by Shipley.**
- + 75 question exam; 42% correct needed to pass; one hour to complete; open book.**
- + Cost: \$450**

### **2) Practitioner (involves interviews, references and preso to board)**

- + 3 years exp.; self-assessment questionnaire; essays;**
- + 36 questions; evidence required.**

- ✦ **No time limit. Should take 4 hours.**

- ✦ **Cost: \$650**

### **3) Professional (requires continuing education credits and giving back to org.)**

- ✦ **Min. 7 years experience.**

- ✦ **Assessment is based on a proposal profession impact paper (like a dissertation); emphasis on how you managed and motivated others; development of tools, development of proposal teams, national level involvement.**

- ✦ **Assessment conducted through interview with 3 references, presentation of paper**

- ✦ **Cost: \$650.**

### **BJ's Accreditation Advice**

- ✦ **Great coaching**

- ✦ **Set a goal and date for completion**

- ✦ **Want to learn and enjoy experience**

- ✦ **Talk w/ those who have taken exam and training**

- ✦ **Study the guide**

- ✦ **Be selective about references**

- ✦ **Prepare your materials carefully**

- ✦ **Enjoy the experience!**

- ✦ **Take price in having accreditation stamp on card**

### **Next Steps If Interested in Pursuing Accreditation**

- 1. Go to APMP site under education/accreditation**
- 2. Set a date to take exam**
- 3. Take training (online or 1-1)**
- 4. Classroom training runs about \$500/person(\$\$ goes back to APMP)**

### **BJ's Contact Information**

[bj@strategicproposals.com](mailto:bj@strategicproposals.com)  
[www.strategicproposals.com](http://www.strategicproposals.com)

### **Blog**

[www.TheProposalGuys.com](http://www.TheProposalGuys.com)

## **Betsey Blakely, APMP Board of Directors**

**Betsey Blakely, with the APMP Eastern Rep of Board of Directors, invited everyone to document our sessions; submit an overview of this historic meeting so that it can be shared with other APMP members.**

**Suggested we direct our write-up to David Winton for inclusion in The Perspective.**

## **Administration**

**Chuck announced the names of all interim chapter members, as well as representation from the steering committee.**

**Chuck requested suggestions for future programs and explained that the majority will be virtual.**

## **Announcements**

**SPAC: October 11 in Chapel Hill, NC. Co-sponsored by GA and NC chapters.**

**We may be able to help sponsor in future; or we may rotate conference around.**

**Professional Day: October 16 in Washington, DC.**

**Recruit: Starts at home, within our own offices.**

**Join: Please APMP if you are not a member.**

**Local Group Interest: Contact Connie and offer suggestions for membership drive.**

**Interest in Officer Position: Contact Chuck**

## **Closing**

**Chuck closed our inaugural meeting and announced when we would next meet.**

## **Upcoming Meetings**

**General Membership Meetings:**

**December 2007; March 2008; June 2008; and September 2008**

**Board meetings will be announced in advance of the general membership sessions. A board meeting will be scheduled for November to discuss, among other things:**

- + Approval of by-laws**
- + Verification of officer nominations**

**Note: The interim officers will probably be next year's officers unless other members express interest.**