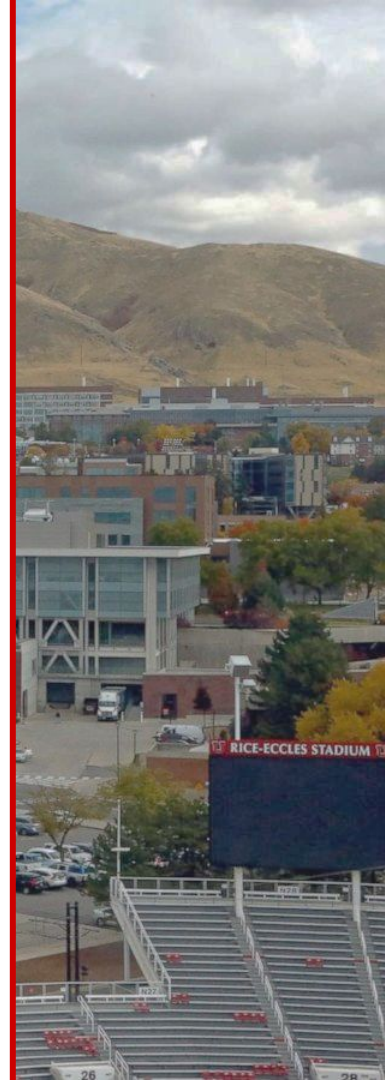




A Status Update From the Utah Office

Conducting a retrospective on progress
and challenges during COVID-19

Specific organizational details of original presentation removed for anonymity.



Summary

Substantial work from local leadership prevented the Utah Office from dissolving during the 2020-2021 academic year.

During this time, the Utah Office successfully conducted **major organizational changes** in order to stay solvent, but **still faces major issues** that pose an immediate risk.

The Utah Office is proposing **significant intervention from the National Headquarters** in order to continue to operate during and past the 2021-2022 academic year.

The Utah Office is also requesting **additional changes in the agenda** of the National Headquarters.

The State of the Utah Office

Office Statistics

16
MEMBERS

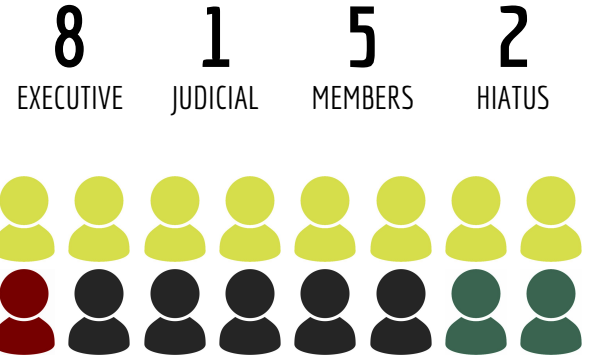
-41% Y/Y change

7
NEW MEMBERS

+0% Y/Y rate change

40
ALUMNI

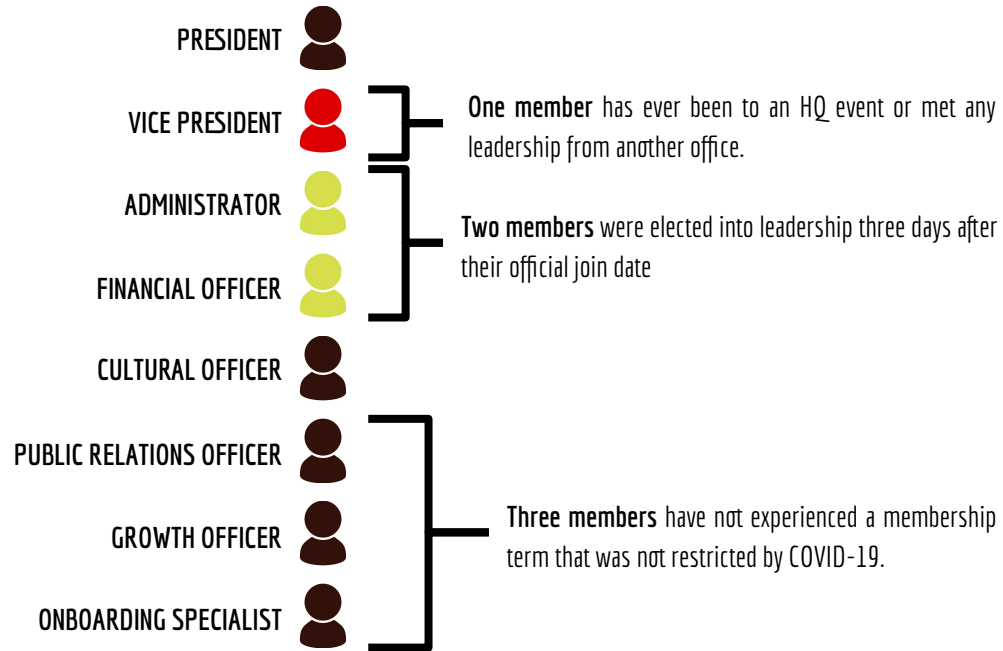
+33% Y/Y change



The Utah Office is in a position where **we barely have enough members to staff adequate leadership.**

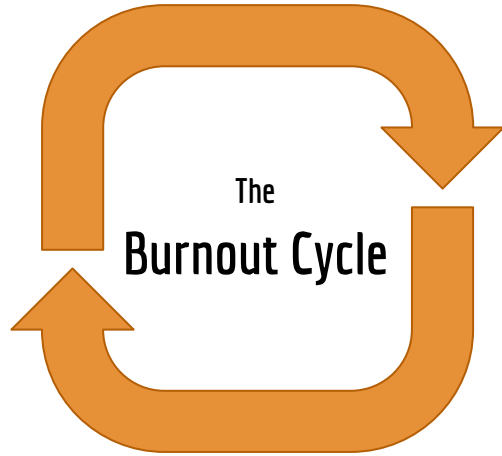
During this time, growth is vital. **Any significant incident** may cause a critical lack of members.

Executive Leadership

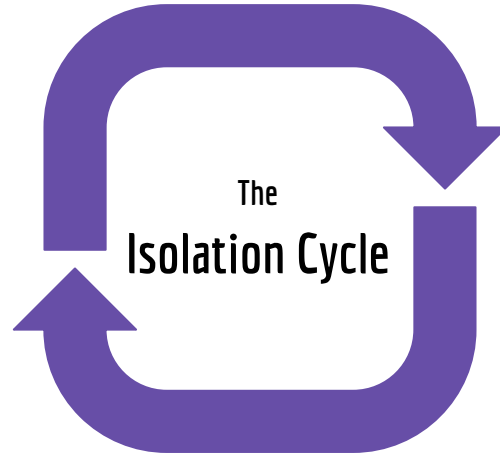


While we're enthusiastic about the newest leadership cohort, we are concerned that **their level of experience may represent a critical risk** given the office's current circumstances.

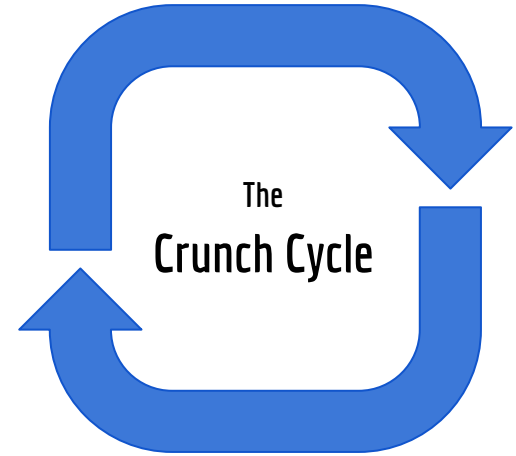
Key Areas for Improvement



Create a more engaged alumni support network by fixing issues that cause member burnout.

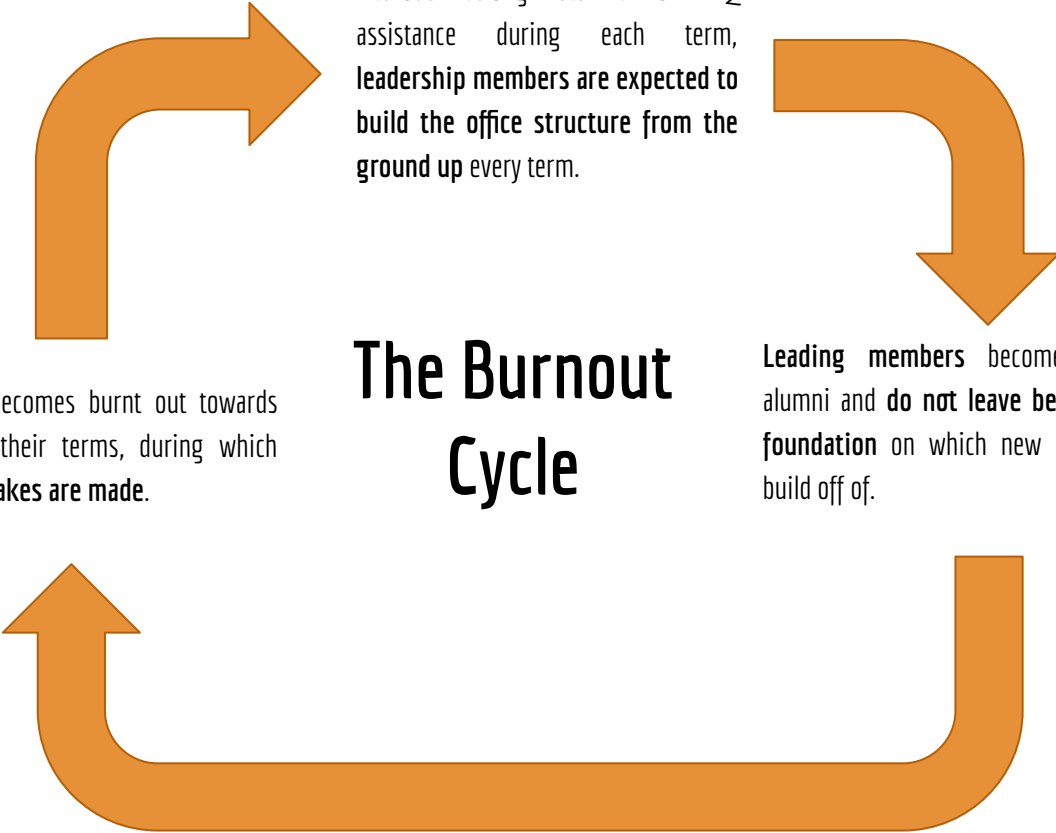


Create closer connections with the National Headquarters by creating more member contact opportunities across offices.



Create a strong financial foothold on which to build a growing local presence by critically evaluating our financial relationship with the National HQ.

The Burnout Cycle



Without strong alumni or HQ assistance during each term, leadership members are expected to build the office structure from the ground up every term.

The Burnout Cycle

Leadership becomes burnt out towards the end of their terms, during which critical mistakes are made.

Leading members become disengaged alumni and **do not leave behind a strong foundation** on which new leadership can build off of.

HQ Leadership Training

Due to a shortage of members, promising non-leadership members were tapped to attend HQ Leadership Training.



A critical incident last term resulted in **four out of five members choosing to withdraw their membership** immediately prior to national training sessions.

All of these members cited the direct or indirect consequences of this incident as their reason for withdrawing membership.

Executive Leadership

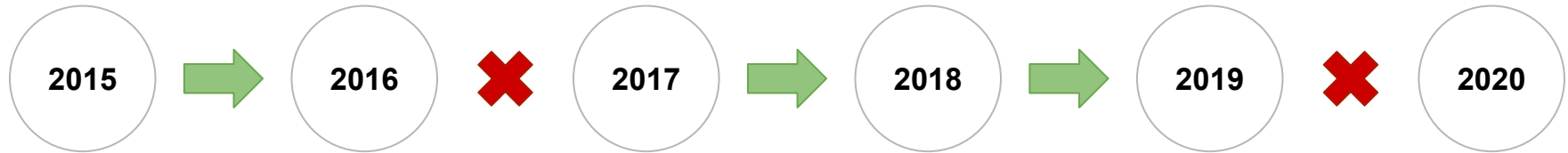


Historically, our office held executive elections **following each academic year**. As a result, leadership cohorts could not take full advantage of calendar year-based HQ leadership trainings

Executive Leadership

Since office establishment in 2015, **only three full transition meetings or retreats** have occurred between leadership cohorts.

Coupled with a lack of any formal or structured office documentation, this means **two leadership cohorts have entered their terms with no formal training.**

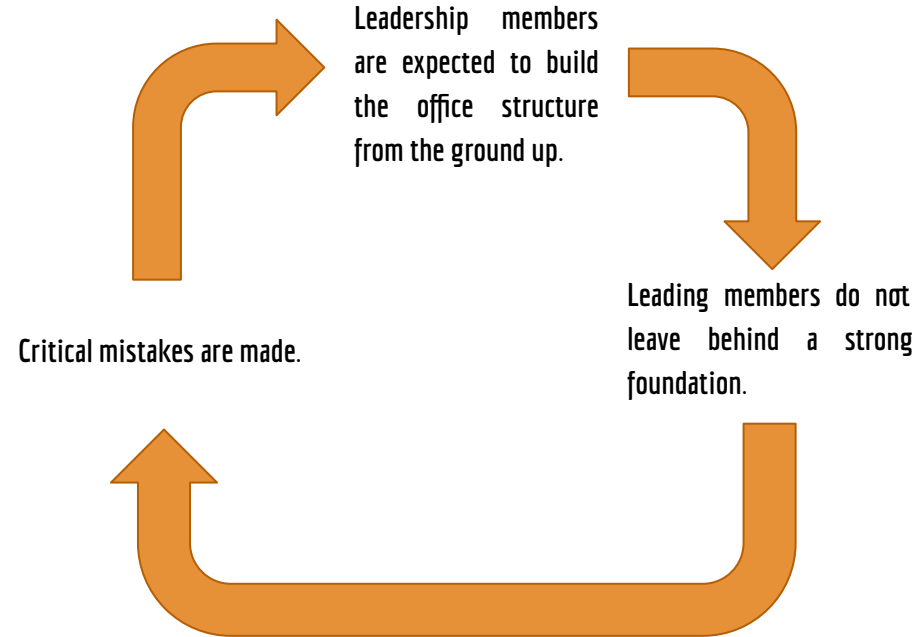


It can be safely assumed that **the benefits from any training** offered to the office prior to its' establishment **are no longer present.**

The Burnout Cycle

Proposed Solutions

- OFFICE:**
- Establish a foundation of core cultural documents
 - Create permanent and maintainable infrastructure
 - Commit to being trained on office leadership
- ALUMNI:**
- Commit to properly passing down critical information
 - Assist in maintaining office documentation and infrastructure
 - Establish a reliable panel of alumni that can answer questions and give advice to leadership
- HQ:**
- Send a staff member **as soon as possible** to provide ground-up training for office leadership.
 - Consistently evaluate the office, and **address and help alleviate issues as soon as they arise.**
 - Consistently visit the office **at least once a year.**



Office Organization

To help future leadership cohorts keep organized records, we have developed multiple solutions.

First Culture Doc

in order for future generations know how the office is structured and why certain critical decisions are made.

Link Removed

Alumni Advisors

for the first time, in order to assist in transitioning between leadership cohorts.

Link Removed

Office Wiki

to establish a permanent pass-down document to prevent making leadership cohorts responsible for completely re-writing pass-down documentation each year.

Link Removed

Additional Infrastructure

Website

An established **office website** provides a framework for future leadership to publicly broadcast updates.

Removed for anonymity.

Discord

Our **organization messaging server** has provided a way to keep uninterrupted contact with growth prospects & alumni.



Discord

Leadership Training

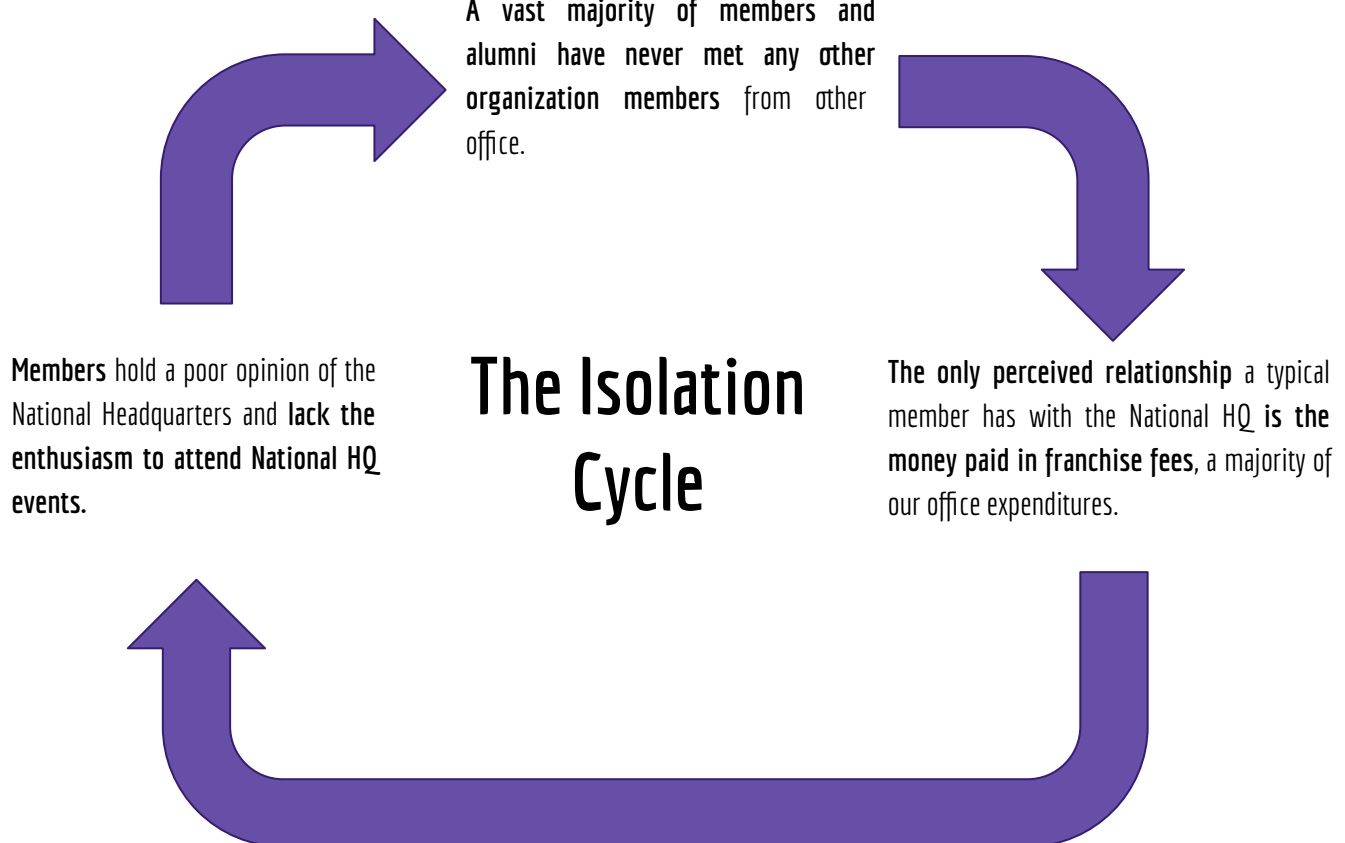


Elections have been redesigned to allow entering leadership boards to attend, ensuring training is targeted to and received by reliable members at the time they need it most.

Requests to the Nationals HQ

- Send a staff member **as soon as possible** to provide ground-up training for office leadership.
- Consistently evaluate the office, and **address and help alleviate issues as soon as they arise**.
- Consistently visit the office **at least once a year**.

The Isolation Cycle



A vast majority of members and alumni have never met any other organization members from other office.

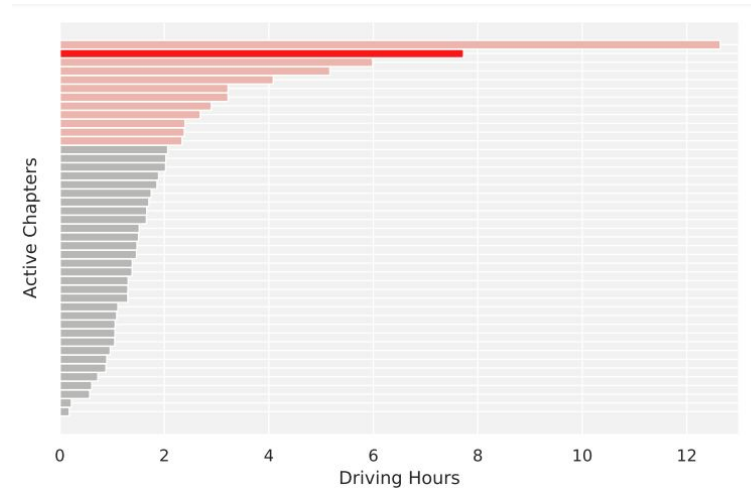
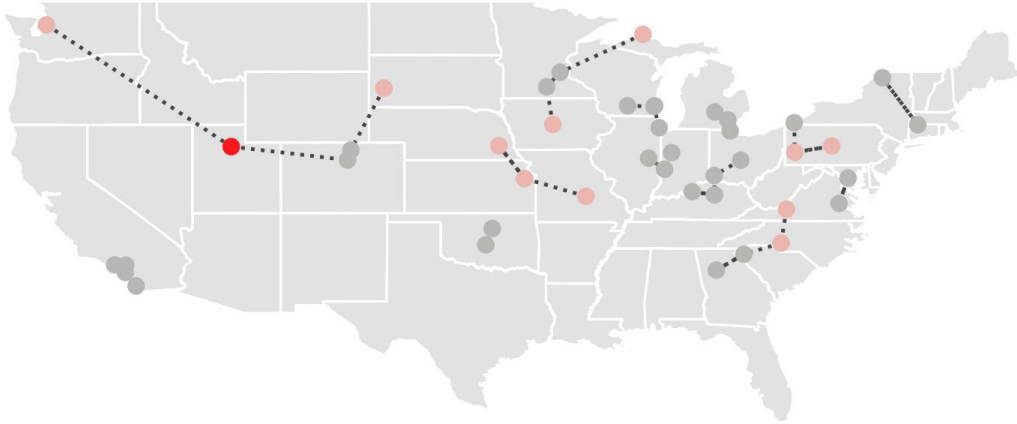
Members hold a poor opinion of the National Headquarters and lack the enthusiasm to attend National HQ events.

The Isolation Cycle

The only perceived relationship a typical member has with the National HQ is the money paid in franchise fees, a majority of our office expenditures.

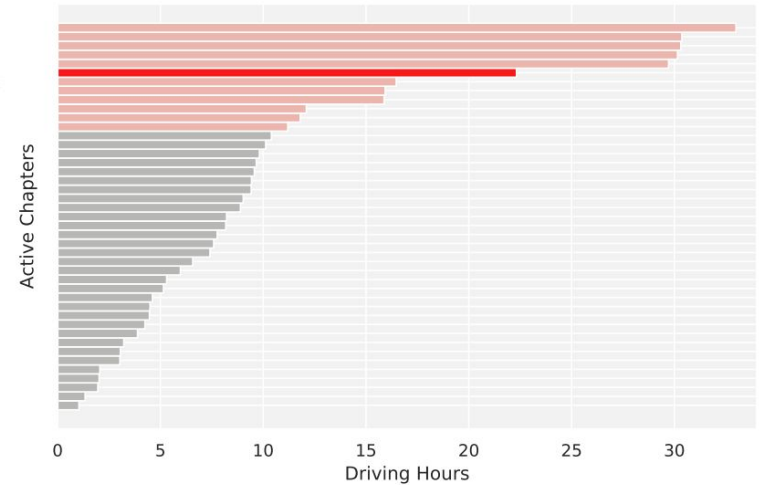
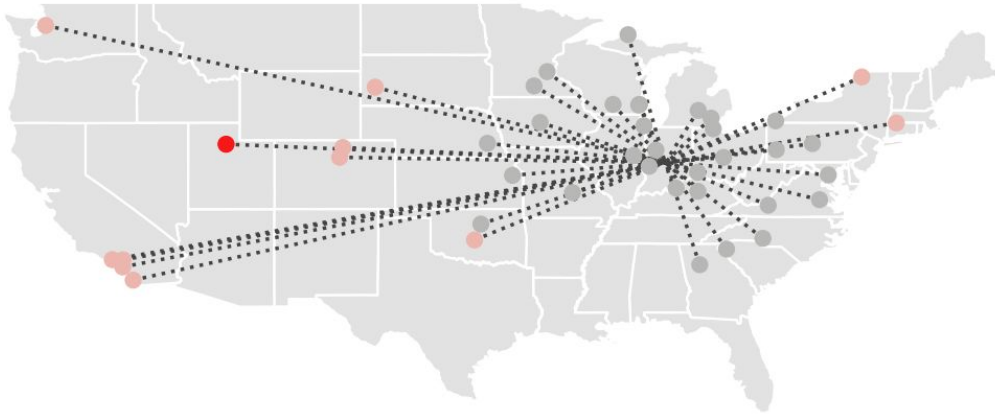
Breaking the Isolation Cycle

In transit distance to neighboring locations, ours is **the most distant office** and **second-most distant national presence** in the nation, second only to the University of Washington.



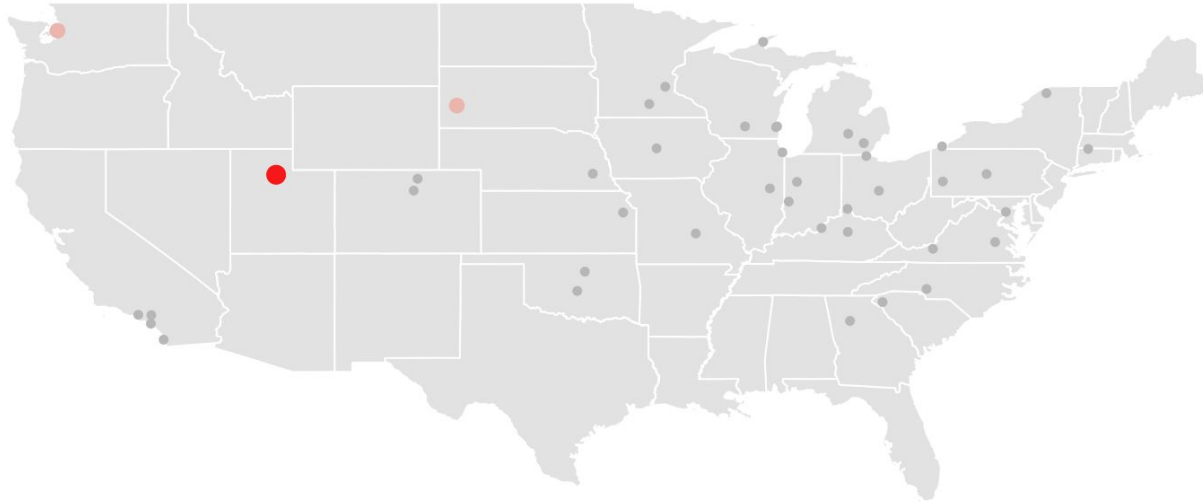
The Middle of Nowhere

Additionally, the Utah Office is **among the furthest from the Nationals HQ**, and has only had **one in-person evaluation on record in the 5 years since our establishment**



The Middle of Nowhere

These factors combined mean that the **Utah Office** is critically isolated, along with two other locations in the Northwestern United States.

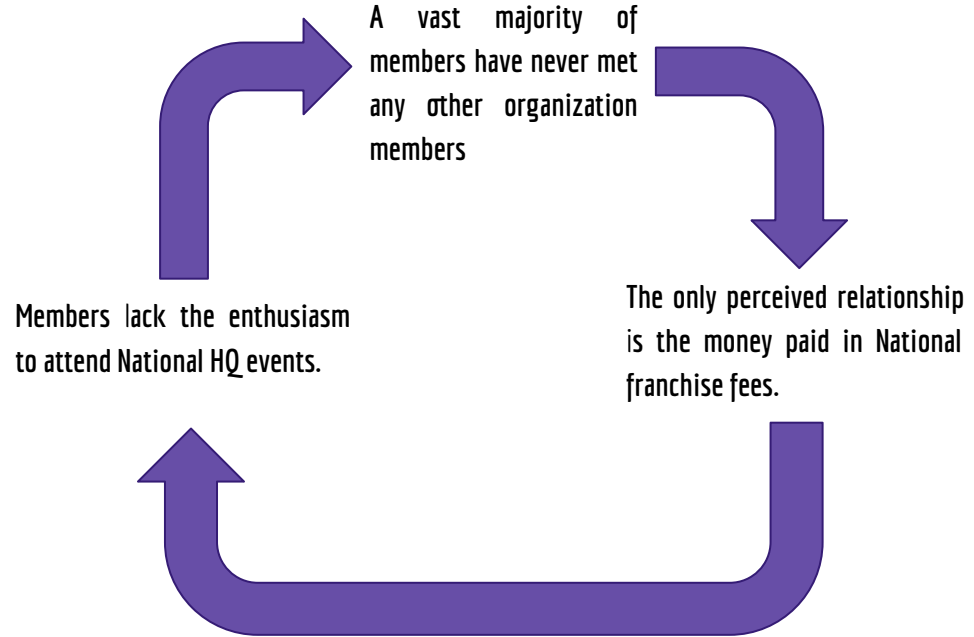


The Isolation Cycle

Proposed Solutions

- OFFICE:
- Continue to find members willing to attend National events
 - Continue to promote a relationship with the National HQ
 - Be willing to help the National HQ in establishing offices in neighboring Northwestern cities

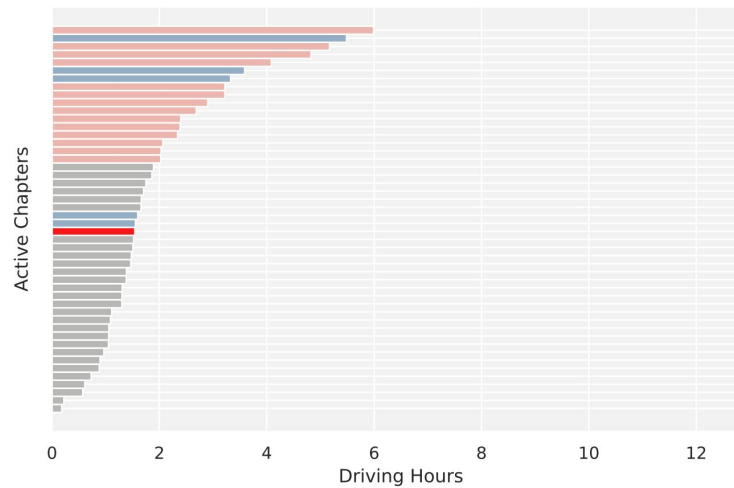
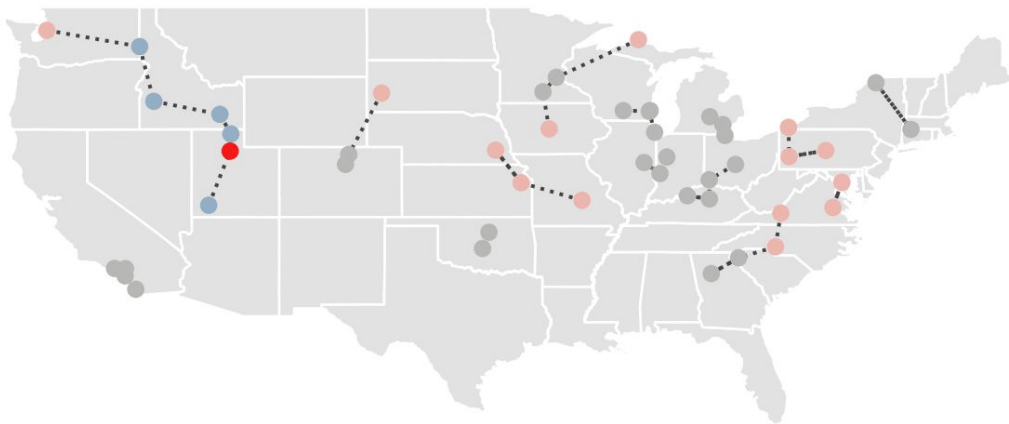
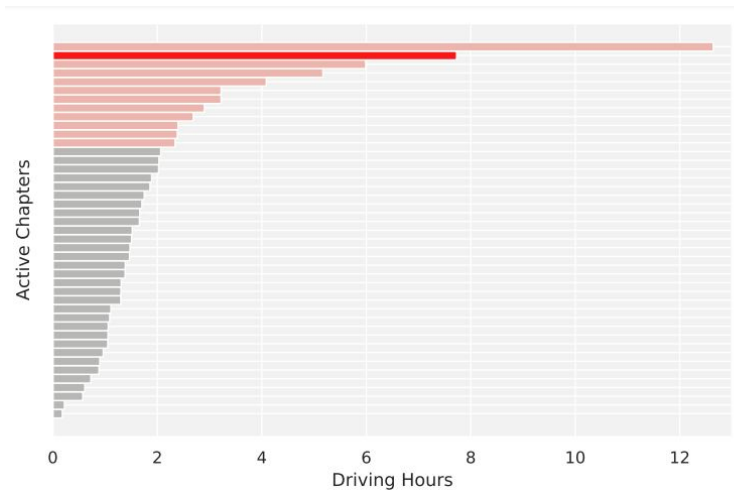
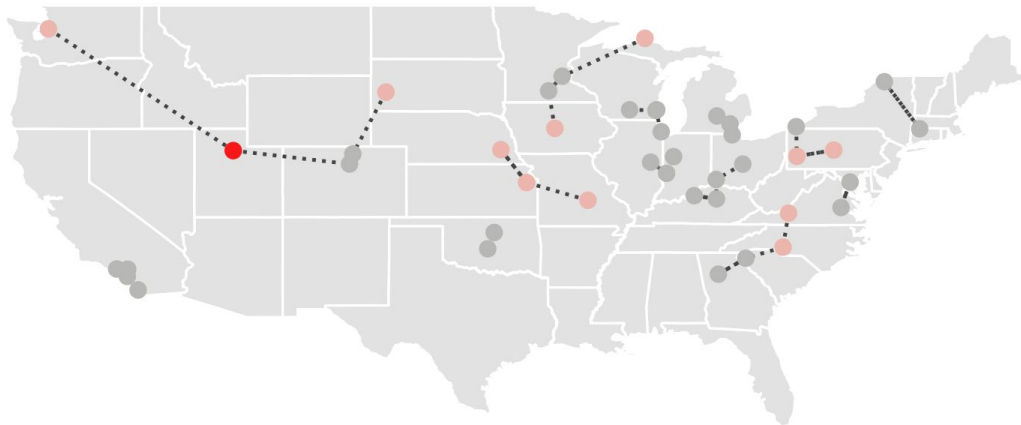
- HQ:
- **Establish other locations in the Northwestern United States** as soon as possible
 - **Routinely send out representatives** from the National HQ to visit the office
 - **Create and promote** an online medium for members across the nation to meet each other socially
 - **Establish a Utah Alumni organization** as soon as possible



The Northwestern Region

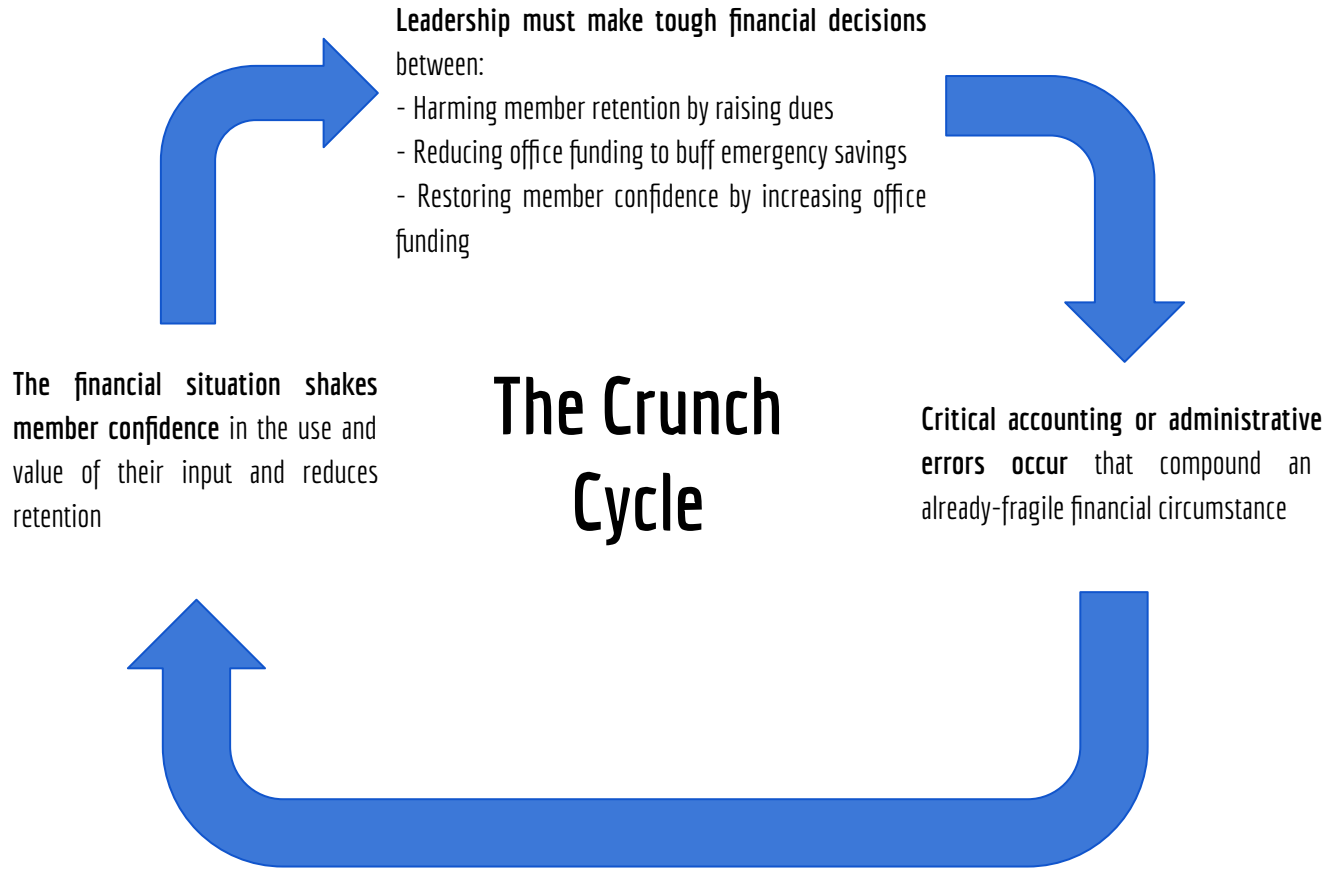
We recommend urgently pursuing expansion to **five** locations in the Northwestern United States:

1. Boise, ID
2. Logan, UT
3. Pullman, WA
4. Pocatello, ID
5. St. George, UT



Source: Wikidata, anonymized, and Google Distance Matrix API

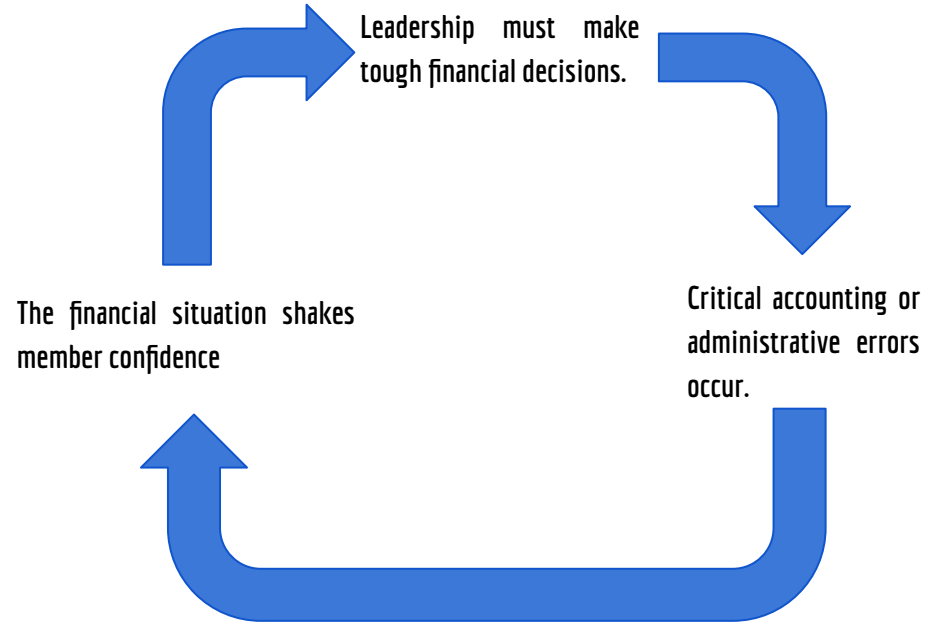
The Crunch Cycle



The Crunch Cycle

Proposed Solutions

- OFFICE:**
- Pursue creative office monetary policy decisions to provide the office with immediate financial relief
 - Provide transparent finances to restore member confidence
 - Receive training and work with HQ to avoid significant financial pitfalls
- ALUMNI:**
- Build a reliable alumni support network on which to fund extra office ventures
- HQ:**
- **Re-evaluate what services small offices are truly receiving** from the National HQ and re-adjust services or re-adjust accounting to reflect
 - **Allow offices effort-based funding** in smaller payment amounts, rather than an all-or-nothing office reward system
 - **Re-evaluate how offices are evaluated** for additional funding



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Update Documents

- Documentation links removed for anonymization