Chapter Coach's Manual

September 2020

Contents

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 each year 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.

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

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. Additionally, we've changed from a "Chapter Advisory Board (CAB)" to a "Chapter Coaches Board (CCB)".

VIDEO: https://www.youtube.com/watch?v=Uhn7VSBZ7cY&t=

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 you 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 IHQ
  - ○ IHQ doesn't have all the answers, but we spend a lot of time studying student development theory 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. 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 references 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
  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 [ChapterSpot](#) 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 (IHQ recommends [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 IHQ 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 IHQ, 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 IHQ has a lot of experience with (but that can be refined)
- Recruitment strategies
- Financial management best practices
- Officer and committee structure
- Risk reduction plans (especially if the Chapter's plan was working well)
- Alumni Relations best practices

Things that are ok to be reinvented
- Anything above that's significantly failing
- Themes of social affairs they host
- Sororities they intermingle with
- T-shirt designs
- Community service ideas

Board Structure & Undergraduate pairing

We need multiple volunteers coaching the Chapter for it to operate at it's 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 pairing them with some select Coordinator roles. A few to consider include the Academics Coordinator, the Community Service Coordinator, and the Elimination of Prejudice 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.

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 Charter exists.
- The Undergraduate Chapter
- The Coaches
- The IHQ
- 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 loose stability - 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 football 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.
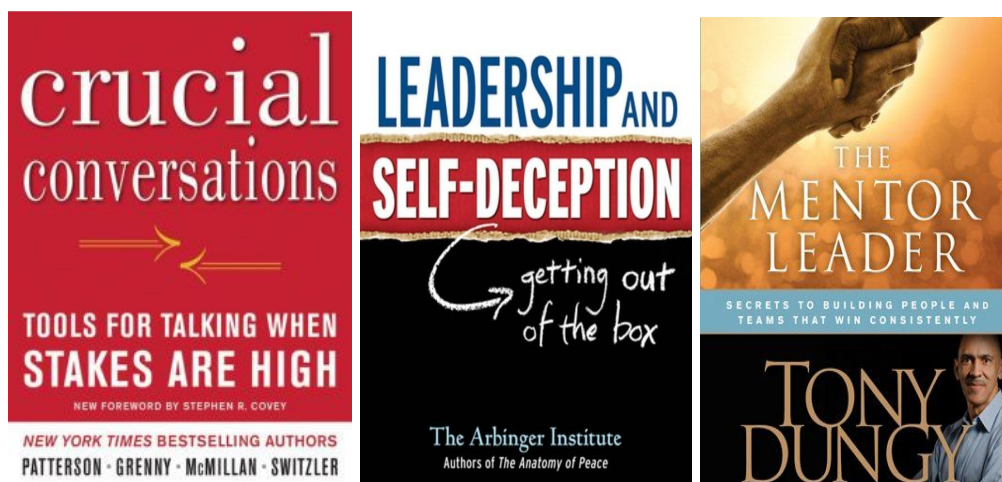
With the students
- **Clear expectations**
  Establish the expectations you have for working with this officer. For him to receive your time, talent, expertise, and coaching, what do you expect of him? What can he then expect from you?
- **Effective communication**
  There's no silver bullet technique 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:

1. Learning about today's student
   a. One way to keep in mind different perspectives of today's college students is to check out the Mindset List produced by Marist College. The "Mindset List" is an annual compilation of the values that shape the worldview (or "mindset") of students 18 years old and entering college. The list is produced every August and shares very fascinating facts about things these students have only always known. Example, many coaches remember the days when we had dial-up internet, using something other than a GPS system in our phone to navigate directions, and landline telephones. Today's college students have literally never experienced a world with those three things. The list is very interesting. Being familiar with today's students can be helpful in your conversations with them. Click to see the Most Recent Mindset List.
2. Familiarize yourself with Emotional Intelligence and 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. 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.
   a. Not familiar with Myers Briggs? Check out this short video on YouTube: https://www.youtube.com/watch?v=M4YLO-2Tb2w
   b. A free assessment that can help with understanding your own MBTI is available through https://www.16personalities.com/. Additional information can be requested from IHQ. IHQ has a plethora of resources and connections to certified MBTI facilitators.
3. Books that can help with coaching students
   a. Crucial Conversations
   b. Leadership & Self Deception
   c. Mentor Leader

4. Books part of our Leadership Institute curriculum with the students that you may enjoy reading:
   a. The Five Temptations of a CEO
   b. The Student Leadership Challenge
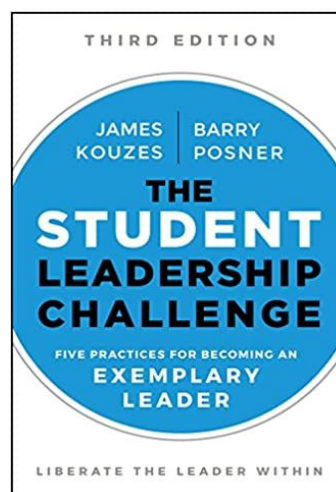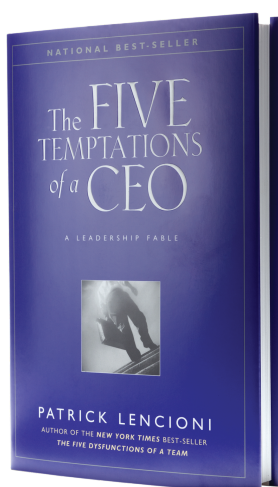
5. Online website resources for students: https://www.pilambdaphi.org/members/resources/

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.

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?
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 IHQ 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**. We 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**. We 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**. We measure this by expecting every Brother 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**. We 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:

If you don't stick to your values when they're being tested... they're not values, they're hobbies.
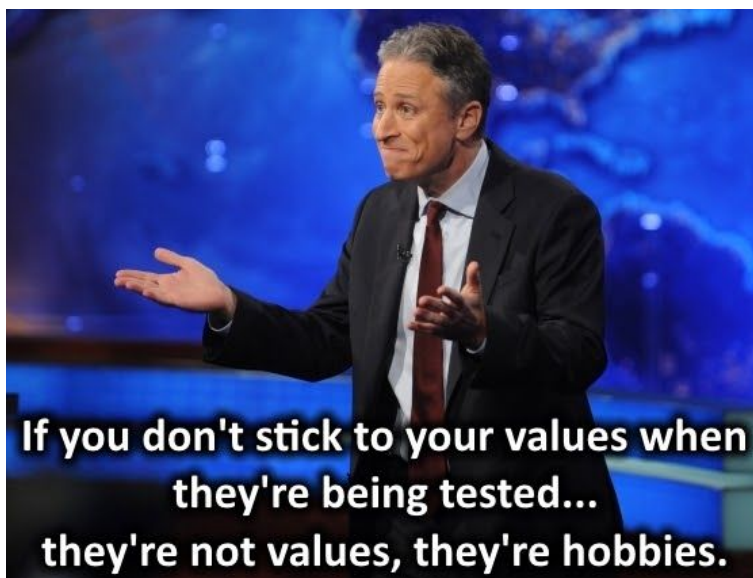
Chapter Minimum Standards (CMS)

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 and is opt-in. We made the move to elevate the importance of the role and to ensure it was getting the dedicated support it needed.

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

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 what went well and what didn't that semester. This would be a time to 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 officer wishes he'd have known when he started
      ii. Greatest achievement
      iii. Biggest mistake or failure
      iv. Additional advice he'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.

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 goals 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 goals 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 members 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 IHQ (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
- IHQ can help with tips and activities to make such a retreat really impactful

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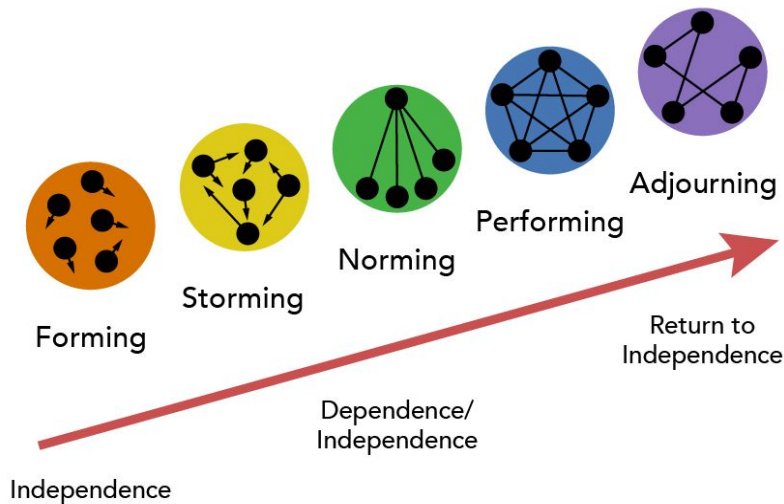
Forming, Storming, Norming, Performing, and Adjourning are the stages. The Executive Board will go through at least some of these stages. Some never get to the performing stage. Use these videos to help you see their current stage and work through solutions to keep them moving toward "Performing".

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-Ul0
Prefer something less fantasy based? An example of the stages visible through the movie Coach Carter.
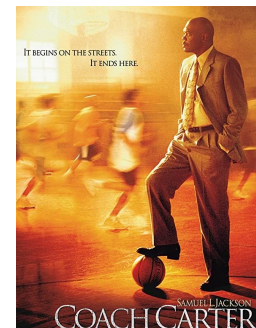
S.W.O.T. Analysis

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 on YoutTube. 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?
- *IHQ*. 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 it's goals for the semester. Revisit after a semester to see if our SWOT has changed at all.

SMARRT 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 SMARRT 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 SMARRT 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
Our Risk Management Policy. Chapters are trained on this during the New Member period, and at all regional and national gatherings.

Best Practices
1. The Chapter's VP of Programming & Risk Management should be re-educating the Chapter on the policy every semester.
2. Creating a "Risk Management Plan" that can be implemented during social gatherings that helps reduce risk and work within the policy. Some universities will provide templates for this. IHQ can assist a Chapter with creating this. As an example, it's not a "policy" of ours, but it's a good best practice to ensure you have the following:
   a. Sober Brothers helping run events
   b. One common point of entrance to the house during events hosted there
   c. Restricted access (keeping guests in common spaces and away from personal bedrooms
   d. Having non-alcoholic drinks and food available to guests

Additional Training
- IHQ can provide training on Risk Management
- In 2021 IHQ will roll out a program called "Tightrope" (http://tightropeprogram.com/). This will be required for all new members and all undergraduate officers. We will then phase it in over the years to come so that all will have experienced the training.

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 their initiated undergraduate brothers as listed on ChapterSpot. Chapters update and verify their roster by logging into ChapterSpot and changing the roster.

What are the types of fees Chapters pay to the National Fraternity?
Per Caps: Per Brother fee HQs uses to operate and provide education, resources, and training to Chapters. Only initiated undergraduate Brothers pay this fee.

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

Educational Assessment Fee: Per Chapter fee HQs uses to create regional and national conferences for the Chapters. This then automatically covers the Chapters 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. 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. Two of the three options provide them discounts if they pay earlier than expected.

OPTIONS	Discount?	DUE DATES
Option 1; 1 payment	8% discount	Sept 30
Option 2; 2 payments	5% discount	Sept 30, Feb 15
Option 3; 3 payments	N/A	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. Only insurance went up in '19-'20.

How does the Chapter receive its invoice?
HQ emails them based on dates that align with the specific payment option each Chapter selects. Chapter Coaches can be copied on these invoices. Questions about the invoices 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
-Advisors having financial records viewing access for periodic review w/ Chapter Treasurer.
-Chapter's Treasurer providing recurring reports to the Chapter about collection rates, account balances, budgeted to actuals, etc.
-Using a third-party collection system like Greek Capital Management. HQs suggests GCM but there are other third-party collection companies.

Training Video
This short training video is for chapters (10 minutes)
VIDEO: https://www.youtube.com/watch?v=3MqpuFaZPlc&feature=youtu.be

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.

Followership
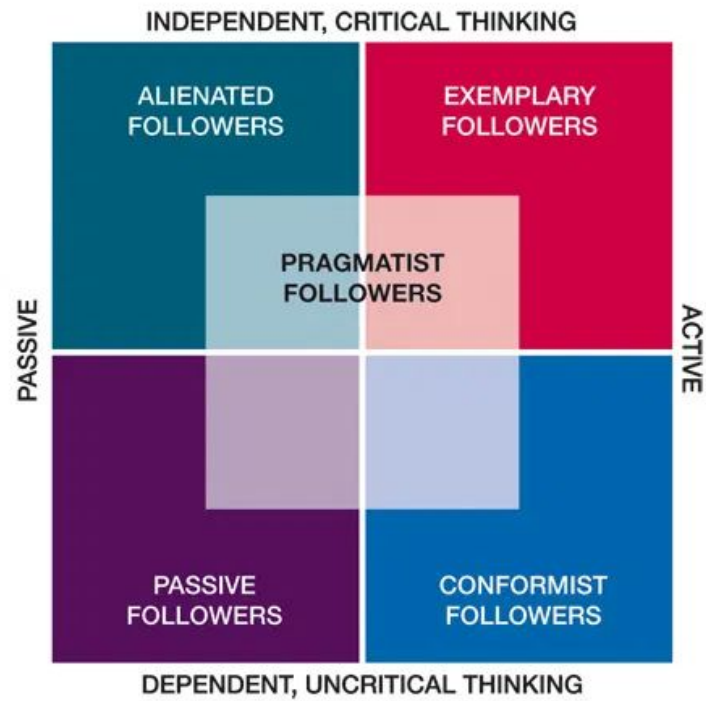
We almost always start out as "followers", but what does it take to be an effective follower? Need the Brothers to better understand their role and how to effectively follow formal leaders? Need your formalized leaders to understand how to inspire effective followership? Use this to better understand how to avoid the ineffective types of follower behavior and to instead, be an effective follower.

VIDEO: https://www.youtube.com/watch?v=nxLwAWPh81k&feature=youtu.be

Understanding the "Commitment Continuum"
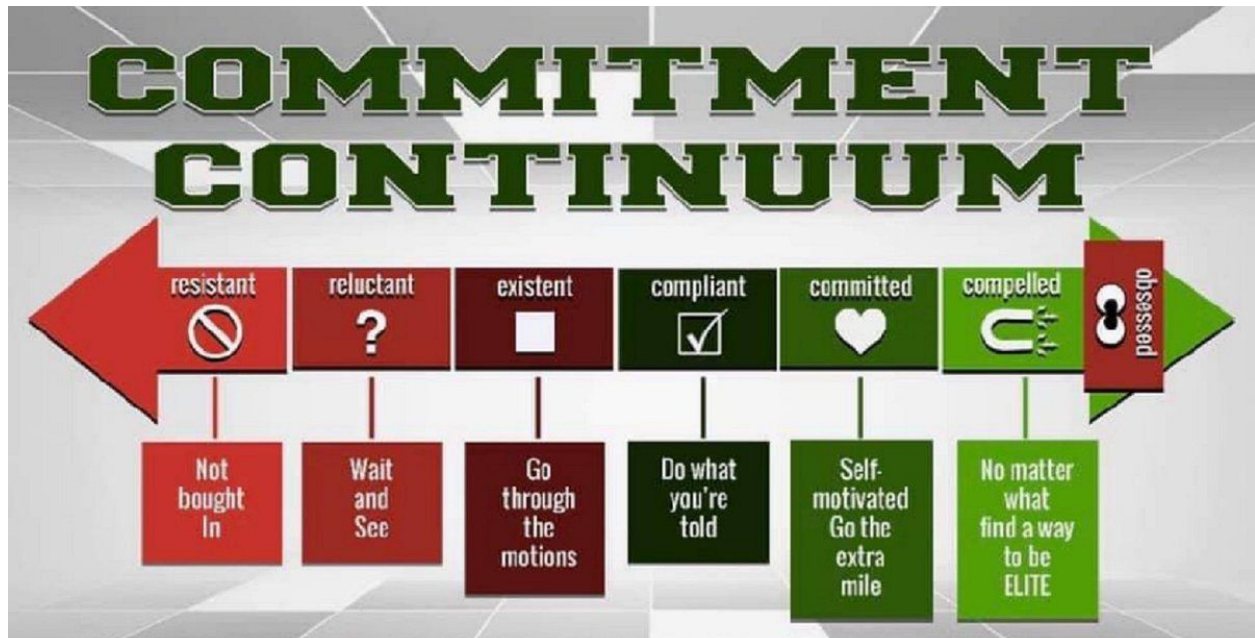
Concerned about your members' lack of commitment? Plagued by too many Brothers Resistant or Reluctant to buy-in? Need Brothers to better understand and apply what it truly means to be committed? Use this to create common language for a Brother's commitment level, and identify strategies to move Brothers through the Continuum all the way up to Committed, and then Compelled!

VIDEO: https://www.youtube.com/watch?v=I87FPZM2rqM&feature=youtu.be

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

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 it's way to foster success and exist on it's 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=bK27DgCuGQQ&feature=youtu.be

How Students work with CCBs
Is the chapter optimizing the purpose of it's Chapter Advisory Board members? Chapter Coaches should serve as the coaches for the chapter to maximize its potential. Effective CCBs provide individual officers leadership development and operational/tactical coaching for their specific officer positions. Utilize this training to learn more about the various types of roles and impact the Chapter Advisory Board can be doing for the chapter.

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 it's 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=W7P7lYKmAkk&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 IHQ 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: https://youtu.be/foUZ_UKO8vk

We have a ton of resources available on our website resources page.
The Chapter has a representative from IHQ 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.
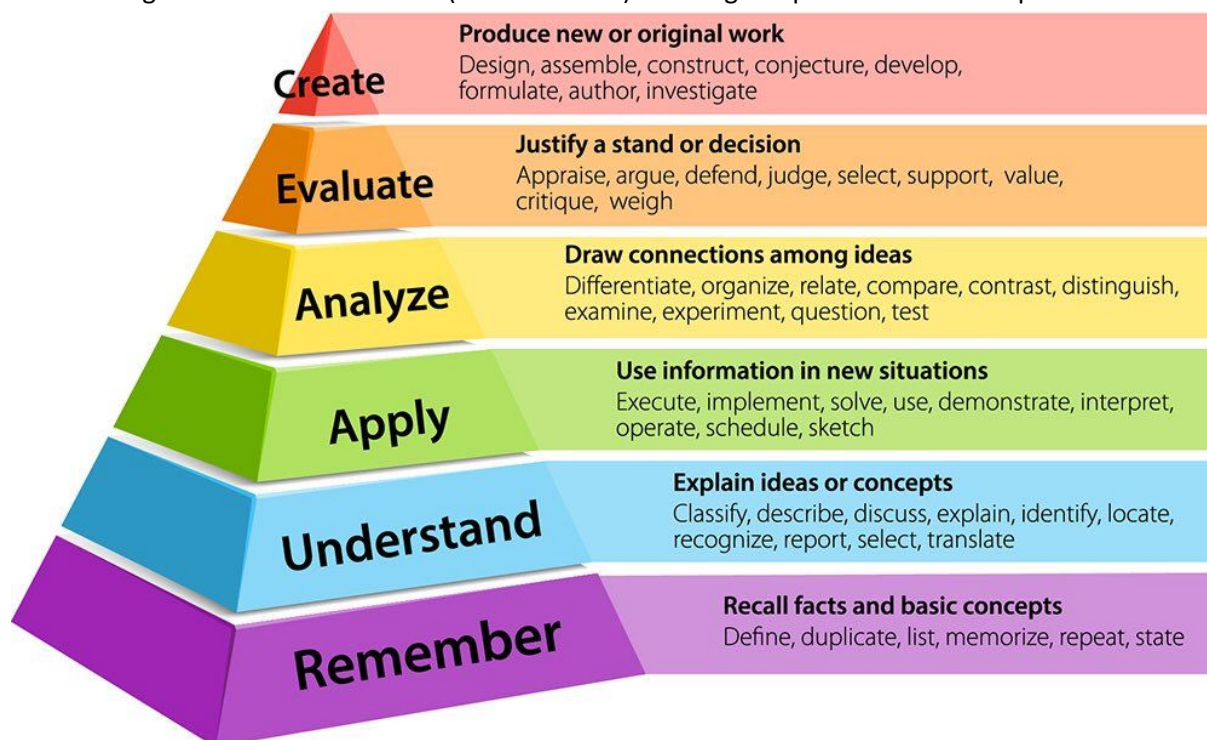
More on Bloom's Taxonomy can be found [here](#).

- 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
    - ○ IHQ can provide the Archon with recurring 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.

Elimination of Prejudice

This is in reference to both the idea expressed within our Creed and the actual separate 501c3 entity. The separate entity is called the "Elimination of Prejudice Foundation" (EOPF) and is run by those outside of the IHQ staff.

Watch this video for a short history and some information for how chapters can host educational or fundraising related events.

VIDEO: https://www.youtube.com/watch?v=sCPs11jWJOI&feature=youtu.be
Due to the nature of how this organization evolved, and due to the ambiguity around the topic of how does one "eliminate prejudice", there have been questions about the foundation. _IHQ is happy to answer any and all questions we can about it or to assist you in getting in touch with the EOPF_. The EOPF

is a meaningful idea, but the organization itself is young and run by volunteers right now, so it doesn't have the notoriety some may desire of it.

Defining Chapter Success

If only it were this easy to tell...

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 though 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", 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. From there, that 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 then 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 IHQ 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 IHQ 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 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.

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 IHQ 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 or a meal. Knowing that's not always possible, how can you then ensure there's real time "face to face" interaction 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. 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, the 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) Recommunicate 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 IHQ know
    a) We are happy too to have a conversation about expectations.

Other Tips & Best Practices
Root Cause Analysis & "Why" x5
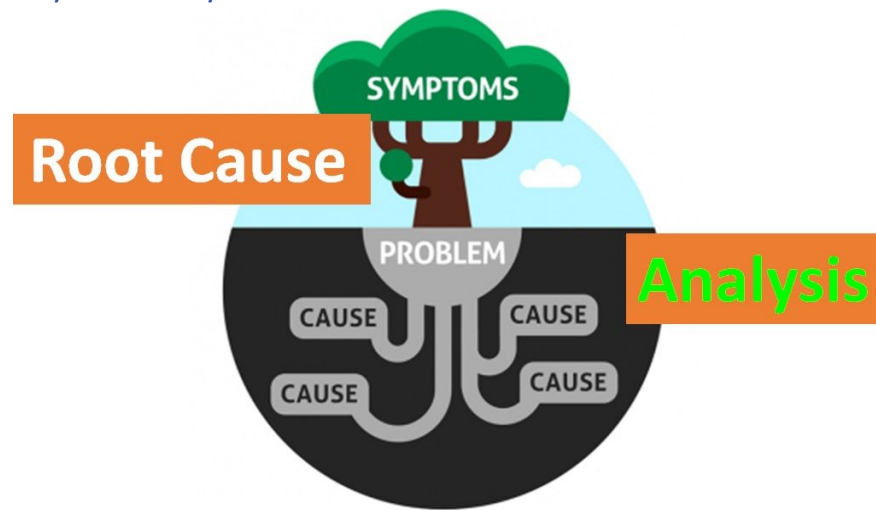
Help the Chapter identify the root cause of their issue and not just the surface level symptom. To do this, when they pose a problem and a quick reason for it, consider asking them "why" multiple times to get a root of their feeling or perspective. This is a very simplistic example, but it is also one we see often.

Problem: We missed our recruitment goal by a lot.
1. Coach: Why did that happen?
   a. Student: We're not very good at recruitment, I guess. Or our goal was too high.
2. Coach: Why would you say that?
   a. Student: Not a lot of guys came out to rush week / our events / etc.
3. Coach: Well why was that?
   a. Student: Well, Covid and the restrictions made it really hard.
4. Coach: Sure, but other fraternities had success despite Covid, so why was it that we didn't?
   a. Student: They must have already known those guys they were recruiting or they used virtual recruiting methods like Zoom.
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 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 (feedback & interaction tool)

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

Bottom line, you need 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

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.

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
- Using ChapterSpot for Chapter roster management
  (https://www.pilambdaphi.org/members/resources/undergrad-officers/)
  Near the bottom of this page there are a series of short tutorial videos about using ChapterSpot.

Insurance & Liability for the Coach

The Fraternity has an Insurance & Claims Manual that provides more information and is available to volunteers and Chapters. The Fraternity's insurance coverage will pay claims for volunteers and coaches approved by the International Executive Council and trained by the IHQ 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 IHQ.