**Affiliate Operations Overview**

**Policies and Procedures**

Q: When are they usually update, and what is the process?

* This is built into a position description
* Everyone helps update sections relevant to them

Q: Why are they not regularly utilized?

* Lack of understanding of how to use them
* Maybe out of date or don’t apply
* Lack of continuity
* Conflicting information

Q: What are some first steps your affiliate could take to make these documents more useful?

* Educate the board on what we have available and what they are at initial meeting
* Creating a better format and including more information

Q: What could your affiliate leadership do to integrate these documents into planning for the year?

**Position Descriptions**

Q: When are they usually update, and what is the process?

* This is built into a position description
* Everyone helps update positions relevant to them

Q: Why are they not regularly utilized?

* Maybe out of date or don’t apply
* Lack of continuity
* Conflicting information
* Not enough information to be useful in office

Q: What are some first steps your affiliate could take to make these documents more useful?

* Use position descriptions as a recruitment tool; create training materials for after a volunteer starts
* Creating a better format and including more information

Q: What could your affiliate leadership do to integrate these documents into evaluating programs/needs?

**Organizational Chart/Structure**

Q: When is it usually update, and what is the process?

* This is built into a position description
* The Executive Director updates and tracks

Q: How is it utilized?

* Website for public and members
* Training and orientation documents for volunteers

Q: What are some first steps your affiliate could take to make this documents more useful?

* Ensure it is up to date and reflects how positions report into each other
* Creating a better format and including more information

Q: What could your affiliate leadership do to integrate this document into evaluating programs/needs?

**Meeting Agendas and Minutes**

Q: How are agendas created?

* Reports submitted – timeline established
* Use of consent and working agenda
* Notes taken within working agenda for minutes

Q: Why are they not regularly utilized?

* Lack of understanding of how to use them
* Lack of engagement in reading materials before meetings (consent agenda and minutes specifically)
* Confusion of board responsibility – why do I need to read this and be prepared?

Q: What are some first steps your affiliate could take to make these documents more useful?

* Educate the board on their responsibility and importance of meeting preparation
* Creating a better format
* Having a consistent timeline for submitting reports and getting agendas out for review

Q: What could your affiliate leadership do to effectively track activities/ideas that come out of meetings?

**Strategic Plan**

Q: When is it usually update, and what is the process?

* This is built into a position description
* Committee is formed and tasked with this

Q: Why is the strategic plan not regularly utilized?

* Lack of understanding of how to use it
* Maybe out of date or doesn’t apply
* Lack of continuity
* Conflicting information with standard programs/activities

Q: What are some first steps your affiliate could take to make this documents more useful?

* Educate the board on what the plan is and which parts are their responsibility
* Creating a better format and including more information
* Yearly planning is set using the strategic plan
* Implementing tracking of activities on a regular basis
* Educate difference between strategic plan versus your annual plan of activities

Q: What could your affiliate leadership do to integrate the strategic plan into planning for the year?