

Planning & Training -- Quadrant 2

Setting Up Officer Structure and Yearly Calendar of Events Helps Create an Effective Structure and Road Map

In order to be successful, a chapter needs to have an internal structure which keeps things running smoothly. This structure revolves around having the right leaders in the right officer positions who have a clear understanding of their roles and responsibilities. It also revolves around a yearly plan of events which help members effectively schedule their involvement and interaction with the chapter. Both are important to keep things in a chapter operating effectively.

Developing a calendar and setting dates make it easier for people to plan to attend an event, and will limit having to cancel or change a program or scramble to get people to come. Setting a calendar with topics and programs gives structure to the year. You always can change the focus or format of the meeting as the date draws nearer. With a definite perspective as to what the chapter proposes to do during the year, members can more readily plan the activities into their schedules. It is essential that the calendar be set well in advance.

Make the calendar, including all updates and revisions, available to all chapter members in a variety of formats. Issue a yearlong calendar as close to the beginning of the year as possible. Provide updates regularly or when changes occur. Provide reminders 1–2 weeks before each event. Use a variety of media, such as:

- a handout at chapter meetings;
- announcements of upcoming events at each meeting;
- your chapter newsletter; and
- e-mails with a two-week window of events every other Monday.

Find a system that works best for you and your chapter. Just remember that if you haven't told them at least twice, they probably haven't heard you at all. Your calendar is bound to need changing and rescheduling. Cancellations will happen and conflicts will pop up for which you could not have planned. As a common courtesy, most planning experts say that you should NEVER give less than two weeks notice for any event.

The chapter's success is related directly to the time and effort in preparing and training the chapter's officers and leaders. Some of the major tasks that the chapter must accomplish before the biennium begins are goal setting, action planning, budgeting, and creating strategies for involving members through the chapter committee structure.

Most of the tasks described here ask you to do what can be very difficult, but is the mark of real leadership: letting others do the work, with you assuming a supporting role. Organize and implement an officer training meeting to occur within four weeks of officer elections.

Take this time to team build, learn about one another, evaluate the chapter's strengths and weaknesses, set goals for the upcoming biennium, and develop an action plan for meeting

those goals, including empowering members.

The Program Committee should meet in the spring (no later than mid-summer) to plan the programs for the ensuing year, including all necessary arrangements (room reservations, particularly).

In smaller chapters, the executive committee will be responsible for programs and membership, if there aren't enough members for separate committees.

Expectations for your chapter encompass three key elements for success: education about the Society, communication, and delegation. If your chapter dedicates itself to these three things in all facets of chapter operations, you will create a chapter that runs itself.

When you receive mail from the state organization or International Headquarters, you can be sure that it contains important information, such as new forms, Society updates, new resources to assist you, membership items, etc. Distribute this information to other officers in person, either at an executive board meeting or one-on-one. Don't just hand someone mail! Look through the information with them and make sure that you both understand what needs to be done with each item.

Checklists for Planning & Training

- Set calendar dates in advance
 - recruitment activities and initiation of members
 - fund-raiser(s)
 - meetings and programs
 - service project(s)
 - social(s)

- Communicate the calendar to members
 - chapter meetings
 - newsletters
 - E-mail
 - Web site

- Leadership
 - Meet within four weeks of elections
 - Set goals for the biennium
 - Plan actions with deadlines to accomplish goals
 - Assign duties to complete actions
 - Establish a budget
 - Devise ways to involve all members

Adapted from the Kappa Delta Pi Chapter Handbook