Elevation Chapter Management Assessment Template

Chapter:

Date:

This document is intended to be used as a template for chapters completing their priority plan assessments. It provides guidance for reflection that allows for goal setting (useful in the next step of Elevation: action plans) and addresses expectations outlined in the Elevation program.

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| Priority Area Six: Chapter Management |
| What went well in the previous year in chapter Management? | Financial Management: *[points for reflection: Does our chapter have an approved budget? Do we provide financial transparency? How? Do members understand financial obligations? Are we financially solvent? Do we pay invoices (to other chapters, our own organization, our governing council) on time and fully?]* |
| Chapter Calendaring: *[points for reflection: Does our chapter maintain a chapter calendar that is widely shared and accessible to all members? Does the chapter plan our calendar in advance to balance all values of our organization (time for academic/scholarship programs, social events, sisterhood/brotherhood events, etc.)?]* |
| Chapter Meeting Management and Minutes: *[points for reflection: Does our chapter host chapter meetings regularly and efficiently? Are chapter meetings well attended? Why or why not? Do we keep accurate chapter meeting minutes and provide them for all members to review after the meeting?]* |
| Communication Efforts: *[points for reflection: Does our chapter have a medium for communicating quickly to all members? Does our chapter communicate expectations in advance to members?]* |
| Chapter Document Maintenance: *[points for reflection: Does our chapter regularly review and share chapter governing documents like our bylaws? Are chapter documents in a place where they can be viewed by all members? Does our chapter maintain a current roster? Does our chapter submit membership information forms for new members to the OFSL in a timely way (within 72 hours of accepting an invitation to membership)?]*  |
| Officer Transition Program: *[points for reflection: Does our chapter have an officer transition program? Is it effective? Do newly elected officers know what is expected of them and have access to important documents and information? Do officers goal set and discuss Elevation as part of the transition program?]* |
| What needs improvement based on the previous year in chapter Management? | Financial Management: *[points for reflection: Does our chapter have an approved budget? Do we provide financial transparency? Do members understand financial obligations? Are we financially solvent? Do we pay invoices (to other chapters, our own organization, our governing council) on time and fully?]* |
| Chapter Calendaring: *[points for reflection: Does our chapter maintain a chapter calendar that is widely shared and accessible to all members? Does the chapter plan our calendar in advance to balance all values of our organization (time for academic/scholarship programs, social events, sisterhood/brotherhood events, etc.)?]* |
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| What are the greatest opportunities that exist for our chapter connected to chapter management? |  |
| Do chapter officers understand what is expected of them in terms of attendance at programs and events? | *[This includes chapter events and OFSL events including the Fraternity & Sorority Leadership Institute, Officer Workshop Series events, presidents forums, roundtables, etc. If officers don’t understand, what can be adjusted to better communicate expectations and provide accountability?]* |
| Does my chapter understand and submit relevant paperwork to the OFSL? | *[For a full overview of forms required through Elevation, visit the Elevation timeline at* [*https://fsl.colostate.edu/elevation-timelines/*](https://fsl.colostate.edu/elevation-timelines/)*. If your chapter doesn’t understand and submit relevant paperwork, what can be adjusted to better meet expectations and provide accountability?]*  |
| What is missing from our chapter’s chapter management efforts? | *[remember, this includes financial management, chapter calendaring, chapter meeting management, communication efforts, document maintenance, and officer transition programs]* |
| Based on this reflection, goals for our chapter in this priority area include: | 1. *[state goal here]*
2. *[state goal here]*
3. *[state goal here]*
4. *[state goal here]*
5. *[state goal here]*

 *[Ideally, there are at least 4-5 goals identified for each priority area that emerge after conducting this assessment based on what went well and areas of growth. What needs to continue happening? What gaps need to be filled? What can be newly implemented? These goals will be further explored in action plans where you will be expected to include more specifics about each goal, including how you will accomplish the goal and by when it will be completed]* |