



Chapter **A**ssessment and **P**lanning **S**ession Handbook

SUGGESTED SESSION AGENDA

SECTION	TIME (IN MINUTES)	ASSIGNED TO
Welcome & Overview	10	_____
What's our vision?	15	_____
What works...	45	_____
BREAK	10	_____
What could be improved...	50	_____
BREAK	10	_____
Goals discussion/formation	60	_____
Closing and evaluations	10	_____

Other Assignments:

Attendance promotion	_____
Duplication of materials	_____
Physical arrangements	_____
Other _____	_____

To the chapter president:

This Chapter Assessment and Planning Session (CAPS) Handbook can be downloaded from www.apo.org. It is your responsibility as chapter president to see that the results of the CAPS are compiled, distributed and put into action so the goals of the chapter can be acted upon in a timely manner.

SESSION OVERVIEW

TIME REQUIRED FOR CAPS	3-4 hours
WHO IS INVOLVED	The entire chapter (at the very least, the executive officers should be there)
HOW OFTEN SHOULD IT BE CONDUCTED?	Annually
WHEN?	3-4 weeks before end of the school year; ideally after officer elections
WHO SHOULD FACILITATE THE CAPS?	The chapter president and Executive Board, its advisory chairman and advisors
IS THERE ANYONE ELSE THE CHAPTER CAN CALL ON FOR ASSISTANCE?	Yes. Contact your advisors, sectional chair and/or regional director
SESSION OBJECTIVES	<ol style="list-style-type: none"> 1. To review current chapter operations. 2. To evaluate how well the chapter has met its goals. 3. To set new goals for the upcoming year. 4. To help unify the chapter and gather input from multiple perspectives. 5. To motivate the members to get the job done.

PRE-CAPS TIMELINE

<u>Action Item</u>	<u>When</u>
<ul style="list-style-type: none"> • Set date, reserve location, invite advisors 	Approximately 8 weeks in advance
<ul style="list-style-type: none"> • Review agenda and CAPS Handbook with Executive Board (including follow up actions); assign session responsibilities 	3-4 weeks in advance
<ul style="list-style-type: none"> • Distribute surveys (How Does Your Chapter Rate & Personal Interest Survey) to chapter 	1-2 weeks in advance

What is the Chapter Assessment and Planning Session?

The Chapter Assessment and Planning Session (CAPS) is a tool to help the chapter identify its goals and begin to plan its program for the coming year, based on an assessment of the past year. It is not designed to be a comprehensive, point-by-point analysis of chapter operations. It is also not designed to plan every activity or to set the calendar in stone for the coming year. However, it should identify areas the chapter wants to improve and key events or activities the chapter wants to see happen.

The end result of the CAPS is documentation of goals and desires in a form that will help the chapter officers develop and implement plans for the coming year in a manner that represents what the chapter sees as most important.

Further, it helps to think of planning as a cycle, not a straight-through process. Approaching planning as a cycle will help the chapter to ensure that plans are fully considered, well focused, flexible, practical, and effective. It will also provide an opportunity to evaluate and learn from any challenges that occur and then feed this information back into future planning and decision making.

Figure 1. The Planning Cycle



- Analysis of opportunities:
 - Review of past year's goals and programs
- Identify aim:
 - Establish or review vision statement
- Explore options:
 - Identify goals
- Selection of best option
 - Goals selection and prioritization
- Detailed planning:
 - Development of specific action plans
- Plan evaluation:
 - Revise plan if needed
 - Finalize plan
- Plan implementation:
 - Put plan into action
- Closure of plan:
 - Revise and evaluate

When to hold the CAPS

Ideally, the CAPS should be held annually around a time when there is a natural breakpoint in chapter operations – a time that allows for both reflection and planning. This usually takes place in the spring, before the chapter suspends or reduces its activity for the summer, but after holding elections for officers who will lead the chapter in the fall.

Who should attend

The CAPS is intended as a meeting for the entire chapter. At minimum, chapter officers and other chapter leaders should attend. It is recommended that chapter advisors also attend, if possible.

Preparing the participants

Distribute a copy of the Personal Interest Survey and How Does Your Chapter Rate to every brother and advisor (*See Appendix for sample forms*). Ask them to complete each of the forms prior to the CAPS and to bring the completed forms with them to the meeting. If they are unable to attend the CAPS, ask them to submit the forms to any officer prior to the meeting date. Officers should hold a brief meeting to develop a feedback summary of all How Does Your Chapter Rate forms; the Personal Interest Surveys should be retained for later review.

Materials needed

- CAPS Handbook
- A prepared outline/agenda of the session
- A calendar from the previous year with the actual events held, and other chapter accomplishments recorded
- Goals forms/action plan from the previous CAPS
- Post-Its ® (enough for each person to have 10-15 sheets)
- Each attendee should also bring a notepad
- Recently completed H. Roe Bartle Award/Review form, or a blank one if your chapter has not yet completed it
- Extra copies of How Does Your Chapter Rate forms for members who have not completed it in advance
- Extra copies of the Personal Interest Survey for those not completing it in advance
- Enough pens or pencils for everyone
- Several wide-tipped markers
- Extra newsprint/flip chart paper
- **Optional** - A calendar for the upcoming academic year with the following marked:
 - Academic schedule, including registration, vacations, midterms and finals
 - National, regional and sectional conferences
 - National Service Week
 - Spring Youth Service Day
 - Annual service projects and chapter/school events that have already been scheduled

The Process

The process below can be modified to fit the needs of the chapter, especially based on the number of people attending. Ideally, a greater number of participants should yield results that are more representative of the entire chapter's desires. At a minimum, the chapter's elected officers should complete it and report the results to the chapter for comments and feedback prior to finalizing goals and plans for the coming year. Approximately 3-4 hours should be allotted for the process, and time limits should be considered for each segment. The time limits depend upon how much time has been dedicated for the session overall.

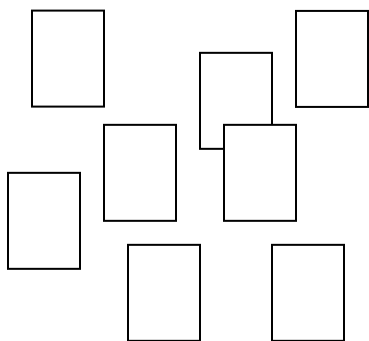
Methodology

- 1) **Small groups** - The use of small groups is intended to encourage more participation by individual members than might happen in a larger, lecture-type setting. The space being used for the CAPS should provide enough area for the small groups to gather and discuss ideas comfortably without interfering with the other groups. At a minimum, there should be a small group for each of the key areas of chapter operations being considered: leadership, friendship, service, communications, membership, recruitment and pledge education.

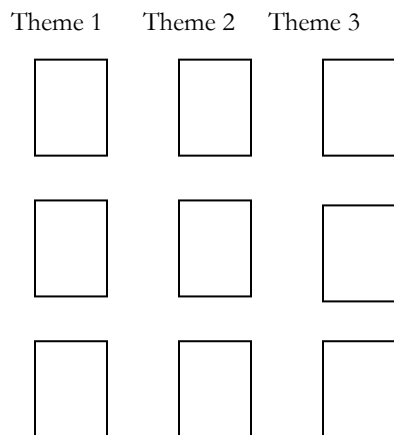
The minimum size for a small group is 3-5 members. Groups may need to be combined to reach this size, or you may decide to have more than one group for each area.

- 2) **Affinity Diagrams using Post-Its ®** (visit www.mindtools.com, click on Problem Solving, then Affinity Diagrams for more information) Affinity Diagrams are designed to get people up and moving – and thinking. After a preliminary review of How Does Your Chapter Rate to highlight areas that might deserve consideration, participants should be encouraged to think freely over all aspects of the chapter's operations and activities, and then group ideas by chapter function ("theme" as depicted in the diagram on the next page) **after** they have been captured.

Random Ideas



Affinity Diagrams



- 3) **Leadership** - The chapter president is the leader of the chapter, supported by the chapter's officers. However, you may want to involve someone else to facilitate this process. This can allow the president and the officers to participate without dominating discussions, or even hang back and observe the process, providing input only as necessary. Chapter advisors are often a good resource for this, particularly if they are familiar with the chapter, its activities and dynamics.

Procedure:

1) Getting Started

- a. **Leader** - Welcome everyone and thank them for their time. Review any safety or facility points (location of emergency exits, restrooms, etc.) Review the process to be

followed at a high-level. Remind participants that no other chapter business will be discussed or decided upon. Set expectations for the flow and for individual input. Ask if anyone has questions about the purpose of the conference, expected outcomes or the process.

2) What's our vision? Where do we want to go?

- a. **Leader** - Does the chapter have an existing vision statement? If so, review it in the large group.
- b. **All** - Write a short statement (5-10 lines max) of where you want to see the chapter in one year's time, as well as three years from now. (*See Appendix for Vision Form worksheet.*)
- c. **Small Groups** - Read each of your group member's statements and then discuss them as a group. Try to agree on a single, combined statement. If there are two or more strong but diverging visions, combine them into a few the group feels comfortable with. Hold onto these throughout the conference and refer to them as needed.
- d. **All** - Review each small group's vision statement. Discuss and capture common elements that everyone generally agrees to without spending too much time on crafting the "perfect" vision statement.

3) What works in our chapter?

- a. **Leader**
 - i. Review the How Does Your Chapter Rate summary to highlight any areas of concern or interest.
 - ii. Briefly review chapter program over the last year; including projects, fellowship events and significant achievements.
- b. **All** - Write on Post-Its ® at least 3-5 items (if there are a large number of participants, only ask for 2-4 items) you think your chapter does well. Instruct participants to write one item per Post-It ®. These could be specific events and projects or broader functions like service, membership retention, advertising, recruiting, etc.

Stick these on the walls and ask for 2-3 volunteers to group them by function (i.e. leadership, friendship, service, communications, membership, recruitment, pledge education and other).

- c. **Leader** - Call for ideas for any function listed in (b) that did not have at least 3-5 (or 2-4) items. Add these to their respective groupings.
- d. **Small Groups** - Each small group takes one or two functions. Chapter officer(s) with responsibility for specific function(s) should lead the corresponding group, or at least be a member of the group. Read each item and combine duplicates. For each unique item:
 - i. Discuss whether the item should be Continued as is or Improved.
 - ii. Mark "C" for Continued or "I" for Improved and compile into a list, using the What Works in our Chapter worksheet. (*See Appendix for What Works in our Chapter worksheet*)

- iii. If anyone feels an item should be eliminated even though it “works well,” mark “E” on the item, as well as the rationale behind its elimination.

e. **All** - Hear reports from small groups

4) BREAK (10 minutes) – Encourage continued discussion & brainstorming.

5) What could be improved in our chapter?

- a. **All** - Write on Post-Its ® at least 3-5 (or 2-4) items you think the chapter needs to improve on, that it needs to begin doing that it does not do today, or that it needs to stop doing. Keep in mind the items marked “No” on How Does Your Chapter Rate. Remember to write one item per Post-It ®.

As before, stick these on the walls and ask for 2-3 volunteers to group them by function (i.e. leadership, friendship, service, communications, membership, recruitment, pledge education and other).

- b. **Leader** - Call for ideas for any function listed in (a) that did not have at least 3-5 (or 2-4) items. Add these to their respective groupings.
- c. **Small Groups** - Each small group takes one or two functions. Chapter officer(s) with responsibility for specific function(s) should lead the corresponding group, or at least be a member of the group. Read each item and combine duplicates. For each unique item:
 - i. Discuss whether the item should be Improved, Started, Continued (as is) or Eliminated.
 - ii. Mark “I”, “S”, “C” or “E” and compile into a list, using worksheet (*See Appendix for What Could be Improved worksheet*).
- d. **All** - Hear reports from small groups.

6) BREAK (10 minutes) - Encourage continued discussion & brainstorming.

7) Discuss Possible Goals

- a. **Small Groups** - Re-form and discuss your lists. Consider what you might do to improve each item marked with an “I”. Discuss a possible SMART goal (*see Appendix for goal guidelines*) for each “I” or “S” item, and then use the SMART goals worksheet (*See Appendix*) to write a goal statement. Use one worksheet per item. Also, discuss and write a statement that identifies other items to either be Continued as is or Eliminated. Go with group consensus, but note any objections or other points of view. Briefly review goal statements, looking for any redundancy and the opportunity to combine or integrate statements.
- b. **All** - Hear reports from each small group.
- c. **Leader** - Allow for comments; ensure that additional suggestions and questions are captured. Briefly review the vision statements from earlier in the process. Will the goals suggested contribute to the chapter’s vision? Goal statements not supporting

the vision may be retained for later review if desired.

8) **Evaluate and Closing**

- a. **Leader** - Summarize the conference and discuss next steps:
 - i. Individual officers review suggested goals for their areas of responsibility and prepare action plan.
 - ii. Executive Board meets to compile an overall chapter action plan.
 - iii. Plan shared with the chapter as a whole and put into action for the coming year.
 - iv. Plan reviewed at least monthly at chapter meetings.
- b. Ask participants to fill out evaluation form (*See Appendix*).
- c. Allow for closing comments from other facilitators and participants **without** reopening debate on specific issues or chapter business.
- d. Thank participants, facilitators and any others!

Follow-up Actions

Simply put, the CAPS will not work for your chapter if the chapter members don't take something away from it and act on it in a timely fashion. It is strongly suggested that the chapter utilize the After-CAPS Checklist located in the Appendix as a checklist for what should occur after the annual session is completed. At minimum, follow-up actions should include a review of evaluations and (as stated above):

- Individual officers to review suggested action items for their areas of responsibility and prepare action plan.
- Officers to meet and compile overall chapter action plan (*see Appendix for sample action plan*) for the coming year. Creating the chapter action plan is a three-step process:
 - 1) List actions and activities – what you're going to do to achieve each goal
 - 2) Schedule those actions and add the dates you intend to start and finish them
 - 3) Determine who will be responsible for each action item and what, if any, resources will be needed
- Plan shared with the chapter as a whole and put into action for the coming year.

It is suggested that chapters strongly consider a mid-year review of the chapter action plan, at the end of the fall semester or the beginning of the spring semester. This review will provide the opportunity to assess progress towards goal completion and to make any necessary modifications to the plan prior to the second half of the academic year.



APPENDIX

EFFECTIVE MEETINGS

(Refer to chapter president's IMPACT Guide for more information)

Meetings require planning in order to be effective. The following components can also contribute to the effectiveness of meetings:

- **Good attendance** - enough members are present to contribute input and interaction, and all officers there. Requiring officers to notify you if they will be unable to attend helps the session to run more smoothly.
- **Time efficient** - keeping a meeting within the timeframe set forth in the agenda makes attendees feel that the meeting was successful and not a waste of time. This can be achieved by closely following the agenda and taking care of details in committee meetings.
- **Clarity of information** - overload can happen when too much information is given out. Repeating the same information over and over can be very irritating. Members may give up on taking notes and decide that they just will not participate or come to that project. Consider handing out fact sheets with important detail outlines or write them on a flip chart or chalkboard so members can write at their own speed.
- **Limited speakers, but all opinions heard** - this can be difficult with a very large chapter. An effective meeting will let everyone speak who wishes to speak on a subject. By publishing information about the session in advance (via e-mail or on a bulletin board), allows members to compose their thoughts on issues that will be discussed.
- **Orderly** - things proceed in an organized fashion, with limited interruptions or distractions. This also is achieved by following the CAPS meeting structure.
- **Fun** - although not generally considered a part of an effective meeting, it is important. Fun and humor at the meeting will increase enjoyment and increase attendance. Incorporate games and skits to entertain members and help them get to know each other. There are many sources for icebreakers and team building activities available on the Internet.

HOW DOES YOUR CHAPTER RATE?

0 = No

1 = Sometimes

2 = Yes

- _____ Do chapter meetings start and adjourn on time?
- _____ Does the Executive Board preview major discussion topics and handle routine business?
- _____ Do chapter meetings follow a carefully prepared agenda?
- _____ Are interesting programs offered regularly?
- _____ Does the Executive Board meet regularly?
- _____ Is an annual budget prepared and used?
- _____ Is a monthly financial statement submitted to the chapter?
- _____ Are appropriate fees paid to the Fraternity on time?
- _____ Does the chapter program include campus, community, Scouting and national projects?
- _____ Do most members perform at least 10 hours of service per semester?
- _____ Is the pledging program written down and approved by the chapter?
- _____ Is the progress of all pledges reviewed weekly?
- _____ Does the Membership Committee conduct a year-round recruiting program?
- _____ Does the Membership Committee follow up on inactive members?
- _____ Is a personal interest survey conducted annually?
- _____ Does the chapter have 25 active members?
- _____ Do your chapter officers attend sectional, regional and national activities?
- _____ Are non-officers encouraged to attend sectional, regional and national activities?
- _____ Does your chapter conduct one interchapter activity a year?
- _____ Does the chapter publish a newsletter regularly?
- _____ Are chapter activities properly recognized in the news media?
- _____ Does your chapter participate in the APO LEADS (Launch, Explore, Achieve, Discover, Serve) program?
- _____ Does your chapter interact with its alumni in meaningful ways?
- _____ Does your chapter properly prepare and conduct meaningful ceremonies?
- _____ Does your chapter seek to build a strong relationship with your school's administration?



(REPRODUCE AS NEEDED)

PERSONAL INTEREST SURVEY

Name _____ Class _____ Major _____
Address next semester _____ Phone _____
E-Mail _____ Year initiated _____ Life Member? _____
Current leadership position in APO _____
Previous positions _____
Do you have a car? _____
Campus activities and/or hobbies _____

Please indicate your preference for committee assignment:

3 = high interest

2 = moderate interest

1 = little interest

0 = none

_____ Service	Investigates, plans and conducts campus, community, Scouting and national projects
_____ Membership	Develops membership recruiting, pledging and retention programs
_____ Public Relations	Internal (newsletters, scrapbooks...) External (press releases, publicity...)
_____ Fellowship	Chapter, interchapter social activities
_____ Finance	Budget preparation, fundraising
_____ Program	Programs at chapter meetings and activities

****This form should be revised to reflect the organizational structure of your chapter.



(REPRODUCE AS NEEDED)

VISION STATEMENT WORKSHEET

Understanding vision:

Warren Bennis and Bert Nanus examined the lives of 90 leaders and found that one of their key strategies was “attention through vision.” Bennis and Nanus said “To choose a direction, a leader must first have developed a mental image of a possible and desirable future state of the organization.” A vision statement translates this mental image into a view of a realistic, credible, attractive future for an organization – a condition that is better in some important ways than what now exists. A vision describes what’s unique about the chapter and sets forth a road map and standard of excellence that clarifies what the chapter wants to be and where it wants to go.

Sample vision statements:

Disney: “We create happiness by providing the finest in entertainment for people of all ages, everywhere.”

Caterpillar: “An admired global leader making progress possible.”

APO: “To be recognized as the premier service-based leadership development organization.”

One year from now:

Three years from now:

Things to consider:

- What should our chapter be doing and/or be known for?
- Who is our audience? Who do we serve?
- What are we trying to accomplish?
- What should pledges expect to get from membership?

(REPRODUCE AS NEEDED)

WHAT WORKS IN OUR CHAPTER WORKSHEET

C = Continue as is

I = Improve

E = Eliminate

C, I, or E

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Comments:

Small group: _____

Leader name: _____

(REPRODUCE AS NEEDED)
WHAT COULD BE IMPROVED WORKSHEET

I = Improve S = Start C = Continue as is E = Eliminate

I, S, C, or E

Comments:

Small group: _____

Leader name: _____

(REPRODUCE AS NEEDED)

GOAL SETTING GUIDELINES

(Refer to chapter president's IMPACT Guide for more information)

What is a goal?

A goal is a milestone to be achieved. Goal setting is a method of developing a plan to meet your objectives as a chapter and your responsibilities as a leader. A goal is more effective when stated in terms that follow the SMART approach:

S pecific	Non-specific & ineffective goal: "A stronger committee system."
M easurable	
A ttainable	Specific & more effective: "By the end of the term, there will be four
R elevant	functioning chapter committees (executive, service, membership, and
T imely	finance, and every chapter activity will be coordinated by a committee."

Because the revised goal is more specific and measurable, it helps you decide if the goal was met. Setting a time when the goal is to be achieved makes the goal more meaningful. Without a specific timeline, it's too easy to say, "Someday, we'll have these committees."

Why are goals important?

Generally, goal setting means that you have a plan for the chapter and your term in office. This plan will, if developed properly, be the core around which you and your fellow officers will work as a team and will enable you to build greater unity within the chapter. Some of the benefits are:

- Better leadership results (success!)
- Improved communication
- Improved decision making
- Framework upon which to build motivation
- Improved commitment through participation
- Better use of organization – responsibilities are clarified, allowing for better delegation
- Identification of problem areas
- Increased creativity and innovation

How can SMART goals be used to assess progress? Be SMARTER!

Making your SMART goals SMARTER will help your chapter set more effective goals, and will help maintain continuity, ever after you leave office. To accomplish this, SMART goals should also undergo the following steps:

E valuate
R evise

For example, if your goal was to add 25 pledges during the fall and spring semester, and your chapter activates 30 members in the fall semester, your goal should change. Perhaps the initial goal

was not challenging enough. If your goal was to complete 1,000 service hours as a chapter, but you only get 900, you should examine why you missed your goal. This can help you identify areas of opportunity in your chapter (“We aren’t planning enough service projects”) or areas of opportunity in your goals (“We have 20 members, and not everyone can complete more than 50 hours a semester”).

The Evaluate and Revise section of the SMARTER goal setting process is the evaluation of the progress in between the annual Chapter Assessment and Planning Sessions. The Chapter’s progress should be regularly reviewed and adjustments made as appropriate, and these reviews should be included in your Action Plan.

The SMART Goals Worksheet that follows is used during the Chapter Assessment and Planning Session (CAPS); the Evaluate and Revise component correlates to the Chapter Action Plan (see sample plan later in Appendix).

Sample Chapter Goals:

- **Membership Growth/Retention**
 - We will contact every member who misses two consecutive meetings.
- **Sectional/Regional Participation**
 - We will send our president and at least 10 members to the sectional conference.
- **National Participation**
 - We will establish a travel fund for National Convention and will allocate \$300 per semester.
- **Fiscal**
 - The treasurer, with the help of the Executive Board, will prepare a budget and submit it by September 15 for the approval of the chapter.
- **Alumni**
 - Our alumni secretary will set up a program to contact 12 alumni living in the area and invite them to a chapter event.
- **Advisors**
 - We will secure two more advisors from the faculty or staff by November 1.
- **Leadership Development**
 - The Executive Board will attend a Launch course the next time it is offered.
- **Friendship**
 - We will plan two chapter fellowship events this year.
- **Service**
 - We will increase service programs by adding two off-campus projects this year.
- **Public Relations**
 - We will write an article about each of our major service projects and send a copy to the campus and community newspapers, as well as to the National Office.
 - We will meet with the school administration at least once each term.

See the president’s IMPACT Guide for more sample chapter goals.

SMART GOALS WORKSHEET

Item the Goal will address: _____

Chapter Member/Officer responsible: _____

Goal statement (write only 1 statement per worksheet):

S PECIAL

M EASURABLE

A TTAINABLE

R ELEVANT

T IMELY

SAMPLE SMART GOAL:

By May 20XX, improve recruiting and new member education (pledge) program to increase membership to 50 with an annual retention rate of 90 percent (including graduating seniors). The chapter's Executive Board will evaluate progress at the end of each semester.

Small group: _____

Leader name: _____

(REPRODUCE AS NEEDED)

**INDIVIDUAL EVALUATION
CHAPTER ASSESSMENT AND PLANNING SESSION**

Please complete and return at the end of the session.

- a) I attended this conference because _____

- b) I did or did not get a better overview of the whole chapter (circle one).
- c) Which part of the session lasted longer than necessary (if any)?

- d) Which part of the session should more time be spent on, if any?

- e) What additional areas should have been covered, if any?

- f) Was the timing of the session appropriate? ____ Yes ____ No (If no, please explain):

- g) Suggestions or comments:



(REPRODUCE AS NEEDED)

CHAPTER EVALUATION CHAPTER ASSESSMENT AND PLANNING SESSION

This form should be completed by the Executive Board, based on the individual evaluations completed during the closing of the CAPS. Please return it along with one copy of your Chapter Action Plan to Alpha Phi Omega, Leadership Development Committee, 14901 E. 42nd Street South, Independence, Missouri 64055-7347.

Chapter _____ College _____

Total # of active members _____

Total # present _____

Total # of advisors _____

Total # present _____

Total # of others _____
(pledges, associates, etc.)

Total # present _____

The following played a leadership role in the CAPS (facilitator, small group leader, speaker, etc.)

Chapter Officers _____

Chapter Advisors _____

Sectional Leaders _____

Other (explain) _____

Which part(s) of the session required more time than indicated? Less time?

Additional areas we suggest should be added to the session are:

Part(s) of the session we suggest should be removed from the session is:

Part(s) of the session that was most valuable to our chapter:

Part(s) of the session that was least valuable to our chapter:

Other comments: (please attach additional sheets if necessary. If individuals want to comment, please submit these but be sure to indicate that these are individual views.)

NOTE: The CAPS format is constantly reviewed; with your input, we can continue to improve it. Thank you for your assistance and for this service to your Fraternity.

AFTER-CAPS CHECKLIST
(NOTE: Schedule reviews and other meetings now!)

1) Compile and distribute to all chapter officers and advisors a summary of the CAPS, including the following:

- Vision (consensus as arrived at in CAPS)
- How Does Your Chapter Rate (average score for each item)
- Output compiled by each small group
 - What Works in Our Chapter
 - What Could be Improved
 - Goals

Target Date: _____ Who's Responsible? _____

2) Individual officers review suggested goals for their area of responsibility and prepare action plan.

Target Date: _____ Who's Responsible? _____

3) Executive Board reviews Personal Interest Survey forms to identify possible resources, committee volunteers, and potential new leaders.

Target Date: _____ Who's Responsible? _____

4) Executive Board meets to compile overall Chapter Action Plan & identify any additional SMART goals for the chapter as a whole. Over Chapter Action Plan should include:

- After-CAPS Checklist
- All individual Action Plan pages (containing SMART goals)
- SMART goals set by the Executive Board as a result of the CAPS process

Target Date: _____ Who's Responsible? _____

5) Plan shared with the chapter as a whole and put into action for the coming year.

Target Date: _____ Who's Responsible? _____

6) CAPS results and plan reviewed with the Advisory Committee. (Suggested at the beginning/end of each semester/term, more often as desired)

Target Date: _____ Who's Responsible? _____

Target Date: _____ Who's Responsible? _____

Target Date: _____ Who's Responsible? _____

- 7) CAPS results and plan reviewed with the sectional chair or representative (suggested at the beginning/end of academic year and at mid-year)

Target Date: _____ Who's Responsible? _____
Target Date: _____ Who's Responsible? _____

- 8) Plan and results to date reviewed with the Executive Board and chapter.
(Suggested time frame: Beginning of fall and spring terms)

Target Date: _____ Who's Responsible? _____
Target Date: _____ Who's Responsible? _____
Target Date: _____ Who's Responsible? _____

- 9) Plan and CAPS results reviewed in preparation for next CAPS. (Suggested time frame: About one month before next CAPS. Possible participants: Chapter officers, advisors, sectional chair/representative)

Target Date: _____ Who's Responsible? _____



SAMPLE CHAPTER ACTION PLAN
For Academic Year _____

Goals and Action Steps	Accountable Officer or Committee	Target Date	Date Completed
SMART Goal: The treasurer, with the help of the Executive Board, will prepare a budget and submit it by September 15 for the approval of the chapter.	Treasurer	9/15/20XX	
Action Steps: <ul style="list-style-type: none">- Review last year's budget- Get input from Executive Board on projected expenses and income- Compile budget- Review and revise with Executive Board, advisors- Present to chapter for approval Resources Needed: Results: (Update as actions are taken and results are known)			

CHAPTER ACTION PLAN

For Academic Year _____

Goals and Action Steps	Accountable Officer or Committee	Target Date	Date Completed
SMART Goal:			
Action Steps:			
Resources Needed:			
Results:			

(REPRODUCE AS NEEDED)