

Chapter Coach's Manual



September 2024

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Introduction

Thank you for volunteering in such a meaningful way! This manual provides guidance on how to be the best Chapter Coach possible. A manual is theoretical so you'll learn a lot as you execute the role. We will add content as we find what works best for you and our Chapters. We welcome your feedback.

We start by looking at the role of a Chapter Coach from a strategic and a philosophical perspective. Then, we get more tactical in how Chapters should be operating so you have an idea of what to look for. Links are included to supplemental training images or videos. Watch and look at them - they'll help. We then include ideas of how you might define success for the Chapter. The "scoreboard" for Chapter success isn't as simplistic as an athletic scoreboard where at the end of a game there's a clear winner. However, we'll provide you with areas you should focus your attention.

Role of a Coach

Why "Coach" instead of "Advisor"?

For years we referred to the role as an "Advisor" but that no longer best captures the type of investment, communication, and mentality we need from volunteers serving in this capacity. "Advisor" was interpreted as too passive. While the "Coach" doesn't have any more responsibility in controlling day to day operations of the Chapter, these "Coaches" will find a lot more success influencing the development and success of the Chapter when they do the following. Watch this two minute video about utilizing a coaching mentality.



Various hats

Oftentimes as a coach, you're not just checking in once a week at chapter meetings. You're texting, emailing, going to judicial board meetings, checking in on philanthropy events. Meeting new members and more. There are many roles that you fill as a coach to a Greek organization.

Mentor. Build personal relationships with your students in order to provide valuable advice and an informed perspective.

Reflective agent and accountability. Encourage your group to reflect on their values and then challenge them to hold to their values and standards and to do the right thing.

Source of information and clarity. The more you know about university and national policies, the better you can coach your students on their plans and clarify and communicate those policies so the students will understand.

Counselor. Help the members of the chapter, and sometimes the chapter itself, through hard times.

Facilitator. Take a backstage roll and make sure things run smoothly, whether that is at meetings between individual members, executive board or chapter meetings, relationships between your organization and others. Or other. Challenge the students to critically think about issues rather than

providing them a solution. You will often be called upon to be the middle person and to assist the organization in its operations, both internal and external.

The most effective coaches traverse all of the above roles. They build relationships with the chapter, help them move towards self governance and accountability, offer clarity and support, and maintain strong connections to the University and the National Headquarters. There are many things you can do. To be most productive and effective as a coach. But here are some of the things that we would recommend.

The Best Coaches

Familiarize yourself with university policies, procedures, and expectations. This will allow you to support the chapter as they plan social events, philanthropic events and through their general chapter operations. Utilize checklist to make sure events are planned well, are educationally based, and are safe environments for students. A list of relevant policies can be found throughout this manual.

Assist the chapter with officer transitions. You're actually present for officer transitions or not. Your knowledge and expertise can be incredibly helpful as new officers come into their roles every year, by providing history and context, or even by just checking in to make sure outgoing officers have a strong transition plan. You can affect the success of new chapter leaders early on.

Be seen. Your full time job likely isn't serving as a coach to your chapter, we understand that. However, your presence at chapter meetings, philanthropy events, chapter retreats, and more will help you be seen as more available and accessible. Set a goal for how often you'll be at chapter events and stick with it. Don't let the only time that the general members hear your voice be when you have to discuss a policy or a role with them at a chapter meeting. Make an effort to talk to general members, introduce yourself to new members every semester, and support all of the chapters efforts as your schedule allows.

Ask questions. When attending executive board meetings, having a one-on-one with an officer, or helping plan a chapter event, one of your biggest roles should be to encourage members to critically think about their plans and goals. One of the best ways to do this is to ask them questions. What are the three main goals you have for this retreat? How can we ensure that the activities reflect these goals? Have you thought through a risk management plan for this event? What's the plan if a member does not follow through with the expectations? How do you plan to address them in the moment?

Coach Terms & Conditions

We ask our Coaches to sign-off yearly on general Terms & Conditions of being in the role of Coach. We are doing this because:

1. it helps us ensure we have active coaches and not just those listed on paper
2. it helps coaches understand the bare minimum terms and conditions expected of them
3. it is best practice given that our coaches have access to liability insurance under our policies

Additionally, Coaches are volunteers that get benefits and access to information that a general alumnus does not. A list of the terms and conditions are provided below.

As a Coach, I agree to the following

- I will actively coach my officer pairing and the Chapter for this coming year.
- I will be familiar with the Fraternity's Risk Mgmt. policy and coach the students to be in compliance with this policy.
- I will have regular meetings with my officer counterpart at least once per month. I acknowledge the HQ recommends weekly meetings during the school year are ideal.
- I will work collaboratively with those on my Chapter Coaches Board if a CCB exists.
- I will review the 2x monthly emails HQ will send with tips and reminders.
- I will complete any required documents or forms the HQ needs as part of the chapter minimum standards or accreditation process.
- My coaching will be in alignment with HQ standard operating procedures.
- I will proactively communicate with HQ if I have questions or needs.
- If I'm having difficulties communicating with my officer counterpart, I will work with the CCB Chairman to resolve. If that does not bring resolution, I will seek help from the HQ.

Coach Expectations

Regular communication with the chapter president. As a coach, it is important that you stay aware of what is occurring within the chapter and are available to help develop and guide the chapter in response. While you should have a relationship with multiple leaders within the chapter, the chapter president will usually have the most up-to-date information and ability to influence the overall direction of the chapter. If you have a CCB, leverage them to work with the other officers.

Regular attendance to chapter events. While we do not expect you to be at every event, it is important that the chapter is able to see that you are interested in their achievements. We recommend attending at least one event per month outside of meetings so you can meet more chapter members and see the outcome of their hard work. It also enables you to see them in a different light than just a Chapter or Executive Board meeting.

Communication with the university and headquarters. You are working in tandem with the headquarters and the university to try to ensure success of the chapter. It is important that the headquarters and the university be made aware of any issues you are working with the chapter on so that coaching from them can be consistent. Additionally, if you are not sure of how to effectively resolve a situation, it is a good idea to check in with the university or the headquarters to come up with a reasonable strategy to help guide the chapter.

Signs of a Healthy or Unhealthy Relationship with the Chapter

Healthy

- Chapter members regularly ask you questions and seek your advice on important matters.
- You receive updates and meeting minutes from the chapter.
- You are included in long-term goals and vision planning.
- You serve as a resource to chapters, helping them to refine their ideas and ensure they are in line with policy. However, you do not take on the work of the students.
- Students communicate their issues and the issues of their organization openly and honestly.

Unhealthy

- You find yourself doing work that should be the student's responsibility. One of the goals of fraternity life is to develop students' leadership potential. Part of that involves taking ownership

of their responsibilities. If you find yourself doing the students' work, it is a sign that the students are not developing the skills they need to be self-reliant.

- Long periods without hearing from or interacting with the chapter.
- It is nearly impossible to be an effective coach if you do not know what is happening in the chapter. If the chapter is not communicating with you, this is an issue you should seek to solve immediately. Establish communication expectations for yourself in the chapter and follow up if those expectations are not being met. Let HQ know if this isn't resolved quickly, as we can help with that.
- Chapter leaders ask you many questions and expect immediate responses.
- Through your mentorship, students should develop skills that allow them to exercise good judgment. While it is important to be in regular contact, you should not be answering common questions at odd hours.
- You are seen more as the student's friend rather than a coach, mentor, or authority figure.

As with all things, it is important to achieve a balance. You want to be respected but not so distant that the students are not honest when communicating with you. Set boundaries early in their relationship so that you and the students have reasonable expectations for your relationship.

Strategic & Philosophical Level

Why be part of a Chapter Coaches Board (CCB)?

1. Your chance to invest into the development of another young man
2. Create the strongest chapter possible; minimize information lost during e-board transitions
3. Ensure the longevity of the Chapter's Charter
4. Add a meaningful volunteer activity to your resume
5. Network with other alumni serving in a similar capacity

Coaching Mentality

VIDEO: https://drive.google.com/file/d/16k_TsR9Ti1XZc6CoN0G8fFkJjPv1njd-/view?usp=sharing

TIP -- increase the playback speed to at least 1.25

Coaching Basics

To be effective in this role these things need to exist for you:

- You must be comfortable and experienced with tough conversations and conflict.
 - Sometimes students will not do what they said they would or they do something they aren't supposed to. When this happens, you have to get involved. For both the chapter and the individual members, expectations exist. We have a great opportunity to help students experience and model responsibility. This is preparation for life after college.
 - When they falter with personal responsibility, you have to bring it up, you have to tactfully hold them accountable and help them hold others accountable otherwise, they don't learn and the chapter suffers with accountability issues.
 - The root cause of Chapter closure is lack of accountability. Students know they have to recruit, manage and keep risks low, manage finances, build meaningful relationships amongst Brothers, and follow basic policies of the university and headquarters to maintain good standing. There are no surprises or unreasonable

expectations. Everything they do can be achieved through a little hard work and planning. If they aren't accountable to those simple things, they will fail.

- Show up consistently (meetings, CCB calls, and individual support) and be invested. It has to be a priority. *Students don't care how much you know until they know how much you care.*
- Engage to help students grow. You cannot take the approach of "Call me if you need me". They'll call well after they should have. Sometimes it's too late.
- Be willing to learn from the students – they have knowledge about current trends, and they can see situations and process those situations. You have to help them process those situations accurately and objectively.
- Be willing to learn from HQ
 - HQ doesn't have all the answers, but we spend A LOT of time studying student development and understanding operational best practices that work in today's fraternity system. We absolutely need you to provide feedback, brainstorm, and discuss things with us, but we need coaches who promote the programs and structure we have.

Final thoughts on being a "Coach"

1. A Coach should understand the processes required to achieve success. A coach works with the student on an ongoing basis to achieve the student's (and Chapter's) specific objectives, whether or not the Coach has actually achieved such goals himself. Effective coaches are generally great at asking questions and provoking the student to identify his own solutions, and stay with the student as he works toward the goal. A coach works with a student to help improve performance.
2. The coaching should be structured to help establish and meet goals, understand and resolve challenges, and focus on growth of the student and the Chapter. The Coach neither necessarily has all the answers a student might seek nor does the Coach do the work on behalf of the student, but the Coach brings an outside and unemotional perspective.
3. Coaches know how to take a student through a process of discovery and skill development, asking questions to lead the student to their desired achievements. The benefits of the coaching engagement can be measured through the performance of the student and/or the Chapter. The student becomes more capable and the Chapter grows and succeeds.

Gameplan

The video referenced knowing and communicating the "Gameplan" to the students. The students still decide their goals and are responsible for achieving them. We don't expect volunteers to execute any of the operations for the Chapter. However, when we say "Gameplan" in this context, we mean the bigger picture things that are important to Pi Lambda Phi Fraternity. Examples that filter into the larger "gameplan" could include following various policies, using standard operating procedures, and implementing operational best practices:

1. Policies & Standards
 - a. Adherence with [Chapter Minimum Standards](#)
 - b. Adherence to the [Risk Management](#), [Financial](#), and Good Samaritan policies (found at the bottom of the Risk Management Policy, and the [Crisis Management Plan](#)).
2. Standard Operating Procedures include but aren't limited to:
 - a. [Undergraduate officer structure](#) - explained in a video in a separate [section](#).
 - i. Already established [positions descriptions and job responsibilities](#) for both officers and Coordinators.
 - b. Using the [Pilam Portal](#) to manage Chapter rosters
 - c. Utilizing [PLP University](#) for online New Member education

3. Operational best practices include but aren't limited to:
 - a. Using an electronic Names List to improve recruitment efforts (ideally [ChapterBuilder](#))
 - b. Having a third party collection agency ([Greek Capital Management](#))
 - c. Having a risk management plan to help ensure the Chapter follows our policy

Creation v. Execution

Remember there is a "Gameplan". Remind the students there are different times when they should be creating new strategies versus simply executing what's already been thought through.

Our HQ has usually spent a lot more time thinking through chapter operational strategy than any one Chapter has. Likewise, the Chapter Coach(es) may have also spent a lot of time already learning what works and doesn't. And finally, prior undergraduate Executive Boards have figured out best practices too. Yet, despite all of this knowledge from HQ, Chapter Coaches, and past E-Boards, we too often have new E-Boards trying to recreate strategy. The intentions of the students are good, but this constant reinventing of the wheel hinders the Chapter's success. It's understood the new officers will want to "create" a new strategy so they feel a sense of ownership. Therefore, coach them to get really good at NOT reinventing the wheel. Help them differentiate the things they shouldn't try to recreate v. the things they have to make decisions on that constantly change. We could argue almost all good operations could be standardized to avoid reinventing the wheel, but knowing the students have to have some creation, here are some tips about how to differentiate.

Operations to not reinvent and/or that HQ has a lot of experience with (but that can be refined)

- Officer and committee structure
- Financial management best practices
- Risk reduction plans (especially if the Chapter's plan was working well)
- Recruitment strategies
- Alumni Relations best practices

Things that are ok to be reinvented

- Anything above if it's an area that is significantly failing
- Themes of social affairs they host
- Sororities they intermingle with
- T-shirt designs
- Community service ideas

Board Structure, Roles, and Undergraduate pairing

We need multiple volunteers coaching the Chapter for it to operate at its best. Having multiple coaches enables each to focus specifically on one officer. That gives the officer more attention and enables the coach to really hone in on one operational area instead of worrying about all operations.

If you had more volunteers than undergraduate officers, you could pair them with some select Coordinator roles. A few to consider include the Academics Coordinator, the Community Service Coordinator, and the Philanthropy Coordinator.

Sometimes a school mandated "Faculty Advisor" will want to pair with the Academics Coordinator to focus on study support systems for Brothers, and other things related to academic performance.

Typical Coaches & Roles

As coaches are paired with individual officers, coaches can start by looking at the [job descriptions](#) listed for each officer. Simply put, the coach helps the officer achieve those descriptions as well as goals the officer group creates by reminding the officer of these items, asking questions about progress toward those, and posing feedback and ideas when those descriptions aren't adequately being met. The coach ought to compare that job description that with any deviations or additions the Chapter believes exist. Occasional deviations may be necessary but multiple deviations and/or multiple officers with deviations ought to draw further questions by the coaches as that may be an indicator of a different problem.

Below is a brief explanation of each coach's role.

Chapter Coach (Chairman of the CCB)

- Serves as the leader of those on the Coaches Board. Normally pairs with the Chapter President. He is then Chairing the CCB. He would communicate with and amongst the other Coaches, help establish Joint Board meeting details with the President (dates, times, agendas, etc.).

Education Coach

- Paired with VP of Education (VPE). Focuses on VPE's responsibilities, specifically New Member Education. Would also help with Judicial Board related matters.

Finance Coach

- Paired with VP of Finance (VPF). Focused on VPF's responsibilities and all things related to Chapter finances.

Risk Mgmt. & Programming Coach

- Paired with VP of Programming & Risk Mgmt. (VPP). Focused on VPP's responsibilities, specifically risk reduction policies and practices.

Communications Coach

- Paired with VP of Communications (VPC). Focused on VPC's responsibilities. This may also include Alumni Relations items.

Recruitment Coach

- Paired with VP of Recruitment (VPR). Focused on VPR's responsibilities, specifically year-round recruitment practices.

Housing Coach

- Paired with VP of Housing (VPH). Focused on VPH's responsibilities relating to filling and maintaining the house or shared living space. The type of housing setup (alumni owned, university owned, third party landlord, etc.) will influence the various expectations of the VPH.

Alumni Relations Coach

- Paired with VP of Alumni Relations (VPAR). Focused on VPAR's responsibilities, specifically with producing a twice a year newsletter and coordinating 1-3 alumni events per year. Given the nature of advanced planning needed for alumni events, the Coach may play a much more collaborative role in this process and may coordinate as well with the Chapter's Alumni Association.

Faculty Coach

- This role fluctuates from campus to campus. Start first by understanding what your campus's expectations are relating to having such a role. From there, determine how this role could best complement the work of the CCB Talk with HQ for more ideas.

If a Chapter Coach does not have a full board, HQ would recommend that he do the following:

1. Whatever coaches you have should focus on the officer areas with the greatest need or impact. We typically find that to be recruitment, risk management, and finance.
2. Take the coaches you have and consider doubling up pairings to ensure engagement with all officers. As an example, the Chapter Coach would take the Rex and may also decide to do VPC or VPAR given the nature of those roles being a little bit less intense but being important, especially with respect to alumni relations planning. Additionally, whomever is with the VP of Risk Mgmt. may also pair naturally with the VP of Education since the VPE also oversees the Judicial Board.

The "Four Legged Stool"

We use this example to talk about how our Charter is supported. Imagine the Charter sitting atop that stool. It would be well supported. Each leg represents a different stakeholder that helps ensure that the Charter exists.

- The Undergraduate Chapter
- The Coaches
- The HQ
- The host institution



While a Charter can't really exist without a Chapter which makes them the biggest stakeholder in the moment, if you remove other stakeholders, the stool's stability becomes jeopardized and it could collapse. However, when all four stakeholders (or legs) are in place and working in unison, the Charter remains protected and its longevity is ensured!

We must look at all stakeholders as important and we must work together to ensure they stay in place. When we don't, and stakeholders disengage, the stool loses stability, and we severely risk the Charter.

Ensuring a CCB Functions

A CCB should focus on how it works with fellow CCB members and with the students.

With each other

- **Commitment**
Commitment to being part of a team (the CCB).
- **Follow-up**
Follow-up with each other. As the CCB Chairperson plans meetings and other board affairs, ensure you're showing up.
- **Communication**
Like a sports team's coaching staff meets to share what they are seeing from their respective areas of focus for the benefit of the entire team, each CCB member should pass along key information they're learning from their officer counterpart that might benefit the other CCB members, undergraduate officers, and the entire Chapter.

With the students

- **Clear expectations**
Establish the expectations you have for working with this officer. For him to receive your time, talent, expertise, and coaching, what do you expect of him? What can he then expect from you?
- **Effective communication**
There's no silver bullet technique that works for everyone, but we'd recommend things like:
 - Have a shared Google Document where you both type your notes, agenda, action items, etc. so there's better clarity on what was discussed and what needs to happen.
 - At the end of the call, recap the action items each of you are to be working on and by what date it will be completed or by which you will follow-up again.
- **Appropriate follow-up**
More likely than not, the student you're working with has never led anything like a Fraternity. He's going to make [missteps](#) and that's part of his learning. Following up will reduce the number of mistakes and it will model for him good practices for following-up and working with someone.

Working with Today's Students

Today's students are different from those even 5 years ago and the differences increase more with every decade that passes. Different doesn't mean better or worse. However, you'll want to understand today's students and find ways to connect with them. If they think you are irrelevant, that you don't get them, that you're not in touch, then your relationship will struggle and your experience will be unfulfilling. Here are some things you can do:

Information about Generation Z

Born in the mid to late 1990s, Generation Z has come of age in the social media era. Researchers have noticed some differences between these students and their millennial predecessors. Here are some tips for success with this generation of students.

Go digital

Students from Gen Z are well versed in the use of most digital platforms. If you are providing resources to your students, consider giving them a digital copy rather than paper documents. This is more sustainable and gives them access to the information at any time.

Keep information concise

While these students are considered better multitaskers, researchers have noted a decrease in attention span for students from this generation. Therefore, it may be worthwhile to vary your facilitation or communication methods to keep students interested.

Set communication expectations

Having grown up with technology and texting, Gen Z often expects instant responses to questions. Setting reasonable expectations about response times may help you to keep in better contact and reduce stress for both you and chapter members. Additionally, students may consider e-mail or calls to be too formal, and they might prefer texting. As a coach, it is important to set your communication boundaries and expectations to something that you are comfortable with.

Project driven learning

Described as more entrepreneurial than previous generations, Gen Z are motivated to tackle new skills and tasks independently. As a coach, you can tap into this motivation by helping them to set a

reasonable goal and timeline, but letting students figure out how to get there. This approach can help you establish trust and help students discover the skills they need along the way.

Utilize Emotional Intelligence instruments

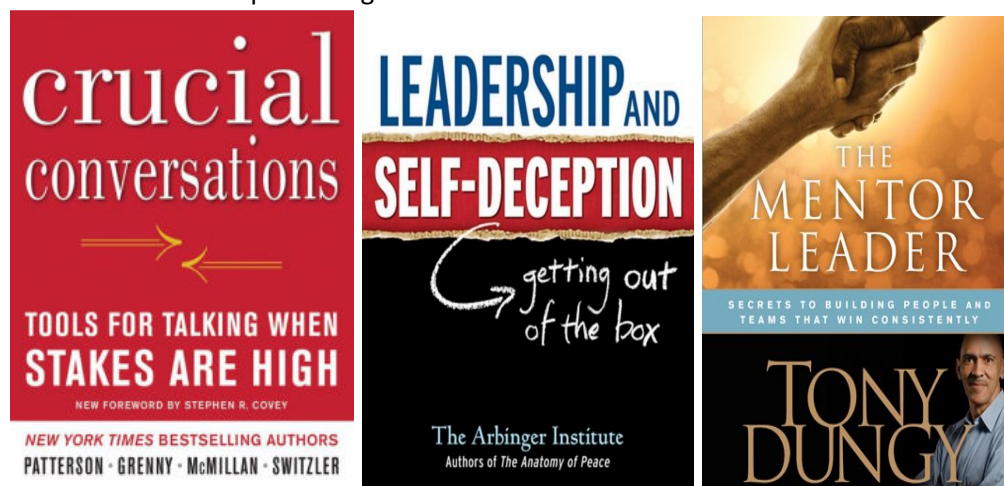
Do you know the student officer types and preferences? There are many different emotional intelligence instruments that exist - Myers Briggs (MBTI), Leadership Behaviors Inventory, StrengthsFinder, True Colors, Leadership Practices Inventory, etc. Pi Lambda Phi doesn't have a standard one we use with all Chapters but we use MBTI amongst our staff and it's an easy one to do with students. Ask the Chapter's officers if they have taken any of these instruments and if so, have them try to explain their results to you. One of the benefits of using some form of emotional intelligence instrument is it gives you and the student some common language to use when talking about personality preferences and how we make decisions, utilize our strengths, how we see the world, etc.

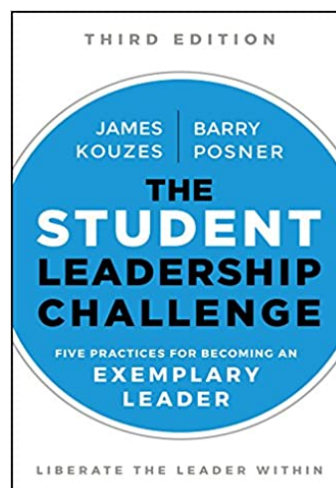
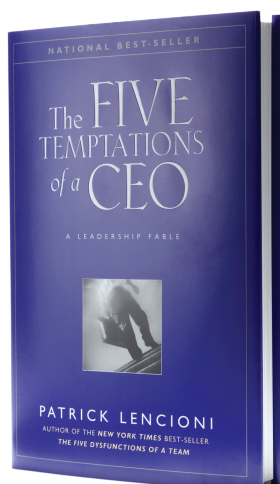
1. Not familiar with Myers Briggs? Check out this short video on YouTube: <https://www.youtube.com/watch?v=M4YLO-2Tb2w>
2. A free assessment that can help with understanding your own MBTI is available through <https://www.16personalities.com/>. Additional information can be requested from HQ. HQ has a plethora of resources and connections to certified MBTI facilitators.

Additional Readings

Books that can help with coaching students

1. Crucial Conversations
2. Leadership & Self Deception
3. The Mentor Leader
4. The Five Temptations of a CEO
5. The Student Leadership Challenge





University Relationships

Our Chapters are guests on college campuses and ought to exist in a manner that doesn't hinder the institution's greater mission. Thankfully, if our Chapters simply do what they're supposed to do, then we complement most institutions' purpose and mission. Most universities have something in their mission, vision, principles, etc. aligned with diversity and inclusivity. Our unique Creed and special history of standing up against instances of discrimination will often speak to a university in ways no other Fraternity can. If we showcase our Creed, hold ourselves to our values and standards, and ensure we are compliant with the basic standards of the International Fraternity and the University, we tend to be really well received by host institutions. If our Chapter provides a fun and meaningful place for other male students to grow and develop safely, the university will be happy.

How to maximize your FSA relationship?

Schedule a recurring meeting with the head of Greek Life on campus. At a minimum, once a semester. Come prepared to those meetings with questions having read communications sent from the institution relating to Greek Life. Seek clarity from that person or department on their expectations for Greek Life on campus, their vision or philosophy, and also understand the various consequences and procedures for when expectations are violated.

Things to pay attention to within a Greek system

- How is the Greek Life Department staffed? How many employees exist? What roles do they play?
- What resources are available for volunteers and coaches? Things like grade reports or similar statistical data can help coaches immensely.
- What policies exist for Greek operations and where can those be found?

Things to watch for

Most universities and Greek Life staff are great partners. Occasionally, you might find a difficult individual to work with or that there's a violation of student rights at hand. Although this is rare, here are things you want to be on the lookout for.

- A significant change to recruitment policies. Especially at public institutions, there are limitations on what a school can do to restrict a student's freedom to associate (join organizations).

- A blanket punishment for multiple Chapters before due process.
- An effort to force Chapters to give up their single-gender status and become Coed.
- Policy changes impacting housing when housing is owned by someone other than the institution.

If you sense any of these may be happening, contact HQ immediately.

Higher Standards: Individual & Chapter Individual Membership Standards



Many Chapters have individual membership standards around GPA, community service hours, extracurricular involvement on campus, paying dues, and attending chapter functions.

To use a visual, think of our fraternity like a house. To build a strong and sturdy house, we need a good foundation and load bearing walls to support the house. We'll use the word "pillars" to refer to our load bearing walls. The foundation must be the Creed which is tied to why Pi Lambda Phi was created in the first place. If we do not have a solid foundation - if we lose sight of our Creed and why we were founded in the first place, we're no longer Pi Lambda Phi, and without a solid foundation, a house would fail. We've depicted our Creed with the word "Equality".

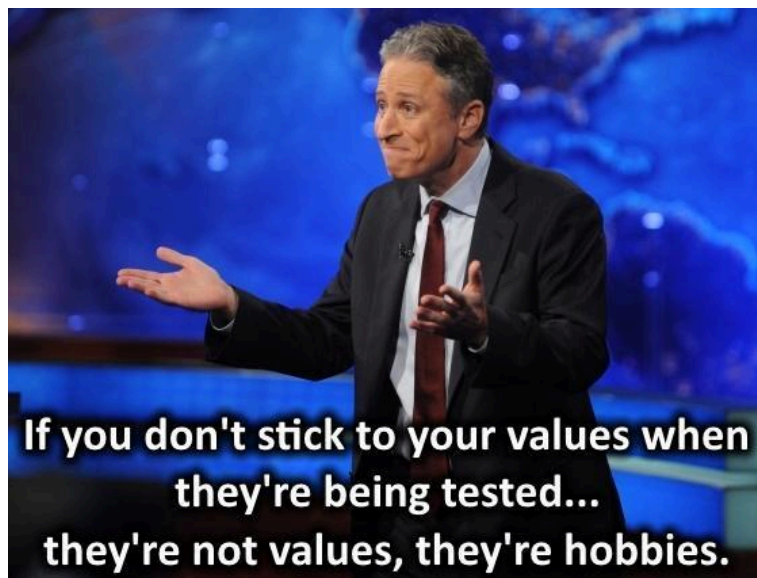
After the foundation, we must install those load bearing walls or pillars to keep the house standing. Our pillars are our fraternity's values – scholarship, character, leadership, commitment, and finance. Espoused values are nice, but it's the enacted ones that matter. So it's best when there's a measurable way to demonstrate our pledge to those values. Examples:.

- **Scholarship.** A Brother's first duty as a student is to prepare for his career by focusing on achieving excellence in his chosen field of study. The job market is saturated with degree holding people. His GPA is a four-year reflection of his work ethic. His GPA may be the deciding factor if he gets that first job or not. A minimum GPA standard means he'd have to be at or above it to receive a bid and to stay active in the Chapter once initiated.

- **Character.** You could measure this by having an expectation to do a minimum number of community service hours each semester. Many Chapters do 15 hours per semester, per Brother. It's important to engage in our community, to spend time with those less fortunate or those in need. It will help Brothers better understand the issues facing their community and enables them to empathize with others at a much higher level. Hopefully, it will inspire them to make any community they are part of better.
- **Leadership.** You could measure this through an expectation that every member is actively involved in another student organization on campus. This helps our Brothers grow their resume, learn leadership in other organizations as well, and network with others who might become Pilam recruits. All of that will make Brothers more attractive to grad schools and future employers.
- **Commitment.** You could measure this by expecting every Brother to attend at least 85% of Chapter meetings, or every member is in one of our committees, or all members come to a certain percentage of chapter related events.
- **Finance.** You could measure this by verifying every Brother has paid his dues on time or is on an approved payment plan.

Remember, we want to be able to demonstrate HOW we live all of these values. The "standards" tied to each value give us an easier way to validate that we live these. If a Brother doesn't meet these, he shouldn't be afforded the same opportunities and privileges that other Brothers get.

Moreover, if we say these are our values, but we won't challenge ourselves to measure it or worse, we measure it, but then don't enforce repercussions for not meeting them, then where does that leave us? Comedian Jon Stewart said it well with this gem:



Chapter Minimum Standards (CMS)

These minimum Chapter Standards ensure we're compliant with our umbrella organization - the [North-American Interfraternity Council \(NIC\)](#) - they help us with our insurance policies, and they help us fit in with university Interfraternity Council (IFC) policies. To review the Chapter Minimum Standards, click [here](#).

Tactical & Operational Level

Undergraduate Officer & Position Structure

Our officer structure consists of 6 Vice Presidents and a President. This short video explains the various roles, titles, and committee structure, and it explains WHY it is structured this way. This format of having multiple VPs was first launched in 2012 and put into full implementation around 2014. Elevating the role of alumni relations to that of a Vice President happened in 2019. We made the move to elevate the importance of the role and to ensure it was getting the dedicated support it needed. Having a VP of Housing is optional based on the housing situation of your Chapter.

VIDEO: https://drive.google.com/file/d/12H_XW5vV3GjATxLRcEzQjYBJksWdOrUc/view?usp=sharing
TIP -- increase the playback speed to at least 1.25

Election Cycles & Transitions

Cycles

Officers have year-long terms. Chapters elect their officers somewhere between November/December with the transition typically occurring in January. That gives some time in between semesters to transition and prepare.

We use this cycle so that the outgoing officers are typically still around in the spring to help answer any questions the new officers have, and to help with any other needed support. Additionally, this gives the newly elected officers a larger "halftime" between May and August to reflect and adjust for the final semester of their term than if they ran a cycle during the Academic year and would only have a few weeks in December as a "halftime".

Officer Transitions

These are best practices for successful officer transitions.

1. Meeting between outgoing Executive Board and the CCB
 Recap and reflect on what went well and what didn't from the term. Review achievement of goals and talk about lessons learned. It's ok if the new Executive Board observes, but it's ideal to keep them as observers at this point. The CCB would be the ones who would want to provide both the affirmative and critical feedback to the outgoing Executive Board.
2. Separate meeting between outgoing and incoming Executive Board
 Focused on transition of information and some initial training. It could be broken down into two different sections.
 - a. Reflections from outgoing Board
 - i. Things outgoing officers wish they'd known when they started
 - ii. Greatest achievements

- iii. Biggest mistakes or failures
- iv. Additional advice they'd offer the new Executive Board
- b. Training
 - i. What are the key things new officers need to know about his specific role?
 - 1. expectations, requirements, job descriptions, policies, SOPS, etc.
 - ii. What are the key things new officers need to know about general leadership?

Coaches may choose to interject at different parts or have their own separate section.

3. Planning

As the new Executive Board begins its planning and goal setting, it may want to run ideas by the former Executive Board. Doing so could provide opportunities for additional helpful knowledge transfer and it could help create buy-in from outgoing officers that could come in handy later.

4. Training outgoing Executive Board on meaningful engagement

Too often, former officers disengage, feel alienated, and don't help the process of new leaders coming into the role. The CCB could provide training to outgoing officers on how to be meaningful contributors and followers now that they are no longer leaders by official title. Areas to cover could include but are not limited to:

- Offering observations and considerations to new officers without stepping on their toes
- How to influence the Brothers to follow and give the new officers the right support
- How to be an "Effective Follower" (see the Followership training)

5. Execution & Follow-up Interaction

If all the prior steps have occurred, creating the conditions for the former officers to provide some occasional feedback to the new officers could be really helpful. Some organizations even create a formalized title and role "Past President" that is carried and that has some basic expectations and roles assigned to it.

CCB Engagement at Executive Board Meetings

Coach observation and participation in Executive Board meetings can make a huge difference in the success of the officers, the CCB, and the entire Chapter. With the prevalence of video conferencing software and with some of the high-tech video cameras that exist, you can even have really meaningful engagement virtually.

Why have a Coach attend weekly E-Board meetings?

Aside from the obvious that the more information you have and can see, the better you can coach, here are additional reasons why this should be part of your practice.

- **Details & Catching Issues Early.** Often the E-Board meeting is when the planning and details of initiatives are flushed out. This gives you a chance to interject before it's presented to the Chapter, especially when there's something that's not been thought through.
- **Build rapport.** The more you show up, engage, and provide value back to them, the more comfortable they will become.
- **Interpersonal Communications between E-Board.** You can learn so much by observing how the E-Board communicates with each other. They often will be more casual and open than they may be in front of the entire Chapter. How does the Rex command the E-Board? Which officers are consistently well prepared and which are not? How do officers respond when another officer is leading the discussion or contributing?
- **Consistency in messaging.** Is what you hear from your officer about the E-Board evident within the E-Board meetings? Is the information you're providing your officer making it back to the E-Board in the manner in which you intended?
- **Easier than a Chapter meeting when virtual.** Attending a Chapter Meeting virtually usually is ineffective given the size of the group. In an E-Board setting, with the right technology, you can be fully engaged and able to follow what each officer is saying.

Your role at the E-Board Meeting

If you are trying this for the first time, the students may have a tepid response to your engagement. It's most likely that they are concerned about your presence either because they think you will begin to "take over" their meeting or because they don't want to have to admit something in your presence. Both of these are challenges but there are ways you ease these concerns.

Be clear with the Rex and E-Board the role of the attending Coach. The primary role of the attending coach is to observe. However, that Coach should have a separate section of the E-Board meeting agenda where he would then give updates. Those updates could be alumni related, reminders from HQ, or follow-up items not naturally covered in the course of the E-Board meeting. Additionally, the coach is welcome to provide input as he sees fit throughout the meeting. Yet, the Coach needs to be cognizant of how frequently he's interjecting and how that may be perceived by the students.

Things for the Coach to consider before he interjects

- Does this need to be addressed right now or can it wait until the Coach's Update section?
- Should this be addressed as an entire E-Board, or is it better to be addressed one-on-one with the officer?
- Is this something the coach should be influencing, or is this better for the students to decide?
- If the coach senses the strategy/plan/action posed by the E-Board is likely to fail, and he hasn't been asked for his input, he may consider what the consequences of the failure would be. In the case of risk management, finances, housing, or recruitment, failure to achieve might be really devastating to the Chapter. As such, the Coach probably should interject. In other cases, the

failure may sting but not cause larger problems. In this case, the Coach may decide to remain quiet if his input wasn't sought. Sometimes, the students learn best through failure.

Maximize the meeting virtually

With the "Meeting OWL" 360 camera and Zoom, you could be sitting in the comfort of your home while the E-Board "brings" you into the meeting. Gone are the days of having a hard time hearing and seeing what's being discussed. Check out this 30 second video on how it works!

[Meet the Meeting Owl \(youtube.com\)](https://www.youtube.com/watch?v=...)

The Chapter can have you shown on a laptop or on a large screen like a TV monitor.

Their experience



Your experience



Best practice

If you have a CCB, create a rotation amongst your Coaches so that every E-Board meeting there is some coach present. With JUST a CCB of 4 members, we're talking about just one extra meeting a month.

Joint Board Meetings & Retreats

A “Joint Board Meeting” is a meeting combining the undergraduate Executive Board and the entire CCB.

Purpose: To convene in a recurring manner so that all stakeholders can review progress made since the last meeting, provide feedback and coaching that should help the undergraduate officers either improve or continue having success, and to complete any other planning for the coming semester.

Frequency: We’d suggest a minimum of three times a year. If you can, shoot for the example below. Listed below is what you might cover at each meeting.

January (before school begins)

Prep for the semester. What are the goals for each officer? Are they [SMART goals](#)? Planning for the objectives or steps that will enable the goals to be achieved. Reminder about lessons learned from the last set of officers (see December description). Reminders of expectations the CCB has for the undergraduates (and vice versa). Some type of team building experience.

March

Mid-semester check-in. Are we on track to achieve the goals? If some goal timelines have already expired (e.g. recruitment may already be done), how did we do? Why were we successful or unsuccessful? What did we learn, and what can we do next time to improve the results or keep them consistent if we did achieve our goal this time around? Do we need to re-prioritize anything?

If we’re not on track with the goals, what can we do right now to adjust and get back on track? If we’re on schedule or ahead, what potential problems could occur that we should plan for now?

May

End of semester review & seed planting for next semester. How did we do with the semester goals? What’s the analysis as to WHY we were successful or not? What did we learn from this experience? What do we need to do differently in the coming semester? Some type of team building experience.

Use the next 2-3 months to think and brainstorm then come to August ready to finalize goals and plans for the coming semester.

August (before school begins)

Prep for the semester. What are each officer’s goals? Are they SMART? Plan for the objectives or steps that will enable the goals to be achieved. Provide reminders about lessons learned from last semester and the expectations the CCB has of undergraduates (and vice versa). Add a team building experience.

October (similar to March)

Mid-semester check-in. Are we on track to achieve the goals? If some goal timelines have already expired (e.g. recruitment may already be done), how did we do? Why were we successful or unsuccessful? What did we learn, and what can we do next time to improve the results or keep them consistent if we did achieve our goal this time around? Do we need to re-prioritize anything?

If we’re not on track with the goals, what can we do right now to adjust and get back on track? If we’re on schedule or ahead, what potential problems could occur that we should plan for now?

December (similar to May but with less focus on the future unless officers were re-elected)

End of semester review & seed planting for spring semester. How did we do with the goals from the fall? What's the analysis as to WHY we were successful or not? What did we learn from this experience? What are the ideas and thoughts that we'd want to pass along to the new Executive Board?

What's it look like?

Think of this like a board meeting with a CEO, the VPs, and a Board of Directors. Ideally, this is an in-person gathering on campus during a weekend. A nice meeting room with AV capabilities and plenty of tables and chairs helps.

The Chapter's Officers would have already prepared a short write-up for the CCB outlining whatever they had to have ready for the meeting. Then, they deliver a small powerpoint presentation that summarizes their written reports. The Executive Board each takes turns presenting their information. The CCB is evaluating the Executive Board on two things - the analysis and their presentation skills.

Analysis

Did the students understand why they were successful or why they failed? Did they convey a logical plan for how they would either fix the problems or ensure they continue to be successful? What role did other members of the Chapter (committee members, E-Board, etc.) play in their success or failure? Sometimes, students will suggest they didn't achieve their goals because "the goal was unrealistic" or they will list some other person or entity as being responsible (e.g. "The whole IFC had bad recruitment too, so that's why our results were what they were").

In both examples, those probably aren't the real reasons they failed. It typically comes down to vague goals, poor planning to achieve the goals, and/or poor execution of their plan to achieve the goals.

Presentation Skills

How they actually present the information to you. You can look at both the information and the delivery.

The information: How was it organized? How much is objective v. subjective? What are their references? Are they using data compared to the IFC or the HQ (all of Pilam)?

The delivery: Their eye contact, use of visual aides, use of filler words (e.g. um, uh, like), non-verbal body language, their dress and appearance (can they tie a tie, match their belt to their shoes, etc.?)

Helpful Reminders for Joint Board Meetings

The leader of the CCB should work with the Rex to:

1. select joint board meeting dates months in advance
2. reserving space for the meeting and ensuring there's a video call option for those CCB members who can't be in person
3. establish a clear agenda in advance

At the end of the meeting, the E-Board should have received affirmation and critique that will help them improve. There should be a clear set of next steps that can be followed up with by each officer's individual CCB Coach.

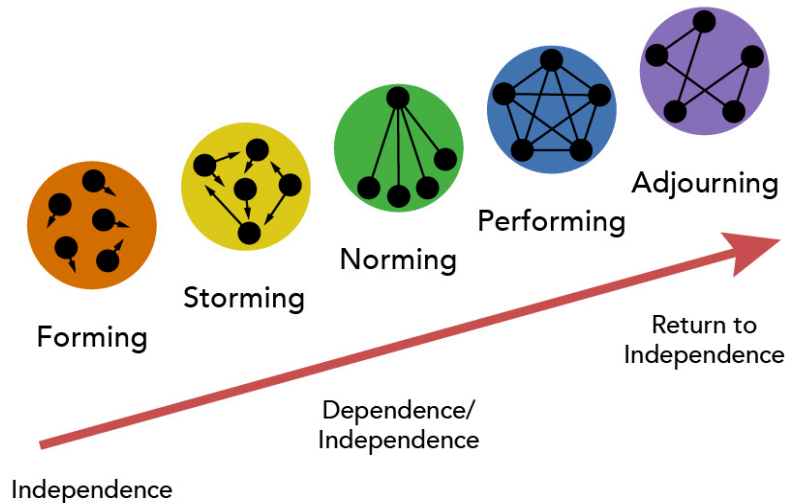
Retreats

Some CCBs make one or two of the joint board meetings official "planning retreats" for the Executive Board and CCB. If exploring this route, a few things to consider:

- An off campus location can help stimulate new ways of thinking.
- A two-day (weekend) affair can provide a lot of time to intentionally develop the Executive Board in multiple ways
- An agenda that includes work and group development activities can make the experience more memorable
- HQ can help with tips and activities to make such a retreat really impactful

Undergraduate Trainings

Stages of Group Development



Forming, Storming, Norming, Performing, and Adjourning are the stages. The Executive Board will go through at least some of these stages. Some never get to the performing stage. Use these videos to help you see their current stage and work through solutions to keep them moving toward “Performing”.

VIDEO: <https://www.youtube.com/watch?v=nRYRZg8YSso>

Provides a strong overview of the theory/model. Meaningful examples are provided.

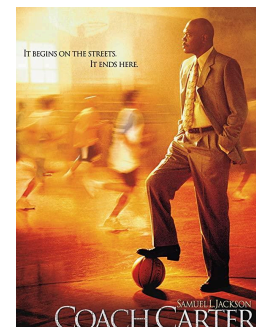


VIDEO: <https://www.youtube.com/watch?v=ysWWGf8VsOg>

An example of the stages visible through the movie Lord of the Rings.

VIDEO: <https://www.youtube.com/watch?v=EJTFaJ1-UI0>

Prefer something less fantasy based? An example of the stages visible through the movie Coach Carter.



S.W.O.T. Analysis



Conducting a S.W.O.T. analysis with a Chapter's Executive Board is a great potential activity for the beginning and midpoint of their term.

Whether you're familiar with the acronym or not, consider checking out this short but highly rated video. It's set up for businesses with talk of "customers and employees", but it could be applied to a chapter. Notice how the author really differentiates between internal and external factors and also helps focus on what to do with each of these areas. Her noting that "Weaknesses" may also be well explained as "Areas of Improvement" may serve you well as you think through this.

VIDEO: https://www.youtube.com/watch?v=I_6AVRGLXGA

When to conduct?

It's worth doing this at the beginning of an Executive Board's term and at the midway point through their term. It may be fascinating to have the outgoing officers complete one too and then see how that compares to what the new officers believe.

Who to include?

Aside from the current officers, you may want to have the following people or groups give feedback:

- Campus Greek Life Director. His/her opinion would be very fascinating and telling. How many times is this individual asked for honest feedback? How might asking this person right off the bat for such feedback set the Executive Board up for success?

- General Brothers. It might take a little more time to gather it and then compile it, but how might that help the Executive Board, especially if it requires every Brother to do it on his own and not just agree with those who speak up?
- HQ. We certainly have an opinion of the Chapter's strengths and weaknesses. Would those match what the students think? How would knowing what we think help the Chapter?
- Alumni and/or CCB. Of course the CCB would have more experience and thus more legitimacy in their assessment, but even alumni who have limited interactions might have formed some quick takes on the Chapter.
- IFC. Would their leadership be willing to provide you feedback? If you knew what they thought, how might that help you?

How to use it

Ensure it is referenced and considered as the Executive Board is crafting its goals for the semester. Revisit after a semester to see if the Chapter's SWOT has changed at all.

SMARTT Planning & Goal Setting

Ever see a group create lofty goals, but fail to actualize them? Often it stems back to the creation of the goal itself. This training below will remind you how to identify your organizational "why". Having SMARTT goals (specific, measurable, agreeable, realistic & relevant, and time-oriented) will help you be more likely to achieve the goals!

VIDEO: <https://www.youtube.com/watch?reload=9&v=r19mvlmbkaU&feature=youtu.be>

Student officers should create goals for their positions over their winter and summer breaks, then present them to their respective CCB pairing. The CCB coach should provide feedback to ensure the goals are both SMARTT and aligned with the big picture strategy of the chapter and national fraternity.

Once created, execution toward goals should be a large part of what a CCB member discusses with his counterpart on their recurring calls.

Risk Management - Policy & Plan

Policy

Our [Risk Management Policy](#). Chapters are trained on this during the New Member period, and at all regional and national gatherings.

Plan

A Risk Management Plan should be created by your Chapter and customized to show how they will operate events within the parameters of our policy and any other guidelines or unique situations presented by their campus or location. The specific details of how each Chapter executes their plan(s) may be notably different based on the size of their school and chapter and if they operate a fraternity house.

The VP of Programming & Risk Mgmt. should create this plan in consultation with his CCB. HQ is available to review plans and offer feedback as requested.

A good plan helps reduce risk and work within the applicable policies. Some universities may provide templates for this as well. Some Chapters have one plan that they use over and over again at all events. Other Chapters have a template plan that they use as a starting point for every social event they create. It is encouraged that a template plan is used as a starting point given the number of extenuating circumstances that may exist differently for every event held (e.g. names of risk monitors, start time of the event, location of event, etc.).

Chapter members should easily be able to articulate best practices and Standard Operating Procedures (SOPs) that would be found within the Chapter's plan. The specific details of the plan, especially if details or protocols change from a prior event, should be reviewed at Chapter meetings immediately preceding the planned event.

A plan should have components including but not limited to:

1. Designated Risk Monitors, who are sober, helping run events and the expectations of a Risk Monitor
2. One common point of entrance and exit to the event location during scheduled event times and awareness of all possible egress options in the case of an emergency.
3. Restricted access (keeping guests in common spaces and away from personal bedrooms/spaces)
4. Having non-alcoholic drinks and food available to guests
5. A protocol that the guests list should be provided to the VP of Programming & Risk Management at least 48 hours prior to the event date

Training Responsibilities

The Chapter's VP of Programming & Risk Management should be re-educating the Chapter on the policy at least every school term. He should provide Risk Mgmt. Plan education to refresh the brothers on best practices at the beginning of the term and/or whenever a change to typical protocol has been made.

Pro Tip: The VPP should be tracking attendance through a Chapter roster that shows which brothers attended, that they signed off on being trained, and then that file should be scanned and added to their electronic filing system where it should be kept for a recommended five years. The file should also include the educational materials (the policy, the RM plan, any PowerPoints, etc.) that the VPP used to train the members.

Additional Training

- HQ can provide training on Risk Management upon request.
- HQ provides the online course "Tightrope" (<http://tightropeprogram.com/>) for all New Members.

Finance

Listed below are the most common questions we receive. An additional training video is included.

Frequent Questions & Answers

When is the Chapter's Roster determined?

To help Chapters financially, their roster is assessed, and they are billed only one time per year, at the beginning of the fall, *when they are at their smallest size*. HQ counts just the Chapter's initiated undergraduate brothers as listed via the Pilam Portal at the end of July. Chapters update and verify their

roster by logging into the Portal and changing the roster. Before the end of July the Chapter should have removed all graduates and any Brothers not returning for classes that coming fall.

What are the types of fees Chapters pay to the National Fraternity?

Per Caps: Per Brother fee HQ uses to operate and provide education, resources, and training to Chapters. Only initiated undergraduate Brothers pay this fee.

Risk Management Insurance: Per Brother fees HQ uses to pay Insurance providers so Chapters have general liability insurance. Only initiated undergraduate Brothers pay this fee.

Educational Assessment Fee: Per Chapter fee HQ uses to create regional and national conferences for the Chapters. This then automatically covers the Chapter's participants' costs associated with attending these functions.

New Member Fee: One-time per new member. Gets them access to PLPU and a manual. Only new members pay this fee.

Initiation Fee: One-time per new initiate fee. Gets them access to jewelry and resources including being covered under our insurance. Only new members who are to be initiated pay this fee.

When and how do they pay?

Our Collections Policy enables Chapters to select from one of three payment options. All three options provide them discounts if they pay them by the due date.

OPTIONS	Discount	DUE DATES
Option 1; 1 payment	\$350	Sept 30
Option 2; 2 payments	\$200	Sept 30, Feb 15
Option 3; 3 payments	\$150	Sept 30, Nov 15, Feb 15

What if a Chapter can't make Option 3?

They can establish a payment plan with the HQ. A small surcharge may be applied.

What is the specific amount for the various fees?

Amounts may change from year to year. Amounts are communicated to the VP of Finance over summer so that he may adequately prepare.

How does the Chapter receive its invoice?

HQ emails them an invoice with the total annual bill. Chapters can then select which payment plan option they want. Chapter Coaches are copied on these invoices. Questions are welcome.

Is additional training provided?

Yes. HQ offers training in the early part of the spring semester to any newly elected VPs of Finance. Training can also be scheduled outside of that time.

What Best Practices exist?

- Avoid using Debit Cards – withdrawn cash is hard to track. Use checks and petty cash.
- Keep all receipts for five years
- Coaches having financial records viewing access for periodic review w/ Chapter Treasurer.

- Chapter's Treasurer provides recurring reports to the Chapter about collection rates, account balances, budgeted to actuals, etc.
- Using a third-party collection system. We have Chapters that have successfully used [Greek Capital Management](#) and [Crowded](#), but there are other third-party collection systems. Having a system that the students can easily use and Coaches can easily follow along with is what's most important.

Training Video

This short training video is for chapters (10 minutes)

VIDEO: <https://www.youtube.com/watch?v=3MqpuFaZPlc&feature=youtu.be>

NOTE - This video is typically for students but may be helpful for Coaches too.

Running a fraternity follows the same basic principles of running a business. One of the essential pieces of business management is understanding finances. Utilize this training to learn more about the various types of dues that impact your chapter's finances and some best practices for financial management.

Finance & Collections Policy

To see the policy, [click here](#).

Financial Incentives for Chapters

We offer two additional financial incentives for Chapters and individual Brothers.

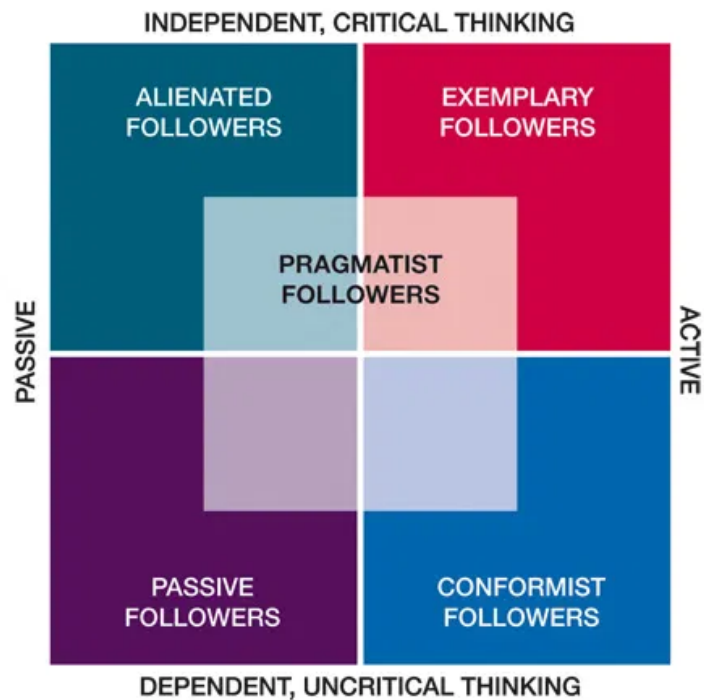
Chapter

- *Recruitment bonus*. Every year the HQ has a target recruitment number for the Chapter to hit. Once the Chapter achieves that number, any New Members they bring in ABOVE that targeted New Member number, are not charged the one-time New Member Fee. The Chapter can then decide to lower the fee they charge OR continue to charge it, but just roll it over into their operating account. The target number is different for every chapter and is based on a mixture of their historical trends and their campus averages. To learn your Chapter's target number, contact the HQ.

Individual

- *Expansion/referral bonus*. Individuals can refer friends from other schools and get paid. Simply referring a friend with their name, university, and contact information gets the member a small individual reduction in their dues. If that friend ends up joining and helping us launch a new Chapter, the Brother who referred the man will have his entire bill to HQ erased for the year! This is such an easy way to make money and help Pilam at the same time.

Followership



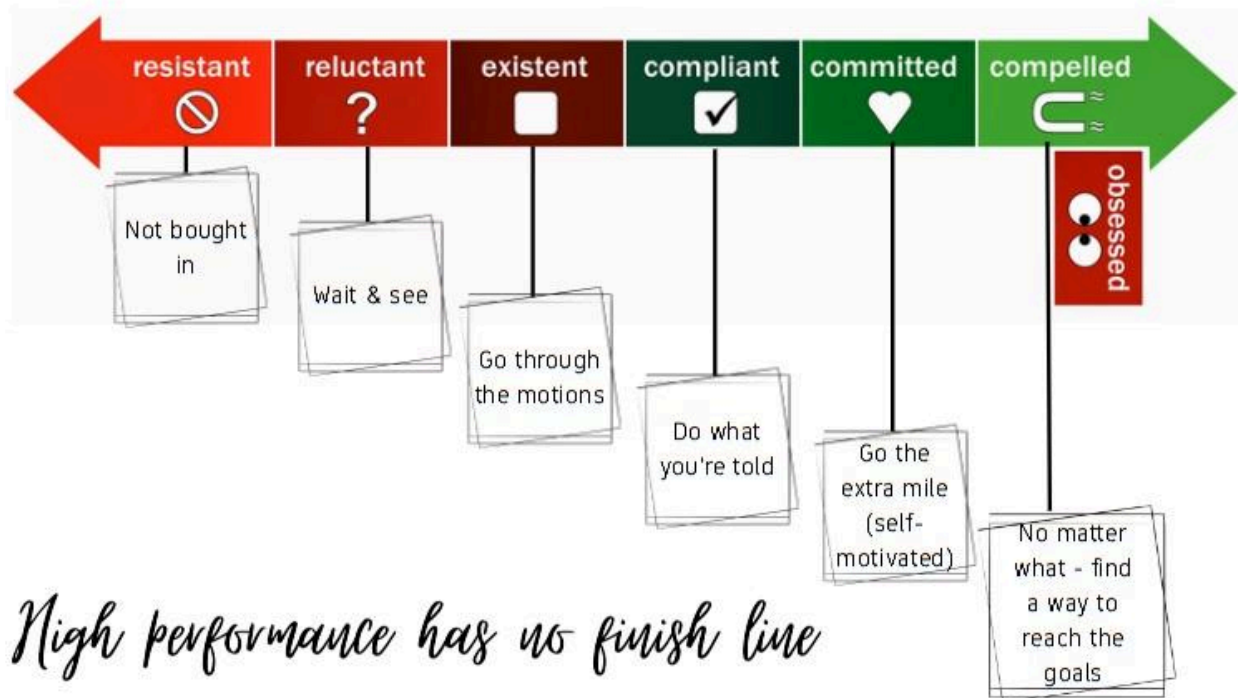
We almost always start out as “followers”, but what does it take to be an exemplary follower? Need the Brothers to better understand their role and how to effectively follow formal leaders? Need your formalized leaders to understand how to inspire exemplary followership? Use this to:

1. Identify common language to describe the types of followers and their behaviors.
2. Learn how to avoid the ineffective follower behavior and to instead, be an exemplary follower.
3. Understand the characteristics of exemplary followership.
4. Have members complete a [self-survey](#) about their Follower behaviors and type.

NOTE - We spend an entire day training this at Pilam’s Leadership Institute. HQ is happy to collaborate with you on how to teach and instill this within your Chapter.

Understanding the “Commitment Continuum”

COMMITMENT CONTINUUM



High performance has no finish line

COMMITMENT CONTINUUM

Jeff Janssen

Concerned about your members' lack of commitment? Plagued by too many Brothers Resistant or Reluctant to buy-in? Need Brothers to better understand and apply what it truly means to be committed? Use the Continuum to:

1. Identify common language for a Brother's commitment level
2. Create a [rubric](#) of fraternal aspects and desired behaviors for each of the levels listed above.
3. Recognize the behaviors of leaders that strengthen or decrease group commitment
4. Learn the language and process used to move Brothers through the Continuum all the way up to Committed, and then Compelled!

NOTE - We spend an entire day training this at Pilam's Leadership Institute. HQ is happy to collaborate with you on how to teach and instill this within your Chapter.

Running Meetings & Roberts Rules of Order

How to help the Chapter run meetings more effectively.

VIDEO: <https://www.youtube.com/watch?v=bLWffHKPUSo&feature=youtu.be>

Setting an Agenda & Taking Minutes

Struggling with hosting time-efficient meetings within your chapter? Effectively structuring meetings through writing is required to minimize wasted time. This training will ensure that at both chapter and

committee levels, you understand how to appropriately prepare for a meeting through agenda setting and by using appropriate recording keeping.

VIDEO: https://www.youtube.com/watch?v=E2eln7_3XTc

How VPs Run Committees

Struggling with encouraging the hearts of every brother on the committee to feel impactful? Effective engagement on the committee level is a sign of a healthy chapter. From knowing when to schedule committee meetings to understanding the art of delegation; this training will help you maneuver how to adopt habits that will ensure your committee structure has everyone feeling mutually impactful and the committee achieving results!

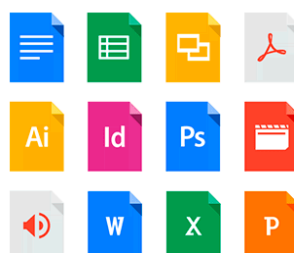


VIDEO: https://www.youtube.com/watch?v=_RUYkKY1ak0&feature=youtu.be

Navigating a Chapter's Google Drive



Google Drive



Description: Struggling with securing old records from your chapter? Tired of a messy chapter drive, or organizational shared storage? This training will inform you on the various forms of shared organizational storage that can be done to ensure your chapter's history is well kept.

VIDEO: https://www.youtube.com/watch?v=MIPGsf05F_Q&feature=youtu.be

Chartering Checklist (newly established groups only)

Struggling to understand the chartering checklist to become a full-fledged chapter? Through this training you will be able to identify what is required through each step of the chartering checklist process to ensure that your Colony is on its way to foster success and exist on its own.

1. Review of Chartering Checklist
 - a. Should be completed between 3 and 6 semesters. Longer than normal means a notable miss on prioritization or execution and thus potential repercussions may need to occur to redirect efforts.
 - b. Review checklist so CCB gets understands the objectives used for evaluating the Chapter

VIDEO: <https://www.youtube.com/watch?v=bK27DgCuGOQ&feature=youtu.be>

How Students work with CCBs

This video for the students was made before we switched from “Advisor” to “Coach”. Although “Advisor” language is used, the content itself remains practical. If the Chapter seems resistant to Coaching, try having them watch this video first and then share back with you what they learned.

Learning Outcomes

- Define a CCB/CAB and its benefits
- How to optimize the CCB
- What recurring interactions between students and coaches should look like
- Why HQ wants its volunteers to be more Coach-minded

VIDEO: <https://www.youtube.com/watch?v=VjZQt9HZsLs&feature=youtu.be>

Enhancing Alumni Relations

Many chapters struggle with communication and relationships with their alumni. From simple newsletters, to intentional calling campaigns, to engaging alumni events, this training will help you learn how to successfully develop alumni to become active participants in the chapter’s network.

VIDEO: <https://www.youtube.com/watch?v=653QZ2KVqMM&feature=youtu.be>

Running the Judicial Board

Is the chapter utilizing its Judicial Board to educate and deter risks or just to penalize Brothers? Are members other than the Executive Board serving on the Board? This training will teach you the ways to utilize the Judicial Board process that are mutually beneficial for the chapter and the individual Brothers.



VIDEO:

<https://www.youtube.com/watch?v=W7P7IYKmAkk&feature=youtu.be>

Recruitment

An entire manual on recruitment best practices exists for our staff. You’re welcome to have it if you’d like. Here are the basics you need to know for starters.

Every Chapter has access to a **FREE** resource called ChapterBuilder. ChapterBuilder revolutionizes our ability to track our recruitment and relationship development efforts with potential new members. By having a lot of data and analytics available, both CCB and HQ can quickly coach a Chapter to better recruitment results. If a Chapter isn’t willing to use this simple tool, they are significantly behind the curve. Further, your ability to coach them will be hindered as you’ll have to spend a lot more time asking questions. Watch the short video below for a brief tutorial on ChapterBuilder.

VIDEO: [ChapterBuilder 2.0 Demo](#)

We have a ton of resources available on our website [resources page](#).

The Chapter has a representative from HQ to help them with recruitment strategies and tactics.

Chapters struggling with recruitment usually have one of the four deficiencies. These go in order of a progression. If you lack # 1, it's hard for the other parts to be as successful, and so on.

1. Lacks a large enough network of non-Greek men friends
2. Can't convert PNMs/friends on a list to actually talking about recruitment
3. Can't get PNMs to come back for additional conversations or events
4. Can't close the deal on a PNM and get him to accept a bid

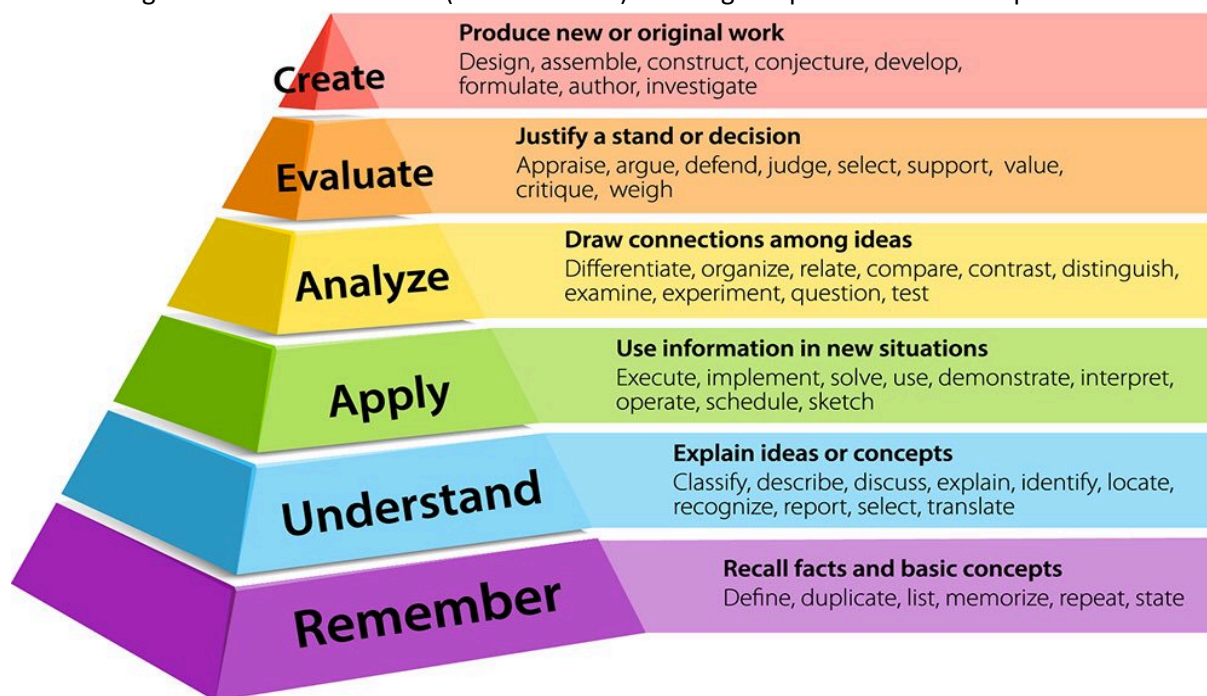
Each deficiency requires a different coaching strategy to resolve. Identifying the most prevalent deficiency is the first step.

Pi Lambda Phi University (PLPU) Overview

Pi Lambda Phi University (PLPU) is the Fraternity's Learning Management System (LMS) used to transfer knowledge from staff to student members.

Some quick information on PLPU

- It's a "blended learning approach" meaning it incorporates online modules and in-class instruction with the New Member Educator (our VP of Education "Archon"). The online modules are completed individually at the user's pace.
- The Archon assigns a handful of modules per week based on his overall learning plan and timeline.
- The Archon should then recap information covered in the modules weekly by leading a facilitated discussion. We want new members to move along Bloom's Taxonomy of Learning so they can demonstrate different types of knowledge. As such, the Archon's questions should range from the bottom level (memorization) to as high as possible. See examples below.



More on Bloom's Taxonomy can be found [here](#).

- Here are examples of what a facilitated discussion would and wouldn't look like.
 - WRONG: "Do you have any questions about what was in the modules?"
 - RIGHT: "Let's review the key points from the modules. In the [second] module from the [History & Traditions] section you learned about our Fraternity's history.
 - When and where were we founded, and by who? (Remember)
 - Can you explain why our Founders created Pi Lambda Phi? (Understand)
 - Their situation was related to religious prejudice. What are some other types of prejudice? What prejudices exist on college campuses today? (Analyze)
 - When looking at our Creed, do you think it is perfect the way it is, or should it be modified for today's needs? Explain. (Evaluate & Create)
- Open ended discussion questions
 - A ton of potential options for meaningful discussion can be found here ([RESOURCE](#)):
- [Learning Plan Outline](#)
 - This shows you the general information about what is covered throughout the program
- Assessment
 - There are built in assessments with PLPU. Archon's are welcome to create additional written or verbal assessments to validate student learning. Within PLPU, some assessments are objective with clear right or wrong answers (e.g. historical facts, dates, names, etc.) and others are subjective journal responses (e.g. "What does the Kovner quote mean to you and how do you think it can still apply to our Fraternity?").
- Reporting
 - The Archon has access to reports that show which users have completed the modules. The Archon can then use this with any New Members who may be failing to complete the expected modules.
- Final Tips
 - New Member Education meeting best practices
 - Meet in an on-campus meeting space where AV resources exist.
 - Have Brothers sit in and observe with occasional input that complements what the Archon is teaching.
 - Have NMs sit in a large circle or U-shape so they can better see each other.
 - Have new members try to relate concepts they learn about Fraternity operations to their own prior experiences in other organizations or from other teams.
 - Use Think, Pair, Share activities for subjective discussion to get more New Members engaged and thinking. Watch this [90 second video](#) to learn more.

Philanthropy partners

The national fraternity has had multiple different philanthropic partnerships over the years. While prior partnerships may have been with good-intentioned philanthropies, the national fraternity strategically decided in 2010 to begin more intentionally partnering with charitable organizations with a similar mission to ours. That led to a partnership with the Elimination of Prejudice Foundation for about a decade. Shortly after Covid, as our Chapters were beginning to re-engage with philanthropic work, students expressed a desire to have options in their philanthropy selection.

The International Executive Council (IEC) then charged the Undergraduate Advisory Council (UAC) in the Fall of 2022 to research 501c3 charitable organizations, find ones aligned with our Creed, and propose them as partner options to the IEC and the undergraduate House of Delegates by August 2023. The UAC went to work, and after many months of research, collaboration, and engagement with student Reges

and the IEC, they came back with a recommendation to have six approved options. Each philanthropy had a unique connection relating to their mission and our Creed. These were approved and announced at the House of Delegates meeting in August of 2023. Those six were (listed alphabetically):

1. The American Civil Liberties Union
2. Big Brothers, Big Sisters
3. Challenge Day
4. The Elimination of Prejudice Foundation
5. The Innocence Project
6. Special Olympics



**INNOCENCE
PROJECT**



Each fall, Chapters are to select one of the six they will support for that academic year, and then conduct philanthropic fundraising and promote awareness of that selection. There are several proven philanthropic fundraising events the HQ has seen Chapters do that engage the campus, are fun, and raise funds for the philanthropic partner. Success is not dependent on Chapter size, as HQ has seen both small and large chapters have lots of success.

Per our Chapter Minimum Standards, each Chapter is expected to execute philanthropic events supporting one of the approved philanthropies each academic year. Each Chapter is expected to complete at least one educational program and one fundraising event each academic year. The fundraising event(s) must raise the greater of a minimum of \$500 or \$20/member of the Chapter.

1. Pi Lambda Phi supports six (6) charitable organizations that align with the mission of eliminating prejudice. Philanthropy fundraising events held to meet our standards should be in support of the following philanthropic organizations:
 - a. The American Civil Liberties Union
 - b. Big Brothers, Big Sisters
 - c. Challenge Day
 - d. The Elimination of Prejudice Foundation
 - e. The Innocence Project
 - f. Special Olympics
2. The Pi Lambda Phi educational partner of choice is the Elimination of Prejudice Foundation (EOPF). Educational events, in accordance with the listed standard, should be held by a chapter in support of and/or in conjunction with the EOPF.

The six partnerships will be reviewed by the UAC every few years. Any questions about our partners or the selection process can be directed to the HQ.

Defining Chapter Success

If only it were this easy to tell...

PLAYER FOULS POINTS			GUEST		HOME		PLAYER FOULS POINTS		
1	4	31	90	8:14	103	2	1	10	
21	1	17	PERIOD 4			5	2	0	
34	4	15	FOULS 13	TIME OUTS LEFT 0	FOULS 12	10	3	37	
42	3	8				44	2	30	
44	2	19				53	4	26	

Introduction

This is a difficult but really important topic. We need you to think critically about the Chapter's performance and where they exist within a set of categories and phases. We'll then provide some reminders of things to be focusing on while they move through the categories and phases.

Repeatable systems and expectations

Repeatable systems and expectations help organizations reach higher performance levels and stay consistent. Unfortunately, the "scoreboard" for success isn't as clear as it is with athletics. Additionally, Chapters change their leaders every year and the entire Chapter flips over within 5 years. No successful business would expect long-term success with such a model. As such, a CCB should create a "scoreboard" that it cares about and expects the Chapter to pay attention to. Inevitably, the students will have different desires for goals and should lead in proposing goals. The CCB wants to give them some general guidance on direction.

Three Categories & Four Phases of a Chapter

Three Categories

What is the Chapter's current state and potential? Generally, a Chapter is in one of three categories:

1. In a fragile state where they could easily perish (this isn't just tied to risk behavior)
 - a. This could be a small group, or a brand new group still forming its identity to operational best practices.
2. Consistently stable, but not really achieving much
3. A group that does or is capable of achieving a lot (awards, high measurable achievements, etc.)

Four Phases of a Chapter

If the Chapter is stable but you're not sure how to evaluate them, consider using the "4 Phases of a Chapter" resource. Have the student leaders each self-assess and then have the CCB do it too. How does your assessment compare to the students?

RESOURCE: [4 Phases of a Chapter](#)

Most Chapters will move through these phases simply because of changing membership and the pressures of society and their peers on campus. Helping the student leadership build common language and have a general understanding of where they fall on this rubric of phases is the first step. As there are

11 different “perspectives” (or categories), the Chapter may be in one phase with one perspective and another with a different perspective. That’s not uncommon.

This resource isn’t meant to be a black and white evaluation as much as a tool to help stimulate conversation within the Chapter (and CCB) about where they fall on this spectrum. This should prompt meaningful discussion on which phase they’d like to be in and what they can specifically do to get there.

Fragile

A group has to be strong and cohesive or they probably won’t be willing to work together on anything of great merit. If they achieve something of note without strong cohesion, it’s probably the result of a few leaders and those successes won’t last - they aren’t part of the Chapter’s culture, just byproducts of a few driven leaders. Additionally, if they are fragile and lack cohesion, when difficulty inevitably arises, they are more likely to bail out than to stick it through with resolve. A group in this category should focus on the following:

- Strong relationships between Brothers. You might observe things like:
 - Members spend quality time together with each other outside of business meetings and other required activities.
 - Students feel bonded to each other and are committed to the Chapter (see [Commitment Continuum](#))
 - Chapter members seem to enjoy each other, laugh often at Chapter meetings, have funny stories and jokes.
- Chapter is open and comfortable with the members of the CCB.
 - It’s hard to admit when we make mistakes. Students may be even less willing to open up to you out of fear of being judged. We need them to be open and honest with the CCB.
- Chapter members can inspire other students to join the Chapter
 - The average size and appropriate goal will change from campus to campus but in most cases, anything less than 10 new initiates a year would be a concern. See HQ for more guidance on this topic.
- A meaningful, written new member education plan exists. Retention of New Members is better than 80%.
- Risks are managed through an effective risk management plan in alignment with the policy
- Philanthropic work is done to raise awareness and/or funds for the Fraternity’s philanthropy
- Chapter achieves the [Chapter Minimum Standards \(CMS\)](#)
- Other Standard Operating Procedures and systems provided by HQ are being used
- Chapter achieves any requirements from the University and IFC
- Chapter’s financial management looks like high (above 90%) collection rates and financials that look like a small amount of savings generated each year (less expenses than costs). Chapter financial records are transparently shared with members to increase their knowledge.
- Chapter maintain and enforces individual membership standards (IMS) if applicable
- ****If in Associate Chapter/Colony status**** Chapter is moving through the Chartering Checklist appropriately

Consistent & Stable OR Achieving

Assuming the Chapter is a bit more stabilized and can do all the things mentioned above, you would then want to focus on helping them get to the next level.

- All prior areas have been maintained
- Competing at a high level

- Chapter begins to be competitive for university and national awards
- Chapter establishes and strives to achieve meaningful goals for its various operations
- Focus is on improving performance from prior years in various operations (recruitment, finance, new member education, service, philanthropy, etc.)
- Living & Learning Community
 - The Chapter has found some type of shared communal living situation (e.g. house, apartment building, residence hall) where a significant number of Brothers live together. This place enables them to further develop their social experiences and relationships while also learning how to manage a shared living space.
- Recruitment
 - Chapter is at or above the IFC average roster size
- Philanthropy
 - Chapter completes a mixture of both educational and fundraising philanthropic work
- Sound financial operations
 - Chapter is able to provide clear reporting of its financial progress
 - Chapter begins to save funds for a specific initiative (e.g. housing, scholarship fund, etc.)
- Meaningful alumni engagement begins to occur
 - Once a semester newsletters and alumni events are the norm
 - *Probably with the help of a CCB or an Alumni Association

Guidance & Direction from the CCB

Use all the aforementioned to determine the “scoreboard” you have for the Chapter. That scoreboard can include [individual expectations](#) too. Lay this out to the Executive Board during one of the first [Joint Board Meetings](#) of their term and then revisit each time you meet with the students.

Common issues and strategies

While every chapter has its own unique issues and problems, we often see general themes emerge. Check out the most common chapter issues we encounter and suggestions for ways to address them.

Low participation

- Reexamine activities and required events. Are they just being done because they've always been done that way, or do they truly contribute to the goals and values of your organization?
- Ask members what they want out of their membership in your organization. What events are their favorite? How can you restructure current events so members can easily see the benefits of attending?
- Consider the committee structure being used. Are they even using one? Does it follow our best practices? Committees exist to get members more involved in things they care about.

Interpersonal conflicts between members

- Meet with the chapter members to determine the source of the conflict. There are multiple sides to each story, so make sure you are getting multiple perspectives to form a full picture.
- Depending on the source of the conflict, establish a plan to tackle the issue. For example, if the conflict is between two members, it might be helpful to set up a mediation between them for them to discuss their relationship and how they can move forward. If the conflict is chapter-wide

and involves multiple groups, it may be more effective to have brotherhood programming to rebuild the relationships within the chapter.

Chapter meetings are long and boring

- Check the chapter's use of parliamentary procedure to eliminate unneeded discussion and chatter.
- Ensure officers are not just reading word for word from the minutes that will be sent out after the meeting. Everyone should be able to read those on their own. Meetings should be for explaining details and moving forward on chapter business.
- Consider limiting the amount of time each officer has to make the report. This will encourage them to share only the necessary information.
- Find ways to make the meeting more fun. Make every other meeting focused on team building or brotherhood building. Incorporate discussion, reflections, and movement in the meetings.

Member aren't paying dues or are consistently late to pay

- Help the chapter develop incentives for early and full dues payments. Examples include, but are not limited to, dues discounts, being entered into a drawing for prizes, free merchandise, etc.
- Educate members early and often about financial requirements. Set up plans to discuss financial information with new members and at the beginning and end of each term with the chapter.
- If the issue is Chapter wide, consider implementing the "5%" rule or some variation of this. This means that when 5% of the chapter's members are past due on their accounts, pause all the social and fun events for the chapter until it's resolved.

Lack of continuity from year to year

- Assist the Executive Board with planning a required officer transition workshop.
- Coaches should check in with officers at several points throughout their term to ensure they're keeping good records and collecting resources and information for the next officer after them.
- To keep a timeline of tasks they complete throughout the year, pass this information along to new officers during their transition workshop.

The chapter is losing members for reasons unrelated to graduation

- Try to determine the reason individuals are leaving through an exit assessment/interview.
- If the issue is related to academics, help the chapter come up with an academic achievement plan to incentivize its members to focus on their grades. Be sure to include an accountability system and to utilize university resources in the plan.
- Work with the chapter to reestablish a feeling of shared ownership. All members share a responsibility to the organization, not just those that hold positions.

You suspect a chapter member is struggling with substance abuse

- Try to sit down with the student and have a conversation with him about his life and how he is currently doing. If you do not have a prior relationship with this student, they may not feel comfortable opening up to you.
- Refer the student to professional resources at the university like a Counseling Center. It is important to recognize that these are difficult situations in which students should receive help from professionals with experience in these areas.
- Encourage the chapter to hold an event or workshop regarding alcohol or other drugs. The university will typically have an office on campus that can help with these types of presentations.

Dealing with interpersonal conflict.

- Seek first to understand.
- Separate the person from the behavior.
 - Use “I” statements.
 - Refrain from saying “you are uninvolved”. Instead, try saying “I've noticed you haven't been involved lately”.
- When you initiate discussion, acknowledge the conflict.
 - Don't beat around the bush, state how you interpret the situation, and let the other person do the same.
- Set a time to communicate directly, preferably in person.
 - Choose a place that is neutral.
 - Include the other person in the scheduling shows them you are flexible.
- Ask directly but sensitively for the other person's ideas and recognize positive intentions.
 - Don't make all the decisions yourself. Conflict resolution should be a compromise and a team effort.
- Repeat back to the other person what you are hearing to make sure you've understood.
 - It is important that what one person is saying is being interpreted correctly by the other person.
- Listen empathetically.
 - Instead of trying to plan what you'll see next, listen to what the other person is saying, then plan your response.

Initiation Ritual: Changes, Education, Expectations, and Tips

Changes

In 2018, our undergraduates and alumni volunteers came together to consider, propose, and recommend modifications to streamline our Initiation Ritual ceremony. For chapters with large classes, initiations were taking prohibitively long, and some felt the significance and messaging of the ceremony was being lost. The committee was tasked to review the language in the ceremony and recommend ways it could better communicate the Fraternity's expectations and significance.

The committee carefully considered feedback from students, Chapter Coaches, and elders of Pilam who knew the history of our initiation ritual. They carefully explored possible modifications while being mindful of preserving the history and symbolism of the ritual. This was reflected in their findings. The committee recommended only cursory changes to the text of the ritual. The changes expedited the ritual by making some of the individual activities into group activities. A number of individual sections were retained, so each New Member individually hears and experiences critical messages of the ceremony on his own. The committee presented their recommendations at the 2018 Convention, and the House of Delegates resoundingly passed the resolution.

Education

An educational session about the meaning and symbolism of the initiation ritual can be provided by the HQ staff to any Coaches and/or Chapters wishing to understand its meaning in a deeper way.

Expectations

We expect the Chapters to conduct the initiation ritual as it is written. We also strongly recommend that a Coach is present for at a minimum, the initiation ritual. Presence of the Coach(es) helps ensure the sanctity of the ritual is preserved and it shows the New Members that we consider this night so special that alumni will attend too.

Tips

We have seen some Chapters do an INCREDIBLE job making the initiation ritual truly unforgettable in ways that are completely safe but that are so unique and stimulating to the senses. We'd love to talk with Coaches and Chapters looking to enhance the initiation experience.

Communication/Coaching Tips & Unresponsive Officers

Frequency of interaction

During the school year, you should be talking with your student at least every other week.

Method of communication

Ideally, some meetings would be in-person over coffee via a video call (Zoom, Facetime, Skype, etc.)? We recommend in the early phases of your relationships development, you always try some form of "face to face" interaction so you can pick up on non-verbal cues. Knowing that's not always possible, how can you then ensure there's real time "face to face" interaction? As the relationship strengthens and rapport is built, maybe you occasionally do a phone call instead of video call.

What should I discuss?

Consider breaking your call into three not necessarily equal sections.

1. How is the student doing in general (classes, life, family/significant other, etc.)?
 - a. This builds rapport and gives you greater insight into who he is. *"People don't care how much you know until they know how much you care."* When you follow-up on personal items he mentions from a prior call that you remember (e.g. "You mentioned last time your mom was sick, how is she doing?") you build trust and rapport.
2. How is the student doing with his officer specific functions?
 - a. Focusing on his officer specific goals (e.g. with the VP of Finance you might use this time to review bank statements, collection rates, budget v. actuals, etc. and ask how his goal with [the fundraising event he planned] is coming along).
 - b. Are we in a good spot or not with those aforementioned things? If not in a good spot, what is his plan to fix it? After hearing his plan, what's your feedback? Consider the [P.I.N.](#) approach.
3. How is he doing as a general leader/officer of the Chapter?
 - a. Assuming all else is well, discuss what challenges he is experiencing in general in the chapter or that he's observing. Example: He might note that there's conflict between two other officers, that the senior Brothers aren't coming around, that the relationship with the IFC is strained, etc. There's always something that could be a bit better. How good is he at seeing it? Assuming he can see it, ask him what he's planning to do about it. He has to remember, although it may not be in his position description specifically, as a general leader of the Chapter, everything is his business and he has to respond when there are problems. That's why he was elected and sits on the Executive Board. Again, use the P.I.N. approach to provide feedback to his ideas.

Email communication

Is great for recording action items and providing general updates but is not a great method for coaching.

Texting

This can be effective for quick communications when the responses you need are simple, but like any texting we do, it sometimes leaves us guessing on feeling, emotion, meaning, etc. and as such, it is also not a great method for coaching.

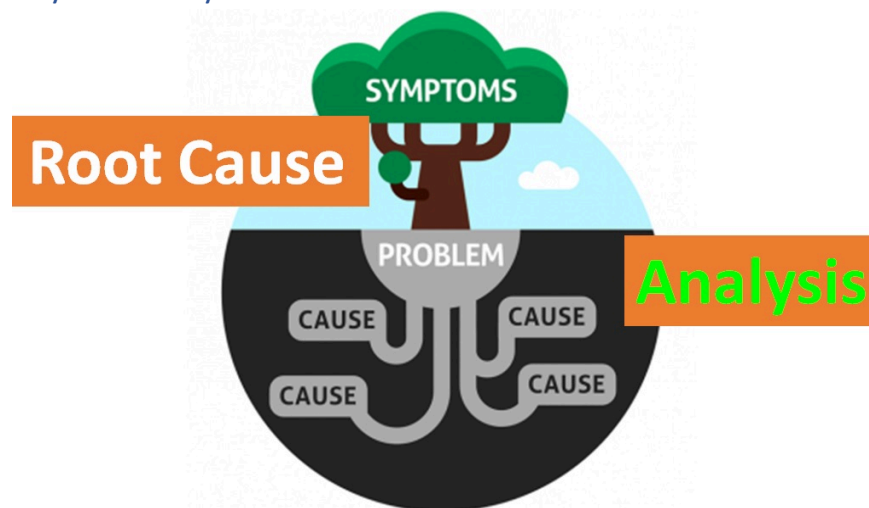
Unresponsive Student

If you're dealing with an unresponsive or notably underperforming officer, what should you do? These steps do not need to occur in this specific order, but you absolutely need to let someone know.

- 1) Communicate your expectations to the undergraduate officer and ask him if he's willing to meet those expectations.
 - a) If he's not, then he should reconsider if he's right to be an officer.
- 2) Let the President know
 - a) Great opportunity for the President to show leadership skills and counsel the officer.
- 3) Let the CCB Chairman know
 - a) He too can help with a conversation about expectations.
- 4) Let HQ know
 - a) We are happy too to have a conversation about expectations if the prior routes didn't yield the positive change needed.

Other Tips & Best Practices

Root Cause Analysis & "Why" x5



Help the Chapter identify the root cause of their issue and not just the surface level symptom. To do this, when they pose a problem and a quick reason for it, consider asking them "why" multiple times to get a root of their feeling or perspective. This is a very simplistic example, but it is also one we see often.

Problem: We missed our recruitment goal by a lot.

1. Coach: Why do you think that happened?
 - a. Student: We're not very good at recruitment, I guess. Or our goal was too high.

2. Coach: What makes you say that?
 - a. Student: Not a lot of guys came out to rush week / our events / etc.
3. Coach: Well why do you think that was?
 - a. Student: Well, [some excuse or explanation] made it really hard.
4. Coach: It looks like other fraternities had success despite those things, so why was it that we didn't?
 - a. Student: They must have already known those guys they were recruiting or they had [fill in the blank advantage].
5. Coach: Ok, so why didn't we have previously established relationships we were developing and why didn't we pivot to virtual recruitment?
 - a. Student: We treat recruitment as a thing we do 2x a year for a week and we rely on big events to bring guys in. We don't have a culture or a VP of Recruitment that implements year round relationship development (recruitment) with non-Greek men.

So the core problem is our Chapter doesn't have a program in place that fits today's needs. Now we can begin to talk about strategies for fixing that. Without that awareness, the Chapter may stop at the surface level and legitimately think, "We just need to wait until we can throw recruitment events again and then we just have to make sure they're even bigger and better." Such an assumption would be a pretty big miss.

P.I.N. approach (feedback tool)

An acronym that breaks down as "Positive, Interesting, Negative". Use this for providing feedback to student ideas. When they pitch an idea, instead of leading with why it won't work, start with what you like about the idea. Then move to parts of the idea that are interesting because they aren't outright bad but you'd need more information to fully understand how that would play out in reality. Then go to the negative - the things you don't like about the idea. Using the approach ensures the students hear you give some level of affirmation and it teaches them to also use an approach with their fellow peers.



"A leader is someone others respond to, trust, and want to work with."

Emotional Bank Account (relations philosophy)

"People don't care how much you know until they know how much you care. "

You want to build up MULTIPLE positive interactions with the student you coach before you begin to have critical interactions. Some suggest being intentional in having at least 4 positive interactions to every negative one. This short video gives a bit more insight.

VIDEO: <https://www.youtube.com/watch?v=Y1ugYimvfhQ>

Mistakes v. Missteps (learning philosophy)

A misstep is an error or wrong decision that has happened for the first time likely due to lack of experience. A misstep is understandable and part of the learning process. In fact, it should be embraced and supported. A mistake on the other hand is when the error has already occurred and been made known, but for whatever reason, this error has been repeated. A mistake is much more problematic as it suggests the person who committed the error wasn't paying attention previously, or they didn't learn

from the error, or they just simply showcase poor decision making because they did the same thing that has already proven to not work. Regardless, this is not what we want to see from our leaders. Mistakes should be avoided and definitely pointed out when they happen.

No one likes failure or having errors, but it's natural, especially with a group of new student executive board members. They will be cautious and nervous about failure. Helping them understand the differences between missteps and mistakes should help you in your coaching and conversations.

Gardner example (coaching philosophy)

In addition to “coach”, “mentor”, “counselor”, and any other terms you think fit this role you've taken on, what if we told you that you're also like a gardener too?

A gardener knows the plant will have to do the work of growing, but the gardener can help influence the situation to provide the greatest likelihood of growth.

Think about it...if you put some seeds in the dirt but then never really revisited them or tried to adjust your approach to maximize their needs, they probably wouldn't grow. Likewise, the Chapter you work with has already been “planted” and they are there, but it will take the right conditions and support from you for them to continue to bloom and grow.

If a flower was planted in bad soil with tough surrounding conditions, we wouldn't be surprised when it failed. Instead, we'd probably adjust our approach and try to give it the extra support (water, nutrients, etc) that it needed to get through that tough environment. What environmental factors are impacting your Chapter? How are you adjusting your approach to help them through it?

When dead or dying leaves overrun a plant, gardeners “deadhead” to free up space for the rest of the plant to bloom and reach its potential. What needs to be cleaned-up or removed from your Chapter that prevents its growth?

“A garden requires patient labor and attention. Plants do not grow merely to satisfy ambitions or to fulfill good intentions. They thrive because someone expended effort on them.”

The same could be said for our Chapters.

Other Resources

All resources can be found on our website (<https://www.pilambdaphi.org/members/resources/>) but these specific ones not already mentioned may also help:

- [Annual Calendar of Responsibilities](#)

Insurance & Liability for the Coach

The Fraternity has an Insurance & Claims Manual that provides more information and is available to volunteers and Chapters. This manual is updated yearly. The Fraternity's insurance coverage will pay claims for volunteers and coaches approved by the International Executive Council and trained by the HQ while acting within the scope of their duties, in compliance with Risk Management policies, and on behalf of Pi Lambda Phi Fraternity.

Insurance coverage would not exist if:

- The volunteer is performing tasks outside of his responsibility (i.e. spontaneous social function planned by an individual member, chapter advisor consuming alcohol with undergraduates, hazing of members, etc.).
- Any volunteer whose illegal or intentional actions result in death or injury to an individual or property damage.
- Any volunteer that participates, supervises, or directs others to participate in the excluded acts of assault and battery, sexual abuse, or molestation, or hazing. "Participate" means to take part in an excluded activity, whether as a direct perpetrator of the excluded activity or as an observer of such activity. "Participate" also means to have knowledge of the excluded activity and fail to aid or respond to the care of anyone injured as a result of the excluded activity.

Further questions can be directed to the HQ.