**Review of Roles & Responsibilities of Regional Directors**

2016-2017

**Communication:**

* National Conference Call Dates
  + Thu, Sep 8, 3pm – 4pm: Beginning of the Year Items
  + Thu, Nov 17, 3pm – 4pm: BP Competitions, Trade Shows, YBS
  + Thu, Mar 2, 3pm – 4pm: YBS, Testing, End of Year Items
* Monthly call with National Program Director and Regional Directors & Coordinators
* Bi-weekly Brief for Teachers & Students (sent from national office with input from regions)
* Portal landing page (place for program news, notes, and upcoming dates)

**Program:**

* Professional Development resources can be found on the Portal
  + Portal / Teacher Tools / Professional Development
* Beginning of the year administration tasks in VEI Portal
  + Enter new schools and firms in the Portal (Regional Director)
    - New firms that have not yet decided on a name should be entered as “School Name-TBD”
  + Deactivate inactive schools and firms in the Portal (Regional Director)
  + Reset bank accounts for restarting firms in the Portal (Regional Director)
  + Ensure that students have been entered for each firm in the Portal
    - Teacher enters the students, Regional Director verifies
* **Firm start-up procedures**
  + Once a firm determines their business they must submit the “*Business Registration Form*” (found on the Portal under “Submittal Forms”)
  + Each RD/Coordinator should review the information submitted on the JotForm
  + Change/update the name of the firm in the Firm Profile of the Central Office Admin
  + Assign a firm email address by selecting the appropriate button from the Firm Profile screen in the Central Office Admin.
  + In the event the firm is “restarting”, go to the “Bank Accounts” tab and click to reset bank data
  + **Approve and make a payment for $20,000 in initial seed funding**
    - Review information and budget submitted in the “Business Registration Form”
  + **Review and approve applications for additional funding**
    - Equity (Angel Investors) 🡪 Equity Investment Application
    - Debt (Small Business Loan) 🡪 Small Business Loan Application
    - Sales (Out-of-Network Sales Contract) 🡪 Payment Request Form
  + Provide payroll guidance to firms
    - Firms should use entry level salaries commensurate w/ position and locale
  + Rent / Utilities rates (Regional Director provides to firms based on local rates)
  + Central Office bank accounts (Regional Directors provide lists to NPD to be included in resources)
* BP Competitions (All firms MUST submit)
  + National BP judge training materials will be distributed once again to all BP competition coordinators
  + We will use competitions.veinternational.org for submissions and scoring.
* **Trade Shows**
  + Use templates provided for Registration Packet and Competition Packet
  + Supply the national office with a Floor Plan
  + National Office will create and open the trade show registrations in Portal
  + Trade Show organizers will monitor registrations and receive/record payments in Portal
  + Use templates provided for Event Recaps
* National Online Competitions
  + New: 7 national online competitions for 16-17
  + Firms will use competitions.veinternational.org to submit and review their scores
* Annual Report (RD must collect from all firms)

**Operational:**

* RD collects 🡪Memo of Intent (16/17)
* RD uses MOI to prepare 🡪 Invoice Request Form 🡪 shares with Kimitra Cain and Nick Chapman
* Kimitra Cain invoices schools based on the Invoice Request Form
* Collecting and processing payments 🡪 checks sent to National Office 🡪 Kimitra books the check and updates the Invoice Request Form
* In May ’17, RD promotes Students Exit Survey and Teacher Exit Survey to all programs
* In May ‘17, RD collects 🡪 Letter of Intent (17/18)
* RD prepares Actual budget with side-by-side to projected and submits to NPD by June 15, 2017