

Status Report on Project to Update the OPPM

To: ACA WSO Board of Trustees
From: OPPM Updating Team – Dove H., Sue V., Mary Jo L., and Trish Irelan (staff)
Date: December 3, 2025

Purpose of the OPPM

The [Operating Policies and Procedures Manual \(OPPM\)](#) was adopted at the 1992 and 1995 Annual Business Conferences (ABC) to guide the day-to-day operations of the Board and the ABC.

History of Updates

- **1992–2017:** Maintained by Board members. From late 2014 through early 2017, changes were drafted, but the actual OPPM was not updated with these changes until late 2017. The preceding revision was dated October 2012.
 - **2017:** A formal OPPM Committee was created (including non-Board members) to systematize updates section-by-section.
 - **2019:** The Board approved a revision of the Committee’s mission:
“The OPPM is the primary WSO policy document for the Board and its Committees. In partnership with the Board, the OPPM Committee reviews and updates this document to provide order and continuity for WSO operations. The goal is to align it with ACA Traditions and Concepts.”
 - **2022:** Committee membership dropped to two non-board members. While there had been at least one Board member assigned as a Liaison on this Committee since 2017, several other Board members stepped in during this time to help. By March of 2023, it was only one non-Board member.
 - **Early 2024:** Still only one non-Board member. The Board put the Committee on pause, and reallocated staff time (Executive Secretary) to support the OPPM update project.
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Project Launch

- **Feb 2024:** OPPM Updating Project launched by the Executive Committee.
 - **Mar 1, 2024:** Board motion passed to pause the OPPM Committee and assign oversight to the Executive Committee.
 - **Mar 6, 2024:** Weekly team meetings began to update the OPPM began (Sue V., Mary Jo L., Trish I., and Dove H. joined in Sept. 2025)
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OPPM Overview

- **Length:** 83 pages
- **Sections:** 16 main sections + 10 appendices + Change Log
- **Coverage includes:**
 - Operations: Board, Committees, Legal/Fiscal, Literature, IT, etc.
 - Conference:* ABC guidelines, ballot preparation, voting rules
- **Process for Updates:**
 - Updates are proposed by relevant committees, the general manager, or the OPPM Updating team and require approval by the Board.
 - Updated versions of the OPPM are posted on the WSO website.
 - Relevant motions passed by the Board at an ABC/CBM are also incorporated.
 - All updates/changes are recorded in the Change Log.
- **Frequency of Updates: 2-4 times/year** based on the number of sections updated or new motions added.
 - We are slowly yet steadily adding historical OPPM copies to the website. You can find the growing collection here: <https://acawso.org/category/oppm/>.

*Important Note: As of August 2024, any proposed updates to Conference sections need to be brought forward to the Conference for approval. The only changes made to these sections since 2023 are the inclusion of ABC/CBM motions.

Project Progress

Key Activities

- Identified needed updates, additions, and reorganizations.
- Ensured alignment with best practices (via research and professional consultation)
- Engaged committees and the Office for input and approval

Deliverables

2024 - 4 updated versions of the OPPM were posted based on 14 board motions

- Updated Sections: 2
- Updated Subsections: 3
- New Policies: 7
- Reorganizations for clarity: 11

All updates were recorded in the Change Log at the end of OPPM.

2025 (Jan. - Nov. 15) - 3 updated versions of the OPPM were posted based on 10 board motions and 7 ABC/CBM motions

- New/Updated Sections: 6
- Updated Subsections/Appendices: 3
- New Policies: 3
- Reorganizations for clarity: 2
- Motions passed by ABC/CBM added: 7

All updates were recorded in the Change Log at the end of OPPM.

Current Project Status

Category	Count
Sections not started	2*
Section in process	4
Subsections in progress	8
Appendices needing review	3
New content to be created	2 policies, 1 section

*Note: Updates to the ABC and Ballot Preparation Committee sections, along with the ABC and CBM Voting Rules Appendix, require Conference approval, as well as a decision about who will be responsible for proposing any revisions. The OPPM Updating Team only incorporates motions passed by the ABC/CBM that are relevant to these sections.

Summary of Completed Work

✓ Updated and New Sections/Subsections (2024–2025 Highlights)

- Section I: Introduction (2025)
- Section II: Board of Trustees (9 subsections) (2024)
- Section III: Board Officers/Executive Committee (2024)
- Section IV. General Administrative Policies and Agreements (2024)
- Section VI: Fiscal Policies (2025)
- Section VII: Operations and Management (*formerly WSO Office*) (2025)
- Section VIII: Information Technology (2024)
- Section IX. Conflict & Dispute Resolution (2025) (incorporates previous section entitled “Placing Issues Before the Board”)
- Section X: Service Structure and Group Registration (2025) (new section that includes relevant information previously included in other sections)
- Section XIV. AWC (2025)
- Appendix IV: Nominating Committee (2024)
- Appendix XII: Standard Complaint Procedures (2025)

✓ New Policies & Agreements Added

- Archives Collection (2024)
- Audit Committee (2024)
- Board Meeting Recordings (2025)
- Communication Platform Agreement (2024)
- Compensation (2024)
- Cost Allocation (2025)
- Non-disclosure Agreement (2024)
- Pricing Policy Statement (2025)
- Prudent Reserve (2024)

- Records Retention (2024)
- Social Media (2024)
- Whistleblower (2024)

✓ Reorganization for Clarity

- Section I renamed from “Purpose of WSO” to “Introduction”
- IT, Literature, and Publishing are each separate sections
- Appendices updated with links to live documents on website
- COMLINE is now a subsection under Literature
- Board Meetings moved under the Board of Trustees section
- Duties of Officers and Executive Committee merged into one section
- ABC and AWC Sections were made into separate sections

✓ Other: OPPM Webpage

- In addition to our work on updating the OPPM, we have continued development on the [OPPM Webpage](#) that includes:
 - The latest version of the OPPM
 - OPPM Updating Team Reports
 - A Historical Copies of the OPPM Section (in process)
 - A brief summary clarifying the relationship between the Bylaws and the OPPM as a supporting resource to help members understand how the two documents interact and where each governs organizational procedures.
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Work in Progress / To Be Completed

🔄 In Progress

- Section II: Remaining Board of Trustees subsections (I, J, M, N, O)
- Section V: Legal/Intellectual Property
- Section IX: Committees
- Section XII: Literature
- Section XIII: Publishing
- Appendix XI: Board Norms
- Policies: WSO AI Policy (new) and Conflict of Interest Policy (updating)

Not Yet Started

- Appendix II: Region Certification
 - New Policies: Accessibility
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Future Plans

- To complete the updating of the OPPM in 2026.
- After the OPPM is fully updated, reassess the process for updating it to keep it current in future years, using volunteers and special workers.