



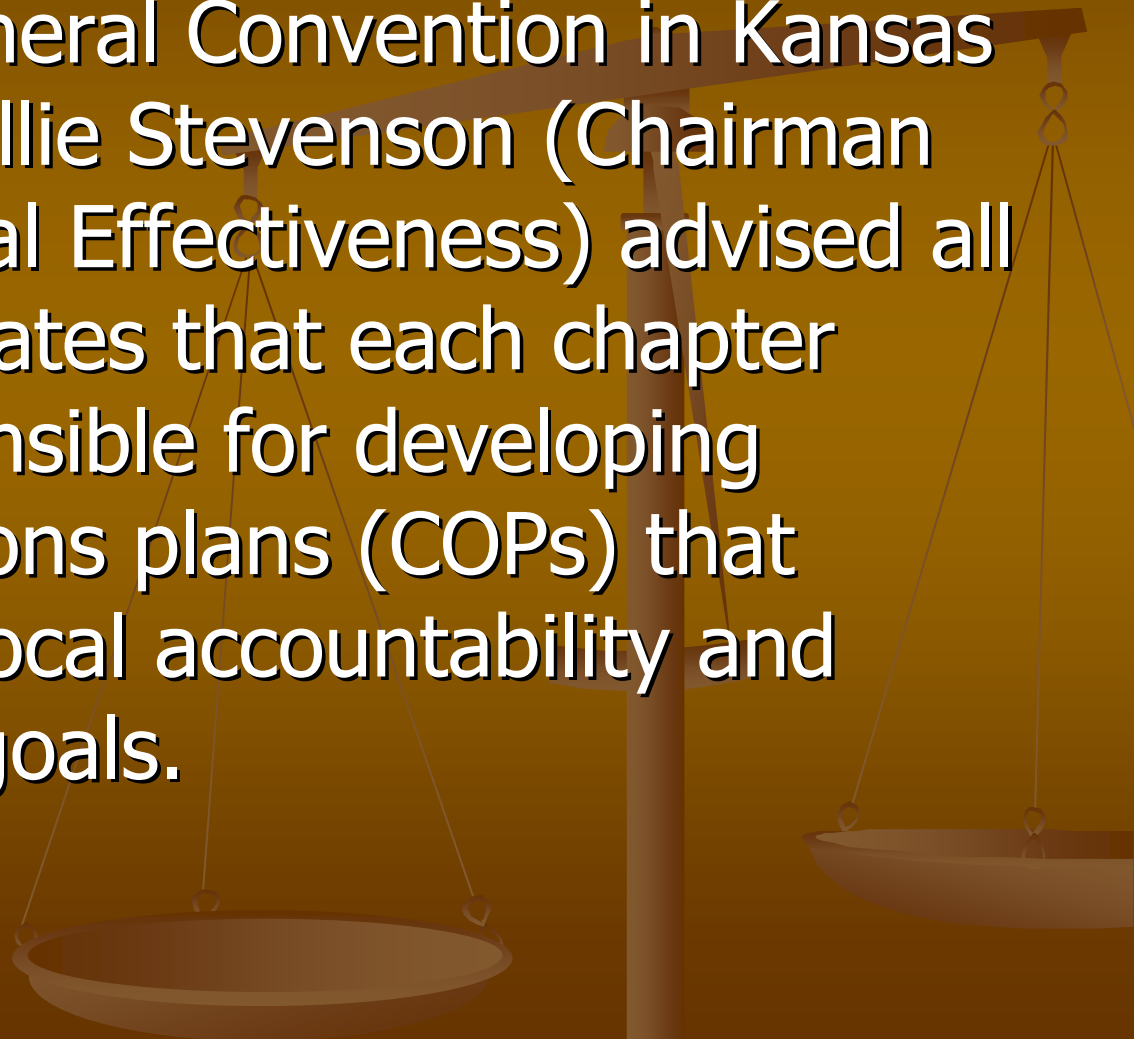
Chapter Operations Plan

**Southwest Region
District Conferences
2010**

Presented by: Bro. David J. Lewis

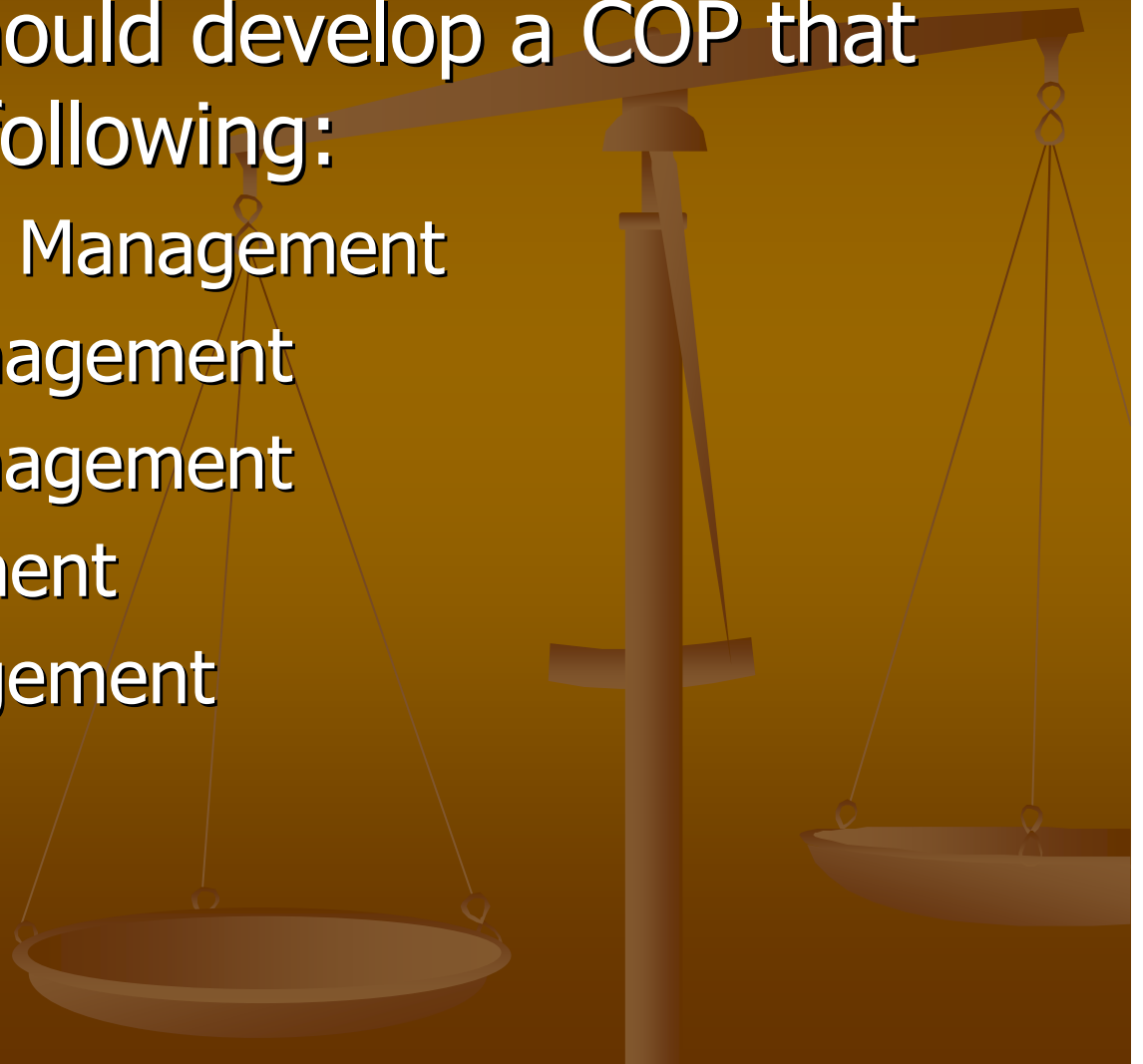
Background & Methods

- At the 2008 General Convention in Kansas City, Brother Zollie Stevenson (Chairman of Organizational Effectiveness) advised all attending delegates that each chapter would be responsible for developing chapter operations plans (COPs) that would provide local accountability and assessment of goals.



Background & Methods

- Each chapter should develop a COP that consists of the following:
 - Communication Management
 - Operations Management
 - Leadership Management
 - Fiscal Management
 - Program Management



Making The Connections



■ Communications Management

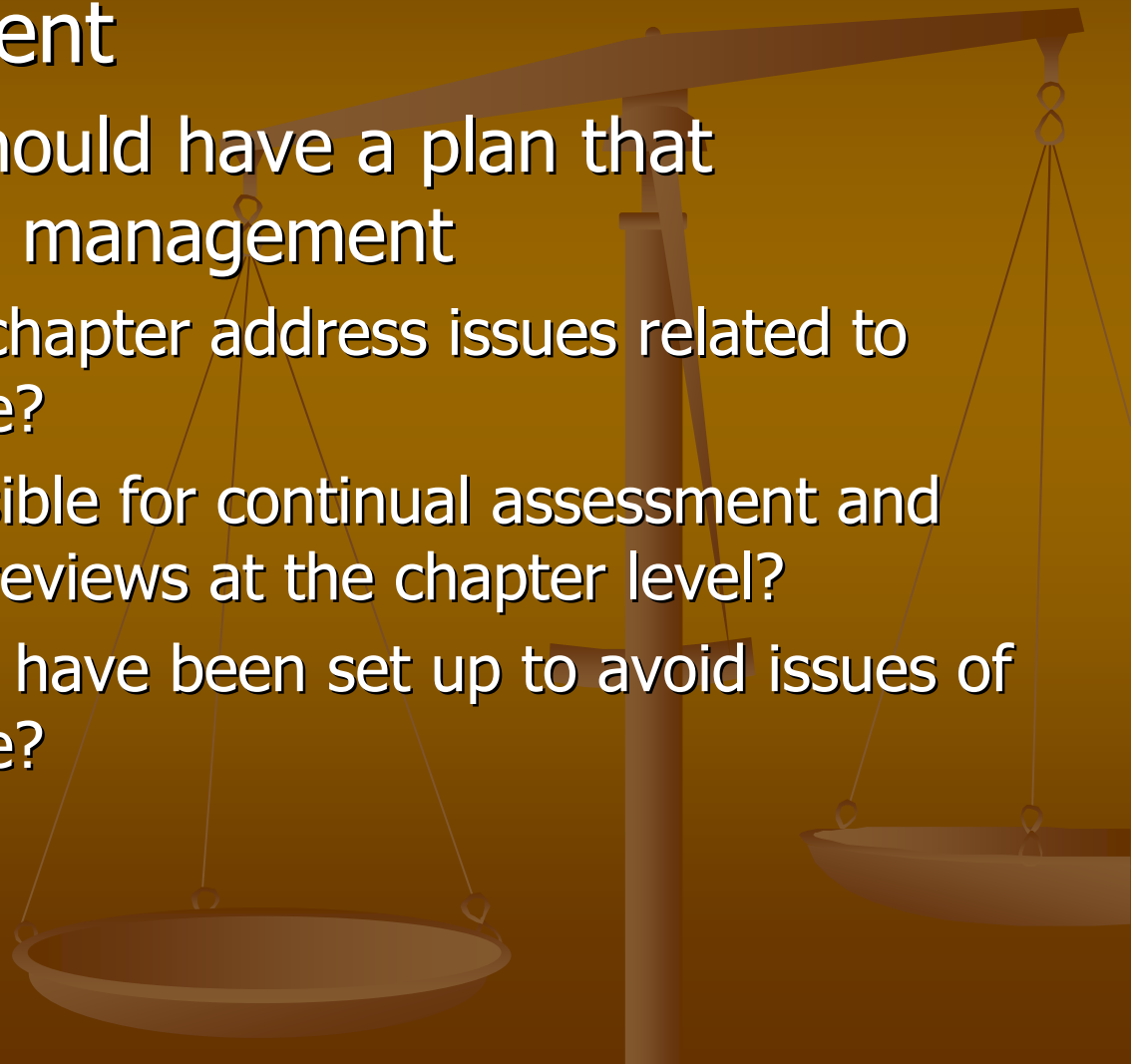
■ Internal Communications

- Who is primary individual responsible for the dissemination of internal communications?
 - Chapter Secretary
 - Chapter Corresponding Secretary
 - Chapter Financial Secretary
- What are the primary tools used for the dissemination of internal communications?
 - Official Chapter Minutes
 - Chapter Online Domain (chapter website, Facebook group, Yahoo group, etc)

Making The Connections

■ Crisis Management

- Each chapter should have a plan that addresses crisis management
 - How does the chapter address issues related to non-compliance?
 - Who is responsible for continual assessment and accountability reviews at the chapter level?
 - What protocols have been set up to avoid issues of non-compliance?



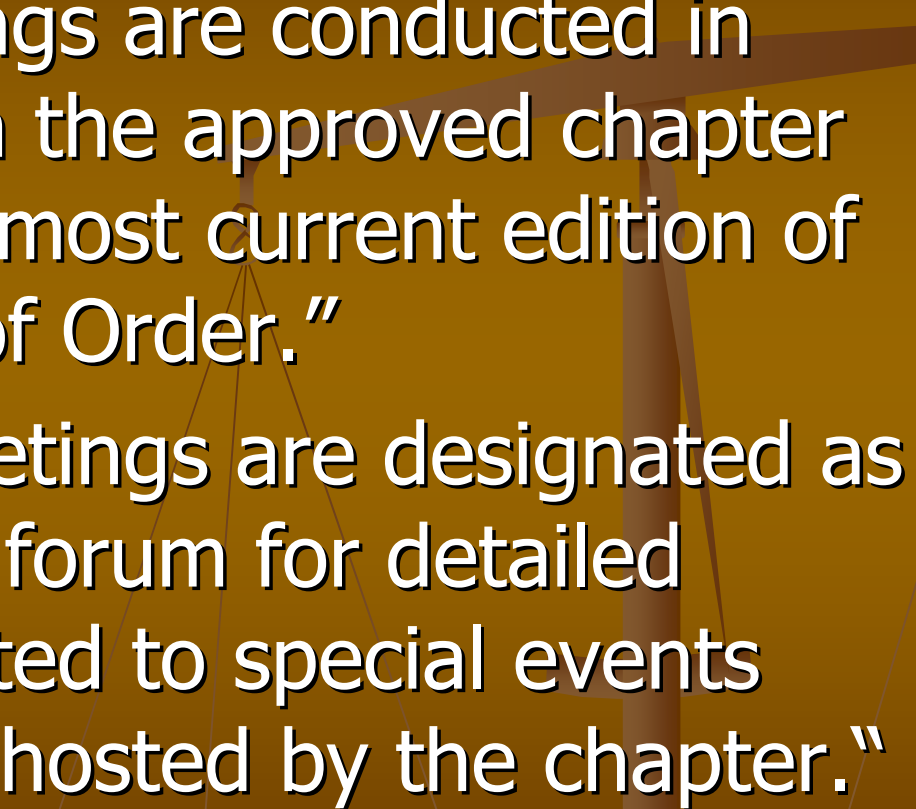
Making The Connections



■ Operations Management

- Each chapter should already have a chapter constitution that addresses many of the areas included in operations management.
 - Chapter key, mailing address, web address (if applicable), chapter e-mail address, and the chapter's meeting date, time, and place.
- Additionally, chapters should address the methods of official chapter meetings and the conducting of chapter business.

Sample

- “Chapter meetings are conducted in accordance with the approved chapter bylaws and the most current edition of Robert’s Rules of Order.”
 - “Committee meetings are designated as the appropriate forum for detailed discussions related to special events and/or projects hosted by the chapter.”
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Operations Management



- What are the methods of introducing information collected at committee meetings?
 - Should a written report be prepared?
 - What should be included in the report?
 - How often should reports be given?
- Has your chapter created any separate non-profit organizations or foundations?
 - State the purpose and chapter relationship to this outside entity.

Leadership Management



■ Chapter Profile

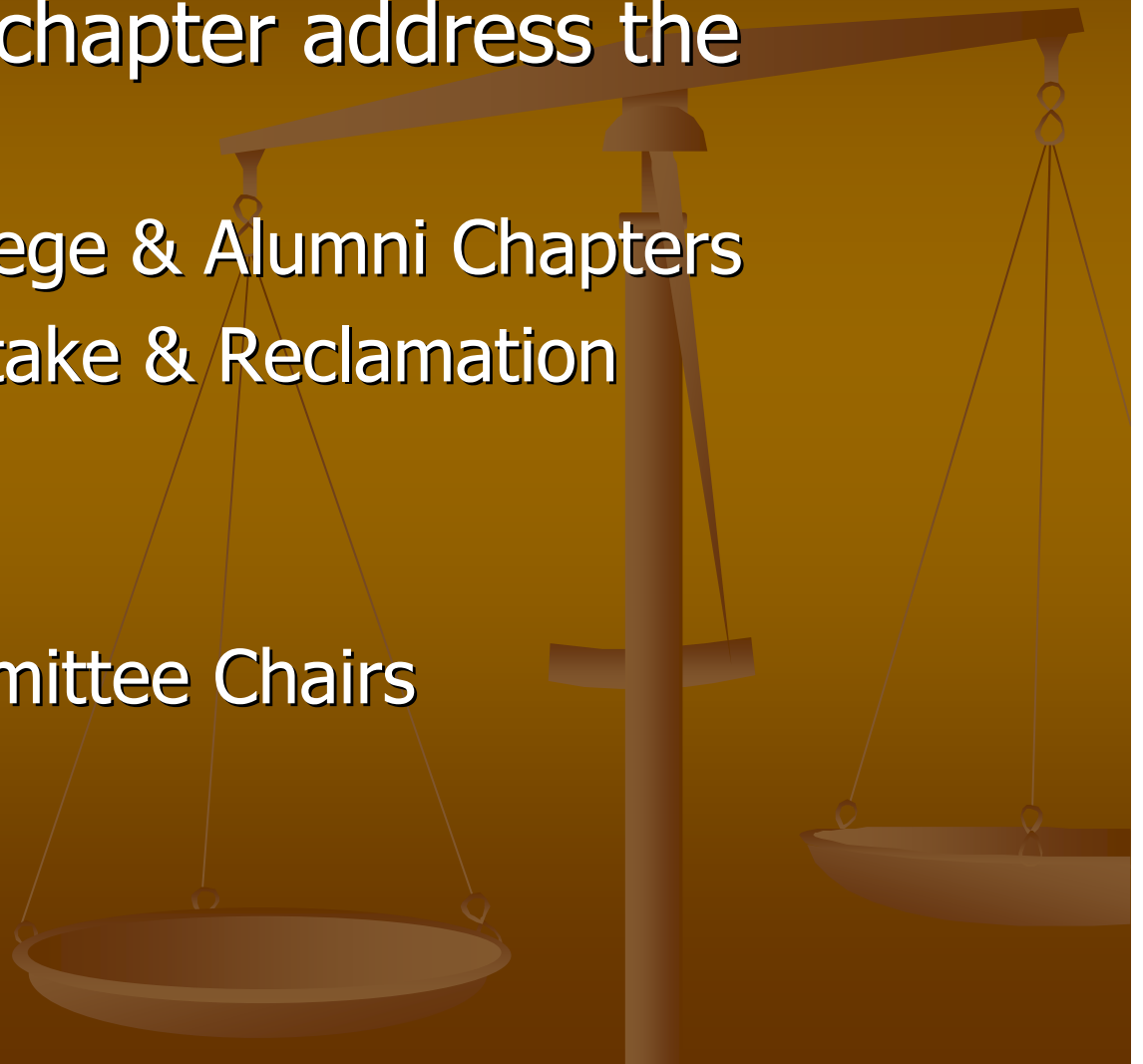
- What is the approved jurisdiction of the chapter?
- What is the current chapter makeup?
 - Total Membership Potential
 - Total Active Members
 - Life Members
 - Senior Brothers (50+ years)

■ Membership requirements

- What are the requirements to be an **ACTIVE** member of the local chapter?
 - Chapters **MUST** consider the national guidelines

Making The Connections

- How does your chapter address the following:
 - Supporting College & Alumni Chapters
 - Membership Intake & Reclamation
 - Training
 - Chapter Roster
 - Officers & Committee Chairs



Fiscal Management



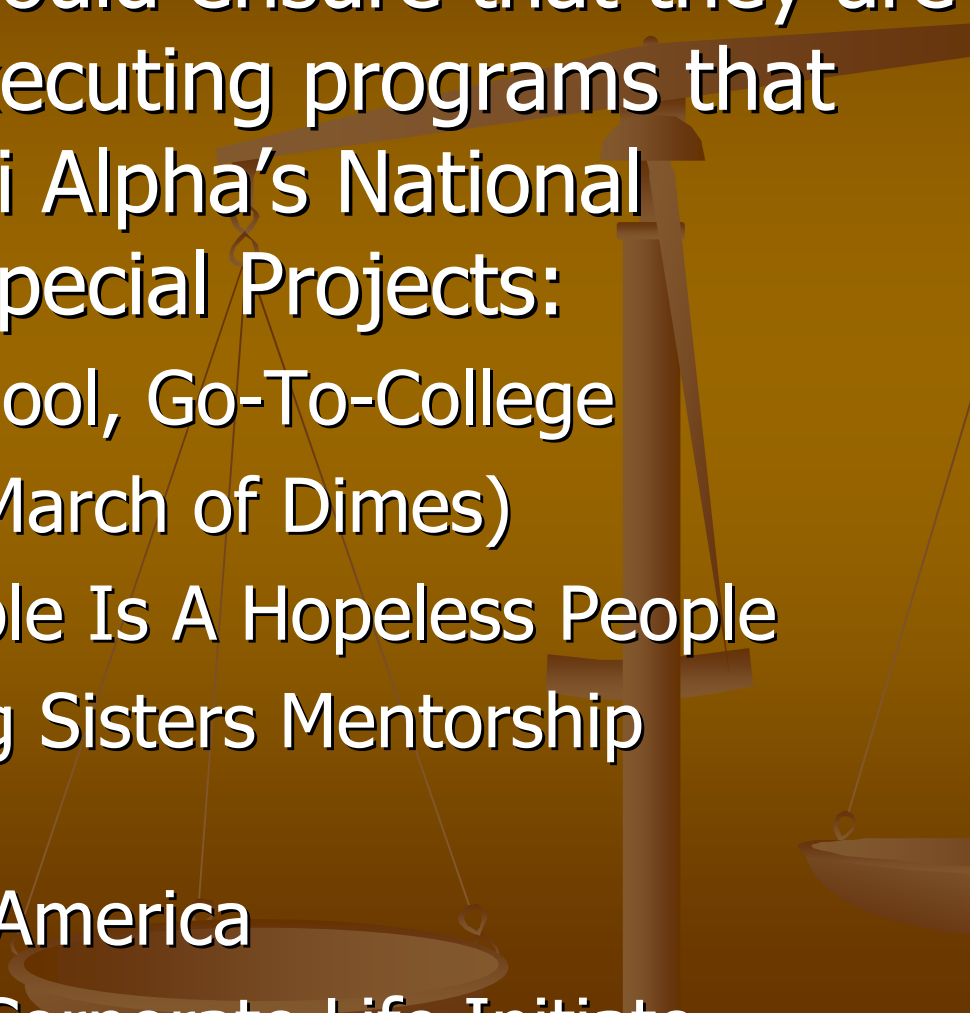
- This section of the COP should describe the structure of financial management that the chapter has put in place to ensure accurate reporting, analysis, and reconciliation of chapter finances.
 - Official Chapter Bank Account(s)
 - List type and location of all chapter accounts
 - Chapter Dues Schedule
 - Present a schedule of dues for your chapter and how dues are assessed and collected

Fiscal Management

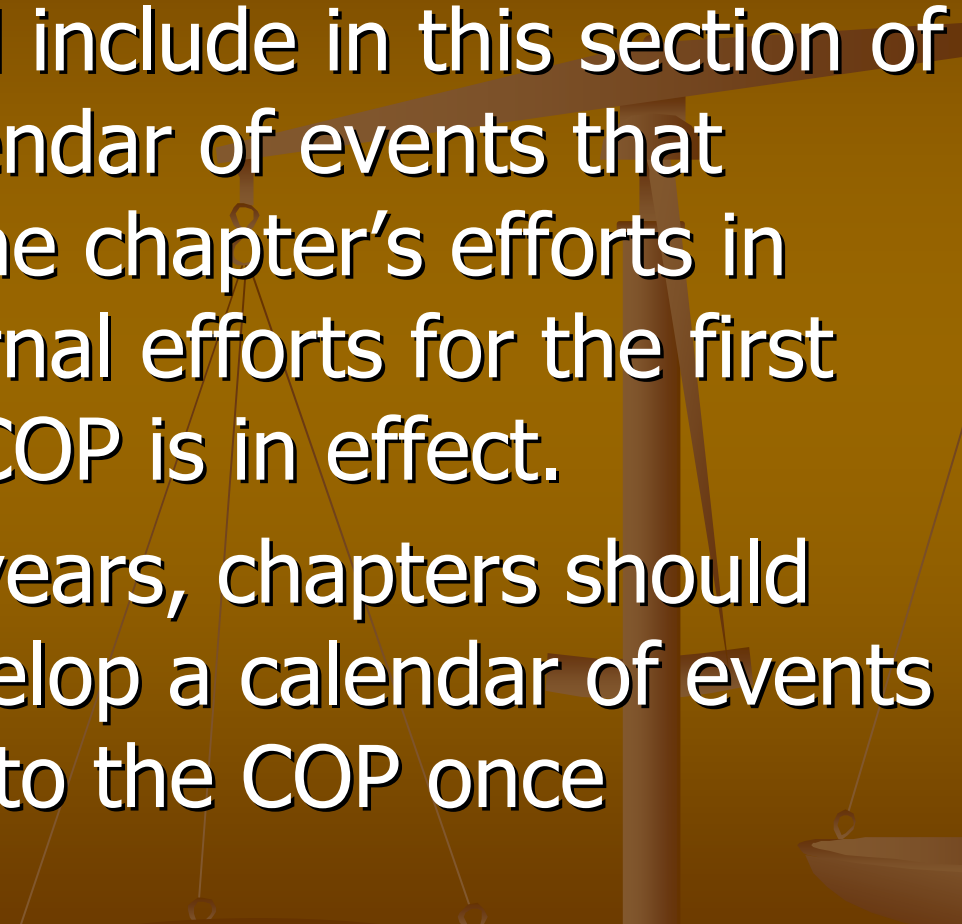


- Does your chapter have an operational budget? If so, include it as part of your plan.
- Address grand tax payments in your plan. In this section, please address the amount and methods of payment for chapter members:
 - Chapter collects and submit on behalf of brothers
 - Brothers responsible for remitting
- Which annual chapter programs require financial resources?
 - Create program budgets for these events and include them in your COP

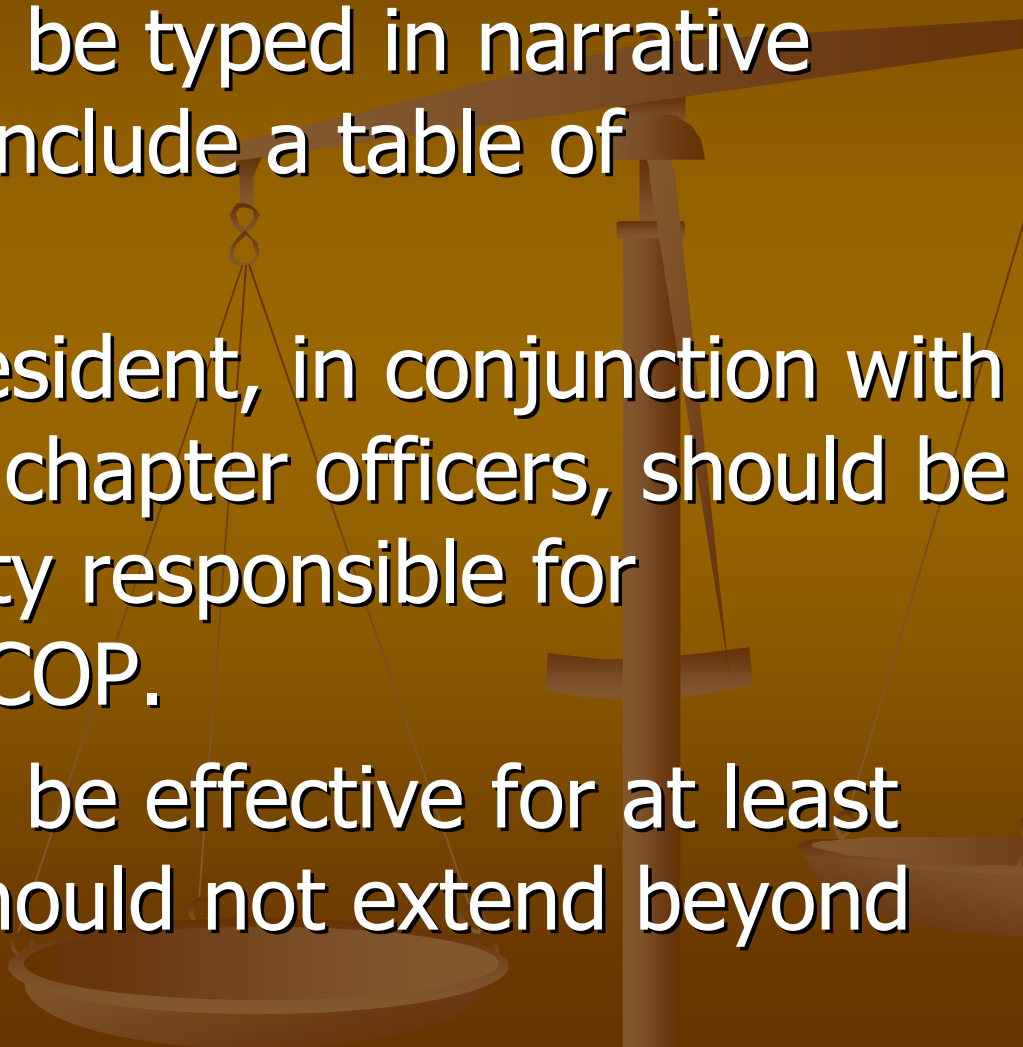
Program Management

- Each chapter should ensure that they are planning and executing programs that satisfy Alpha Phi Alpha's National Programs and Special Projects:
 - Go-To-High School, Go-To-College
 - Project Alpha (March of Dimes)
 - A Voteless People Is A Hopeless People
 - Big Brothers/Big Sisters Mentorship Partnership
 - Boys Scouts of America
 - College Life to Corporate Life Initiate
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Making The Connections

- Chapters should include in this section of their COP a calendar of events that demonstrates the chapter's efforts in managing fraternal efforts for the first year that their COP is in effect.
 - In subsequent years, chapters should continue to develop a calendar of events and attached it to the COP once developed.
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Important Tips To Remember

- The COP should be typed in narrative format (please include a table of contents).
 - The Chapter President, in conjunction with the appropriate chapter officers, should be the primary party responsible for developing the COP.
 - The COP should be effective for at least one year, but should not extend beyond four years.
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Important Tips To Remember

- COPs should be the vision of the chapter as opposed to a single individual. The COP should be transferable if a different administration takes over during the effective dates of the plan.
 - Use your current constitution and by laws to guide you through this process.
 - COPs should be completed by the Regional Convention (April 2010).
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