Context:
What exactly are we leading?

IIA Chapters - serve as the voice & convening body of IIA members within their local communities:

- Professional Networking
- Advocacy for the profession
- Continuing Professional Education (CPE)
- Career development

View from SPACE

“Where are we…?”

“…and where do we want to go?”
View from Space
(Overview)

- IIA Basics
- Governance
- Tools & Resources
- Products & Services

Flight Plan: IIA Basics

Who is The IIA?

Membership
- 180,000+ Globally
- 74,000+ NA
- 162 Chapters
- 32 Districts (DR)
- 9 Regions (DA)

Headquarters Staff
- 200+ Staff
- Chapter Relations Team
  - Sarah Rossio, Director
  - Donna Wiley, Manager
  - Jake Parks, Manager
  - Ray Villegas, Manager
  - Karina Urena, Help Desk
  - Spencer Stolfo, Help Desk
District Advisors (8)
- Strategic guidance for CRC
- Leads CRC subcommittees (projects/initiatives)
- Mentors & assist DRs
- Much more!

District Representatives (32)
- Mentors & assists Chapter Leaders - your 1st point of contact
- District Workshop Planning
- Hours of conference calls
- Much more!

Core purpose: To advance the internal audit profession and serve our members.

Goal A – Professionalism
Goal B – Advocacy
Goal C – Sustainable Value
Goal D – IIA as Leader
The Chapter Compact

Agreement between
The IIA and Chapters

Chapter Bylaws

Framework for Chapter operations

Tools and Resources
Chapter Administrators

- Complete privacy policy & submit annually
- Obtain President’s approval
- Assigned role from IIA HQ
- Add/Remove Officers & Board of Governors members

Leader Resources Webpages: ACCESS

Leader Resources Webpages: CONTENT
Leader Resources Webpages: CHAPTER MANUAL

North American Chapter Manual

Treasurer’s Manual

Officer Descriptions
Training & Support
Branding policies and guidelines
New chapter formation
Chapter Event Considerations
Reporting Calendar
CAP
Financial Administration
Legal Issues

Banking Procedures
Cash Receipts / Disbursements
Reporting & Record Keeping

Treasurer Policy
Chapter Treasury Job Description
Ethical Guidance & Expectations
Financial Reports
...& more!
IIA Brand Standards

Understanding the brand
IIA logo, chapter logo, & other IIA brands
Brand guidelines, brochures, samples & slide presentations
Copy style guide

Leaders Link
E-newsletter

• Sent to all Chapter Leaders quarterly
• Chapter-related news & updates

District Workshops

• Local trainings made available to all Chapters in your District
• Coordinated & facilitated by your DIH & IIA Headquarters Staff
BLAST OFF TO SUCCESS!