41st WESTERN AREA CONFERENCE
JUNE 19 – 22, 2013

Committee Name: Janice Lumas White

Committee Chair: Western Area Recording Secretary

Constance Fitzpatrick Smith, Area Director
Westin Galleria Hotel, Houston, TX
2011 – 2013 GOALS

GOAL 1: Understanding and training of new duties for Chapter Recording Secretaries.

GOAL 2: Timeframe for implementation of new duties.

GOAL 3: Enhanced organizational operations from Chapter to Area to National levels.
SUMMATION and NEXT STEPS

In Summary: Conducted 4 mandatory webinars in 2011, 4 webinars in 2013 and Workshops at the 2012 National Assembly and Western Area Leadership Conference to train secretaries in their new duties, which included 1.) updating necrology information of Links, Connecting Links and Heir-O-Links in the Membership Management System within 24 hours of death notification 2.) Complete online Chapter Profile each year. 3.) Verify each Chapter members’ one-in-five information within the online Membership Management System. 3.) Run relevant reports to include one-in-five membership reports and Chapter rosters by giving the secretaries access to the Member Management System. 4.) Developed a timeline for Formal Transition of Duties after chapter elections. 5.) Aligned the update of information with National Calendar with deadlines for accountability and accurate communication.
6.) Eliminated forms to update Chapter Profiles...based on accessibility of available technology.

The purpose of this effort was to **Align duties** with Area and National duties, **keep our secretaries updated** as to their changing roles, **introduce technology driven practices** and **provide appropriate training** for seamless implementation.

**List next steps here:**

1.) Complete the Update of the Secretaries Handbook
2.) Continue to provide training at Area Forums, Assembly Workshops and other Trainings and Webinars as needed
3.) Continue to Provide Telephone Technical Assistance
RECOMMENDATIONS TO THE EXECUTIVE COUNCIL (IF ANY)

List Recommendations here:

In order to increase our efficiency and accuracy as an organization, we desperately need to communicate to our Presidents the responsibility and importance of timely responses to Area and National requests.