

ΑΕΠi 2032

A Vision to Guide our Actions



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DEVELOPING LEADERSHIP
for the JEWISH COMMUNITY

aepi.org

A Vision to Guide our Actions

MISSION:

The Mission of Alpha Epsilon Pi is "To Provide education, resources and training to the future leaders of the world's Jewish communities."

VALUES:

Honesty

Perseverance

Mutual Helpfulness

Faith

Humility

VISION:

To be known as a Premier Fraternity on College Campuses and a Premier Jewish Organization within our community.

Growth

Member Development Health and Safety Stakeholder Engagement Support

Funding

STRATEGIC FOCUS: Growth

FOCUS ON STRATEGIES THAT GROW OVERALL ACTIVE MEMBERSHIP AND TARGET OUR GROSS MEMBERSHIP POTENTIAL BASED ON OPTIMAL ENGAGEMENT OF OUR TARGET DEMOGRAPHIC.

GOALS

INCREASE RECRUITMENT CAPACITY IN EXISTING CHAPTERS

Related Initiatives:

- 1)** Implement technology tools by that integrate and streamline Headquarters, Volunteer, and Chapter level efforts and help to drive the recruitment process. Initial launch of the platform will occur by Fall 2022.
- 2)** Develop procedures that enable AEPi to track potential members from birth thru alumni status by Spring 2023. Information can later be utilized to develop a birth thru initiation recruitment strategy.
- 3)** Reinforce the value of legacy through continuous efforts on education and policy enforcement.
- 4)** Optimize early recruitment outcomes (March thru August) utilizing active training and early tracking of the recruitment processes with regard to recruitment leads.
- 5)** Fully realize a chapter service model that includes tiered support services based on size by Fall 2027.

OPTIMIZE RETENTION

Related Initiatives:

- 1)** Increase New Member retention to 95% in both fall and spring. (An increase of 10% in fall and 5% in spring)
 - a)** Minimize Pledge focus by promoting a short, core concept New Member program
 - b)** Aggressively investigate allegations of misconduct and take action to eliminate hazing
 - c)** Work with chapters to proactively phase out pledging and permanently abolish pledging where chapters have required intervention in new member processes.
- 2)** Increase Member Retention by ensuring that the experience provides continuous addition of value.
 - a)** Re-orient the leadership pipeline away from sophomore executive boards by increasing the prominence of committee leadership.
 - b)** Expand leadership opportunities by building the value proposition of participation in committees.
 - c)** Ensure robust and diverse programming on a chapter level that touches on all elements of

the undergraduate experience.

Focus on strategies that grow overall active membership and target our gross membership potential based on optimal engagement of our target demographic.

EXPANSION TO INCLUDE ALL 180 DEMOGRAPHICALLY VIABLE US AND CANADIAN CAMPUSES

Related Initiatives:

- 1)** Open colonies in collaboration with universities where possible. Open colonies in locations where universities are not proven partners or aggressively exert our right to exist. In all cases facilitate students' rights to associate.
- 2)** Explore the feasibility of citywide, regional, trade School, and community college chapters where singular universities do not have sufficient Jewish populations.

RETURN TO FOREIGN OPERATIONS IN A MORE STABLE AND ECONOMICALLY VIABLE WAY

Related Initiatives:

- 1)** Ensure undergraduate experience viability for foreign chapters and make appropriate tweaks to align the product with the culture.
- 2)** Build unique financial models for each country that make operating abroad self-supporting through a culturally appropriate combination of undergraduate fees, donations, and other revenues.
- 3)** Integrate foreign corporate entities and their governance into the existing corporate structure

STRATEGIC FOCUS: HEALTH AND

ENSURE THAT HEALTH AND SAFETY OUTCOMES FOR MEMBERS AND GUESTS EXCEED REPRESENTATIVE HEALTH AND SAFETY OUTCOMES ON COLLEGE CAMPUSES.

GOALS

FOSTER A CULTURE OF CARE

Related Initiatives:

- 1)** Innovate AEPi's baseline Health and Safety program to exceed fraternal industry standards
 - a)** Develop a custom baseline training mechanism for safety issues unique to AEPi (security & antisemitism) in addition to those required by fraternity GL insurance programs (drugs, alcohol, hazing, sexual assault, bystander intervention), and issues AEPi has identified as relevant to all students (Premises/fire safety, mental health, and social media use)
 - b)** Provide proof of digital delivery to 95% of undergraduates by Fall of 2023
- 2)** Engage with partners that operate in the high school space (BBYO, NFTY, USY) to identify sources of culturally prevalent health and safety issues and tackle prevalent problems earlier.
- 3)** Focus all Health and Safety Education around themes of wellness (self), care (your brothers & guests), and reputation (community)
- 4)** Leverage existing Chapter Families and Big Brother programs as a source of formal and informal peer support

PROVIDE SAFE ENVIRONMENTS FOR DEVELOPMENT

Related Initiatives:

- 1)** Staff chapter facilities with Resident Advisers or Campus Directors. Staffing level will adhere to a strategic tiered service plan which matches number and type of support mechanisms provided through HQ with chapter size.
- 2)** Evaluate premises safety on a regular basis and log reports on condition. Make capital investments in safety and security infrastructure such as fire suppression, fire alarms, water cutoffs, and security technologies in houses owned or operated by AEPi.
- 3)** Expand real estate holdings owned by AEPi entities and/or managed by Esponda Associates in order to ensure that members have access to safe facilities

COMPLIANCE

Related Initiatives:

- 1)** Benchmark chapters against the Undergraduate Experience model with regard to structures and programming. Actively consult toward model compliance.
- 2)** Incentivize compliance with the Undergraduate Experience model as well as participation in training programs that outline expectations and mitigate risk thru discounted fee program.

ADVOCATE FOR SAFE CAMPUSES

Related Initiatives:

- 1)** Take a Lead Role in Responding to incidents on campus which impact the Jewish Community. (Antisemitism, Anti-Israel Activism, Holocaust Denial, DEI issues, etc.)
- 2)** lobby for university responsibility in establishing positive cultures and enforcing behavioral standards within their student body.
 - a)** notify of expectations for university officials when providing proof of insurance or additional insured status
 - b)** Advocate for universities to hold individual students accountable for their actions and jointly and severally accountable in cases of organizational misconduct.

DIRECT RESOURCES AWAY FROM COVERAGE AND TOWARD CONSULTANCY

Related Initiatives:

- 1)** Create a custom insurance program that benchmarks based on AEPi's individual history, stabilizes the insurance premium trends, lowers the overall cost of risk transfer, and funds risk mitigation efforts with equity.
- 2)** Utilize insurance premium savings to fund additional high quality chapter facing staff.

STRATEGIC FOCUS: Stakeholder Engagement

DEVELOP AND EXECUTE PLANS TO MAXIMIZE JEWISH COMMUNAL RELATIONSHIPS AND COMMUNAL OUTCOMES ON EACH CAMPUS

STRENGTHEN JEWISH CAMPUS PARTNERSHIPS

Related Initiatives:

- 1) develop decentralized relationships with Hillel staff on all active AEPi campuses
- 2) develop decentralized relationships with Chabad Rabbis on all active campuses and strengthen the Chabad national partnership utilizing mutual feedback modeling.
- 3) Provide additional financial support mechanisms when chapters partner with AEPi and SAEPi chapters on campus for programming.

ENGAGE LOCAL JEWISH COMMUNITY ORGANIZATIONS

Related Initiatives:

- 1) Utilize Synagogue Connect as a platform to link both college students to the local community and local community members to Jewish programming on campus
- 2) Engage local federations and communal advocates with our regional planning to ensure that student support is coordinated and community wide support is generated based on campus needs.

DEVELOP AND EXECUTE PLANS TO MAXIMIZE GREEK RELATIONSHIPS AND COMMUNAL OUTCOMES ON EACH CAMPUS.

Related Initiatives:

- 1) Exhibit the ability to maintain consistent relationships between AEPi regional chapter support staff and OFSL staff.
- 2) Proactively communicate our chapter assessment data to OFSL staff and request their assessment data ahead of annual chapter performance reviews.
- 3) develop a campus assessment rubric and utilize data to engage in discussion on community needs and/or support decisions not to engage with campus affiliation.
- 4) Create and disseminate educational materials on Jewish Peoplehood and Jewish Fraternity that can be used to proactively engage with DEI offices and Greek life staff. Materials should focus on Jewish Peoplehood and educate on the diversity of culture, ethnicity, religious practice, etc. within the Jewish population.

EXCITE OUR ALUMNI

Related Initiatives:

- 1)** Reinvigorate alumni social gatherings in saturated markets
- 2)** facilitate the creation of profession (industry) specific clubs, networking, and content
- 3)** foster the creation of affinity groups (whiskey, cars, cigars, wine, skiing, travel, dads, lifestyle, etc.)
- 4)** promote chapter reunions, tailgates, homecomings, and alumni weekends

INVOLVE PARENTS AND FAMILIES IN THE AEPi EXPERIENCE

Related Initiatives:

- 1)** Gather contact information and develop a proactive communication plan for all Parents of undergraduates by 2025
- 2)** understand parent clubs and develop a success model that integrates with the parent/family committee at the local chapter.
- 3)** Develop advisory resources for chapters on parental expectations for communication, billing behavior, and support systems.

PROACTIVELY ENGAGE DONORS

Related Initiatives:

- 1)** Create a monthly donor newsletter that provides feel good feedback on scholarships, programs, fraternity operations, and charitable activity.
- 2)** Proactively tell AEPi Experience stories through substantial editorial and PR work
- 3)** Utilize impact metrics to develop standard reports proving the value proposition of investing in AEPi.
- 4)** Create young alumni giving circles, and honorary boards that promote the feeling of belonging.

STRATEGIC FOCUS: Support

CREATE AN INFRASTRUCTURE THAT PRIORITIZES SERVANT LEADERSHIP AND PROVIDES ALL MEMBERS ACCESS TO THE SUPPORT INFRASTRUCTURE THAT ENABLES THEM TO FURTHER THE MISSION OF THE FRATERNITY.

RECRUIT AND MAINTAIN AN INDUSTRY LEADING STAFF

Related Initiatives:

- 1)** Implement a staffing model that focuses on high quality direct stakeholder, chapter, and member interface regionally.
- 2)** Achieve a coverage level on 1 regional director for every 15 chapters and 1ELC for every 300 members. By 2028
- 3)** fill critical administrative and executive roles that lead to direct operational impact.

ADVANCE THE VOLUNTEER EXPERIENCE AND INCREASE THE NUMBER OF ENGAGED VOLUNTEERS.

Related Initiatives:

- 1)** Create a chapter focused non-hierarchical volunteer structure with 80% chapter coverage by 2028.
- 2)** Promote use of advisory teams rather than singular advisers and deliver educational materials, tools, and ideas that promote a high quality, achievable, and fun volunteer experience.
- 3)** Activate working advisory committees focused on providing expertise to the Fraternity in operational areas.

DELIVER THE TOOLS THAT OUR STAKEHOLDERS NEED WHEN THEY NEED THEM.

Related Initiatives:

- 1)** Launch the first AEPi produced E-learning program by fall of 2022 and follow up with e-learning modules for all chapter and volunteer roles. (Collectively AEPi.edu)
- 2)** Launch a platform containing first class Chapter Management Tools by 2027 with full integration of chapter management by 2032
- 3)** Utilize live feedback tools such as dashboards, leaderboards, and awards to incentivize performance and deliver feedback required for proactive interventions.

CREATE EXPERIENCES THAT IMPACT

Related Initiatives:

- 1)** Engage with student leaders to teach planning processes that set them up for successful execution of the events that they plan.

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- 2)** Plan for world class Convention experiences that account for a variety of stakeholder needs and interests.
 - 3)** Execute a top Master's & Advanced Leaders Program consisting of a retreat, convention track, and opportunities to engage leaders in their fields.
 - 4)** Invigorate Regional Pride with high level regional experiences such as conclaves, leadership cohorts, and competitions.
 - 5)** Facilitate Chapter specific leadership retreats.

STRATEGIC FOCUS: Funding

RECOGNIZE OUR VARIOUS SOURCES OF FUNDING RELATIVE TO ONE ANOTHER AND SEEK TO MAXIMIZE EACH IN A SUSTAINABLE MANNER OVER TIME. INCREASE MEMBERSHIP REVENUE OVERALL WHILE DECREASING PROPORTIONATE SHARE RELATIVE TO TOTAL ORGANIZATIONAL REVENUE.

Related Initiatives:

- 1) Realize revenue gains of 15% annually thru 2028 driven primarily by growth and retention outcomes.
- 2) Stabilize the 4-year cost of membership with modest rate increases driven by CPI and insurance cost adjustments.

STABILIZE HOUSING REVENUE

Related Initiatives:

- 1) Achieve 90% actualization of Gross Potential Housing revenue (rent, meal plans, parlor fees, parking) through establishment of a two-year lease program standard by 2023
- 2) Grow revenue through portfolio growth; acquiring facilities on 12 additional target campuses by 2032

DRIVE ALTERNATIVE REVENUE PROGRAMS

Related Initiatives:

- 1) grow the number and variety of revenue generating affinity programs such as product boxes, wine of the month clubs, specialty insurance products, and commission sharing opportunities.
- 2) increase royalties & licensing fees through promotion of well-designed products. Develop sophisticated AEPi products that appeal to adult audiences in order to expand the customer base.
- 3) Seek Sponsorships for our existing educational programming from partner organizations and for-profit companies.

GIVING

FOCUS EFFORTS AROUND AN ANNUAL CAMPAIGN

Related Initiatives:

- 1) Develop materials that tell the story of investment in a cohesive program and provide proof of payoff
- 2) Mobilize volunteers to give and actively fundraise in support of a defined annual campaign goal and provide opportunity to showcase AEPi programming
- 3) Engage Jewish communal funders in new ways that promote AEPi's visionary look toward the future.

PROVIDE FUNDING FOR SPECIAL PROJECTS AND INITIATIVES

Related Initiatives:

- 1)** Mobilize chapter alumni bases around special projects such as housing acquisition and renovation
- 2)** Identify passion points for alumni and provide naming opportunities related to programming and physical spaces.

LEAVE A LEGACY OF ENDOWMENT

Related Initiatives:

- 1)** Create a culture that values endowment with equal weight to today's funding
- 2)** Target a 15% minimum of all funds raised each year to be designated to endowment
- 3)** Strengthen our planned giving initiatives in line with AEPis commitment to the Jewish Future and register participants.