

Local Office Operations Guide Assessment

This tool has been developed to assist with determining each local office's current alignment with the newly developed [Field Office Operations Guide](#). The information will be gathered via a conversation with the LCOL chair, VEC liaison and regional director. The information gathered will be used to assist the VEC in the development of training plans and tools.

1. Is the local office delivering the six core services: accreditation, professional development, volunteer engagement, membership, community and business development, government relations? Please share how they are delivering the services.
 - a. Is there a service(s) that is stellar?
 - b. Is there a service(s) that needs development?
 - c. Are there/What are the barriers or challenges that are preventing the LCOL from delivering any of the core services?
 - d. Do you have some strategies identified, and/or have you identified the support needed to overcome the barriers?

2. Is the local office delivering any complementary services?
 - a. Please list the complementary services.
 - b. Is there a need that has been identified that the LCOL has not been able to meet? If yes, please identify the barriers or challenges that are preventing the LCOL from delivering the complementary service(s)?
 - c. Do you have some strategies identified, and/or have you identified the support needed to overcome the barriers?
 - d. Does the office have a scholarship/campership program? Or is there a desire to begin a program and for what reasons?
 - e. Is the local office involved in any local fundraising activities? Or is there a desire to fund raise and for what reasons?

3. LCOL Structure
 - a. Please list the members of the LCOL and their primary roles.
 - b. Are all of the core services specified responsibilities listed covered? *Please share who is responsible for what. (i.e., government relations not a position, but covered by XXX)*

4. Committees, Task Forces and Work Groups
 - a. Please share the committees, task forces and work groups and their primary responsibilities.

5. Selection of LCOL Chair and Other Local Leaders
 - a. Please describe the identification and selection process of leaders to the LCOL. Describe how volunteers and staff are involved.

6. Tenure
 - a. Please describe the succession planning process for the LCOL
 - b. Is the LCOL following the Field Office Operations Guide tenure guidelines?
 - i. If there are any extensions, please explain and share what the plan is to recruit a new leader to fill the position

7. Volunteerism
 - a. How are you identifying and recruiting volunteers for open positions?
 - b. Have the LCOL and local office committee members completed their volunteer profile in the ACA Connect Volunteer Center?
 - c. Is the local office using the Volunteer Center to promote opportunities and recruit volunteers?

8. Meetings
 - a. Please share the annual calendar of meetings for the LCOL

9. National Council of Leaders
 - a. Does the LCOL actively participate in NCOL meetings? Does the LCOL have ACA national issue conversations at their meetings? Are there discussions at the LCOL meetings based on information/issues from the NCOL meetings?
 - b. Describe the process that the LCOL uses to choose their NCOL representative(s).

10. Staff/Local Leader relationship
 - a. Describe the working relationship between the LCOL and the staff.
 - b. What is working well?
 - c. What opportunities are there for improvement?

11. Volunteer Engagement Committee and Local Office
 - a. Describe the relationship between the VEC Liaison and the LCOL.

12. Reserve Funds
 - a. Does the LCOL understand the process to request Reserve Funds?

- b. If applicable, describe how the LCOL has used Reserve Funds to benefit their local area.
 - c. Dream, plan, innovate.
13. Code of Conduct
- a. Have all LCOL members and local office volunteers signed the conflict of interest form?
14. Communication Guidelines
- a. Does the local office understand the communication guidelines?
 - b. Does the local office follow the communication guidelines?
15. Planning
- a. What are you currently doing? What do you hope to do? What do you *plan* to do?
 - b. Is there an operational strategic plan in place?
 - c. Are plans in alignment with ACA mission and strategic priorities and based on a local needs assessment?
 - d. How are the financial resources aligned with delivering core and complimentary services?
16. Are there members on the LCOL who could provide mentorship to another LCOL? Are there members of the LCOL or your local office membership who are ready to volunteer at an expanded level? Regional or national committee or task force?
17. Please share about a "gem" and/or what you are most proud of at this time
18. Are there any issues or topics that have not been discussed that the Volunteer Engagement Committee should be aware of?