

# CHAPTER OPERATIONS

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## CONTINUITY PLANNING GUIDE

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# OVERVIEW

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There's no denying that social distancing forced most, if not all chapters to make quick and substantial pivots in terms of chapter operations this past spring. While this was an uncomfortable and less than ideal situation that likely challenged the leadership skills of officers and members, APO chapters across the country answered the call and found ways to ensure students stayed connected, supported each other and their communities through crisis, and continued finding ways to be a leader, be a friend and be of service. The commitment of our student to improve the world for those around them, no matter how far apart the world might seem, was aweinspiring.

While we hope to some day move back to what we once saw as normal campus and chapter operations, the reality is that as a society we will likely be asked to continue modifying in order to maintain social distance for at least the near future in order to reduce exposure. With that, campus operations will vary greatly from one state to the next this coming fall.

We all look forward to the day when we can return, physically, to campus and we want to be sure that we are ready for when that time comes. A little bit of planning can make it easier to hit the ground running. In order to be prepared for what comes in the coming academic year, chapter officers must spend time as an executive committee discussing, preparing and creating plans for modified operations.

Now is the time to be flexible, patient and creative when it comes to chapter operation and activities. As the country and world work to recover from this pandemic and the subsequent socio-economic crisis, APO chapters will be needed more than ever. Alpha Phi Omega was founded for moments like this - where a high standard of college student steps forward to shine the light of service during crisis on their campus, community, fraternity, country and world.

This guide will direct officers through the following series of facilitated discussions and activities to help prepare the chapter for whatever the campus environment looks like this coming academic year:

1. Discussion and brainstorming to identify key strategic planning areas
2. Delegation of planning topics to sub-groups
3. Regrouping to finalize and execute plans

At the least, the chapter's executive and advisory committees will need to be involved in these activities. The best practice would be for the chapter's leadership to guide this process and ask for participation from as many chapter members as possible to ensure the chapter's voice is heard. You will need one facilitator to guide the first activity. The facilitator can be a chapter leader, however it doesn't need to be.

While this is an unprecedented situation, there is one thing that is consistent decade after decade... The chapters and brothers of Alpha Phi Omega will work and be creative in finding ways to support their campuses and communities through service, leaving the world better and brighter.

## ACTIVITY 1

# FACILITATED DISCUSSION

The first activity is a facilitated discussion. The objective is to arrive at a list of strategically important planning topics and specific priorities, challenges, and ideas for each. At the end of this activity, planning topics will be delegated to sub-teams for further development.

## SET UP

### TIME

You will need about 2 hours for this activity.

### ROLES

Identify one person in advance for each of the roles below:

- **FACILITATOR** - Organizes and guides the discussion. Helps to steer the group towards identifying planning topics. Ideally this would be a strong facilitator and a person who can focus on guiding the discussion rather than participating directly in it, such as a graduating senior, advisor, alumnus.
- **SCRIBE** - Records highlights of the conversation and documents the list of planning topics.

## ACTIVITY INSTRUCTIONS FOR THE FACILITATOR

### INTRODUCTION

*{Facilitator Note: Read the text below to the group}*

Social distancing measures brought on by COVID-19 have led to vast, but hopefully temporary, changes to our society and to our campus. Most of our Brothers across the country are now engaging with their colleges remotely, which means that our chapters are operating remotely as well. We all look forward to the day when we can return, physically, to campus and we want to be sure that we are ready for when that time comes. A little bit of planning can make it easier for us to hit the ground running.

In the next two hours, I will ask a series of questions to spark conversations about how our chapter will change over the coming months and how we can best prepare for when we return to campus. At the end, we will identify topics for further planning and development and assign them out to groups to find solutions for our chapter. Once these groups have had some planning time, we will reconvene to agree on our plans as a chapter.

As we have these discussions, remember that the most important thing is the health of our chapter and the success of our Brothers. These are remarkable times, and getting through them successfully will require remarkable solutions, exhibiting flexibility, creativity, and compassion. We shouldn't be afraid to think outside of the box or "break the rules". At a time like this, maintaining the status quo may not be in our chapter's best interest, even if it means temporarily relaxing our policies. Despite its challenges, this time presents an opportunity to try bold new things and in the end we may find that some of the ideas that we try are worth adopting permanently.

## ACTIVITY INSTRUCTIONS FOR THE FACILITATOR (CON'T)

While social distancing will eventually end, the timeline isn't certain.

As I ask each question, consider what the answers might be under each of the following possible scenarios:

1. We return to campus, as normal, in the fall
2. We return to campus with a delayed start
3. We return to campus in a split environment, where some brothers have physically returned and some are still remote
4. We return to campus, and are subject to changing policies in response to transition or infection surge related measures, such as limited access to facilities, limits on group meeting size, a return to remote learning, etc.
5. Fall is fully remote

## DISCUSSION QUESTIONS

*{Facilitator Note: Read each of the following questions to the group, and guide the group through resulting discussion. You will want to help the group identify potential challenges, potential solutions, and natural topic groupings. The scribe should record highlights and important points. The recommend time for each of the four major sections is 20 minutes.}*

### MEMBERSHIP MANAGEMENT

- How is our chapter's size likely to have changed when we return?
- How will this affect our chapter operations and programs?
- When we return, will it be reasonable to apply our normal Active requirements?
- Are there potential unintended consequences of applying normal Active requirements upon our return to campus?
- Does it make sense to try a different model, like rewarding meeting Active requirements but not penalizing failure to meet them?
- How do we handle requirement and rule exemptions? Does it scale to what may be needed?

### LEADERSHIP

- Will our voting procedures adapt well to a remote or mixed environment?(Robert's Rules, quorum, elections, vote counting, etc.)
- What will we do if officers need to step down?
- How will we transition officers?
- What if we don't have the number of qualified brothers that we need to fill our executive board?
- What is the minimum slate of officers that our chapter needs to operate successfully?

### RECRUITMENT

- What if we're not back on campus for our next recruitment?
- How would we conduct recruitment, new member education, and initiation remotely?

## DISCUSSION QUESTIONS (CON'T)

- What if we are back on campus for our next recruitment?
- How will we prepare remotely for an in-person recruitment?
- How do we conduct our recruitment activities in a way that conforms with social distancing and/or public health guidelines that may be in effect?
- What if we are in a mixed environment for our next recruitment?
- Can we accommodate new members who are both on and off campus?
- Does our normal new member education process make sense in this environment?
- Do our normal pledge requirements make sense?
- Does our normal pledge period make sense?

## FINANCE

How will remote operations impact our budget?

How will our spending be impacted?

How will our income be impacted?

What will our account probably look like next year?

Has our ability to access and manage our account changed?

If our account is on campus, has the school changed how accounts are managed?

Do we need to adjust which officers have access to money and how?

Do our current chapter dues make sense in this environment?

## IDENTIFICATION OF PLANNING TOPICS, PRIORITIES, CHALLENGES, AND IDEAS

Follow the steps below to develop the preceding discussion into planning topic areas for assignment to break out groups with priorities, challenges, and ideas under each. The recommend time for each of the four major sections is 20 minutes.

1. Ask the group to identify between three and six strategic planning topics that encapsulate the various discussion items that will need more development. Have the scribe list them.
2. Identify challenges and ideas that stand out from the discussion and sort them into the strategic planning topics.
3. Identify groups of brothers to take on each of the planning topics and develop solutions for the challenges and ideas in each.
4. Agree upon how long to spend before regrouping. We suggest a week or two.
5. While social distancing will eventually end, the timeline isn't certain.

## ACTIVITY 2

# PLANNING TOPIC TEAM BREAKOUTS

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Now that you have your topic teams, each team should begin developing solution proposals to share with the entire group when you reconvene after the amount of time that you have agreed upon.

## ACTIVITY 3

# REGROUP AND IDENTIFY ACTION ITEMS

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Hopefully, your focus groups were able to come up with creative ideas and suggestions to support your chapter's return to campus. In this final phase, you will discuss these ideas and decide which to go forward with. Some ideas may require the buy-in and/or approval of the whole chapter. Be sure to share the outcome of this meeting with your chapter, and decide what kinds of follow up may be needed to make the ideas that you adopt successful.

## SET UP

### TIME

You will need about 1 hour for this activity.

### ROLES

Identify one person in advance for each of the roles below:

- **FACILITATOR** - Organizes and guides the discussion.
- **SCRIBE** - Records highlights of the conversation and documents the list of outcomes.

## ACTIVITY INSTRUCTIONS FOR THE FACILITATOR

Return to the list of topics and challenges from the first discussion session. Go down the list and, for each:

- Have the breakout team present their findings and recommendations.
- Discuss and assess the ideas as a group.
- Identify concrete action items that seem promising to go forward with.

- Decide what happens next for each action item.
- Does the chapter need to formally approve this action?
- What resources are available to us to help with our action steps?
- Who will be responsible for seeing this through?

Guide the group through developing a concrete list of next steps, action plans, and/or SMARTER goals, documented by the scribe.

## **NEXT STEPS**

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Now that you have plans, carry them out.

Things will surely change over time. A major part of good planning is reassessment. As fall approaches, we suggest reviewing your progress as a group and adjusting.

If you would like and are able, you could conduct this self-assessment again, updating your plans to reflect your new environment.