



# OMEGA BULLETIN

Official Administrative Publication of Omega Psi Phi Fraternity, Inc.  
(Publications for MEMBERS ONLY!)

Volume XXXVII

Summer, 2007

International Headquarters

3951 Snapfinger Parkway, Decatur, Georgia 30035

Phone: (404) 284-5533 Fax: (404) 284-0333 www.oppf.org

## A Special Bulletin from the Grand Keeper of Records and Seal Bro. Charles A. Bruce

*The Summer 2007 Edition of the Omega Bulletin was created to provide the Brotherhood with a clear understanding of the issues and obstacles of distributing membership cards during the first half of fiscal year 2006 - 2007.*

Without risk there is no reward. The goal of this administration was to streamline operations and improve service delivery. Every four years, the Fraternity is challenged with providing thousands of membership cards to Brothers; the former process was antiquated and desperately needed to be overhauled to maximize and promote future efficiency. The time for change is now, and this administration chose to address this daunting task head-on, not allowing the Fraternity to fall further behind.

These facts are presented from the perspective of the Grand Keeper of Records and Seal. Although one may challenge these assertions as though *"this is not the way things had to be,"* the fact remains that this is indeed my view of the current condition of this administrative function.

Also presented here is a brief summary of actions and plans in place to overcome those dilemmas and to assure we do not have a repeat of these circumstances in any future period. Some of those actions are in progress while some are still in development. Likewise, some of the required response depends upon a change in the interface between the chapters and the International Headquarters (IHQ) operations.

### Background

In the late Spring of 2006, the Fraternity leadership decided to implement several new procedures related to the processing of the transactions required to establish financial status for each member.

- ❖ All financial transactions would be transmitted to IHQ via a Lock Box protocol. This required the use of uniquely designed forms that were made available to the chapters and the membership on the Fraternity web site.
- ❖ Each Brother provides a photo to IHQ for identification purposes and for inclusion on the membership card. The criteria for these photos (shirt with collar, tie, jacket, light background) were communicated to the Brotherhood via the Spring 2006 bulletin. This document was mailed to the chapters and was (and still is) available on the Fraternity web site.
- ❖ That the financial obligation for the Building Fund Assessment would have to be met for any Brother to achieve Financial Status.

With the start of the fiscal '06 - '07 dues paying season, it became quickly apparent that we had serious disconnect with the chapters and the membership on these criteria.

## Grand Officers

Warren G. Lee, Jr., Grand Basileus

Carl Blunt, 1st Vice Grand Basileus

Brian Gundy,  
2nd Vice Grand Basileus

Charles Bruce, Grand KRS

Tony Knox,  
Grand Keeper of Finance

Michael Adams Esq.,  
Grand Counselor

## Inside

Win free registration to the 2008 Grand Conclave, details inside....

95% of the Leadership Conference registration has been accomplished online, using the Lock Box

Proposed amnesty plan aimed at addressing building fund assessment payments....

- 1) Only a very small percentage of the chapters submitted their dues transactions using the proper Lock Box forms and protocol. Yes, it was anticipated that there would be some chapters who would, for whatever reasons, not follow the new protocols. And indeed we were prepared to correct those inputs and convert them, at IHQ, to the proper forms. (This is the “Plan B” that many of you asked about.) What I did not properly anticipate was that such an overwhelming majority of the dues submissions would not adhere to the proper procedures. As I stated at the District Meetings which I attended, the one to be held accountable for that miscalculation is your Grand KRS.
- 2) Substantial problems were encountered relative to the submission and receipt of the required photos. Certainly, part of the problem here was misunderstanding at the chapter and member level of the acceptability and accessibility of photos on file at IHQ and those captured for registration purposes at Grand Conclaves and Leadership Conferences.
- 3) Enforcement of the Building Fund assessment has revealed shortfalls in record keeping at the member, chapter and IHQ level. Where no payment record exists, it is impossible to definitively declare that a Brother has previously paid the assessment. This, more than anything else, has created not only delays in the processing of member cards, but also some ill will between the membership and the IHQ staff.

Unfortunately, the sum total of the delays created by the three situations listed above, required double and triple handling of a substantial portion of the transactions resulting in delays in processing even for those transactions that were submitted on-time, on the proper forms and using the proper protocols. *(Compare this to your own experience when driving down a narrow road under construction, observing all the posted warnings and restrictions, but that some other driver, who failed to follow the rules, impedes your progress.)*

This is where we are. I am not asking anyone to be satisfied with this condition because I personally am not satisfied. With my apologies, I do ask that the Brotherhood to understand the root causes of the condition.

### Resolution

We have implemented a host of protocols and support routines which have aided us in addressing the conditions stated above:

- A new email address system was implemented in April of this year to allow the IHQ Membership staff to communicate with the chapter officers, in particular, the chapter KRS. I cannot overemphasize the importance of this enhancement. This has expedited the communication required to resolve questions regarding documents and payments received at IHQ. Absent this routine, we were previously forced to communicate by phone to initiate research and resolution of issues.
- A “**Hold Sheet**” is emailed to each chapter indicating which member cards for that chapter are on hold and the reason why the cards are held. (This functionality was not available until we implemented the email protocol mentioned above.)
  - o The principal reasons for a card going on hold are:
    - No photo available
    - Some unsatisfied financial obligation
  - o If the card is on hold for lack of a photo and no other reason, this routine allows us to communicate that the member is financial even if the card is not issued.
- We have communicated to each chapter and district to reconcile our member status records with theirs.
- In addition to the Lock Box training that was provided to the DKRS’s earlier this year, we enhanced the instructions that are available on the web site for use of the Lock Box.

- As is the case with any web-based application, we have been in a constant review mode of our membership software application. Our IT department has developed and tested some corrections and new features. Those new features include:

### Automating the importing of Lock Box Files

### Batch Processing of Re-generated Invoices

### Automating the processing of member dues

- a. Advancing the expiration date
  - b. Updating the membership status along with start and end date
  - c. Adding notes why a member’s card is on Hold
  - d. Processing Events (such as the 2007 Leadership Conference) through Lock Box
  - e. Creation of Chapter Invoices (CEF and Insurance)
  - f. Roles Based access to the Membership System
- We have made several enhancements to our Fraternity’s web page. There were so many enhancements implemented (and still being added!) that we rolled out those upgrades as a new product. (This release is available for viewing right now and we are collecting feedback from the Brotherhood to address any substantial shortfalls in the performance and interface with the new website.) One of the key features of the new website, when it’s fully functional, will allow Brothers to view their own member record and make any adjustments that are required. This will allow each member to confirm that we have the correct mailing address in our database. Also, the member can review his payment history and, if any apparent errors exist, contact IHQ for resolution.

## *Omega Bulletin Summer 2007*

- We are set to begin a procedure wherein we will take any available photo of a financial member and digitally modify it so that the resulting photo of the member meets all the previously stated photo requirements. This may seem radical and, in fact, that is why we delayed the start of this action. However, as we have so very many photos eligible for this treatment and with no other option in sight, this program will go live on June 11, 2007. (Please note, any member who receives their card on which their photo has been “recreated”, can request a replacement card, for a fee, by providing an alternate photo.)
- The summer months of this 2007 calendar year will be spent cleaning up our membership database and reconciling it to our finance database. This will remove a substantial impediment we had in Fiscal '06 – '07. (It was my decision to not issue any statistics about our membership until those databases could be confirmed as accurate – not perfect, but accurate.)
- We will operate a new protocol for Life Members. In September of 2007, we will send, via an email, a list of Life Members to each chapter KRS. The KRS will be required to send confirmation, via a return email, to IHQ that these Life Members are indeed still members of that chapter and to add to the list the names and control numbers of any Life Members that were missing from the list. Upon receipt of that documentation, we will send the Fiscal '07-'08 Financial Status credential (a sticker or a card as required) for each of those Life Members to the chapter KRS. Then, as soon as that Life Member fulfills their obligations to the chapter and district, the chapter KRS can issue the credentials to the Life Members in that Chapter. Therefore, Life Members can receive their '06-'07 financial status credential, theoretically, as early as October 1, 2007. This should be perceived as an additional “paid for” benefit for being a Life Member. Plus, it will reduce the early dues-season burden on the IHQ staff.
- We will implement an amnesty plan to allow final resolution of the Building Fund Assessment payments. The plan will not forgive the obligations but will allow a Brother to achieve Financial Status while satisfying the Building Fund obligation. Frankly speaking, we are still working out the details of this plan. In particular, it will be simple and fair to those members who paid the fee previously. We will not create any anxiety among our loyal Membership by creating a false sense that some members received a benefit by being slow to respond to the obligation.

We are in the final stages of our disciplined plan to add an Executive Director to the IHQ staff. The job description of this position has been modified from the past; it now concentrates on the ED's responsibilities to membership— related activities. It is appropriate for the Brotherhood to anticipate an upgrade to the efficient operation of the IHQ Membership Department by the addition of this paid staff member.

### ***Fiscal 2007 – 2008***

It is fair and expected that the membership would ask what assurance will be provided that the experience next year will be different. Certainly a multitude of things will be in place to provide that assurance. Some relate to systems and procedures at IHQ while others are related to programs designed to modify behaviors of everyone involved in the membership financial transaction process — and yes, that does include the individual members and their chapter KRS. For example:

- One benefit we will have next year (and through Fiscal '09 – '10) is that 90% of the members will not require a new card to be printed. Those cardholders will be issued a sticker. The workload of issuing stickers is substantially reduced when compared to the task of printing new cards.
- Although chapters will still be required to follow the Lock Box protocol, we will be equipped to have immediate and direct communication with the chapter KRS if some discrepancy is noted in their documentation or payments. This capability is facilitated by the implementation of the new email address system mentioned previously. This will greatly increase the speed of disposition of transactions that contain errors.
- Finally, in my sincere attempt to upgrade the efficient administrative operation of the Fraternity, I will be implementing an incentive program for the chapter KRS's in regard to their effective compliance to the Lock Box program. Fiscal '07-'08 will be the second year of operation of the Lock Box Program. We will certainly expect a shift in the percentage of chapters using the Lock Box as compared to our first year experience. The greatest benefit is derived when the transactions are done entirely online — using the electronic Lock Box form, submitting the form electronically (rather than printing and mailing) and submitting the funds via an electronic fund transfer (credit card or e-check). Chapter KRS's are encouraged to request assistance as required to accomplish this task. Thus, the following will be implemented:
  - o The first chapter KRS to complete error free electronic submission of the ENTIRE Chapter membership dues will be awarded a pre-paid registration to the 2008 Grand Conclave.
  - o The first DKRS to manage to have 50 Chapters in his District to complete error free electronic submission of the ENTIRE Chapter membership dues will be awarded a pre-paid registration to the 2008 Grand Conclave. For Districts that have fewer than 50 Chapters, this milestone would require 100% of the Chapters to fulfill the objective

- o The first District Representative to have 100% of his Chapters submit their ENTIRE chapter membership dues error free, regardless of the submission format, will be awarded a **Special Prize**. (Currently under consideration is to have one night's rental in their District's 2008 Conclave parlor room paid for by the Fraternity. This may change but the Prize will be at that value level.
- o Each Chapter KRS that completes electronic submission of the ENTIRE Chapter membership dues will have their name included in a raffle drawing. The drawing will occur at the District Meetings in 2008. The prize will be a gift certificate for a special item bearing Fraternity logos and insignia. (We will use a gift certificate because this prize will not be a "One Size Fits All" item) I am purposefully being non-specific about this prize inasmuch as I

want to generate some excitement about this particular element of the incentive program. I will guarantee you that the KRS who wins will be very, very happy that he chose to contribute to the maximized efficiency of our Fraternity by using the electronic Lock Box submission protocol.

Keep in mind, these incentives are only available when the entire chapter dues are included and that the submission is accomplished error free and electronically – forms and funds. These incentives are particularly focused on the KRS role at chapter and district level because I recognize that they play an essential role in our success relative to membership transactions. (Plus, I am trying to raise the interest in Brothers considering running for a KRS position at the chapter and district level.)

I have full confidence that these improvements, enhancements and incentives will be effective. That confidence is based upon my faith in the Brotherhood and, based upon the evidence

available from our most recent experience with registration for the 2007 Leadership Conference. Thus far, registration for that event has been accomplished, thus far, at about **95% on-line using the Lock Box protocol**. We closed "Early Bird" registration at just over 300 registrants — and unprecedented pre-registration total! The incentive of the registrants was to get a reduced rate **and** to demonstrate their commitment to the Fraternity.

Please be aware that although the discounted "Early Bird" registration is over, you can still register for the Leadership Conference. Also be aware that, because of our successful wlvctronic pre-registration, we are very quickly approaching capacity for the event.

Brothers, this information is provided to you so that you can be fully aware of the Fiscal '06-'07 problems, the short and long-term solutions. We have taken these steps in order that Brothers can be prepared for the benefits to be enjoyed in the future, as a payback for the patience excercised this year.

---

*Typesetting/layout and printing by Precision Digital Services • Shelton L. Moore 6ZΩ286 • 216.218.4523 • slimmo@sbcglobal.net*

---



**Omega Psi Phi Fraternity, Inc**  
International Headquarters  
3951 Snapfinger Parkway, Decatur GA 30035  
[www.oppf.org](http://www.oppf.org)

Non-profit organization U.S. Postage PAID Decatur, GA 30035 Permit #9
-----------------------------------------------------------------------------------------