DISTRICT V ARCHON REPORT
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March 4, 2017
St. Louis, Missouri

Brother SWGP and Brothers,

I feel truly blessed to be able to write this report on behalf of District V and very lucky to have had the opportunity to serve on the Executive Council of our beloved Fraternity for the last year and a half. I am eternally thankful for this opportunity to serve as District V Archon and believe it has made a significant impact on my personal development. I want to express my gratitude to all the staff and Executive Council members, past and present, who have committed so much of their personal and professional time to helping build our Fraternity into an impactful organization which positively creates value for our many undergraduates. I look toward the end of my term with optimism on how our management team at Headquarters approaches issues, manages problems, and implements solutions to continuously improve.

Although the state of District V is strong, currently home to our Grand Chapter, it is troubling to see our Nebraska chapters come under recent fire for certain bad actors in the chapter and less than positive chapter and campus cultures. Some may argue that some of these action could have been prevented but all of the actions leading to disciplinary consequences were definitely not aligned with our values or Fraternity best practices. Moving forward beyond the incident we as an organization must realize these cases are tremendous learning opportunities for every chapter in our organization. At an organizational level and we should absolutely take painstaking care in internally recording what went wrong so as our HQ staff transitions out, we do not forget the lessons of the past.

As my senior year comes to a close and I look toward the next chapter in my life in Chicago as a young working professional ultimately doomed to remember my collegiate freedom as a fading dream, I am continuously reflecting on my experience as Archon, my professional work experience, my undergraduate education, and my experience as one of our collegiate Fraternity members. This experience will serve as my basis for this report as I will recommend some organizational development ideas to constructively help move our organization forward. I want to communicate some of these recommendations also because I am cognizant that my audience for this report may be future Archons of District V so I hope my analysis will help educate our future Executive Council member(s) and shorten the learning curve of as they transition in their role. These ideas and recommendations are not a backward looking reflection or recording of what has occurred, but rather relying on my past ~18 months of personal analysis I seek to create a forward looking vision of what we could potentially implement to create value for our undergraduates, our organization, and our many stakeholders. These thoughts and ideas are my own and do not reflect the policy decisions or expectations of staff from the Executive Council.

Lastly, like I mentioned in my Fall report, Iowa Alpha, our Grand Chapter will also be celebrating their **sesquicentennial (150th) anniversary** this this April 21st, 2017. Please sign up on the link below! https://www.eventbrite.com/e/iowa-alphas-150th-anniversary-celebration-registration-26826126667

In The Bond

Nicolas Suarez…
Minnesota Beta '14
District V Archon

General Updates

Feedback on ROT & Continual Multi-Chapter Training

I can say with confidence, after attending Regional Officer Training in Ames Iowa, continual programming like Regional Officer Training will be a driver of our success on campuses nationwide in providing same-chapter growth, same-chapter risk reduction, cross-chapter brotherhood, and will improve our HQ staff's competency in becoming high quality educators. Every chapter officer I spoke to after their event thought it was extremely well run and very informative and helped ease the burden of transitioning new officers into their role from a HQ compliance/behind the scenes process standpoint. Chapter leaders did overwhelmingly express a desire for these Regional Officer Trainings to include some socialization aspect after the educational sessions.

Questions for Staff

- Could we expand some of the training to happen pre or post event day via video tutorials or google hangouts discuss to add value to allow for our undergraduate members who can't attend or for follow up training?
- Can we make sure that brothers have the opportunity to socialize with another afterward?
- Could we coordinate with chapters with large quality housing at hosting institutions to host other brothers, even if on a couch? Could the national Fraternity provide simple pop-up housing solutions like air mattresses even for a weekend to ensure chapter leaders are able to socialize beyond the event and stay for a longer period?

Mitigants to Continued Success: Not providing enough time for chapter leaders to meet each other in a casual setting will miss a huge opportunity for cross-chapter learning and natural connections with brothers that could lead to deeper chapter-to-chapter connections and much more. Although providing housing for a night may be costly, I think it will be deeply appreciated by chapter leaders and will mitigate risk that brothers associate quality HQ training as cut, dry, and impersonal. It would certainly allow for chapter leaders to develop better relationships with HQ staff and other chapter brothers which I believe have significant intangible benefits and add value for everyone.

Mizzou, Texas A&M Colony – Future Colonization Efforts

I have forward looking optimism about the reopening of our chapter and the great alumni support around the Columbia and St. Louis area to help this colony succeed. Noticing the recent success of chapters such as Iowa Beta and others who have had to adapt and begin operating in a new compliance driven environment on many of our college campuses, rather than fight old traditions and cultures that are not necessarily aligned with the forward looking trends in the fraternal industry. Additionally, it seems that recolonization efforts reinvigorate alumni to become involved in the chapter and allow a positive environment for culture creation and change.

Through my initial discussions with the current GP of our newest colony at Texas A&M and what fellow Archon Meeks informed me about his positive impression with its chapter members at the Houston Regional Officer Training, I am looking forward to seeing them succeed in the coming semesters as a colony.

Based on that I recommend we should be more aggressive in our aggregate expansion efforts to keep with the growing pace of the popularity of fraternities nationwide but still be diligent in who we allow to represent our Fraternity.

WWLS Planning Committee Involvement
Myself and fellow Archon Zorrilla will be a part of the Woodrow Wilson Leadership Committee planning committee and we are tasked with helping plan the Archon selection and vetting process and finalizing the credentials process. We will be working closely with Kyle Hickman and Ron Ransom.

Finance Committee
As the sole Archon on the finance committee, I have to say that I am very pleased and optimistic about our financial reporting capabilities moving forward. Amanda Baldwin and Brother Enrico Hernandez deserve recognition for their all their painstaking efforts in bringing our organization up to speed from a financial reporting perspective.

Organizational Development

Cross-Chapter Training and Brotherhood Events: I will say that we need more opportunities for chapters to learn from each other, more casual discussion & socializing needs to happen after HQ sponsored training. I echo an idea from my previous EC report that unfortunately I regrettably was unable to push forward quick enough which is having a sort of temporary band-aid solution to losing ALA. This idea should be to host HQ sponsored training (to keep educational message consistent) and cross-chapter brotherhood events at some of our landmark/prototypical chapters with exceptional housing like Kansas Alpha, Texas Alpha, Iowa Alpha, Mississippi Alpha, California Gamma, Washington Alpha, among others.

HQ Chapter/District/Operations Analyst Internship: I believe we could develop an opportunity for current undergrads to help analyze our chapters from a best practice standpoint and help assist our HQ staff in their roles and even developing a case study and solution to real life Fraternity wide problems. It seems like a no brainer value adding solution if we consider ourselves in the education business. I cannot recommend very specific actions at this time as this requires further discussion and ideation. It could be as easy as hosting interns for a week (or longer) at HQ in the Butler chapter house and teaching them how our organization works then giving them specific actionable goals and information to collect over their summer through phone interviews with different chapter leaders across the country, alumni, campus administration officials, and others.

The goal would be to have a business analysis of each chapter (similar in nature to Chapter Consultant Visit Reports) to help not only the Executive Council, but for our staff understand each chapter's history as we transition new staff into roles that require them to learn what chapter needs, risks, and strengths are currently. We could also send the Archons during GAC summers (once they are more comfortable in

their roles) to help train and share with them a board level vision of what is going on in the fraternal industry and such.

Value Adding Benefits

- You are effectively educating our prospective future leaders on best practices and current issues in the fraternal industry.
- This creates another pipeline for future chapter leaders, Archons, and expansion/recruitment/chapter consultants.
- We create sustainable solutions through a diversity of chapter perspectives in solving large scale Fraternity issues.

Disciplinary Updates & Case Study: Unfortunately for District V, which is so fragmented, chapters are heavily influenced by their own campus Greek environment rather than other fraternities around the country and our high quality HQ training. Best practices, lessons that encourage risk reduction, and cautionary tales need to be leveraged across chapters. I have learned that other districts often have chapters that have the opportunity to visit other chapters more frequently, based on limited geographical distance, which is a difficulty for District V.

A large portion of my collegiate education has come from case studies and I am a very big proponent of using it to continue educating our undergraduates. Running a high performing chapter is only technical to a certain extent and the 'leadership laboratory' aspect of fraternities is how I believe that fraternities deliver value in the higher education industry.

Questions for Staff

- Is it possible to create a case study with more specific chapter operations problematic cases occur? Or even having one of our internal HQ staff write a case about a prototypical chapter and present that to our undergraduates as content to learn from?
- I understand we likely do not want to 'air our dirty laundry' and expose material details about specific chapter disciplinary issues, but could we expand on the case study that the Pilot New Member (Pledge) Education Program had to cover a more Chapter Leadership & Management case to help introduce ideas such as Kotter's 8-Step Change Model?

Accreditation Flexibility: I fully support the idea that we need to have standards to which we measure our chapters against to make sure we are incentivizing high performance, classifying problem behavior and much more. From my perspective we have many chapters that operate in extremely different market/campus environment conditions and it is very difficult to find a 'one size fits all' model that respects the individual integrity and individuality of our chapters. I do not want to suggest replacing the entire process by any means, but rather adding in a chapter submitted proposal, subject to approval by someone on staff, that would be in keeping with the underlying spirit of the compliant action but in a more suitable manner that best fit the chapter's unique situation.

A potential example I would like to point out that falls under the Accredited Recognition Status that would severely restrict chapters that may operate in markets/campus environments without a

significant alumni presence in area would be item #5. *One Chapter Advisory Committee member present at each chapter meeting.*

I recognize this requirement is good natured in spirit, but I know it may cause an issue with chapters geographically isolated from major metropolitan centers (college towns), young chapters without an established alumni base and difficulty in recruiting non-chapter alumni to come back for a meeting, and alumni who frankly do not want to be involved in the day-to-day operations of a chapter but would rather serve exactly as their title suggests; ADVISOR.

Proposed Solutions: If some chapters are able to meet most of our standards but have a difficulty in meeting a few requirements, could we allow those chapters to submit a 'proposal' as to how they will try to meet the spirit of the accreditation requirement through another method?

My fear is that without allowing individual chapter leadership teams the entrepreneurial flexibility to do as they see fit for their chapter, being the market experts on each one of their campuses, our Accreditation process will not be complied with honesty and chapters will check the boxes and submit reports without actually complying because they don't have another avenue to fix the issue. The benefits could also include having chapters learn new ways of managing themselves and helping Headquarters leverage these insights to assist similar chapters facing similar issues.

A potential proposal to this Chapter Advisory Dilemma would be a chapter suggesting a solution as simple as requesting a Chapter Advisory Committee Advisor be present at only one meeting a month because of time constraints on being a working professional. It could also be requesting that a Skype-style attendance be acceptable. Could a faculty advisor be present at a meeting instead? What if after every meeting the Executive Board of each individual chapter had a conversation with a member of their Chapter Advisory Committee

The opportunities in keeping with the spirit of how our Accreditation help chapters perform to a high standard are endless if we allow our requirements to be adaptive rather than just prescriptive and inflexible.

Stakeholder Analysis: In **Appendix B** I included an assignment I created for our recently initiated class at MN Beta as I was the fall New Member (Pledge) educator. It definitely needs to be continually refined but I believe it would be a good addition to our New Member (Pledge) education program. My purpose behind it was for our New Member (Pledge)s to actually begin analyzing their environment and synthesizing solutions that helped create long term value for our chapter, our campus community, and anyone impacted. My directions were that they be completed at a self-organized new member retreat and continually refined after feedback from myself and older chapter brothers. It seemed to go well as our New Members had to self-manage and create a significant document which provided actionable advice and we all felt it was a value adding exercise to understand the environment each chapter finds itself in.

APPENDIX B

Stakeholder Analysis/Audit Report
To be worked on at Pledge Retreat

Background: Every winter break I try to read as much as I can and to learn and get a lot of different perspectives and stimulate some new ideas in my personal and professional life. One of the books I chose this break was *Conscious Capitalism*, written by John Mackey (CEO of Whole Foods). The main thesis presented is that there are 4 main tenets of conscious capitalism, Stakeholder integration, higher purpose and core values, conscious leadership, and a conscious culture and management.

The four tenets of conscious capitalism

What is a stakeholder: Anyone who voluntarily directly interacts with a company/organization or any party who is directly or indirectly affected by any activity the company/organization is responsible for.
"Managing for stakeholders is not about trade-off thinking. It is about using innovation and entrepreneurship to make all key stakeholders better off and get all of their interests going in the same direction." – Ed Freeman

GAC 2020: Our, Phi Kappa Psi's, biennual conference will more likely than not be in Minneapolis in 2020 to celebrate the 100th anniversary of the SC. Most of you will have graduated in the spring of 2020 or before. In front of you lies a huge opportunity to, for better or worse, influence and build our culture to showcase MN Beta to the rest of the Phi Psi. How do you want to present yourselves?

Grand Chapter Campaign: Every GAC one chapter, out of the 100+, is awarded the Grand Chapter award. We want to be Grand Chapter. This stakeholder analysis should be a building block so you are aware of where we stand in our community, environment, and culture to ultimately improve as an organization towards Grand Chapter. You will be the ones leading this house one day, how are you going to do that and more importantly why? This is not intended to be an outcome based goal, but a more values/principles based foundation that great things can be built from, not a measured metric, nor a

prescribed process. Rather what are the core principles, core values, higher purpose that will guide and define what we want the national Grand Chapter to have?

Purpose of this assignment: Write this report in terms of helping MN Beta become a partner on campus rather than a frat on an island. Write this to have an understanding

Potential Recommendations Conclusions

- Why are Alumni our important in our success in creating value for everyone
- What will our guiding principles and core values be?
- How do we get to Grand Chapter in 2020?
- How do we fundraise more effectively towards alumni
- How do we strengthen our meaningful relationship with the school to mitigate risk

Best Practice Process to Construct Report

1) Watch one of the "Curriculum Videos" from the bottom of this document, then briefly discuss (5-10 min) and how best this idea can be integrated into our organization. Take notes during this stage.
2) Repeat for all videos
3) Begin discussing stakeholders and analyze in depth. Take plenty of notes during this stage.
4) Continue discussion but split up work into teams and begin writing the report.
5) By the end of your retreat you should have a draft (v1) and you should email it to me (or share via google docs) and I will make comments to it and send it back your way to prepare for a final draft.

Audience: The entire brotherhood, our Chapter Advisory Committee, and House Corp. Write it as you would have to present your findings at Founders Day to our Alumni. Other possible audience members: IFC/Panhel and The Office of Fraternity & Sorority Life.

Expectations: Since most of you will be meeting during the retreat, this should be a main topic of discussion and note taking. Past that, serious detail should be put into writing the report.

Most importantly if you committed to learning, take initiative and you can develop a story you can tell in a job interview down the road.

'The Power of Habit' - Charles Duhigg	Gaither	Beaver	Springer	
'Deep Work' - Cal Newport	Steeves	Robb	D Bye	
'Good to Great' - Jim Collins	Lesser Gavin	Tfal	Heim	
'Drive: The Suprising Truth About Motivation' - Daniel Pink	Luke	Spencer	Terrell	
'Smarter Faster Better' - Charles Duhigg	LaRose	Langan	Metcalf	Kurt
The Slight Edge - Jeff Olson	Moe	Dom	Phil	
Your Brain at Work - David Rock	Harry	Barber	Lilienthal	
Nudge: Improving decisions about health, wealth, and happiness - Richard Thaler & Cass Sunstein	Kolpin	Prisby	Brett	

APPENDIX B

Integrating your winter break book: Your book should be 100% read before you all meet and begin discussing this Stakeholder analysis. This is so you have some better background and you can use some of these management theory frameworks in your recommendations.

Deliverables:

I. Define each of our stakeholders
   a. How do we normally interact with this stakeholder?
   b. What are best practices for maintaining a positive relationship with this stakeholder?
   c. How can we improve our stakeholder relationship?
   d. How can we partner with each stakeholder
   e. Is this stakeholder supportive/favorable of us? What kind of support or compliance does this relationship require?

II. What events/practices/organizational habits/etc. are a risk at disturbing the balance in our stakeholder relationships and how can we best mitigate those risks?
   a. E.g. **XYZ Risk:** Define risk factor in detail
      How we can mitigate that risk: Long term value generating strategies, actionable tactics, and purposeful policy decisions.

III. Repeat steps I & II, but in the context of Phi Kappa Psi Headquarters, the fraternity industry as a whole, and higher education. Does not have to be as much detail, but you need to get enough so you have a broad, 360 view of the environment.

IV. Understand what the regulatory/compliant environment we play in. What stakeholders does this include? Springer & Steeves and anyone who wants to be part of the legal research Team:
   a. Research Title IX and its impact on higher education institutions and the implications it in terms of investigating suspected violations of student codes of conduct.
   b. To help direct your research, reach out to Tom Johnson 652-497-4109 and ask him for advice as he is a legal student and a very outspoken advocate on issues of due process in higher education.

V. Define what you want to see in Phi Psi by 2020. What higher purposes and core values do you want this chapter, this brotherhood, to emulate and live day by day. How will we define Grand Chapter?

VI. Ultimate Recommendation(s) your team recommends that MN Beta implements to fully integrate stakeholders in a meaningful way. Please write in a 'why – how – what' framework. E.g. why is this recommendation positive, how will we implement it (similar to Risk Mitigants above), and what it ultimately will accomplish or how will you test the success of the recommendation.

Curriculum Videos:

https://www.ted.com/talks/jim_hemerling_5_ways_to_lead_in_an_era_of_constant_change
https://www.ted.com/talks/tom_wujec_got_a_wicked_problem_first_tell_me_how_you_make_toast
https://www.ted.com/talks/david_logan_on_tribal_leadership
https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action
https://www.ted.com/talks/dan_pink_on_motivation

APPENDIX B

Guide to Business Writing
https://www.sec.gov/pdf/handbook.pdf

Conscious Capitalism background
http://mendoza.nd.edu/assets/151593/j_mackey_march_2010.pdf
http://www.flowidealism.org/2007/Downloads/Conscious-Capitalism_JM.pdf
http://www.drtomlifvendahl.com/What%20is%20Conscious%20Capitalismv2.pdf

Extra Ted Talks if you want to watch them on your own
https://www.ted.com/talks/julian_treasure_how_to_speak_so_that_people_want_to_listen
https://www.ted.com/talks/adam_grant_the_surprising_habits_of_original_thinkers
https://www.ted.com/talks/adam_grant_are_you_a_giver_or_a_taker
https://www.ted.com/talks/rick_warren_on_a_life_of_purpose
https://www.ted.com/talks/john_wooden_on_the_difference_between_winning_and_success
https://www.ted.com/talks/yves_morieux_as_work_gets_more_complex_6_rules_to_simplify