# ΩΦA Action Plan

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|---|---|
| **GOAL 1** | Clarify the structure of Omega Phi Alpha and detail how each component functions. |
| **STRATEGY 1.1** | Assess current structural state of the organization and determine progress based on Vision 2005. |
| **ACTIVITY 1.1.1** | Review Vision 2005 regarding structure to determine purpose, goals, and the expected function of each organizational level. |
| **DESCRIPTION** | Look through the Vision 2005 presentation and documents to find any information regarding expected organizational structural goals, and the intended purpose and functions of the structural levels for OPA. The National Secretary will prepare a final report of the findings and distribute to all committee members for use during subsequent steps. All findings will also be posted to the Vision 2010 progress section of the national website.<br><br>This activity (and several following) also requires the creation of a temporary committee, the Structure Committee, to complete the work necessary for this task. |
| **RESPONSIBILITY** | National Secretary and Structure Committee |
| **TIMETABLE** | Start 8/1/05<br>End 12/1/05 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Copy of Vision 2005 documents | One-time | None |
| Structure Committee time | One-time | 6 hours |
| National Secretary time | One-time | 6 hours |

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| **LEGISLATION** | None |
| **EVALUATION** | 12/1/05 Present report to the Structure Committee on the Vision 2005 planned structural changes and expected functions and purposes |

# ΩΦΑ Action Plan

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|---|---|
| **GOAL 1** | Clarify the structure of Omega Phi Alpha and detail how each component functions. |
| **STRATEGY 1.1** | Assess current structural state of the organization and determine progress based on Vision 2005. |
| **ACTIVITY 1.1.2** | Compare how the organizational chart and reporting relations were proposed in Vision 2005 to the current status. |
| **DESCRIPTION** | Look through notes and documents pertaining to Vision 2005 for documents depicting proposed organizational charts and reporting relations. Determine how similar or different things currently look in the organization. What changes have been made so far, what changes were disregarded and why? Findings will be presented in a report to the committee and posted online. |
| **RESPONSIBILITY** | National Secretary and Structure Committee |
| **TIMETABLE** | Start 8/1/05<br>End 12/1/05 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Copy of Vision 2005 documents | One-time | None |
| Structure Committee time | One-time | 10 hours |
| National Secretary time | One-time | 10 hours |
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| **LEGISLATION** | None | |
| **EVALUATION** | 12/1/05 | Status report submitted to the Structure Committee of the progress on proposed organizational chart and reporting relations |

# ΩΦA Action Plan

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| **GOAL 1** | Clarify the structure of Omega Phi Alpha and detail how each component functions. |
| **STRATEGY 1.2** | Define functions and purposes of each level of the organization, and develop a national organizational chart and chain of command with reporting relationships. |
| **ACTIVITY 1.2.1** | Survey stakeholders for their view and understanding of the functions and purposes of the levels of the organization and on how they think the organizational chart should look. |
| **DESCRIPTION** | After gathering research in strategy 1.1 regarding the Vision 2005 proposals and current progress, survey stakeholders for their view on how OPA should be configured – what is the purpose and function of the national, district, and chapter level? How do the alumnae fit into the overall structure? What's the purpose of a district retreat? How do they envision an organizational chart would look for OPA?<br><br>The Virtual Assistant (VA) should randomly select 75 actives and 75 alumnae from the database that we DO NOT have email addresses for – these 150 people will receive the survey by mail. Surveys will also be emailed to all actives and alumnae that the organization has an email address for, being sure to include all chapter, district and national leaders. Finally, the survey should also be posted on the website with notice placed in the *Chevron* to direct members to participate. |
| **RESPONSIBILITY** | National Secretary, Structure Committee, and Virtual Assistant (VA) |
| **TIMETABLE** | Start 1/15/06<br>End 4/1/06 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Survey copies and distribution | One-time | $75.00 |
| Virtual Assistant time (4 hours) | One-time | $60.00 |
| Structure Committee time | One-time | 6 hours |
| National Secretary time | One-time | 6 hours |

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| **LEGISLATION** | None |
| **EVALUATION** | 2/1/06 Surveys and instructions sent to VA for distribution<br>2/15/06 VA distributes surveys by mail and email<br>3/15/06 Survey return deadline<br>4/1/06 VA submits compiled results to National Secretary |

# ΩΦA Action Plan

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|---|---|
| **GOAL 1** | Clarify the structure of Omega Phi Alpha and detail how each component functions. |
| **STRATEGY 1.2** | Define functions and purposes of each level of the organization, and develop a national organizational chart and chain of command with reporting relationships. |
| **ACTIVITY 1.2.2** | Define and document functions and purposes of National Executive Board (NEB), districts and chapters, and create a flowchart to show the chain of command and a reporting relations chart. |
| **DESCRIPTION** | Based on findings from the review in strategy 1.1 and the survey in activity 1.2.1, the committee should determine official functions and purposes of each level of the organization and create a flow chart that should include all positions in the organization such as the NEB, appointments, contracted employees, standing committee chairs, district officers, alumnae chapters, chapter officers and active members. Once these documents have been completed, they should be presented at Convention 2006. In addition the documents should be emailed to the VP of Business Operations for use in creating standard operating procedures (SOP). All final documents should be submitted for inclusion in the National Handbook and posting on the national webpage.<br><br>The Vision 2010 Committee recommends purchasing Visio, a flowchart program. |
| **RESPONSIBILITY** | National Secretary and Structure Committee |
| **TIMETABLE** | Start 4/1/06<br>End Convention 2006 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Software for creating a flowchart | One-time | $150.00 |
| Structure Committee time | One-time | 10 hours |
| Copies | One-time | $25.00 |
| National Secretary time | One-time | 10 hours |

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| **LEGISLATION** | Bylaws legislation should be submitted for Convention 2006 for the delegation to approve the purpose and functions of each structural level.<br>Substantive legislation should be presented at Convention 2006 to approve an official organizational chart for OPA. |
| **EVALUATION** | 6/1/06 All previous research and survey summary gathered for review<br>7/1/06 Proposed purpose and function for each level and flowchart created<br>Conv. 2006 Presentation to convention delegation for approval |

# ΩΦA Action Plan

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| **GOAL 1** | Clarify the structure of Omega Phi Alpha and detail how each component functions. |
| **STRATEGY 1.2** | Define functions and purposes of each level of the organization, and develop a national organizational chart and chain of command with reporting relationships. |
| **ACTIVITY 1.2.3** | Develop and document standard operating procedures (SOP). |
| **DESCRIPTION** | The VP of Business Operations will construct SOPs detailing the flow of responsibility, information, money, forms, procedures, and resources within and between all levels of the sorority. The SOPs will be reviewed at the midyear meeting, revised, and then posted online and included in the National Handbook. |
| **RESPONSIBILITY** | VP Business Operations and National Secretary |
| **TIMETABLE** | Start 8/1/06<br>End 6/1/08 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Business Operations time | Recurring | 5 hours/ month |
| National Secretary time | Recurring | 5 hours/ month |
| Copies | One-time | $50.00 |
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| **LEGISLATION** | None |
| **EVALUATION** | Midyear 2007 50% of procedures should be documented and presented to the NEB for input<br>3/1/07 Revisions to first 50% of procedures completed<br>Conv. 2007 Presentation and progress update on SOPs made to convention delegation<br>Midyear 2008 Remainder of procedures should be documented and presented to NEB for input<br>3/1/08 All revisions completed<br>Conv. 2008 All SOPs presented to convention delegation |

# ΩΦA Action Plan

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| **GOAL 1** | Clarify the structure of Omega Phi Alpha and detail how each component functions. |
| **STRATEGY 1.3** | Assess current district divisions and determine a selection process for alumnae convention representatives. |
| **ACTIVITY 1.3.1** | Determine if the current districts meet our active chapter needs and ensure adequate representation for alumnae. |
| **DESCRIPTION** | Gather numbers from database to identify location and clustering of alumnae members. Draw appropriate geographical district lines that will allow for adequate representation of alumnae, and allow for growth within the districts without having to annually re-draw the lines. The districts should allow for appropriate individual attention and servicing of active chapters as well. District lines should be re-evaluated every 5 years, beginning with 2010.<br><br>Updated district lines (and map) should be submitted for inclusion in the National Handbook and on the national webpage. |
| **RESPONSIBILITY** | VP Alumnae Relations, VP Leadership Development, and Virtual Assistant (VA) |
| **TIMETABLE** | Start 8/1/05<br>End 8/1/06 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Virtual Assistant time (1 hour) | One-time | $15.00 |
| VP Leadership Development time | One-time | 6 hours |
| VP Alumnae Relations time | One-time | 6 hours |
| Copies | One-time | $10.00 |
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| **LEGISLATION** | Legislation to re-draw district lines should be submitted for Convention 2006. |
| **EVALUATION** | 10/1/05 Lists generated for alumnae location<br>12/1/05 Draft proposal of how to draw district lines, and how to account for representation, growth and adequate services<br>Midyear 2006 Present draft to NEB for feedback<br>2/1/06 Legislation due for Convention 2006<br>Conv. 2006 Present to convention delegation for approval |

# ΩΦA Action Plan

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|---|---|
| **GOAL 1** | Clarify the structure of Omega Phi Alpha and detail how each component functions. |
| **STRATEGY 1.3** | Assess current district divisions and determine a selection process for alumnae convention representatives. |
| **ACTIVITY 1.3.2** | Determine the best way for selecting alumnae convention delegates to best represent alumnae. |
| **DESCRIPTION** | Survey alumnae to determine what changes should be made in the process of the selection of alumnae convention voting delegates. Based on survey results, develop procedures to ensure that the delegates of their choice represent each district. Document and implement proper procedures to ensure quality representation. |
| **RESPONSIBILITY** | VP Alumnae Relations and District Alumnae Advisors (DAA) |
| **TIMETABLE** | Start 8/1/06<br>End 6/1/08 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Survey cost (copies & postage) | One time | $75.00 |
| VP Alumnae Relations & DAA time | One-time | 10 hours |
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| **LEGISLATION** | Submit legislation for Convention 2007 regarding process for selecting alumnae delegates. |

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| **EVALUATION** | Fall 2006 | Create survey |
| | Spring 2007 | Administer survey to alumnae |
| | Spring 2007 Retreat | DAAs review results and draft a plan |
| | Conv. 2007 | Present draft plan at Convention 2007 to delegation for approval |
| | Fall 2007 | Finalize details of selection process |
| | Ongoing | Begin use of new selection process for selection of alumnae representatives beginning with Convention 2008 |

# ΩΦA Action Plan

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|---|---|
| **GOAL 1** | Clarify the structure of Omega Phi Alpha and detail how each component functions. |
| **STRATEGY 1.4** | Define roles and responsibilities for all OPA leaders. |
| **ACTIVITY 1.4.1** | Assign duties to positions to provide for proper internal controls and maximum efficiency, ensuring that all duties are assigned. |
| **DESCRIPTION** | Survey OPA leaders and review the constitution and bylaws, the National Handbook, and any other needed materials to create a complete list of duties and responsibilities that must be accomplished for the sorority to function and carry out its mission and purpose.<br><br>Evaluate the current duties of local, district and national officers, and then using the complete list made above, assign and/or re-assign job duties in a manner that evenly distributes workload and provides for internal control, and maximum efficiency. |
| **RESPONSIBILITY** | VP Business Operations, National Secretary, and Nominating Committee |
| **TIMETABLE** | Start 8/1/06<br>End Convention 2007 |

**RESOURCES**

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Business Operations time | One-time | 10 hours |
| Nominating Committee time | One-time | 10 hours |
| National Secretary time | One-time | 10 hours |
| National Executive Board time | One-time | 2 hours |
| Copies | One-time | $25.00 |

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| **LEGISLATION** | Submit bylaws legislation for job duties of all positions that are changed or added. |

**EVALUATION**

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| 10/1/06 | NEB submit lists of duties to VP Business Operations and the Nominating Committee |
| Midyear 2007 | Report proposed changes to NEB and gather input |
| 6/1/07 | Submit final bylaws revisions for convention |
| Conv. 2007 | Delegation votes on legislation |
| Ongoing | Every odd year, duties and responsibilities should be re-evaluated |

# ΩΦA Action Plan

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|---|---|
| **GOAL 1** | Clarify the structure of Omega Phi Alpha and detail how each component functions. |
| **STRATEGY 1.4** | Define roles and responsibilities for all OPA leaders. |
| **ACTIVITY 1.4.2** | Create a duties supplement to the flowchart. |
| **DESCRIPTION** | This document should describe in detail the duties and functions of each officer, appointment, and committee at the national and district level of the sorority. This document will serve as a supplement to the official organizational chart. |
| **RESPONSIBILITY** | National Secretary |
| **TIMETABLE** | Start 1/15/07<br>End Convention 2007 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| National Secretary time | One-time | 5 hours |
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| **LEGISLATION** | Final document submitted as substantive legislation along with bylaws legislation from activity 1.4.1 on officer duties. |
| **EVALUATION** | 6/1/07 Final document completed<br>Conv. 2007 Presented to convention delegation |

# ΩΦA Action Plan

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|---|---|
| **GOAL 1** | Clarify the structure of Omega Phi Alpha and detail how each component functions. |
| **STRATEGY 1.5** | Communicate and educate members on structure. |
| **ACTIVITY 1.5.1** | Update national calendar and the National Handbook. |
| **DESCRIPTION** | The Leadership Development (LEAD) Team oversees the National Handbook revisions every year. Revision should be posted by September of each year. Minor revisions can be submitted to the LEAD Team chair at any time. Revisions should be promptly posted online, with notification sent to chapters and leaders.<br><br>The national calendar will include due dates and any obligations of chapters to nationals. It will also be posted online. Chapters will be informed of any updates posted online via email or the chapter officer yahoo group. Additional activities, such as district retreats, can be added to the online calendar at any time by submitting changes to the VP Communications. The National Secretary will oversee updates to the calendar and submit by September each year for posting online. |
| **RESPONSIBILITY** | LEAD Team and National Secretary |
| **TIMETABLE** | Start 8/1/05<br>End Ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| LEAD team time | Recurring | 5 hours/year |
| National Secretary time | Recurring | 3 hours/year |
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|---|---|---|
| **LEGISLATION** | None | |
| **EVALUATION** | 9/1/06 | Updated materials posted for 2006-07 school year |
| | Ongoing | Update materials posted every September |
| | Ongoing | Additional updates and activities posted online promptly |

# ΩΦA Action Plan

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|---|---|
| **GOAL 1** | Clarify the structure of Omega Phi Alpha and detail how each component functions. |
| **STRATEGY 1.5** | Communicate and educate members on structure. |
| **ACTIVITY 1.5.2** | Create an annual structure and function presentation for convention. |
| **DESCRIPTION** | Create a PowerPoint presentation for the national convention that includes diagrams depicting OPA's structure along with explanations, the function and purpose of each level of the organization, the job duties of each officer, appointment, and committee, a flow of information diagram with dates to indicate who gets what when and to whom/when materials should be dispersed, a flow chart of responsibility indicating who oversees what office, appointment, or committee, how and when a person would go about running/volunteering for such positions/committees, and an updated national calendar. Information/documents on the website that have previously been completed in accordance with this strategic plan (i.e. flow chart that shows chain of command, duties/function of officers, national calendar, FAQs, district structure/function, and our structure/function goals should be incorporated into this PowerPoint so that it is all inclusive. This presentation should be updated by the National Secretary and VP of Business Operations annually and presented at EVERY convention. |
| **RESPONSIBILITY** | National Secretary and VP Business Operations |
| **TIMETABLE** | Start 8/1/06<br>End 6/1/07<br>Ongoing updates and annual presentations |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Business Operations time | Recurring | 3 hours/year |
| National Secretary time | Recurring | 6 hours/year |
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| **LEGISLATION** | None |
| **EVALUATION** | 11/1/06 Creation of PowerPoint<br>Midyear 07 Review of PowerPoint by NEB at mid-year<br>3/1/07 Revisions complete<br>5/1/07 Post online<br>Conv. 2007 Present at Convention 2007<br>Ongoing Annual updates and presentations at convention |

# ΩΦA Action Plan

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|---|---|
| **GOAL 1** | Clarify the structure of Omega Phi Alpha and detail how each component functions. |
| **STRATEGY 1.5** | Communicate and educate members on structure. |
| **ACTIVITY 1.5.3** | Create a Frequently Asked Questions (FAQ) page on the national website. |
| **DESCRIPTION** | Throughout the 2005-2006 academic year, all OPA national and district leaders, are to keep a log of all frequently asked questions (FAQs) in a Word document along with the corresponding answers. Documents will be emailed to the Virtual Assistant (VA). FAQs will be compiled by the VA into a summary document and then given to the National Secretary to create a PowerPoint presentation for Convention 2006. The questions will also direct sisters to whom they should address such questions, i.e. how much are local dues? (VP of Finance) Local dues are….<br><br>At convention, the FAQs will be presented and the delegation will provide comments and brainstorm for other questions. After changes/additions are made, FAQs will be posted to the member section of the national website. The National Secretary will keep the FAQs current on the website and make any necessary additions/changes. |
| **RESPONSIBILITY** | National and district leaders, National Secretary, and Virtual Assistant (VA) |
| **TIMETABLE** | Start 8/1/05<br>End 11/1/06 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Leaders time to Document questions | One-time | 1 hr/week |
| VA time to prepare Initial FAQ file (3 hrs) | One-time | $45.00 |
| National Secretary time to complete final review and prepare presentation | One-time | 1 hour |

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| **LEGISLATION** | None |
| **EVALUATION** | 8/1/05 – 5/1/06 Gather FAQs<br>5/1/06 Submit FAQ documentation to VA<br>7/1/06 Completed compilation of FAQs sent to National Secretary<br>Conv. 2006 Present at convention<br>10/1/06 Revised FAQs complete |

# ΩΦA Action Plan

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| **GOAL 2** | Maintain healthy chapters and provide adequate support to active chapters. |
| **STRATEGY 2.1** | Establish chapter health monitoring guidelines, and develop strategies for responding to chapter problems. |
| **ACTIVITY 2.1.1** | Create a checklist and monitoring process to aid in determining the "health" of a chapter. |
| **DESCRIPTION** | In order to identify chapters "at risk," it is important to first know what constitutes a healthy chapter. Brainstorm and then finalize a list of what defines a chapter to be healthy. Using this brainstorm list, create a simple checklist that provides the criteria for a "healthy" chapter. Train the Traveling Leadership Consultants (TLC's) to use this checklist to evaluate the health of their assigned chapters and report to VP of Leadership Development each semester. Additionally, research several organizations similar to OPA to determine the best practices for maintaining healthy local organizations and incorporate this into our materials.<br><br>This activity (and several subsequent activities) calls for the creation of a new temporary committee, the Chapter Health Committee, to complete this task. It is recommended this committee be chaired by the VP Leadership Development and include at least one TLC, one District Alumnae Advisor (DAA), a National Executive Board (NEB) officer, and an active. |
| **RESPONSIBILITY** | VP Leadership Development, Chapter Health Committee, and input from the NEB |
| **TIMETABLE** | Start 8/15/05<br>End Convention 2006 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Individual officer brainstorming | One-time | 2 hours |
| VP Leadership Development time | One-time | 10 hours |
| Chapter Health Committee time | One-time | 10 hours |
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| **LEGISLATION** | None |

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| **EVALUATION** | 9/1/05 | 3 organizations identified |
| | 11/1/05 | Officers submit brainstorming to VP Leadership Development |
| | Midyear 06 | Complete list and research findings submitted with VP Leadership Development report at midyear 2006 |
| | 6/1/06 | Completed checklist and documented procedures ready for distribution and training at Convention 2006 |
| | Conv. 2006 | Training on process provided at Convention 2006 for chapters, NEB, and TLCs |
| | Ongoing | Annual training at convention |

# ΩΦA Action Plan

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|---|---|
| **GOAL 2** | Maintain healthy chapters and provide adequate support to active chapters. |
| **STRATEGY 2.1** | Establish chapter health monitoring guidelines, and develop strategies for responding to chapter problems. |
| **ACTIVITY 2.1.2** | Develop indicators and strategies or responses for "trouble" areas for chapters. |
| **DESCRIPTION** | After developing criteria and the checklist for healthy chapters, indicators should be identified that could signal "early trouble" for chapters. Strategies and responses should then be identified and documented for each indicator. These strategies and responses should be added to sorority's standard operating procedures (SOP) and included with officer training materials. |
| **RESPONSIBILITY** | VP Leadership Development and Chapter Health Committee |
| **TIMETABLE** | Start 8/1/06<br>End Convention 2007 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Chapter Health Committee time for developing and documenting strategies | One-time | 20 hours |
| VP Leadership Development time for creating training materials | One-time | 5 hours |
| Copies | One-time | $50.00 |
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|---|---|---|
| **LEGISLATION** | None | |
| **EVALUATION** | Midyear 2007 | Indicators identified and reported with VP Leadership Development report |
| | 6/1/07 | Strategies and responses ready for presentation at Convention 2007 |
| | Conv. 2007 | OPA leaders should be trained on these strategies and responses during Convention training |
| | Ongoing | Annual training at convention |

# ΩΦA Action Plan

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| **GOAL 2** | Maintain healthy chapters and provide adequate support to active chapters. |
| **STRATEGY 2.2** | Establish chapter support guidelines. |
| **ACTIVITY 2.2.1** | Create a contract checklist between the organization and chapters as to support and communication they should have to ensure chapters receive adequate support. |
| **DESCRIPTION** | Individual officers should document needed communication and support from their position to the chapter. These documents should be sent to the Virtual Assistant (VA) to compile a summary for the VP Leadership Development and the Chapter Health Committee. The committee should specify guidelines/requirements indicating annual support and contact each chapter should have with national officers and district officers. Using these guidelines, create a checklist/contract that can be used to quickly evaluate the support chapters are receiving. Develop the procedure for completing these contracts to ensure each chapter receives adequate support and communication. |
| **RESPONSIBILITY** | VP Leadership Development and Chapter Health Committee |
| **TIMETABLE** | Start 8/1/07<br>End 6/1/08 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Officer time to collect data | One-time | 2 hours |
| Virtual Assistant compilation time (3 hours) | One-time | $45.00 |
| Chapter Health Committee time | One-time | 10 hours |
| Copies | One-time | $25.00 |

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| **LEGISLATION** | None |

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| **EVALUATION** | 11/1/07 | Each OPA leader should submit their contact needs to the VA |
| | 12/15/07 | VA will prepare a summary of all contact requirements and submit it to the VP Leadership Development |
| | 3/1/08 | Submit draft checklist and procedures to NEB for input and review |
| | 6/1/08 | Finalize checklist and procedures for presentation at Convention 2008 |
| | 2008-09 | Implement use of checklists |
| | Ongoing | Continue use of checklists annually |

# ΩΦΑ Action Plan

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| **GOAL 3** | Improve intra-sorority communication. |
| **STRATEGY 3.1** | Develop formal communication guidelines. |
| **ACTIVITY 3.1.1** | Review reporting requirements already in place – including both internal and external requirements at the chapter, district, and national levels. |
| **DESCRIPTION** | Look through the constitution, bylaws, handbooks, and any other resources for current guidelines and requirements regarding any and all types of reporting. In addition, contact all universities with active chapters to find out what reporting requirements they place on the chapters. Create a full and comprehensive list of all current and necessary internal and external reporting requirements. |
| **RESPONSIBILITY** | National Secretary and chapter secretaries |
| **TIMETABLE** | Start 8/1/05<br>End 12/15/06 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| National Secretary time | One-time | 10 hours |
| Chapter Secretary time | One-time | 2 hours |
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| **LEGISLATION** | None |
| **EVALUATION** | Midyear 2006 Report of all current reporting requirements |

# ΩΦA Action Plan

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|---|---|
| **GOAL 3** | Improve intra-sorority communication. |
| **STRATEGY 3.1** | Develop formal communication guidelines. |
| **ACTIVITY 3.1.2** | Document reporting requirements that are mandated by external agencies, and develop standard operating procedures (SOPs) to ensure compliance with those requirements. |
| **DESCRIPTION** | Using completed report from activity 3.1.1, develop procedures to meet all external reporting requirements. Be sure these SOPs are added to the National Handbook. |
| **RESPONSIBILITY** | VP Business Operations |
| **TIMETABLE** | Start 1/15/06<br>End 6/1/06 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Business Operations time | One-time | 20 hours |
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| **LEGISLATION** | Substantive legislation to officially document created SOPs should be submitted for Convention 2006. |
| **EVALUATION** | 6/1/06 Detailed documentation with SOPs completed |

# ΩΦA Action Plan

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|---|---|
| **GOAL 3** | Improve intra-sorority communication. |
| **STRATEGY 3.1** | Develop formal communication guidelines. |
| **ACTIVITY 3.1.3** | Mandate, develop or establish official and formal internal reporting requirements and formats. |
| **DESCRIPTION** | Create standard operating procedures (SOPs) for formal internal reporting and communication procedures. |
| **RESPONSIBILITY** | VP Business Operations |
| **TIMETABLE** | Start 8/1/06<br>End 6/1/08 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Business Operations time | One-time | 30 hours |
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|---|---|
| **LEGISLATION** | Substantive legislation to officially document created SOPs should be submitted for Convention 2006 and 2007. |
| **EVALUATION** | Midyear 2007 Progress report submitted to the NEB for input<br>Conv. 2007 50% of SOPs written<br>Midyear 2008 Progress report submitted to the NEB for input<br>6/1/08 Completed (100%) detailed documentation with SOPs completed |

# ΩΦA Action Plan

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|---|---|
| **GOAL 3** | Improve intra-sorority communication. |
| **STRATEGY 3.2** | Use technology to improve communication. |
| **ACTIVITY 3.2.1** | Revise the national website to include pertinent information for public, donors, and members. |
| **DESCRIPTION** | Restructure the national website to have more information pertinent to each group of Omega Phi Alpha. Survey stakeholders to determine what types of information would be most useful to them. Use the website as a major source of OPA information – include details of programs, standard operating procedures, contacts, etc. The website should be the first place one could go to gather information about the sorority. Hire a professional web-designer and/or use the talents of other actives and/or alumnae to re-design omegaphialpha.org. |
| **RESPONSIBILITY** | VP Communications |
| **TIMETABLE** | Start 3/1/05<br>End 6/1/06 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Part of website design – no additional cost | One-time | |
| VP Communications time | One-time | 50 hours |
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|---|---|
| **LEGISLATION** | None |

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|---|---|---|
| **EVALUATION** | 3/1/05 | Contract signed with professional company |
| | 7/15/05 | Phase one, content gathering, complete |
| | 9/1/05 | Phase two, design, complete |
| | 10/1/05 | Phase three, programming, complete |
| | 6/1/06 | Additional elements not included by the company complete and online |

# ΩΦA Action Plan

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|---|---|
| **GOAL 3** | Improve intra-sorority communication. |
| **STRATEGY 3.2** | Use technology to improve communication. |
| **ACTIVITY 3.2.2** | Clarify and communicate OPA publication distribution details, and increase methods of distributing. |
| **DESCRIPTION** | Revise *Chevron* publication deadlines to more evenly distribute issues throughout the year and to distribute material in a timelier manner. Communicate deadlines for both the *Chevron* and Chapter newsletter publication online, in the publications, and on the national calendar. Increase issues of the chapter newsletter publication to provide more timely distribution of information. E-mail an electronic version of all publications to each active and alumnae chapter president so that she can distribute it to her chapter.<br><br>Begin offering the option of email versions of *Chevron* issues in addition to mailed versions during the 2005-06 year. Review possibility of offering the option of email only versions during the 2006-07 year. (The Virtual Assistant (VA) will distribute email versions to those who request it). |
| **RESPONSIBILITY** | VP Communications |
| **TIMETABLE** | Start 8/1/05<br>End 6/1/07 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Communications time | Recurring | 2 hours |
| Virtual Assistant time (4 hours/year) | Recurring | $60.00 |
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|---|---|---|
| **LEGISLATION** | None | |
| **EVALUATION** | 9/1/05 | Publish revised deadlines and frequency of issues for all publications |
| | 2005-06 | Implement new deadlines and frequencies, and begin emailing publications to chapters |
| | 2005-06 | Begin emailing issues to those requesting email copies |
| | 2006-07 | Possibly begin email only option for those that request it |

# ΩΦA Action Plan

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|---|---|
| **GOAL 3** | Improve intra-sorority communication. |
| **STRATEGY 3.2** | Use technology to improve communication. |
| **ACTIVITY 3.2.3** | Develop a national message board. |
| **DESCRIPTION** | Create a national message board through existing services or through a website designer that allows sisters to do things such as:<br>• Discuss upcoming events in their chapters<br>• Contact other sisters with ease<br>• Meet other sisters in O Phi A<br>• Get ideas for service projects<br><br>This message board should be part of or linked to the member section of the national website. |
| **RESPONSIBILITY** | VP Communications |
| **TIMETABLE** | Start 1/15/06<br>End 6/1/06 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Communications research & development time | One-time | 5 hours |
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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 3/15/06 Research complete on how to set up and host national message board<br>6/1/06 Design and develop message board complete and ready to begin use |

# ΩΦA Action Plan

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|---|---|
| **GOAL 3** | Improve intra-sorority communication. |
| **STRATEGY 3.2** | Use technology to improve communication. |
| **ACTIVITY 3.2.4** | Develop an emergency contact for OPA, both an email address and a phone number that will have a guaranteed 24-hour response time (or less). |
| **DESCRIPTION** | Set up a help email address and phone number. Work out a schedule for manning these two communications venues to guarantee some sort of response within 24 hours.<br><br>An FAQ response sheet will need to be provided with instructions of when to refer callers onto someone else, and to whom they refer them. |
| **RESPONSIBILITY** | National Secretary |
| **TIMETABLE** | Start 8/1/06<br>End 12/15/06 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Cost of 800 number service set up | One-time | $55.00 |
| Cost of an 800 number service | Recurring | $450.00 |
| National Secretary research time | One-time | 5 hours |
| National Secretary procedure development time | One-time | 5 hours |
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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 9/1/06 Email address set up<br>10/1/06 Research complete for systems/companies to use for phone service<br>11/1/06 Written Procedures and schedule of manning these venues complete<br>12/1/06 Phone account established<br>12/15/06 Begin using help lines |

# ΩΦΑ Action Plan

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|---|---|
| **GOAL 3** | Improve intra-sorority communication. |
| **STRATEGY 3.3** | Develop ongoing communication education. |
| **ACTIVITY 3.3.1** | Develop email guidelines and etiquette. |
| **DESCRIPTION** | Hold workshops and create documents that put forth:<br>• What "reasonable response time" is for an e-mail, and how to respond if one does not have the time to generate an adequate response at that time<br>• How to correctly write an e-mail (grammar, signatures, attaching files, etc.)<br>• How to properly respond to emails notifying the sender their message was received and what action was taken |
| **RESPONSIBILITY** | National Secretary and Leadership Development (LEAD) team |
| **TIMETABLE** | Start 1/15/06<br>End 8/1/06 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Time to develop workshop | One-time | 5 hours |
| Copies | One-time | $25.00 |
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|---|---|
| **LEGISLATION** | SOPs (substantive legislation) for email requirements (i.e. how often a chapter should check email) submitted for Convention 2006. |
| **EVALUATION** | 6/1/06 PowerPoint and documents complete<br>Conv. 2006 Present first workshop |

# ΩΦA Action Plan

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|---|---|
| **GOAL 3** | Improve intra-sorority communication. |
| **STRATEGY 3.3** | Develop ongoing communication education. |
| **ACTIVITY 3.3.2** | Develop workshops and conferences on communication guidelines and use. |
| **DESCRIPTION** | Create workshops for chapters/districts on:<br>• E-mail initiative / reasonable response time<br>• Courtesy towards other sisters / how to communicate your feelings without coming off mean / how to deal with an unreasonable sister / etc.<br>• Educating actives on proper behavior at meetings or official Omega Phi Alpha events - stressing the importance of professionalism and conduct. |
| **RESPONSIBILITY** | Leadership Development (LEAD) team |
| **TIMETABLE** | Start 6/1/06<br>End 6/1/08 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Workshop development | One-time | 15 hours |
| Copies and supplies | One-time | $100.00 |
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|---|---|---|
| **LEGISLATION** | None | |
| **EVALUATION** | 6/1/06 | Email etiquette workshops complete |
| | Conv. 2006 | First presentations given at Convention 2006 |
| | 12/1/07 | "Sisterly behavior" workshops complete |
| | 5/1/08 | Professional behavior workshops complete |
| | 6/1/08 | Submit all new workshops to LEAD team |

# ΩΦA Action Plan

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|---|---|
| **GOAL 3** | Improve intra-sorority communication. |
| **STRATEGY 3.3** | Develop ongoing communication education. |
| **ACTIVITY 3.3.3** | Develop procedures for (and offer training for) the use of communication tools including but not limited to: teleconferencing, on-line live meeting software, chat sites, IMP on-line, etc. |
| **DESCRIPTION** | Create a Communications Committee and brainstorm different communication options available to OPA. Research and identify which would be most viable and then create instructions to teach members how to use each and under which circumstances each should be used.<br><br>Acquire a permanent account with a teleconferencing company (MSN Messenger, et al) and allow any members who need legitimate access to it for intra-chapter/intra-officer meetings to have the account number and other important information. Create a toll-free 1-800 number for conference calls (in conjunction with MSN Messenger).<br><br>Distribute communication guidelines in the National Handbook and online. |
| **RESPONSIBILITY** | National Secretary and Communications Committee |
| **TIMETABLE** | Start 8/1/06<br>End 6/1/07 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| National Secretary time to set up a permanent MSN Messenger account | One-time | 2 hours |
| Communications Committee time for creating training materials | One-time | 20 hours |
| Copies | One-time | $25.00 |

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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 10/1/06 Communications Committee assembled<br>12/1/06 Accounts established<br>Midyear 2007 Progress report submitted to NEB<br>6/1/07 Written instructions and guidelines for each option complete<br>Conv. 2006 Presentation on communication tool options and education on use |

# ΩΦA Action Plan

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|---|---|
| **GOAL 3** | Improve intra-sorority communication. |
| **STRATEGY 3.3** | Develop ongoing communication education. |
| **ACTIVITY 3.3.4** | Develop procedures for the establishment, oversight, and use of Yahoo groups, and then provide written procedures and training for users. |
| **DESCRIPTION** | Document standard operating procedures (SOPs) for use of Yahoo groups, and create training materials or tutorials for using them. Provide guidelines to help users identify when Yahoo groups is a more appropriate method of communication in comparison to the other options presented in the previous activity.<br><br>Post an official list of all available OPA related Yahoo groups on the national website.<br><br>Investigate which topics could be moved to message boards on our website rather than communicated through another Yahoo group. |
| **RESPONSIBILITY** | National Secretary and Communications Committee |
| **TIMETABLE** | Start 1/1/06<br>End 6/1/07 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Communications Committee time for training materials development | One-time | 5 hours |
| Communications Committee time for procedures development time | One-time | 5 hours |
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|---|---|---|
| **LEGISLATION** | None | |
| **EVALUATION** | 3/15/06 | Complete list of available OPA Yahoo groups distributed |
| | 6/1/06 | Provide written guidelines and procedures for the use of Yahoo Groups to LEAD team |
| | 6/1/07 | Complete set of training materials for use of Yahoo groups submitted to LEAD team |

# ΩΦA Action Plan

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| **GOAL 4** | Create, maintain and facilitate a comprehensive national educational and training program. |
| **STRATEGY 4.1** | Determine a timely and effective method for maintaining leadership and education materials. |
| **ACTIVITY 4.1.1** | Review current status of OPA's leadership and educational materials. |
| **DESCRIPTION** | Review current available leadership and educational materials, determining what is available, the quality of existing materials, and the accessibility to chapters. |
| **RESPONSIBILITY** | Leadership Development (LEAD) team chair |
| **TIMETABLE** | Start 1/15/06<br>End 6/1/06 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| LEAD team chair time | One-time | 5 hours |
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| **LEGISLATION** | None |
| **EVALUATION** | 3/15/06 List posted on the website identifying all current topics and items<br>6/1/06 Report completed and submitted to the VP Leadership Development |

# ΩΦA Action Plan

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|---|---|
| **GOAL 4** | Create, maintain and facilitate a comprehensive national educational and training program. |
| **STRATEGY 4.1** | Determine a timely and effective method of maintaining leadership and education materials. |
| **ACTIVITY 4.1.2** | Determine the appropriate method for the maintenance of leadership and education material and where the appropriate oversight of these materials should be located. |
| **DESCRIPTION** | Investigate and evaluate several options for maintaining and updating education and leadership materials. Review the current function and purpose of the Leadership Development (LEAD) team and recommend what services they should continue to provide. Provide a spreadsheet with benefits, cons, and proposed costs of each option to the NEB. Based on the evaluation of options, provide a recommendation with details and processes for oversight of education materials. |
| **RESPONSIBILITY** | Leadership Development (LEAD) team chair and VP Finance |
| **TIMETABLE** | Start 8/1/05<br>End Convention 2006 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Finance time | One-time | 3 hours |
| LEAD team chair time | One-time | 10 hours |
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| **LEGISLATION** | Possible substantive, and constitutional/bylaws legislation if function is moved out of LEAD team responsibility and to further clarify any needed processes and procedures for oversight of materials. |
| **EVALUATION** | 9/15/05 Identify options to be investigated<br>Midyear 2006 Analysis and recommendation presented to NEB<br>2/1/06 Legislation due to Constitution Revisions Committee<br>Conv. 2006 Present proposals to convention delegation |

# ΩΦΑ Action Plan

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|---|---|
| **GOAL 4** | Create, maintain and facilitate a comprehensive national educational and training program. |
| **STRATEGY 4.2** | Update and improve all training and education materials. |
| **ACTIVITY 4.2.1** | Update national handbooks to include details of duties, standard operating procedures (SOPs) and FAQs. |
| **DESCRIPTION** | Review national handbooks to determine the best organization of materials to include duties, SOPs, common questions, and officer training topics. Consider reorganizing the National Handbook to reduce the number of individual handbooks. Updated materials should be placed online for access. |
| **RESPONSIBILITY** | Leadership Development (LEAD) team |
| **TIMETABLE** | Start 6/1/05<br>End Ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| LEAD team time – initial review, reorganizing and updating | One-time | 30 hours |
| LEAD team ongoing revisions | Recurring | 5 hours |
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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | Conv. 2005 Initial revision drafts<br>12/31/05 Final revisions complete<br>Ongoing Updates should be posted annually in September to the website |

# ΩΦA Action Plan

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|---|---|
| **GOAL 4** | Create, maintain and facilitate a comprehensive national educational and training program. |
| **STRATEGY 4.2** | Update and improve all training and education materials. |
| **ACTIVITY 4.2.2** | Define education curriculum for pledging and colonization, and revise pledging and colonization handbooks to contain lesson plans and teaching instructions. |
| **DESCRIPTION** | New pledge education materials will be presented at Convention 2005. These materials will identify the topics and material that should be covered in pledge education and include assessment materials to measure mastery of the topics, lesson plans, activities, and teaching instructions for each topic in the curriculum. The new materials should guide pledge educators through the process of both teaching the pledges to be members of a service organization and also on being members of a national sorority. Chapter pledge educators will be instructed to implement the new materials during the Fall 2005 semester and then provide feedback for improvement and revisions for the Spring 2006 term.<br><br>During the Spring 2006 term, the National Membership Director will work with the VP Expansions to modify the materials for use in colonization.<br><br>All new and revised materials will be presented again at Convention 2006 with a report on how the new materials worked during the 2005-06 school year. Completed materials will be placed in the National Handbook and posted online. |
| **RESPONSIBILITY** | National Membership Director and VP Expansions |
| **TIMETABLE** | Start Convention 2005<br>End Convention 2006 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| National Membership Director time | One-time | 10 hours |
| VP Expansions time | One-time | 10 hours |
| Focus group at Convention 20 05 | One-time | 1 hour |
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|---|---|
| **LEGISLATION** | Substantive legislation submitted for Convention 2005 and 2006. |
| **EVALUATION** | Conv. 2005 Presentation and training on new pledge materials<br>12/15/05 Feedback from chapter pledge educators submitted to National Membership Dir.<br>1/15/06 Revised materials based on Fall feedback distributed to chapters<br>5/15/06 Feedback from chapter pledge educators submitted to National Membership Dir.<br>6/1/06 Modified materials for expansions complete<br>Conv. 2006 Revised and complete materials for pledging and expansions presented |

# ΩΦA Action Plan

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|---|---|
| **GOAL 4** | Create, maintain and facilitate a comprehensive national educational and training program. |
| **STRATEGY 4.2** | Update and improve all training and education materials. |
| **ACTIVITY 4.2.3** | Research what universities and local community organizations have to offer for leadership conferences and training, and provide information to chapters. |
| **DESCRIPTION** | Using a representative from each chapter, contact each university and community organizations where OPA chapters are located to determine what resources for leadership training currently exist. Create literature that can be provided to each chapter annually. This information can also be posted on the national website. |
| **RESPONSIBILITY** | Leadership Development (LEAD) team chair and chapter representatives |
| **TIMETABLE** | Start 8/1/06<br>End 6/1/07<br>Ongoing annual updates |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Time gathering information | Recurring | 15 hours |
| Copies for distribution of lists | Recurring annually | $25.00 |
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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | Conv. 2007 File of information for each chapter that can be distributed each convention, starting with Convention 2007 |

# ΩΦA Action Plan

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|---|---|
| **GOAL 4** | Create, maintain and facilitate a comprehensive national educational and training program. |
| **STRATEGY 4.2** | Update and improve all training and education materials. |
| **ACTIVITY 4.2.4** | Create and gather sets of ready-to-use workshops. |
| **DESCRIPTION** | Contact each chapter asking them to brainstorm a list of topics they could use or would like to see developed as ready workshop presentations. Surveys can be a simple email. A completed list can then be developed to use for prioritizing topics to find or create materials. The Leadership Development (LEAD) team can then begin to gather and write materials for identified topics. This should become an ongoing process of gathering additional and new materials, and updating existing materials each year. |
| **RESPONSIBILITY** | Leadership Development (LEAD) team |
| **TIMETABLE** | Start 8/1/07<br>End 6/1/08<br>Ongoing after initial set is created |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| LEAD team time for initial gathering | One-time | 20 hours |
| LEAD team time for annual gathering | Recurring | 5 hours |
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|---|---|
| **LEGISLATION** | None |

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|---|---|---|
| **EVALUATION** | 8/1/07 | Emails sent to chapters |
| | 9/1/07 | Returned responses received |
| | 10/1/07 | Completed list in a priority order |
| | Conv. 2008 | 10 ready-to-use workshops should be completed |
| | Ongoing | 3 new workshops should be added each year thereafter |

# ΩΦA Action Plan

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|---|---|
| **GOAL 4** | Create, maintain and facilitate a comprehensive national educational and training program. |
| **STRATEGY 4.2** | Update and improve all training and education materials. |
| **ACTIVITY 4.2.5** | Create a leadership program to increase actives' leadership education opportunities. |
| **DESCRIPTION** | Add a leadership requirement to what actives must complete annually. The requirement should be flexible to offer many options for completion. The purpose is to put emphasis on the leadership element of the organization in the way service is emphasized and offer many different ways a person can develop leadership skills. In developing the program through out the 2005-06 school year, several types of activities should be identified as ways to gain leadership experience that would then meet this requirement. This should not be a difficult requirement – it isn't meant to add requirements as much as it is meant to provide opportunities and exposure to leadership experience.<br><br>Include a reporting form and ongoing education requirements. |
| **RESPONSIBILITY** | VP Leadership Development and Traveling Leadership Consultants (TLCs) |
| **TIMETABLE** | Start Convention 2005<br>End Convention 2006 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Leadership Development & TLCs Time | One-time | 10 hours |
| Copies | One-time | $25.00 |
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|---|---|
| **LEGISLATION** | Initial Constitution/bylaws revision submitted for Convention 2005. |
| **EVALUATION** | Conv. 2005 Initial requirement passed at Convention 2005 by convention delegation<br>Conv. 2006 Processes and procedures of carrying out program and any amendments completed throughout school year and presented at Convention 2006 |

# ΩΦΑ Action Plan

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|---|---|
| **GOAL 4** | Create, maintain and facilitate a comprehensive national educational and training program. |
| **STRATEGY 4.3** | Implement national education program. |
| **ACTIVITY 4.3.1** | Develop/document requirements of the sorority's education program. |
| **DESCRIPTION** | Write up documentation on the education program including such things as who and how it will be administered, details of the curriculum for pledges and colonists, any ongoing education requirements, and processes and procedures for documenting completion of requirements. The written program should be placed in the National Handbook and online. This step is basically the writing of a new section of the National Handbook to describe all of the education program elements that have been created in previous steps. |
| **RESPONSIBILITY** | VP Leadership Development |
| **TIMETABLE** | Start 8/1/06<br>End Ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Leadership Development time | One-time | 10 hours |
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|---|---|
| **LEGISLATION** | None, all legislation will have been completed in other steps. This step will just be the final documentation of all earlier completed steps. |
| **EVALUATION** | 6/1/07 Initial written education program should be submitted to the LEAD team and the VP Communications<br>Ongoing Additions and updates should be submitted every June |

# ΩΦΑ Action Plan

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|---|---|
| **GOAL 4** | Create, maintain and facilitate a comprehensive national educational and training program. |
| **STRATEGY 4.3** | Implement national education program. |
| **ACTIVITY 4.3.2** | Establish methods of presenting and teaching materials. |
| **DESCRIPTION** | Develop a list of methods that can be used for teaching or presenting OPA education materials. Document details on use of each method including how and when appropriate. Create any teaching strategies and activities that may help in presentation and teaching of lessons and topics. Final documentation should be placed in National Handbook and online. |
| **RESPONSIBILITY** | VP Leadership Development and Leadership Development (LEAD) team |
| **TIMETABLE** | Start 1/1/07<br>End 6/1/07 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Leadership Development time | One-time | 5 hours |
| LEAD team time | One-time | 5 hours |
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| **LEGISLATION** | None |
| **EVALUATION** | 6/1/07 Completed document should be submitted to LEAD team and VP Communications |

# ΩΦA Action Plan

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| **GOAL 4** | Create, maintain and facilitate a comprehensive national educational and training program. |
| **STRATEGY 4.3** | Implement national education program. |
| **ACTIVITY 4.3.3** | Develop a calendar of annual topics with dates (ongoing education program). |
| **DESCRIPTION** | Establish a list of topics that can be presented or taught each year from OPA's library of topics as ongoing education. Create an annual calendar of when topics will be presented/taught, who will teach them, how they will be presented, and where. Post this calendar on the national website with the education program information. The calendar should be revised and updated annually and presented at convention. |
| **RESPONSIBILITY** | VP Leadership Development |
| **TIMETABLE** | Start 1/1/07<br>End 6/1/07<br>Ongoing for annual updates |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Leadership Development time | Ongoing | 10 hours |
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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 6/1/07 Initial calendar and commitments for teaching should be completed<br>Conv. 2007 Calendar and explanation of ongoing education program explained at a workshop at Convention 2007<br>2007-08 Initial program should be deployed during the 07-08 school year with a minimum of 4 presentations each semester |

# ΩΦA Action Plan

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| **GOAL 5** | Develop a leadership development and evaluation plan. |
| **STRATEGY 5.1** | Establish a leadership development and transition plan. |
| **ACTIVITY 5.1.1** | Create a flowchart or a document that shows a ladder of leadership succession. |
| **DESCRIPTION** | Create a document that shows the different leadership positions in OPA and possible ladders of succession to acquire skills and experience and work up to higher levels of leadership in the organization. The chart should also provide basic information on requirements for each position. The completed document should be placed in National Handbook and online. |
| **RESPONSIBILITY** | National Secretary |
| **TIMETABLE** | Start 1/1/07<br>End 6/1/07 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| National Secretary time | One-time | 2 hours |
| Software for creating a flowchart | One-time | Included in activity 1.2.2 |
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| **LEGISLATION** | None |
| **EVALUATION** | 3/1/07 Completed flowchart should be submitted to LEAD team and VP Communications<br>3/15/07 Document should be online for election information |

# ΩΦA Action Plan

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| **GOAL 5** | Develop a leadership development and evaluation plan. |
| **STRATEGY 5.1** | Establish a leadership development and transition plan. |
| **ACTIVITY 5.1.2** | Create "tasks" and committees below each national VP to create learning opportunities and additional leadership roles for sisters to gain experience. |
| **DESCRIPTION** | Each National Executive Board (NEB) officer should brainstorm tasks and committees that could be created under their position. Brainstorming results should be presented to the NEB with 2008 Midyear reports, and then discussed by the NEB for a finalized list of opportunities to create and offer beginning with the 2008-09 school year. |
| **RESPONSIBILITY** | National Executive Board (NEB) officers |
| **TIMETABLE** | Start 8/1/07<br>End 12/1/08 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| NEB Officer time | One-time | 1 hour |
| NEB midyear meeting time | One-time | 1 hour |
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| **LEGISLATION** | Substantive legislation may be presented to the Convention 2008 delegation. |
| **EVALUATION** | Midyear 2008 Brainstorm results should be provided by each NEB officer with her Midyear 2008 report<br>Midyear 2008 Official list should be complete for all officers at conclusion of Midyear 2008 meeting<br>2/15/08 Information should be distributed with 2008 election information and proposed legislation for Convention 2008<br>9/1/08 Have people appointed to serve in 50% of identified task assignments<br>12/1/08 100% of appointments in place |

# ΩΦΑ Action Plan

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| **GOAL 5** | Develop a leadership development and evaluation plan. |
| **STRATEGY 5.1** | Establish a leadership development and transition plan. |
| **ACTIVITY 5.1.3** | Document and distribute success skills for each position in the sorority. |
| **DESCRIPTION** | Update existing, and create success skills forms for new positions. Currently the organization has some "role of" forms that identify the requirements and success skills needed for several leadership positions. Expand on this idea by creating these forms for all leadership positions in the organization. These can then be used as position vacancy announcements. All forms should be added to the National Handbook. |
| **RESPONSIBILITY** | National Secretary and Nominating Committee |
| **TIMETABLE** | Start 8/1/05<br>End 3/1/06<br>Additional updates should be added as positions are added or amended. |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| National Secretary & Nominating Committee time – initial additions | One-time | 15 hours |
| National Secretary & Nominating Committee time – ongoing additions and updates | Recurring | 5 hours/year |
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| **LEGISLATION** | None |
| **EVALUATION** | 10/1/05 Updating of existing role of forms completed<br>10/15/05 List of positions to be added<br>3/1/06 Creation of new forms<br>3/1/06 Submit all forms to LEAD team and VP Communications<br>4/1/06 Post all forms under election information for Convention 2006 |

# ΩΦA Action Plan

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|---|---|
| **GOAL 5** | Develop a leadership development and evaluation plan. |
| **STRATEGY 5.1** | Establish a leadership development and transition plan. |
| **ACTIVITY 5.1.4** | Use the Nominating committee to identify needed skills and talents for upcoming year, and begin actively seeking out qualified applicants. |
| **DESCRIPTION** | The Nominating Committee should become a committee that functions all year, not just at convention time. They should identify upcoming needed positions for the sorority and use the "role of forms" to begin posting vacancy announcements and actively seek persons to apply for open positions. Nominating Committee should be used to seek out qualified applicants anytime any leadership vacancy becomes open, not just in preparation of annual National Executive Board (NEB) elections. After determining the best way for the committee to function during the 2006-07 academic year, any revisions needed to re-define the makeup or duties should be submitted with legislation for the 2007 Convention (constitution and bylaws legislation occurs during odd convention years). |
| **RESPONSIBILITY** | National Secretary and Nominating Committee |
| **TIMETABLE** | Start 1/15/06<br>End Ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| National Secretary & Nominating Committee time | Recurring | 2 hours/week |
| Annual admin budget (calls, mailings, copies, etc.) | Recurring | $150.00 |
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| **LEGISLATION** | Potential constitution and bylaws revisions if Nominating Committee make-up or duties are changed. Legislation would be due for Convention 2007. |
| **EVALUATION** | 2/1/06 List of potential open positions for the 2006-07 school year created<br>2/15/06 Submit announcement information to *Chevron* for issue # 3 of the 2005-06 school year<br>4/1/06 Post announcements online for upcoming open positions<br>7/1/06 Applicants for each open position acquired |

# ΩΦA Action Plan

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| **GOAL 5** | Develop a leadership development and evaluation plan. |
| **STRATEGY 5.1** | Establish a leadership development and transition plan. |
| **ACTIVITY 5.1.5** | Create a standardized application and selection process for TLCs and DAAs that involves both the overseeing VP and the actives or alumnae. |
| **DESCRIPTION** | Create an application form and process for selecting Traveling Leadership Consultants (TLCs) and District Alumnae Advisors (DAAs) for each district. The process should allow members to weigh qualifications and skills of each candidate and allow input from both the constituents (actives or alumnae) of the district they will serve and the overseeing VP. The positions will remain appointed by the VP to allow for removal when required performance is not met. The VPs should work together with input from a committee made up of actives and alumnae to develop this process. |
| **RESPONSIBILITY** | VP Leadership Development, VP Alumnae Relations, and Nominating Committee |
| **TIMETABLE** | Start 8/1/06<br>End 6/1/07 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Nominating Committee time | One-time | 7 hours |
| VPs time | One-time | 7 hours |
| Nominating Committee budget for communication | One-time | $50.00 |
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| **LEGISLATION** | Substantive and possibly bylaws legislation to implement application process officially. Legislation should be submitted for Convention 2007. |
| **EVALUATION** | 6/1/07 Documented process and application completed and submitted to LEAD team and VP Communications<br>2007-08 Begin use of new application process for selection of TLCs and DAAs |

# ΩΦA Action Plan

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| **GOAL 5** | Develop a leadership development and evaluation plan. |
| **STRATEGY 5.1** | Establish a leadership development and transition plan. |
| **ACTIVITY 5.1.6** | Maintain an active database of professional and degree information that can be accessed for "networking" purposes. |
| **DESCRIPTION** | At graduation, document graduate's skills and education background. Have this information sent to the Virtual Assistant (VA) for inclusion in the database. Encourage alumnae to keep us updated as they develop skills and talents that may be of use to the sorority. Provide an easy online method to update this information, and allow for searching this database for networking purposes and to locate alumnae with specific needed skills.<br><br>Investigate the possibility of sending semi-annual postcard mailings to encourage alumnae to update their information. |
| **RESPONSIBILITY** | VP Communications, Virtual Assistant (VA), and Chapter officers |
| **TIMETABLE** | Start 8/1/05<br>End Ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Web development for searchable database (include needed fields) | One-time | Included in current redesign |
| Form for information collection | One-time | 1 hour |
| Copies | One-time | $25.00 |
| Creation of online form | One-time | 3 hours |

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| **LEGISLATION** | None |
| **EVALUATION** | 10/1/05 Website database ready for collection and searching<br>11/1/05 Completed form ready for distribution and online<br>12/1/05 First collection of information at end of Fall 2005 semester |

# ΩΦA Action Plan

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| **GOAL 5** | Develop a leadership development and evaluation plan. |
| **STRATEGY 5.2** | Create evaluation processes for all OPA leadership positions. |
| **ACTIVITY 5.2.1** | Identify all OPA positions that should be evaluated, and identify the evaluation criteria and the process for completing the evaluations. |
| **DESCRIPTION** | Brainstorm a list of all leadership positions (NEB through committee chairs and appointments) that should be evaluated. Using officer duties assigned in activity 1.4.1, create an individual checklist of criteria for each position to be used to evaluate success and performance of duties and responsibilities. Determine a process for how each position will be evaluated including when, how, and who will be involved in completing the evaluation checklists. All details and procedures for officer evaluations should be added to the National Handbook. |
| **RESPONSIBILITY** | National Secretary and Nominating Committee |
| **TIMETABLE** | Start 8/1/07<br>End Convention 2008 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| National Secretary and Nominating Committee time | One-time | 30 hours |
| Budget for Nominating Committee communication | One-time | $150.00 |
| Copies | One-time | $50.00 |
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| **LEGISLATION** | Bylaws and substantive legislation should be submitted for Convention 2008 delegation to approve new evaluation procedures. |
| **EVALUATION** | 9/1/07 Completed list distributed to NEB for input<br>6/1/07 Checklists completed for each position<br>6/1/08 Documented procedures for evaluation process, and all materials needed for process complete<br>Conv. 2008 Present to Convention 2008 delegation |

# ΩΦA Action Plan

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| **GOAL 5** | Develop a leadership development and evaluation plan. |
| **STRATEGY 5.2** | Create evaluation processes for all OPA leadership positions. |
| **ACTIVITY 5.2.2** | Provide copies of duties requirements and evaluation checklist to each person as they enter into a position so they know up front what will be expected and what will be evaluated. |
| **DESCRIPTION** | The National Secretary will provide information and a copy of the criteria checklist to each leader that will be evaluated upon selection and explain to them the process and what they will be evaluated on.<br><br>The first evaluations will take place during the 2008-09 school year. Evaluations will be conducted by those described in the procedures developed in activity 5.2.1<br><br>Completed evaluations will be submitted to the Virtual Assistant (VA) to compile into a summary and returned to the National Secretary. |
| **RESPONSIBILITY** | National Secretary and Virtual Assistant (VA) |
| **TIMETABLE** | Start 8/1/08<br>Ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Copies of material for distribution | Recurring | $75.00 |
| Evaluation time | Recurring | 2 hr/ evaluation |
| Virtual Assistant time (4 hours) | Recurring | $60.00 |
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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 2008-09 Evaluation information provided to all selected leaders for 2008-09 year<br>6/1/09 First evaluations completed and sent to the VA<br>7/1/09 VA sends evaluation summaries to the National Secretary<br>Conv. 2009 Report on evaluation findings presented at Convention 2009 |

# ΩΦA Action Plan

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| **GOAL 6** | Build and manage an effective alumnae program. |
| **STRATEGY 6.1** | Define the alumnae program within the national organization. |
| **ACTIVITY 6.1.1** | Define and document the alumnae program, how it functions, and how it fits into the overall organization. |
| **DESCRIPTION** | Determine and document how the alumnae program should function within the national organization including topics such as the structure, purpose and goals, activities, SOPs, and the budget. The alumnae program will NOT be a separate organization and entity; it will be a subsection within the main organization of OPA. The budget for the alumnae program will be a portion of the main operating budget, set aside as the convention budget is. The documentation will explain what the purpose of the alumnae program is, what sort of activities occur for alumnae, and how the alumnae and their chapters fit into the overall organization. Documentation should be placed into the National Handbook.<br><br>Along with documenting details of the alumnae program, sub-committees should be created to oversee and run ongoing activities and aspects of the alumnae organization. For example, there may be a fundraising committee, convention planning committee, alumnae chapter support committee, etc. SOPs for committees should be included with program SOPs. |
| **RESPONSIBILITY** | VP Alumnae Relations and District Alumnae Advisors (DAAs) |
| **TIMETABLE** | Start 8/1/05<br>End Convention 2007 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Alumnae Relations time | One-time | 20 hours |
| VP Finance time to help with budget | One-time | 5 hours |
| DAA time | One-time | 20 hours |
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| **LEGISLATION** | Legislation to be submitted for Convention 2007 |
| **EVALUATION** | Midyear 2007 Update on progress due to NEB at Midyear 2006 meeting<br>6/1/07 Completed documentation<br>Conv. 2007 Presentation at Convention 2007 |

# ΩΦΑ Action Plan

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|---|---|
| **GOAL 6** | Build and manage an effective alumnae program. |
| **STRATEGY 6.1** | Define the alumnae program within the national organization. |
| **ACTIVITY 6.1.2** | Define the role of the District Alumnae Advisors (DAAs) and other alumnae leaders in both national and district level activities. Develop written procedures for DAAs that covers both of their roles. |
| **DESCRIPTION** | Clearly define the role of DAAs and any other alumnae leaders at both the national and district level. Create and document a clear list of duties and responsibilities at both levels and how they fit into the overall organization. |
| **RESPONSIBILITY** | VP Alumnae Relations and District Alumnae Advisors (DAAs) |
| **TIMETABLE** | Start 8/1/05<br>End Convention 2007 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Alumnae Relations time | One-time | 10 hours |
| DAA time | One-time | 10 hours |
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| **LEGISLATION** | Legislation to be submitted for Convention 2007. |
| **EVALUATION** | Midyear 2007 Update on progress due to NEB at Midyear 2006 meeting<br>6/1/07 Completed documentation<br>Conv. 2007 Presentation at Convention 2007 |

# ΩΦA Action Plan

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|---|---|
| **GOAL 6** | Build and manage an effective alumnae program. |
| **STRATEGY 6.1** | Define the alumnae program within the national organization. |
| **ACTIVITY 6.1.3** | Define how alumnae chapters fit into the alumnae association and overall structure of OPA. |
| **DESCRIPTION** | Create guidelines, support, and expectations of alumnae chapters while allowing enough flexibility to encourage membership on different levels of time commitment by the members of the alumnae chapters. |
| **RESPONSIBILITY** | VP Alumnae Relations and District Alumnae Advisors (DAAs) |
| **TIMETABLE** | Start 5/1/05<br>End Convention 2007 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Alumnae Relations time | One-time | 10 hours |
| DAA time | One-time | 10 hours |
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| **LEGISLATION** | Submit legislation for Convention 2005 regarding steps to create a new alumnae chapter.<br>Submit legislation for Convention 2006 for requirements and annual reporting form for alumnae chapters.<br>Include complete SOPs regarding alumnae chapters with all legislation on the alumnae program for Convention 2007. |
| **EVALUATION** | Fall 2005 Create and post to the national website the steps needed to create a new alumnae chapter<br>2005-06 Create annual report form for alumnae chapters<br>2006-07 Create and develop SOP and activities handbook for alumnae chapters |

# ΩΦA Action Plan

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| **GOAL 6** | Build and manage an effective alumnae program. |
| **STRATEGY 6.2** | Develop and improve alumnae communication venues. |
| **ACTIVITY 6.2.1** | Create a section of the website dedicated to alumnae for information regarding alumnae association, opportunities, recognition, etc. |
| **DESCRIPTION** | Dedicate a section of the national website to focus on alumnae events, opportunities, the association details, recognition, etc.<br><br>The VP Alumnae Relations will provide a list of topics and material that should be placed in this alumnae section, and the VP Communications will design and update the site when new information is provided. |
| **RESPONSIBILITY** | VP Alumnae Relations and VP Communications |
| **TIMETABLE** | Start 5/1/05<br>End 6/1/06<br>Ongoing maintenance |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Communications time for design of new section | One-time | 10 hours |
| VP Communications time for upkeep of new section | Recurring | 5 hours |
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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 10/1/05 Detailed list of what is to be included in alumnae section<br>12/1/05 Initial start of alumnae section online<br>6/1/06 All elements listed online |

# ΩΦA Action Plan

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| **GOAL 6** | Build and manage an effective alumnae program. |
| **STRATEGY 6.2** | Develop and improve alumnae communication venues. |
| **ACTIVITY 6.2.2** | Continue to enhance the *Chevron* – encouraging this as a communication tool between alumnae and alumnae chapters. |
| **DESCRIPTION** | Survey alumnae to identify topics they would like to see in their *Chevron* and to determine their satisfaction level with the current *Chevron*. Identify topics and items to include in each *Chevron* issue targeted at alumnae. Communicate with active and alumnae chapters to request information from them targeted at communicating with alumnae. |
| **RESPONSIBILITY** | VP Alumnae Relations and VP Communications |
| **TIMETABLE** | Start 8/1/05<br>End 6/1/06<br>Communication ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Survey cost (copies and postage or extra page in *Chevron*) | One-time | $300.00 |
| VP Alumnae Relations time | One-time | 5 hours |
| VP Communications time | One-time | 5 hours |
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|---|---|
| **LEGISLATION** | None |

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| **EVALUATION** | 11/1/05 | Survey created |
| | 12/1/05 | Survey included in 05-06 *Chevron* issue #2 and posted online |
| | Spring 2007 | VPs review survey results and create a content list for future *Chevrons* |
| | 6/1/07 | Content list completed |
| | Ongoing | Implement new content guidelines in *Chevron* issues starting 2006-07 school year |

# ΩΦA Action Plan

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| **GOAL 6** | Build and manage an effective alumnae program. |
| **STRATEGY 6.3** | Create national alumnae involvement opportunities. |
| **ACTIVITY 6.3.1** | Create a list of activities and opportunities for alumnae and communicate it. |
| **DESCRIPTION** | To begin creating ways for alumnae to be involved with the organization, it would be good to first identify how they are already involved, and then brainstorm ideas on additional ways they could get involved. Next, survey alumnae to find out what they might be interested in, how they might like to be involved, and the amount of time they have to offer. Finally, using information gathered from brainstorming session and survey summary; finalize a list of opportunities and activities for how alumnae can get involved. Present findings at Convention 2007 and then post final results online. |
| **RESPONSIBILITY** | VP Alumnae Relations and District Alumnae Advisors (DAAs) |
| **TIMETABLE** | Start 8/1/06<br>End Convention 2007 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Alumnae Relations and DAA time | One-time | 15 hours |
| Survey costs (copies & postage) | One-time | $75.00 |
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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 10/1/06 Brainstorm list complete<br>12/1/06 Survey complete<br>1/15/07 Administer survey<br>4/1/07 Summarize survey results<br>6/1/07 Prepare final report of opportunities for alumnae<br>Conv. 2007 Presentation at Convention 2007 |

# ΩΦA Action Plan

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| **GOAL 6** | Build and manage an effective alumnae program. |
| **STRATEGY 6.3** | Create national alumnae involvement opportunities. |
| **ACTIVITY 6.3.2** | Actively seek alumnae to fill positions and involved them - don't wait for them to call. |
| **DESCRIPTION** | Create a committee to search for alumnae to fill appointments and engage in opportunities identified by the step above.<br><br>This step requires the creation of an Alumnae Involvement Committee. |
| **RESPONSIBILITY** | VP Alumnae Relations and Alumnae Involvement Committee |
| **TIMETABLE** | Start 1/15/07<br>End ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Budget for Alumnae Involvement Committee | Recurring | $100.00 |
| VP Alumnae Relations budget increase | Recurring | $50.00 |
| VP Alumnae Relations time | Recurring | 15 hours |
| Alumnae Involvement Committee time | Recurring | 2 hr/wk |

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| **LEGISLATION** | Constitution and bylaws revisions to create the Alumnae Involvement Committee and define duties and responsibilities of this committee should be submitted for Convention 2007. |
| **EVALUATION** | 2/1/07 Legislation due for Convention 2007<br>8/1/07 Appoint committee members (after approval at convention)<br>2007- 08 10% increase in alumnae involvement compared to 2006-07 academic year |

# ΩΦA Action Plan

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| **GOAL 6** | Build and manage an effective alumnae program. |
| **STRATEGY 6.3** | Create national alumnae involvement opportunities. |
| **ACTIVITY 6.3.3** | Create avenues and resources for alumnae to give back to the Omega Phi Alpha community and to their local communities. |
| **DESCRIPTION** | Create avenues and resources for alumnae to contribute to their local communities, the national and international arena, and the organization of Omega Phi Alpha. This internal organization plan will develop an understanding for alumnae on methods and strategies that they can give back at a small level, medium level, and large level. Creating an alumnae service program and resources that highlight the different commitment levels will do this. |
| **RESPONSIBILITY** | VP Alumnae Relations and District Alumnae Advisors (DAAs) |
| **TIMETABLE** | Start Convention 2007<br>End 6/1/08<br>Ongoing maintenance |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Brunch/refreshments for focus group | One time | $300.00 |
| Program development | One-time | 15 hours |
| Copies | One-time | $25.00 |
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|---|---|
| **LEGISLATION** | Substantive legislation to be submitted for Convention 2007 |
| **EVALUATION** | Conv. 2007 Utilize alumnae focus group at Convention 2007<br>Fall 2007 Utilize website for alumnae service announcements<br>6/1/08 Completed alumnae service plan (document processes and procedures)<br>Conv. 2008 Present service plan at Convention 2008<br>Ongoing Host alumnae chapter functions and service projects annually beginning 2008-09 |

# ΩΦA Action Plan

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|---|---|
| **GOAL 6** | Build and manage an effective alumnae program. |
| **STRATEGY 6.3** | Create national alumnae involvement opportunities. |
| **ACTIVITY 6.3.4** | Motivate alumnae dedication to service and OPA through increased recognition programs. |
| **DESCRIPTION** | This effort strives to better recognize alumnae achievements in service on a national, district and local level. This can be done through monitoring alumnae service, communicating events and milestones and developing a holistic awards program for alumnae. |
| **RESPONSIBILITY** | VP Alumnae Relations, District Alumnae Advisors (DAAs), and Alumnae Chapters |
| **TIMETABLE** | Start 8/1/05<br>End Ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Award funding | Recurring | $500.00 |
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| **LEGISLATION** | New awards and guidelines to be submitted for Convention 2005. |
| **EVALUATION** | Conv. 2005 Present new awards with criteria<br>Conv. 2006 Begin giving new alumnae awards |

# ΩΦA Action Plan

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| **GOAL 6** | Build and manage an effective alumnae program. |
| **STRATEGY 6.3** | Create national alumnae involvement opportunities. |
| **ACTIVITY 6.3.5** | Create additional alumnae chapters throughout the country. |
| **DESCRIPTION** | Create a strategic alumnae chapter expansions plan to increase the number of alumnae chapters and oversee their functioning and health. The plan should include the cost, who will be involved in expansions, what they will be doing, and when things will occur. |
| **RESPONSIBILITY** | VP Alumnae Relations, District Alumnae Advisors (DAAs), and existing alumnae chapters |
| **TIMETABLE** | Start 8/1/06<br>End 6/1/10 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Plan development | One-time | 15 hours |
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| **LEGISLATION** | Legislation for new chapter guidelines will be submitted at Convention 2005.<br>Substantive legislation for expansions plan and budget to be presented at Convention 2007. |
| **EVALUATION** | Conv. 2005 Present legislation on alumnae chapter guidelines<br>Conv. 2007 Present alumnae chapter expansions plan<br>2007-10 Increase Alumnae chapters by 10% each year |

# ΩΦΑ Action Plan

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|---|---|
| **GOAL 6** | Build and manage an effective alumnae program. |
| **STRATEGY 6.3** | Create national alumnae involvement opportunities. |
| **ACTIVITY 6.3.6** | Inform and enroll alumnae in OPA programs. |
| **DESCRIPTION** | Use the tools that have been developed in the education, leadership and fundraising programs targeted specifically for alumnae to explain how OPA works today and where their participation and/or contributions are needed.<br><br>Be sure that information is included to facilitate making financial donations at any level, who they contact to get involved at any level, and provide opportunities for involvement at varying levels of commitment depending on the individual's ability to participate and/or contribute. |
| **RESPONSIBILITY** | VP Alumnae Relations, District Alumnae Advisors (DAAs), VP Finance, and Leadership Development (LEAD) Team |
| **TIMETABLE** | Start 1/15/06<br>End Ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Alumnae Relations develop alumnae focused materials | One-time | 5 hours |
| VP Finance & LEAD Team time | One-time | 2 hours |
| DAAs material maintenance | Recurring | 2 hours |
| Copies/supplies | Recurring | $50.00 |

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| **LEGISLATION** | None |
| **EVALUATION** | 6/1/06 Determine topics, prepare first presentation for Convention 2006<br>Ongoing Update annually, and present information each year at convention |

# ΩΦA Action Plan

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| **GOAL 6** | Build and manage an effective alumnae program. |
| **STRATEGY 6.4** | Create an exit program for graduating actives. |
| **ACTIVITY 6.4.1** | Develop an exit package for all new alumnae. |
| **DESCRIPTION** | This program should include congratulations on graduation, thank them for their active dedication to OPA, and inform them of how to get involved as an alumna. This package will be mailed twice a year to recent graduates and women who have become early alum. This package is meant to be a welcome to alumnae membership, a friendly correspondence that motivates the new alumna to stay involved the best she can. The package will outline different ways to stay involved no matter if the woman is going on to graduate school, entering the workforce, or starting a family. Names of early alumnae and graduates will need to be turned in via the Member Status Update Form to the Virtual Assistant (VA) in October and February of each year. A comprehensive list of what items should be included in these packets should be noted in SOPs. It is necessary to check for items already created in other steps of this strategic plan that may be included in that packet, rather than creating additional similar items. The packets contents may improve and expand with time, and should be updated annually. Packets should also be available on the national webpage. |
| **RESPONSIBILITY** | Young Alumnae Leader and Alumnae Exit Package Committee |
| **TIMETABLE** | Start 8/1/05<br>End 11/1/05<br>Ongoing mailings |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Postage | Recurring | $200.00/yr |
| Packet development | One-time | $300.00 |
| Packet printing | Recurring | $200.00/yr |
| Exit Package Committee time | Recurring | 20 hours |

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| **LEGISLATION** | None |
| **EVALUATION** | 11/1/05 Package materials identified and ready for distribution<br>11/15/05 First mailing sent<br>Ongoing Mailings sent each November 15th and April 15th |

# ΩΦA Action Plan

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| **GOAL 6** | Build and manage an effective alumnae program. |
| **STRATEGY 6.4** | Create an exit program for graduating actives. |
| **ACTIVITY 6.4.2** | Create an interest checklist that allows graduating members to notify OPA of their desire and preferred way to remain involved. |
| **DESCRIPTION** | Create a form that can be included in the exit package mailings, and placed online. This form will be an informal way for alumnae to identify ways they are interested in continuing to be involved with OPA after graduation. The form should list various opportunities available, and allow the member to mark their interests. The form can be submitted anytime just prior to and anytime after graduation. Members may wish to update their interests over time. |
| **RESPONSIBILITY** | VP Alumnae Relations |
| **TIMETABLE** | Start 8/1/07<br>End 12/1/07 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Alumnae Relations time for development of form | One-time | 2 hours |
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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 11/1/07 Form complete<br>11/15/07 Form online and ready for use<br>12/1/07 Begin distributing forms with exit mailing packages |

# ΩΦA Action Plan

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|---|---|
| **GOAL 6** | Build and manage an effective alumnae program. |
| **STRATEGY 6.4** | Create an exit program for graduating actives. |
| **ACTIVITY 6.4.3** | Create welcome packets for common cities our graduates move to. |
| **DESCRIPTION** | Create a package of information about service opportunities, local alumnae (especially those actively involved with OPA), alumnae chapters nearby, and community services for common cities our graduates move to. The information should be placed online for alumnae to retrieve. When address changes are received from alumnae for cities we have packages for, the Virtual Assistant (VA) will send a postcard to the alumna that directs them to the website for information.<br><br>This step requires the creation of a Community Packets Committee to help develop the city packets. |
| **RESPONSIBILITY** | VP Alumnae Relations, Community Packets Committee, and Virtual Assistant. |
| **TIMETABLE** | Start 8/1/08<br>End Ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Community Packets Committee budget (calls, supplies) | Recurring | $100.00 |
| VP Alumnae Relations budget increase | Recurring | $50.00 |
| Community Packets Committee time for researching information | Recurring | 15 hrs |
| Virtual Assistant time mailing postcards (2 hours) | Recurring | $30/year |
| Postcards (printing and postage) | Recurring | $50/year |

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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 11/1/08 Identify materials and topics that should be in each packet<br>12/15/08 List of goal cities to cover for the next several years<br>1/15/09 Standard postcard created<br>8/1/09 First 10 city packets online<br>2009-10 Add 10 new city packets<br>Ongoing Update packets to keep the information current, and add additional cities as needed |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.1** | Develop an organization wide fundraising initiative. |
| **ACTIVITY 7.1.1** | Review previous fundraising plans and initiatives. Determine the effectiveness of current fundraising methods used at all levels of the organization – include ALL collections from ALL sources (include dues and other collections from members). |
| **DESCRIPTION** | Review Vision 2005 and the National Fundraising Plan introduced at Midyear 2005. Identify all revenue sources for all segments of OPA including (but not limited to): 1) average annual collection, 2) amount of collections per sister, 3) source of funds, 4) method of collection, and 5) how funds are used. Based on information above, rank each method of fundraising based on effectiveness: 1) by sister, and 2) annual total.<br><br>First draft of the report should include a list by component of all monies collected during FY05. This report should be reconciled to the financial report prepared by the VP Finance and then confirmed by each chapter.<br><br>Final report will enable us to evaluate our current collection methods in terms of effectiveness – for inclusion in a comprehensive plan. |
| **RESPONSIBILITY** | Fundraising Chair and VP Finance |
| **TIMETABLE** | Start 10/1/05<br>End 6/30/06 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Supplies/postage | One-time | $25.00 |
| Fundraising chair/VP Finance time | One-time | 40 hours |
| Chapter officer time (2 hours/chapter) | One-time | 34 hours |
| Will use email to gather info – chapter news etc | | |

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| **LEGISLATION** | None |
| **EVALUATION** | 3/31/06 Draft completed<br>6/30/06 Final report due |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.1** | Develop an organization wide fundraising initiative. |
| **ACTIVITY 7.1.2** | Establish the infrastructure to support the fundraising effort across the organization, including the people, procedures and evaluation tools to ensure a successful model. |
| **DESCRIPTION** | To truly sustain a fundraising initiative, we need to establish the infrastructure within OPA to allow that to take place. That includes the following:<br><br>❖ RESOURCES:<br>➢ National level – the Fund Development Coordinator (FDC) will be appointed by and report to the National President to work with the NEB and a representative from each component of the organization.<br>➢ National level – the VP Alumnae Relations will appoint one District Alumnae Advisor (DAA) to work with the FDC to coordinate the fundraising initiative for alumnae at the national level.<br>➢ District level – the Traveling Leadership Consultant's (TLC's) duties will include working closely with the FDC to coordinate the fundraising initiative at the district level.<br>➢ Active chapters – each chapter will appoint a chapter fund development chair to coordinate the fundraising initiative at the active chapter level.<br>➢ Alumnae chapters – each alumnae chapter MAY appoint a chapter fund development chair to coordinate the fundraising initiative at the alumnae chapter level, based on their organizational structure.<br><br>❖ PROCEDURES:<br>➢ We need to develop written procedures for how fundraising activities are conducted and resource materials to provide information on how to conduct events.<br><br>❖ EVALUATION TOOLS<br>➢ We need to develop tools to allow us to evaluate and report on the effectiveness of our efforts. Did we really make any money? Did we enjoy ourselves? |
| **RESPONSIBILITY** | VP Finance (develop initial proposal)<br>Fund Development Coordinator (completion of the plan) |
| **TIMETABLE** | Start 6/30/06<br>End 6/1/08 |

**RESOURCES**

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| FDC officer budget | Recurring | $200.00 |
| FDC Travel – NEB meetings/convention | Recurring | $600.00 |
| Print procedures – distribution | One-time | $25.00 |
| VP Finance time to write legislation | One-time | 3 hours |
| FDC to write legislation and implement @ district | One-time | 20 hours |
| FDC to implement @ chapter level | One-time | 50 hours |
| FDC to implement @ alumnae level | One-time | 20 hours |

**LEGISLATION**

Creation of new FDC position in constitution – Convention 2006
Creation of new district positions in constitution – Convention 2007

**EVALUATION**

| | |
|---|---|
| 6/30/06 | Initial legislation and procedures to create FDC |
| 8/1/06 | Appoint FDC |
| 12/31/06 | Procedures and evaluation tools ready |
| 6/30/07 | Chapter and district Fund Development Chairs created |
| 12/31/07 | Alumnae chapter chairs created |
| 6/1/08 | Procedures written; evaluation tools available; chapter Fund Development Chair positions created in each chapter |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.1** | Develop an organization wide fundraising initiative. |
| **ACTIVITY 7.1.3** | Establish a separate fund for "fundraising administrative proceeds" to allow for the development of professional marketing campaigns and paid professional fees. |
| **DESCRIPTION** | Beginning immediately, set aside 10% of all proceeds from "external revenues generated for OPA" (to be defined in the National Handbook) into a separate fund. This money will be used exclusively for the purpose of developing marketing campaigns and professional fundraising campaigns and the administrative costs associated with fundraising. As our fundraising efforts become more successful, the amount available for professional help will grow and help us earn even more money. The fundraising campaign and setting aside the 10% fee can begin immediately as long as we wait until the delegation approves the use of donations and the administrative fee to spend the proceeds.<br><br>NOTE: This should be an organization-wide effort; funds raised at every level that meet the definition will contribute 10% to the effort, and all levels will benefit from the marketing campaigns. |
| **RESPONSIBILITY** | VP Finance |
| **TIMETABLE** | Start 7/1/05<br>Ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| New accounting system | One-time | $5,000 |
| VP Finance time to prepare legislation | One-time | 3 hours |
| | | |
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|---|---|
| **LEGISLATION** | A bylaws revision will be needed to describe our accounting structure as we become more complex. It will definitely require a substantive proposal at Convention 2005 to use the funds as described.<br><br>A budget proposal for the 10% fundraising administrative proceeds will need to be presented at Convention 2005. |
| **EVALUATION** | 6/30/06 $100 in the fund (10% of 1,000)<br>6/30/07 Generating $500 - $1,000 a year for the fund<br>Ongoing Total amount generated should continue to grow |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.1** | Develop an organization wide fundraising initiative. |
| **ACTIVITY 7.1.4** | Contract with professional marketing firm to develop a fundraising plan for OPA – each component. |
| **DESCRIPTION** | Using primarily proceeds from earlier fundraising efforts, work with a professional firm to develop a fundraising strategy that we can apply across our organization to target our different donors (parents, alums, corporations, etc).<br><br>This plan will need to be multi-faceted since we have many levels within our organization and need to allow our donors the ability to give where they feel most comfortable – at the local or national level. |
| **RESPONSIBILITY** | Fund Development Chair (FDC) |
| **TIMETABLE** | Start 7/1/2008<br>End Ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Fundraising Consultants | One-time | $15,000 |
| FDC time working with consultants | One-time | 30 hours |
| VP Finance working with consultants | One-time | 20 hours |
| VP Communication working with consultants | One-time | 20 hours |

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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 12/31/08 RPF for consultants<br>12/31/09 Complete plan from consultants<br>Ongoing Plan in use, increase external revenue by 25% |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.2** | Identify available resources and communicate giving opportunities. |
| **ACTIVITY 7.2.1** | Develop section on OPA website for on-line donations. |
| **DESCRIPTION** | Using the OPA website re-development currently underway, develop a special section to encourage donations. This section should allow for a wide variety of donations including:<br>Direct chapter support<br>Alumnae – general<br>Alumnae – special project<br>Sorority – general<br>Sorority – special project<br>Scholarship trust (501c3)<br><br>The donor should be able to record their donation online and then send the payment by check or via Pay Pal. |
| **RESPONSIBILITY** | VP Communications and VP Finance |
| **TIMETABLE** | Start 8/1/05<br>End 12/1/05 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Part of website design – no additional cost | One-time | |
| VP Communications time | Recurring | 5 hours |
| VP Finance time | One-time | 2 hours |
| | | |

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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 12/1/05 Interested parties are able to visit our website and make on-line donations. |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.2** | Identify available resources and communicate giving opportunities. |
| **ACTIVITY 7.2.2** | Initiate an alumnae annual giving program. |
| **DESCRIPTION** | Contact alumnae and offer them the opportunity to get back involved with OPA. Be sure to let them know that we need their TIME, their TALENT, and their IDEAS, but if they happen to want to send MONEY, they have these options:<br>Direct chapter support<br>Alumnae – general<br>Alumnae – special project<br>Sorority – general<br>Sorority – special project<br>Scholarship trust (501c3)<br>Investigate phone solicitation options for contacting alumnae for this task. One suggested method is the use of phonetree.com. |
| **RESPONSIBILITY** | VP Finance and VP Alumnae Relations |
| **TIMETABLE** | Start 11/1/05<br>End Ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Supplies | Recurring | $25.00 |
| VP Alumnae Relations | One-time | 3 hours |
| VP Finance | One-time | 3 hours |
| Virtual Assistant (4 hours) | Recurring | $60.00 |

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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 12/1/06 Letter drafted and distributed<br>6/1/06 Donations starting to come in<br>Ongoing Send letters annually in August |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.2** | Identify available resources and communicate giving opportunities. |
| **ACTIVITY 7.2.3** | Develop a section of the national website for sharing fundraising ideas, contacts and links. |
| **DESCRIPTION** | In the members' only section of the website, setup a section for sharing fundraising project ideas, contacts and links. Encourage chapters (both active and alum) to post ideas and results of projects. |
| **RESPONSIBILITY** | VP Communications to design/develop site<br>National Fundraising Chair to oversee the site and be sure that it is developed<br>Fund Development Coordinator to continue ongoing oversight |
| **TIMETABLE** | Start 1/15/06<br>End 3/15/06 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Website design (already planned) | | |
| VP Communications time | One-time | 5 hours |
| Fundraising Chair time | One-time | 5 hours |
| Fund Development Coordinator | Recurring | 5 hours |

| | |
|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 3/1/06 Website section is developed<br>3/15/06 Chapters and others begin contributing ideas and posting results of projects |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.2** | Identify available resources and communicate giving opportunities. |
| **ACTIVITY 7.2.4** | Develop a written statement that can be given to each member that explains how important their *personal* contribution to OPA is – in terms of time, talent, money and ideas. |
| **DESCRIPTION** | We need a document that can be given to our members that explains how important each individual is to this organization. Their time, their talent, their ideas, and yes, their money is critical in making OPA a successful sorority. Each member should receive this upon milestones in their OPA career - when they are activated, upon their graduation, when they are elected to a national office, etc.<br><br>This will be a wonderful marketing tool when seeking donations. We may want to get some professional help with this at a later date, but we can make it very special now. |
| **RESPONSIBILITY** | VP Communications and National Secretary |
| **TIMETABLE** | Start 1/15/06<br>End 5/1/06<br>Ongoing distribution |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Supplies (letter for each pledge/graduating senior) | Recurring | $75.00 |
| VP Communications | One-time | 3 hours |
| National Secretary time | Recurring | 4 hours |
| Virtual Assistant (1 hour) | Recurring | $15.00 |

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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 3/15/06 Letter drafted<br>5/1/06 Letters received by spring 06 pledge class<br>Ongoing Letters received by all pledges as activated, actives at their senior ceremony; national or regional officers as inducted, and other events as deemed appropriate |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.3** | Investigate grant, investment, and tax opportunities. |
| **ACTIVITY 7.3.1** | Create a 501c3 organization for the sorority to allow tax-deductible donations. |
| **DESCRIPTION** | Develop within the structure of OPA, an educational foundation that will enable us to apply for a 501c3 tax-exempt status. It will be necessary to:<br>• Get a legal advisor to help us work through the process<br>• Define our operations to split out the educational portions<br>• Prepare the necessary tax and legal documents to apply for foundation status<br>• Continue to do the necessary accounting to maintain separate records<br><br>Investigate the possibility of absorbing the existing scholarship trust into the new educational foundation. |
| **RESPONSIBILITY** | Legal Advisor and VP Finance |
| **TIMETABLE** | Start 8/1/05<br>End 6/30/07<br>Ongoing necessary accounting |

**RESOURCES**

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Accounting system to track at this level | One-time | Included in activity 7.1.3 |
| VP Finance implement new system | One-time | 75 hours |
| VP Finance prepare tax papers foundation | One-time | 15 hours |
| Legal Advisor prepare foundation papers | One-time | 25 hours |
| VP Finance prepare 501c3 application | One-time | 5 hours |
| Legal Advisor prepare 501c3 application | One-time | 5 hours |
| VP Finance prepare private charity application | One-time | 5 hours |

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| **LEGISLATION** | A substantive proposal will be required to move the designated portions of OPA operations into the 501c3 organization. The new activity will be a separate legal entity with a separate board, so we will need to account for things that way. |

**EVALUATION**

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|---|---|
| 9/30/05 | Appoint Legal Advisor |
| 6/30/06 | Define organization structure |
| 6/30/07 | Prepare legal and tax documents |
| Complete | 501c3 status is conferred by IRS |
| Follow-up | 60 months after 501c3 status is conferred, must file for private charity status |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.3** | Investigate grant, investment, and tax opportunities. |
| **ACTIVITY 7.3.2** | Apply for federal and private foundation grants to fund OPA activities. |
| **DESCRIPTION** | In that OPA prepares college age women with leadership skills and promotes service, we should pursue funding from government and corporate grants that are intended to promote those ideals. We would need to generate a standard proposal that describes OPA and our activities that could then be modified to the specific requirements of each grant application.<br><br>Once the basic package is completed, it would be necessary to do a search on the on-line grants websites (available at the public library) to locate grants that we would be eligible for and start sending in applications.<br><br>Seek advice and support from a volunteer grant writer. |
| **RESPONSIBILITY** | VP Communications and VP Finance |
| **TIMETABLE** | Start 7/1/06<br>End 3/31/07<br>Ongoing for other grants |

**RESOURCES**

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Paper/printing | Recurring | $25.00 |
| Postage | Recurring | $25.00 |
| Grant writer development time | One-time | 40 hours |
| VP Finance research time | Recurring | 5 hours |
| | | |

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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 12/31/06 Complete basic package<br>3/31/07 Submit first grant application<br>Ongoing Submission for additional grants |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.3** | Investigate grant, investment, and tax opportunities. |
| **ACTIVITY 7.3.3** | Maximize investment earnings on idle funds. |
| **DESCRIPTION** | OPA's investment policy has always been ultra conservative. Our investments are currently held in US Savings Bonds and Certificates of Deposits. Given the inflation rate and the interest we are earning, our investments do not even keep pace with inflation. If we start to earn more money from donations and begin to think of our money as one large "pool" rather than 20 very small accounts, we should be able to invest our funds in a way to earn much higher interest while still protecting the sorority's assets.<br><br>We do not currently have sufficient resources to enlist a professional for these services, but when our "invest-able" balance reaches $50,000, we should employ a financial manager and pay the fees necessary for their services. |
| **RESPONSIBILITY** | VP Finance |
| **TIMETABLE** | Start 12/31/07<br>End Ongoing review |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Financial Manager fees | Recurring | $500.00 |
| VP Finance time | Recurring | 10 hours |
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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 6/30/08 Increase returns from investment by 5% in first year<br>Ongoing Annual increase returns from investment of 10% |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.3** | Investigate grant, investment, and tax opportunities. |
| **ACTIVITY 7.3.4** | Increase chapter savings balances with national using an education/incentive program to encourage deposits. |
| **DESCRIPTION** | Currently the national organization can offer chapters the ability to keep their idle funds in the national account and earn interest at a rate much higher than what they can earn in a bank savings account (even though we are only currently investing in bonds or CDs, the rate is still much higher than a bank). This "pooling" of assets is good for the chapter and good for the sorority as a whole as it allows us to earn more on our money.<br><br>Unfortunately, many chapters do not take advantage of this. They allow their chapter accounts to build large balances that are earning little or no interest.<br><br>We need an education/incentive program to encourage chapters to use this service that is currently available to them. |
| **RESPONSIBILITY** | VP Finance |
| **TIMETABLE** | Start 9/30/05<br>End 6/30/06<br>Since the service is already available, this is just a matter of developing the materials for presentation and incentives – this could be done by 9/30/05 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Supplies | Recurring | $25.00 |
| Incentives | One-time | $500.00 |
| VP Finance develop/distribute incentive plan | One-time | 10 hours |
| VP Finance encourage ongoing participation | Recurring | 10 hours |

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|---|---|
| **LEGISLATION** | A budget proposal for FY 2006 will need to be presented at Convention 2005. |
| **EVALUATION** | 9/30/05 Materials are distributed<br>6/30/06 Chapter savings balances increased by 100%<br>Ongoing Continue with the program and encourage chapters to use the accounts |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.4** | Develop donor recognition program. |
| **ACTIVITY 7.4.1** | Create a special insert to the *Chevron* to recognize donors. |
| **DESCRIPTION** | Create an insert for the *Chevron* that will be used to recognize donors at all levels. We could develop donor "levels" to recognize those who give at a certain level and publish a list of all those who help OPA throughout the year. The insert would probably be published annually and would include everyone, not just alumnae who had contributed. |
| **RESPONSIBILITY** | VP Communications and VP Finance |
| **TIMETABLE** | Start Summer 2006<br>End Ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| 1 page insert to *Chevron* – summer issue | Recurring | $50.00 |
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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | Summer 2006 First printing in Summer 2006 *Chevron* issue<br>Ongoing Donor information printed annually in summer *Chevron* issue |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.4** | Develop donor recognition program. |
| **ACTIVITY 7.4.2** | Report all donations received by each chapter as well as those received at the national level. |
| **DESCRIPTION** | Each year, encourage chapters to report all donations that they have received from their alumnae, from their universities, from parents, and from the communities where they are located. Include donations of money, time, talent and ideas. These donations will be recognized in a special insert in the *Chevron* with special mention for the most signification donations being made at the annual convention. |
| **RESPONSIBILITY** | VP Communications and Awards Chair |
| **TIMETABLE** | Start 1/1/06<br>End Convention 2006 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Special insert in *Chevron* | Recurring | Included in activity 7.4.1 |
| VP Communications | One-time | 5 hours |
| Awards Chair | Recurring | 3 hours |
| | | |

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|---|---|
| **LEGISLATION** | None – these will just be mentions, not actual awards to be given. |
| **EVALUATION** | 06/1/06 Information will be available for summer *Chevron* issue<br>Conv. 2006 First commendations will be made at Convention 2006 |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.4** | Develop donor recognition program. |
| **ACTIVITY 7.4.3** | Design/purchase donor gifts to reward donors for making contributions. |
| **DESCRIPTION** | As a part of the overall funding plan, develop small gifts that can be sent to donors to thank them for their donations. These gifts can include: address labels, calendars, and note pads. Items that are easily mailed with a donation request and can be personalized with the donor name and ΩΦA. |
| **RESPONSIBILITY** | VP Communications, VP Finance, and VP Alumnae Relations |
| **TIMETABLE** | Start 1/1/06<br>End 7/1/06 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Printing fundraising items | Recurring | $500.00 |
| VP Communications | One-time | 15 hours |
| VP Finance | Recurring | 5 hours |
| VP Alumnae Relations | Recurring | 5 hours |

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| **LEGISLATION** | We should segregate this activity into a separate fund, so we would need a substantive proposal for that. |
| **EVALUATION** | 1/1/06 Begin designing & contacting vendors<br>7/1/06 Items available for distribution |

# ΩΦA Action Plan

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|---|---|
| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.4** | Develop donor recognition program. |
| **ACTIVITY 7.4.4** | Provide a "lifetime of giving" plan with appropriate recognition and "rewards." |
| **DESCRIPTION** | This could be a little tricky and we need to be sure we are ready for this before we start it, but the bottom line is that we track a sister's financial donations for her entire lifetime and beyond. Sisters would be encouraged to include OPA in their wills, and we would include a way to recognize their lifetime of giving in their memorials.<br><br>Set giving recognition levels for increments from $25 through $25,000. Currently we have a similar set of recognition levels for donations to the scholarship trust, but the current levels only span from $25 through $100. |
| **RESPONSIBILITY** | VP Finance and VP Alumnae Relations |
| **TIMETABLE** | Start 7/1/08<br>End 12/31/09 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Finance system development | One-time | 25 hours |
| VP Alumnae Relations system development | One-time | 25 hours |
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| **LEGISLATION** | Bylaws legislation will be needed to recognize the plan and establish levels of giving. |
| **EVALUATION** | 12/31/08 Draft plan ready<br>Midyear 2009 Present to NEB<br>Conv. 2009 Present to convention delegation<br>Fall 2009 Finalize all details and prepare for implementation<br>12/31/09 All legislation adopted and plan in place |

# ΩΦA Action Plan

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| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.5** | Develop a sponsorship program. |
| **ACTIVITY 7.5.1** | Identify activities and functions that private companies could "sponsor" with donations. |
| **DESCRIPTION** | In that OPA prepares college age women with leadership skills and promotes service, we should pursue funding from corporations that are intended to promote their products or services to our members as long as they meet certain established guidelines. We would need to establish very specific guidelines about the way that our members could be "solicited" in exchange for the sponsorship. Sponsorships/advertising could be sold in association with sorority publications and specials events on the local, district, and national level.<br><br>Review the National Fundraising Plan proposed at Midyear 2005.<br><br>First, we need to determine what activities, such as convention banquet, service projects, maybe one of the convention lunches, or the materials for convention, etc could be sponsored. |
| **RESPONSIBILITY** | VP Communications, VP Finance, and VP Business Operations |
| **TIMETABLE** | Start 8/1/06<br>End Convention 2007 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Communications development time | One-time | 3 hours |
| VP Finance development time | One-time | 3 hours |
| VP Business Operations development time | One-time | 3 hours |
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|---|---|---|
| **LEGISLATION** | A substantive proposal and bylaws legislation will be required to approve sponsorship program with written procedures that strictly define how and when members will be solicited, and ensuring confidentiality of member information and privacy of our members. | |
| **EVALUATION** | 12/1/06 | Complete list of possible activities and functions identified for sponsorship |
| | Midyear 2007 | Submit list to NEB for additional input |
| | Conv. 2007 | Submit to convention delegation for approval |

# ΩΦA Action Plan

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| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.5** | Develop a sponsorship program. |
| **ACTIVITY 7.5.2** | Identify incentives to be given in return for sponsorship dollars and levels of sponsorship. |
| **DESCRIPTION** | Determine what will be offered in return for sponsorship dollars. Will we provide advertising space on t-shirts, banners, our website, etc, or provide some other type of incentive? We should create levels of sponsorship, either by activities or dollar amounts, or both. Each level would detail the incentives offered for that level of sponsorship. |
| **RESPONSIBILITY** | VP Communications, VP Finance, and VP Business Operations |
| **TIMETABLE** | Start 1/15/07<br>End Convention 2007 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Communications development time | One-time | 3 hours |
| VP Finance development time | One-time | 3 hours |
| VP Business Operations development time | One-time | 3 hours |
| | | |

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| **LEGISLATION** | Substantive and bylaws legislation needed for delegation to approve sponsorship program. |
| **EVALUATION** | 6/1/07 Creation and documentation of levels and incentives<br>Conv. 2007 Present to convention delegation for approval. |

# ΩΦA Action Plan

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| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.5** | Develop a sponsorship program. |
| **ACTIVITY 7.5.3** | Develop list of potential companies to solicit for sponsorships. |
| **DESCRIPTION** | We should identify a list of about 20 companies to initially solicit for these sponsorships. Additional companies can be added to the list over time. |
| **RESPONSIBILITY** | VP Communications, VP Finance, and VP Business Operations |
| **TIMETABLE** | Start 1/15/07<br>End 8/1/07 |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| VP Finance research time | One-time | 2 hours |
| VP Business Operations research time | One-time | 2 hours |
| VP Communications research time | One-time | 2 hours |

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| **LEGISLATION** | Substantive and bylaws legislation needed for delegation to approve sponsorship program. | |
| **EVALUATION** | 6/1/07 | Potential company list completed |
| | Conv. 2007 | Present to convention delegation for approval |
| | 8/1/07 | Complete sponsorship/advertising guidelines in place |

# ΩΦA Action Plan

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| **GOAL 7** | Increase revenue from external sources. |
| **STRATEGY 7.5** | Develop a sponsorship program. |
| **ACTIVITY 7.5.4** | Seek contributions from private companies to sponsor specific activities or functions. |
| **DESCRIPTION** | Once sponsorship program has been approved by the delegation at Convention 2007, we can begin actually contacting companies to sponsor OPA activities starting with the 2007-08 school year. |
| **RESPONSIBILITY** | VP Communications |
| **TIMETABLE** | Start 8/1/07<br>End Ongoing |
| **RESOURCES** | |

| Item/Mileage | Recurring or One-time | Amount |
|---|---|---|
| Paper/printing | Recurring | $100.00 |
| Postage | Recurring | $200.00 |
| VP Communications time | Recurring | 20 hours |

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|---|---|
| **LEGISLATION** | None |
| **EVALUATION** | 12/31/07 20 sponsors contacted<br>2007-08 At least 2 sponsorships secured for activities during the 2006-07 academic year |