



Chapter Operations Vision & Strategy

Overview

The Chapter Operations committee is made up of collegiate officers, brothers, and alumni volunteers who enable the Chapters with the right people, processes/resources, and tools/technologies to successfully learn/execute their role, create visions/goals, and deliver their plans on-time and on-budget with participation from everyone in the chapter.

People

- Organizational structure and hierarchy
 - Committee structure and alignment
 - Reporting lines
- Chapter roles, responsibilities, and expectations
 - Expectations for Candidates, Brothers, Officers, Exec Officers
 - Officer roles and responsibilities
 - Committee roles
- Officer & committee performance management

Workflows, Processes & Policies

- Yearly chapter processes (Elections, Officer Transition, Pursuit of Excellence (PEP))
- Quarterly chapter processes (Snake Pit/Budgeting, Calendars)
- Officer & committee system onboarding and offboarding
- Officer accountability
 - Accountability groups
 - 1:1 and group check-ins
 - Chapter meeting & weekly reports
- Brother accountability, governance, and engagement
 - Incentive and fee systems
 - Bylaws
 - Feedback
- Performance tracking and reporting

Tools & Technology

- Chapter-managed technology
 - Google Workspace, (Email, Calendars, Groups, Drive, etc.)
 - Attendance software
 - Legfi
 - Website & Domain
- Chapter-managed tools (spreadsheets, templates, etc.)



- ZX Rosters & Databases
- ZX Calendars
- Project Plans
- Officer Budgets
- Documentation, file structure & training materials
 - Standard Operating Procedures (SOPs)
 - Officer manual
 - ZX Google Drive

SWOT Analysis

What are our strengths (internal origin/attributes of org, helpful) in this area? Our weaknesses (attributes of org, harmful to objective)? Our opportunities (external origin/attributes of environment, helpful)? Our threats (external, harmful)?

Strengths	Weaknesses
<ul style="list-style-type: none"> -New influx of highly motivated candidates every quarter -Consistent scheduling for committee days -Numerous officers with roles that share a purpose -50-person manpower for many years has allowed for enough manpower to do most events/functions -Events and mandatory events are created and published last week of previous quarter -Budgeting significantly improved with the introduction of a detailed line item budget templates 	<ul style="list-style-type: none"> -Individual personalities drive our processes at times -Poor recruitment can lead to leaner chapter operations -Brothers are only part-time and have limited time/motivation available; some brothers have more/less time for ZX -Brothers are inconsistent in participation of planning or execution of events/function -Officers only have 30 weeks part-time to learn and execute a strategy -Candidates bring little experience or skills -Committees now result in unknown regular attendance -Committees are not all well-resourced -Committee effectiveness dependant on officer with little visibility -Little visibility into yearly deadlines with quarter
Opportunities	Threats
<ul style="list-style-type: none"> -PEP and Nationals provide resources and structure but little rollout support 	<ul style="list-style-type: none"> -Fraternity perception continues to hurt manpower. Lower manpower means more work across less people -Limited time to rollout everything by Fall



<ul style="list-style-type: none"> -Effective committees act as training for productive brothers and future officers as a byproduct -More updates & visibility on milestones in calendar and progress for officer workflows and brother requirements can improve accountability 	<ul style="list-style-type: none"> -Resistant to changes from officers and brothers; behavior requires repetition and recommitment
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Requirements

What needs to happen (include PEP requirements)? What do you want to happen?

Needs	Wants
-PEP specific requirements go here	-Additional requirements we want to add but are not necessary

Vision

Chapter Officers and Leadership

Our chapter officers set the example for what a good brother in our fraternity is and each strives to earn the respect of others rather than expect it. Officer positions are sought out and contested by the most qualified individuals, as we foster a culture of initiative and recruit aspiring leaders into our fraternity. But whether or not we hold officer positions, we are all leaders, within our fraternity and without on campus and elsewhere. Our leaders exemplify both servant and executive leadership; we are understanding and yet firm when necessary, proficient in delegation, knowledgeable about the resources available to us, and we effectively and seamlessly transition incoming officers into their positions. Above all else our leadership will preserve the core values of our fraternity.

Involvement and Participation

We are involved. We will make 100% effort to attend everything while recognizing that when we miss functions or activities, we remain 100% committed. The time commitment will be reasonable and we don't make excuses. Our involvement will not be a detriment to our daily lives, we will not spread ourselves "too thin," we will manage our time effectively, and our involvement and participation with the fraternity will be constructive, time well-spent in an



environment that is comfortable for everyone. Every member of the fraternity will sit on at least one committee.

Objectives & Key Results

Objectives: Is what we want to accomplish and why is it important crystal clear? If others read the objective, will it guide their focus and effort (key results)?

Key results: What must my team (or I) deliver/complete to achieve the objective (deliverable)? What are the key metrics that will indicate success for the objective?

Objective

Improve officer transition, training, and enablement to ensure the successful transition of power, making each administration better than the last

Key Result: 100% officer positions (elected & appointed) filled with quality candidates before Transition Day (Week 5)

Initiatives / Activities:

- Identify successors for each elected officer role starting with Exec in Oct
- Develop an Election Guide for brothers to learn about officer roles and expectations
- Host a pre-Election AMA with officers to educate brothers on roles
- Recommend each candidate to speak to the current officer
- Facilitate the Election process in Nov & Jan
- Facilitate the Officer Transition Day and program with Alumni
- Maintain and keep organized officer folders, manuals, checklists, and other supporting materials

Key result: 100% officers have access to resources and tools for their role

Initiatives / Activities:

- Maintain a New Officer Transition Checklist
- Maintain and keep organized officer folders, manuals, checklists, and other supporting materials
- Onboarded into ZX systems (Workplace, Groups, etc.)

Key result: 100% officers create a vision for the year following training program

Initiatives / Activities:

- Facilitate the Officer Transition Day and program with Alumni
- Run group sessions to train on key officer topics
- Host Retreat to develop visions for the year



Objective

Improve the committee system to engage brothers in chapter operations' planning and execution with better role/committee alignment, clear expectations, and easy onboarding

Key result: Roll out a new committee assignment system for brothers the in Fall

Initiatives / Activities:

- Define number and function of committees
- Review roles and responsibilities to align with committees and make changes as needed
 - Add/remove responsibilities for officers
 - Change reporting lines and committee assignments
 - Create new select or official committees
- Develop a Committee Assignment tool that can easily manage the process each quarter
- Outline the process for adding newly crossed brothers each quarter and create SOP doc

Key result: Onboard and enable new committee members quickly and effectively

Initiatives / Activities:

- Maintain Committee sites and Committee folders
- Outline Lt. Chair responsibilities, expectations, and how to become one
- Train officers on how to manage Lt Chairs

Objective

Increase productivity and involvement of officers, brothers, and committees to produce better results faster with centralized information, business technology, and structured workflows

Key result: All brothers are onboarded and offboarded depending on their role

Initiatives / Activities:

- Collect all necessary information from each brother, officer, alumni
- Onboard and offboard members from Workplace (Groups, etc.) and other systems

Key result: 95% brothers in a committee, officer, working/volunteering

Initiatives / Activities:

- Clarify expectations & requirements for brothers and officers and reset at beginning of year
- Maintain a public roster of all brothers/candidates who are in committees vs. not
- Create a consistent schedule for brothers to work around for committee meetings and group committees together on the same days to increase attendance for popular/less popular committees



- Maintain an easy way for brothers to show their attendance and for the Recorder to track it digitally

Key result: 100% committees/officers produce visions, plans and budgets

Initiatives / Activities:

- Provide clear instruction through SOPs, templates and process documents for guidance
- Provide timeline of milestones and important dates through shared calendars & email/notifications
- Meet with officers regularly to check on progress in private and/or group setting

Objective

Reinforce our culture of accountability, manly candor, and constant improvement

Key result: Improved visibility and transparency across all layers

Activities:

- Create layers of transparency, reporting, and check-ins
 - Promote the concept of removing “nothing to report” from Chapter Meeting vocabulary
 - Run a weekly officer meeting before Chapter Meeting to ensure effective chapter reports and progress towards goals from plan
 - Create accountability groups/layers to delegate the people management responsibilities of the LC (~20 officers to manage) across Exec roles
 - Create a regular meeting schedule of 1:1s for Exec officers to meet with their assigned officer to review a set of questions, plans, and goals

Key result: Higher satisfaction from officers and brothers

New incentivization and fee system that encourages the right behavior without being a financial burden

- Review incentivization and fee systems to motivate brothers to do the right actions while punishing for missing mandatory events (use sparingly)
 - Gamify and publish the brother points system in public location to incentivize brothers to compete for the right things
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Committee Structure

The reporting structure, roles and responsibilities. Co-Chair are responsible for managing and leading the team to succeed in our function.

Role Name	Role	Name	Email	Phone
Lieutenant Commander	Co-Chair			
Supreme Scribe / Recorder	Co-Chair			
Alumni Director of Ops	Co-Chair			
Treasurer	Member			
Eminent Commander	Member			
Chapter Advisor	Member			
LC Advisors	Member			
Recorder Advisors	Member			
Treasurer Advisors	Optional Member			

Resources

List any tools reference documents, files, templates, background documents or useful links.

Tools

- Google Workspace
 - Admin:
- Google Groups



- All groups
- My groups

Links:

- [Chapter Operations Best Practices](#) from Nationals
- Governance Best Practices from Nationals

Planned Timeline

Important Dates

What do we need to work around when planning? What are cemented dates?

Quarter Week / Date	Description
Fall Week 7	Elections held for Big 5
Jan 1-10	College of Chapters held
Winter Week 3	Elections held for other positions
Winter Week 5	Officer Transition Kick-Off (in-person)
Spring Week 1	New officers take over
April 30	Pursuit of Excellence application and documents due
Late June / early July	Grand Chapter

Milestones

What are the progress “mile markers” that we should be aware of.

Quarter Week / Date	Description
Fall Week 1	Committee assignments are published to brothers w/ schedule
Fall Week 5	Winter quarter planning & budgeting kick-off
Fall Week 5-6	Officer check-ins for Snake Pit
Fall Week 7	Snake Pit held for final feedback



Fall Week 8	Plans published & budgeting meeting held
Fall Week 9	Calendar meeting held
Fall Week 10	Elections held for Big 5
Fall Week 10	Winter quarter calendar published
Winter Week 1	Committee assignments published for newly crossed brothers
Winter Week 3	Elections held for other positions
Winter Week 5	Officer Transition Kick-Off (in-person)
Winter Week 5	Spring quarter planning & budgeting kick-off
Winter Week 5-6	Officer check-ins for Snake Pit
Winter Week 7	Snake Pit held for final feedback
Winter Week 8	Plans published & budgeting meeting held
Winter Week 9	Calendar meeting held
Winter Week 10	Spring quarter calendar published
Winter Week 10	Officer transition process and training ends
Spring Week 1	New officers take over
Spring Week 1	Committee assignments published for newly crossed brothers
April 1	Pursuit of Excellence officer submission process starts
April 15	Pursuit of Excellence answers are due from officers
April 15	Advisors begin reviewing
April 22	Pursuit of Excellence supporting documents due from officers
April 25	Pursuit of Excellence complete submission target date
April 30	Pursuit of Excellence application and documents deadline
Spring Week 5	Spring quarter planning & budgeting kick-off
Spring Week 5-6	Officer check-ins for Snake Pit



Spring Week 7	Snake Pit held for final feedback
Spring Week 8	Plans published & budgeting meeting held
Spring Week 9	Calendar meeting held
Spring Week 10	Spring quarter calendar published
Late June / early July	Grand Chapter

Working Notes

[From initial 2009 vision:](#)

Chapter Officers and Leadership

Our chapter officers set the example for what a good brother in our fraternity is and each strives to earn the respect of others rather than expect it. Officer positions are sought out and contested by the most qualified individuals, as we foster a culture of initiative and recruit aspiring leaders into our fraternity. But whether or not we hold officer positions, we are all leaders, within our fraternity and without on campus and elsewhere. Our leaders exemplify both servant and executive leadership; we are understanding and yet firm when necessary, proficient in delegation, knowledgeable about the resources available to us, and we effectively and seamlessly transition incoming officers into their positions. Above all else our leadership will preserve the core values of our fraternity.

Financial Management

We will be a credible organization that practices sound, transparent financial management. We pay our bills on time, stay out of debt and spend wisely; just because we have the money doesn't mean we have to spend it. The cost of membership in our fraternity will be reasonable, with fundraising efforts made in earnest to aid in this. While we will be patient, flexible and understanding of each individuals' financial situation, truancy will not be tolerated, and it is expected that each man be honest about his financial situation. We will end each year with a minimum of 5% financial surplus.



Involvement and Participation

We are involved. We will make 100% effort to attend everything while recognizing that when we miss functions or activities, we remain 100% committed. The time commitment will be reasonable and we don't make excuses. Our involvement will not be a detriment to our daily lives, we will not spread ourselves "too thin," we will manage our time effectively, and our involvement and participation with the fraternity will be constructive, time well-spent in an environment that is comfortable for everyone. Every member of the fraternity will sit on at least one committee.

OKRs

- major chapter milestones, processes, and calendars to keep everyone informed and on-task to hit deadlines
 - Housing (Dec-Jan), Elections (Nov & Jan), Officer Transition (Feb-Apr), Plans & Budgets (each quarter), PEP (Apr)
 - Manage the ZX Calendars (Collegiate, Alumni, Chapter Operations)
 - Dues and rent collection
 - Oversee election process and brothers understand the roles
 - Maintain election guide that outlines roles, key responsibilities & time commitment to set expectations for potential officers
 - Run a LEAD-like session to review Election process, each role, and allow brothers to ask officers questions
- Oversee organizational design and structure, such as org structure & reporting lines, roles & responsibilities, committee/team systems, and roll out changes to the Chapter as needed
 - Act as Bylaws committee to develop initial language for review in Exec
 - Maintain a roster of all brothers, roles, and key contact information
 - Maintain an org chart for the chapter
 - Maintain officer manuals to outline roles and responsibilities of each officer
 - Maintain committee strategic plans for committees
 - Maintain meeting notes, plan, budgets, etc. that are published to a publicly available folder
 - Review organizational roles and responsibilities to ensure alignment with committees and make changes as needed



- Add/remove responsibilities for officers
- Change reporting lines and committee assignments
- Create new select or official committees
- Provide easy to use software, tools, and processes and the training needed to use them successfully (Workplace/Drive, meeting schedules, plans & budgets, etc.)
 - Onboard and offboard members from Workplace (Groups, etc.) and other systems
 - Keep the Drive organized and well-maintained through regular clean-ups and permissioning
 - Review any new monthly/yearly subscriptions or tools needed by officers to add to the budget
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- Create a positive culture that inspires brothers to contribute and transparent/visible systems to keep brothers accountable and incentivized
 - Clarify expectations for candidates & brothers and their involvement in the chapter, school and community
 - Proposed change: All active brothers must hold an Officer role, committee membership, part-time or full-time employment or volunteering (>10 hours/week)
 - Improve the committee system to ensure all officers have the people resources necessary to succeed and improve brother & officer effectiveness and engagement
 - Confirm committee teams based on function/goals
 - Assign relevant officers to Committees as Lts.
 - Identify how many brothers we need per committee for it to effectively function (ask officers & Exec assessment)
 - Have officers recruit or hold sign-ups for committees to fill in open slots; assign afterwards
 - Each person must be on a committee to managed by Scribe
 - All committees must hit required membership goals before exceeding one committee's membership goal
 - (ie if Recruitment gets 20 volunteers of 10 required and Alumni only gets 3 out of 5 required, we must move over 2 to Alumni)
 - Volunteer/assign candidates to committees once they cross; let candidates "try out" committees during their candidate quarter



- Create a consistent schedule for brothers to work around for committee meetings and group committees together on the same days to increase attendance for popular/less popular committees
- Create layers of transparency, reporting, and check-ins to promote a culture accountability and action/progress
 - Promote the concept of removing “nothing to report” from Chapter Meeting vocabulary
 - Run a weekly officer meeting before Chapter Meeting to ensure effective chapter reports and progress towards goals from plan
 - Create accountability groups/layers to delegate the people management responsibilities of the LC (~20 officers to manage) across Exec roles
 - Create a regular meeting schedule of 1:1s for Exec officers to meet with their assigned officer to review a set of questions, plans, and goals
 - Identify potential icebergs from officers and discuss during Exec; escalate to Alumni/Advisors as needed
- Maintain incentivization and fee systems to motivate brothers to do the right actions while punishing for missing mandatory events (use sparingly)
 - Gamify and publish the brother points system in public location to incentivize brothers to compete for the right things
- Track and maintain a high standard of excellence to meet PEP requirements for Excellence in all 10 categories
 - Tracking progress by committees & officers through quarterly updates to the Alumni Chapter, quarterly debriefs, and spreadsheets