# Implementation Roadmap

Bringing EO's Future Architecture to Life



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The Masterplan Compendium describes EO's future governance and operating architecture. This Implementation Roadmap explains how EO will thoughtfully move from an approved architecture into a sustainable operating model.

**IMPORTANT**: Masterplan is not a single change event. It is an evolution of how EO operates. The aim is not to implement a new structure as quickly as possible. The objective is to build the understanding, capability, confidence, and capacity required for the future architecture to succeed.

## Why This Roadmap Exists

EO has grown organically over nearly 40 years. Every generation of leaders has built on the work before them, creating structures, roles, and practices designed to solve the needs of EO at that time.

That growth is part of what makes EO unique. It reflects entrepreneurial energy, commitment, and a willingness to improve. At the same time, growth creates complexity. As EO moves toward its 2030 ambition, the organization needs greater clarity around who sets standards, who measures outcomes, who owns improvement, who executes delivery, and how member leadership and professional execution work together.

The Masterplan Architecture defines the future model: the why and the what. This roadmap defines the journey toward that future state: how EO will prepare leaders, build capability, test new ways of working, learn from experience, and transition responsibly.

## What This Roadmap Is Designed To Do

This roadmap is designed to help you understand:

- Why EO is evolving.
- How implementation will be approached.
- What happens first and why.
- How leaders and teams will participate.
- How EO will protect the organization during the transition.


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## The Philosophy Behind Implementation

### EO Will Evolve, Not Disrupt

Chapters remain central to member value. Member leadership remains essential. Professional staff remain essential. The future model strengthens the foundation that allows EO to grow.

### Readiness Before Speed

EO has committed to a thoughtful, human-centered evolution. The organization must have the understanding, capacity, and confidence needed before significant changes are introduced.

### Learn Before Scaling

The future model will be tested. Feedback, evidence, and experience will inform refinement before broader adoption.

### Protect Existing Priorities

Masterplan implementation must strengthen, not distract from, EO's current commitments including retention, growth, and member experience.

### Authority, Accountability, and Resources Must Align

Leaders should not be accountable for outcomes without the authority and resources required to influence those outcomes.

### Transparency Builds Trust

People support what they understand. EO will communicate what is changing, why it is changing, and how people will participate.


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## How to Read This Roadmap

Masterplan implementation is organized across two dimensions.

**The first dimension is time.** Five sequential phases describe how EO will move from architecture approval to sustainable operation. Each phase has a distinct purpose and builds capabilities needed for the next phase.

**The second dimension is ownership.** Implementation work is organized across several workstreams, each with a clear purpose and accountable owner.

The sequencing is intentional. Each phase produces the understanding, decisions, capabilities, or evidence required for the next phase. Moving faster without readiness would create risk rather than progress.

## Implementation Journey Overview

Implementation will unfold through five phases. Each phase has a distinct purpose and builds the capability required for the next stage. The gates between phases ensure EO moves forward with readiness rather than simply following a calendar.

| Phase | Purpose | Capability EO Builds | Readiness Gate |
|---|---|---|---|
| **Align & Prepare** | Finalize decisions, align leaders, establish ownership | Clear decision-making and readiness discipline | Leaders understand architecture and ownership |
| **Design & Build** | Translate architecture into operating components | Written charters, decision rights, standards | EO is ready to test the model |
| **Test & Learn** | Test and refine | Ability to learn and adapt | Evidence supports scaling |
| **Scale & Transition** | Expand proven approaches | Sustainable operating practices | Model works beyond pilots |
| **Embed & Improve** | Move into continuous improvement | Long-term governance discipline | Implementation transitions into normal operations |


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PHASE

# 1 Align & Prepare

## Purpose

Before EO changes structures, EO must create shared understanding, finalize readiness, establish ownership, and prepare the organization for a thoughtful implementation journey.

The first phase is intentionally focused on alignment and preparation rather than immediate execution. The objective is to ensure that leaders understand what is changing, why it is changing, what remains the same, and how EO will move forward together.

A strong architecture can only succeed when the people responsible for bringing it to life understand both the intent behind the design and their role within it.

## Why This Phase Matters

Masterplan introduces clearer distinctions between governance, standards, measurement, accountability, and execution. Those distinctions create clarity, but they also require new ways of working.

For example:

- Functional Committees (currently Portfolios) will need clarity on their role as standards-setting bodies.
- Regions will need clarity on their role in chapter health accountability and support.
- Professional teams will need clarity on execution responsibilities.
- Member leaders will need clarity on where their judgment, credibility, and experience create unique value.

These changes cannot be achieved simply by publishing a new organizational chart. They require shared understanding and deliberate preparation.

The first phase therefore focuses on creating the conditions for successful implementation.

## What EO Will Focus On

### Finalizing Remaining Architecture Decisions

Some elements of the future model require additional validation and definition before implementation can begin.

This includes:

- Clarifying Functional Committee authority, composition, and relationship to current Portfolio structures.
- Defining the role and governance relationship of the Global Chapter Health Council (GCHC).
- Establishing the principles for Regional Director/ Staff Liaison and Regional Chair/Committee Chair decision-making. Who is accountable for what?
- Confirming implementation implications for the Path of Leadership.
- Clarifying how existing structures and leadership roles transition over time.

The objective is not to redesign the architecture. The objective is to ensure the approved architecture can be implemented with clarity.

### Establishing Implementation Governance

A strong architecture requires more than a clear design. It requires disciplined implementation, coordination across multiple workstreams, and ongoing visibility into progress, risks, and decisions.

To support this, EO will establish a temporary Implementation Oversight Group (IOG) to coordinate the implementation journey.

The purpose of the IOG is not to create another layer of governance. Its purpose is to ensure that the many interconnected elements of Masterplan implementation move forward in a coordinated, transparent, and intentional way.


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**What the IOG Owns**

The IOG is responsible for the integrity of the implementation process. It owns:

- Coordinating implementation sequencing across workstreams.
- Monitoring dependencies and identifying where one area of work impacts another.
- Tracking readiness and progress against agreed milestones.
- Surfacing risks, challenges, and decisions requiring escalation.
- Ensuring communication and transparency throughout implementation.
- Supporting alignment between member leaders and professional staff involved in implementation.

The IOG helps ensure that implementation remains connected to the approved architecture and that emerging challenges are addressed proactively.

**What the IOG Does Not Own**

The IOG does not replace existing governance structures or assume decision-making authority that belongs elsewhere.

The IOG does not:

- Change the approved Masterplan architecture.
- Redefine decision rights established in the future model.
- Approve changes that belong to the Global Board.
- Direct the ongoing operations of EO.
- Become the permanent owner of any function or capability.

Where implementation questions arise that require changes to governance, accountability, or architectural principles, those decisions are routed through the appropriate governance body.

**Relationship to Board Governance**

The Global Board retains ultimate governance authority throughout implementation.

The Board's role is to:

- Approve the future architecture.
- Provide oversight of implementation progress.
- Make decisions where implementation requires changes to approved governance principles, decision rights, or accountability boundaries.
- Ensure implementation remains aligned with EO's strategic direction.

The IOG serves as the connection point between implementation activity and governance oversight. It ensures the Board has appropriate visibility without pulling the Board into day-to-day implementation decisions.

This distinction is intentional:

The Board governs the architecture. The IOG coordinates the journey. Implementation teams execute the work within their workstreams.

Together, these roles ensure EO can move forward with both the discipline needed for successful implementation and the flexibility needed to learn and adapt along the way.

This distinction is important because successful implementation requires both strong coordination and strong governance discipline.

## Building Understanding and Confidence

Communication begins immediately.

The first message to leaders should reinforce what remains unchanged:

- EO remains member-led.
- Chapters remain central to member experience.
- Member leadership remains essential.
- The Path of Leadership remains an important part of EO's future.

At the same time, leaders need visibility into the implementation journey. EO should avoid creating uncertainty by asking people to wait without understanding the path forward. Transparency builds confidence.


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## Capability EO Builds

During Phase 1, EO builds the capability to make and communicate structural decisions with:

- Clear ownership.
- Visible reasoning.
- Defined accountability.
- Shared expectations.

The organization begins moving from informal understanding to explicit agreements.

## Early Actions That Can Begin Immediately

Not every benefit of Masterplan requires a new structure.

During this phase, EO can begin applying future principles by:

- Increasing focus on chapter health as a strategic priority.
- Helping Regions consider how resources best support Chapter success.
- Applying Fixed, Flexible, and Freestyle thinking to current work.
- Creating greater clarity around decision ownership.
- Increasing transparency around decisions.

These actions allow EO to begin practicing the future model before structural changes occur.

## Readiness Gate

EO moves into Phase 2 when:

- Remaining architecture decisions are sufficiently clear.
- Implementation governance is established.
- Leaders understand the direction and their role.
- Workstreams and ownership are confirmed.
- Communication and readiness plans are in place.

PHASE

# 2 Design & Build

### Purpose

Phase 2 translates the future architecture into practical operating components while allowing leaders to begin practicing new ways of working before broader structural transition occurs.

The purpose of this phase is to design the capabilities, relationships, and supporting systems required for the future model to function successfully.

## Why This Phase Matters

The architecture creates clarity about the intended future state. Phase 2 answers the next set of questions:

- What should the professional staffing model look like?
- How will Regions operate in the future model?
- How will Functional Committees work?
- How will member leaders and professional staff partner?
- How will standards move from creation to adoption?
- How will leaders be prepared for future roles?

The organization must move from understanding the model conceptually to understanding how it will work in practice.


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## What EO Will Focus On

### Designing the Professional Staffing Model

The future architecture defines what EO needs to accomplish. Phase 2 will determine what professional capabilities, roles, and resources are required to successfully support that future model.

This work is not intended to begin with a staff restructuring exercise. The objective is to understand the capabilities required by the future architecture and ensure that EO has the right capacity, expertise, and support model to deliver against those needs.

The staffing model design will consider:

- What capabilities must exist globally versus regionally versus locally.
- Which activities require professional execution, member leadership, or partnership between both.
- How Global Delivery Teams should be supported.
- What professional roles are needed to enable Regions and Chapters.
- How staff capacity should scale based on membership growth, chapter needs, service demand, and demonstrated workload.
- Where current roles align with future responsibilities and where evolution may be required.

The goal is not “define an organizational chart”. The goal is to ensure that EO’s professional capability model supports the governance architecture and enables member leaders to focus on where they create the greatest value.

### Designing the Regional Operating Model

The Regional Operating Model is one of the most important implementation areas because Regions are where global standards, chapter realities, and member experience come together.

The design work will clarify:

- The role of Regional Councils.
- The relationship between Regional/Functional Chairs and Regional Directors/Staff Liaisons.
- How chapter health accountability operates.
- How Regions prioritize resources.
- How Chapters receive support.
- How escalation pathways function.

The future model requires Regions to remain connected to Chapters while operating with clearer purpose and accountability.

### Evolving Portfolios Toward Functional Committees

The transition from Portfolios to Functional Committees is not simply a name change. The meaningful shift is one of focus.

Functional Committees will increasingly focus on:

- Defining standards.
- Stewarding quality.
- Identifying emerging member needs.
- Reviewing innovation.
- Helping determine what belongs in Fixed, Flexible, and Freestyle categories.

Existing Portfolio structures can begin practicing these behaviors before formal transition occurs. This creates continuity while allowing EO to learn before fully changing structures.

### Defining Global Delivery Capabilities

Global Delivery Teams require clarity around:

- What work requires a global solution.
- Where professional execution creates the greatest value.
- Where member leadership provides essential credibility, judgment, or stewardship.

The goal is not to remove member leadership. The goal is to ensure member leaders are focused on where they create unique value rather than being required to function as EO’s operational infrastructure.


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### Aligning the Path of Leadership

Organizational structure and leadership development cannot be separated. As roles evolve, EO must ensure that leaders understand:

- Why a role exists.
- What outcome it owns.
- What authority accompanies it.
- How it works with other leaders.
- How success is measured.

The Path of Leadership will be aligned to the future architecture so that EO continues developing leaders for the organization it is becoming.

### Building Staff Capability and Supporting Transition

Once the future staffing model is understood, EO will ensure professional teams have the capabilities, resources, and support needed to operate successfully within the future model.

EO must ensure that:

- Professional teams have appropriate capabilities.
- Roles align with future responsibilities.
- Capacity matches expectations.
- Staff support the successful execution of the architecture.

## Capability EO Builds

During Phase 2, EO builds the ability to operate through:

- Written charters.
- Clear decision rights.
- Defined standards.
- Transition agreements.
- Stronger accountability.

EO begins moving from relationship-dependent operation toward system-supported operation.

## Readiness Gate

EO moves into Phase 3 when:

- The professional staffing model and required capabilities have been sufficiently defined to support pilot implementation.
- The Regional Operating Model is sufficiently defined.
- Decision rights are clear enough to test.
- Initial standards work is underway.
- Leaders understand their roles.
- Pilot readiness has been confirmed.

PHASE

# 3 Test & Learn

### Purpose

Phase 3 is where EO tests the future model in practice. The purpose is to learn what works, what needs adjustment, and what additional support is required before broader implementation.

## Why This Phase Matters

Organizational design cannot be perfected on paper. The future model introduces new relationships:

- Regional leaders working through clearer accountability.
- Functional leaders setting standards.
- Professional teams executing delivery.
- Chapters experiencing the impact.

The testing and iteration period creates the opportunity to test behaviors, not just structures.


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## What EO Will Test

### Regional Accountability and Support

Regions will test:

- How Regional Councils prioritize Chapter needs.
- How Regional Chairs and Regional Directors work together.
- How chapter health information informs decisions.
- How resources are allocated.

### Decision Rights

Leaders will test whether decision rights create clarity.

Do leaders understand:

- Who recommends.
- Who provides input.
- Who decides.
- Who executes.

### Functional Standards

Functional Committees will begin exercising their future role by developing and testing standards.

The focus will be on:

- Creating clarity.
- Understanding adoption challenges.
- Learning where flexibility is needed.

### Leadership Pathways

EO will test whether future leadership pathways create stronger clarity and opportunity for leaders.

## Capability EO Builds

During Phase 3, EO builds the ability to learn as an organization.

EO demonstrates that:

- Feedback changes design.
- Evidence matters.
- Adjustments are part of success.

## Readiness Gate

EO moves into Phase 4 when:

- Test evidence has been reviewed.
- Necessary adjustments have been made.
- Leaders have demonstrated readiness.
- The Board has confidence that scaling will strengthen rather than distract from EO's priorities.

PHASE

# 4 Scale & Transition

### Purpose

Phase 4 expands/reinforces what has been tested successfully while supporting leaders and teams through transition.

The objective is to ensure that the organization can operate successfully within the new model.

## Why This Phase Matters

This phase ensures that proven approaches are reinforced thoughtfully, that important responsibilities have clear future ownership, and that leaders are supported through the transition.

## What EO Will Focus On

### Expanding Proven Practices

Scaling decisions will consider:

- Readiness.
- Capacity.
- Learning from tests.
- Strategic priorities.


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### Transitioning Structures

Where structures change, EO will ensure:

- Important responsibilities have a future home.
- Leaders understand what changes.
- Knowledge is transferred.
- Contributions are recognized.

### Aligning Leadership Cycles

Leadership transitions should respect EO's Path of Leadership cycles wherever possible.

EO should avoid unnecessary disruption by ensuring leaders understand future roles before they apply and serve.

## Capability EO Builds

EO builds the ability to operate consistently while preserving flexibility where local adaptation creates value.

## Readiness Gate

EO moves into Phase 5 when:

- The model is operating successfully in expanded areas.
- Major transitions are complete.
- Leadership pathways are functioning.
- The Board has reviewed evidence of progress.

PHASE

# 5 Embed & Improve

### Purpose

Phase 5 moves EO from implementation into continuous improvement.

The future architecture becomes part of EO's normal governance and operating rhythms.

## Why This Phase Matters

A successful operating model cannot depend on the leaders who created it.

It must be durable beyond individual leadership terms.

## What EO Will Focus On

### Evaluating Effectiveness

EO will assess:

- Chapter health.
- Member experience.
- Retention.
- Volunteer engagement.
- Leadership pipeline.
- Organizational readiness.

### Embedding Governance Rhythms

Implementation responsibilities transition into normal governance structures.

The organization continues:

- Reviewing standards.
- Measuring outcomes.
- Learning from experience.
- Improving systems.


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## Continuing Improvement

The end of implementation is not the end of evolution.

Strong organizations continue learning.

## Capability EO Builds

EO builds the ability to hold itself accountable to outcomes rather than structural intent alone.

## Readiness Gate

Implementation concludes when:

- Continuous improvement processes are established.
- Ownership has transferred into standing governance.
- The Implementation Oversight Group can sunset.


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## Implementation Workstreams

Bringing the Masterplan architecture to life requires coordinated work across several interconnected areas. While the architecture defines the future state, these workstreams focus on building the capabilities, relationships, and supporting systems required to operate successfully within that model.

Each workstream represents a critical area of implementation. Together, they ensure that EO is not only changing structures, but also strengthening the ways of working, leadership capabilities, decision rights, and support systems needed for long-term success.

The workstreams are intentionally interconnected. For example, the Regional Operating Model cannot be designed separately from the professional staffing model, the Path of Leadership, or the Chapter Health Framework. Likewise, Functional Committees, Global Delivery Teams, and Regions must evolve together to create a clear connection between standards, execution, accountability, and member experience.

Each workstream will have clear ownership, defined outcomes, and alignment with the principles established in the Masterplan architecture.

| Workstream | Purpose |
|---|---|
| **Governance Design** | Resolve remaining governance decisions and clarify accountability |
| **Operating Model Staff Capability & Support** | Define roles, capabilities, and decision rights. Ensure professional capabilities align with the future model |
| **Path of Leadership** | Align leadership pathways with future roles |
| **Standards & Chapter Health** | Establish standards, GCHC framework, and measurement approach |
| **Communication, Trust & Culture** | Build confidence and engagement |
| **Measurement & Learning** | Define success measures and readiness indicators |

## Transitioning from Today to Tomorrow

The future architecture does not replace current work overnight. Before any existing role or structure changes, EO must understand the work currently being performed, where that accountability belongs in the future model, and what support is required.

Some responsibilities will continue unchanged. Some will move to different structures. Some will evolve. Some may no longer be needed.

The objective is not to preserve every existing activity. The objective is to ensure that important work has a clear future home.


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## Risks We Are Actively Managing

Successful implementation of the Masterplan architecture requires more than a clear design. It requires awareness of the human, operational, and organizational factors that can influence adoption.

Every meaningful organizational evolution carries risks. The purpose of identifying these risks is not to suggest that implementation will fail, but to ensure EO proactively addresses the conditions required for success.

The greatest risks are not necessarily related to the architecture itself. They are related to how effectively EO helps people understand, adopt, and operate within the future model.

The implementation approach therefore includes intentional safeguards: thoughtful sequencing, transparent communication, readiness checks, pilots, feedback loops, and clear accountability.

The following risks represent areas EO will actively monitor and manage throughout the implementation journey.

| Risk | Why It Matters | How EO Will Manage It |
|---|---|---|
| **Change fatigue** | Leaders have experienced previous changes that created uncertainty | Transparency, pilots, visible learning |
| **Volunteer overload** | New expectations must match capacity | Role clarity, support, co-leadership |
| **Functional Committees lack clarity** | New structures need clear mandates | Charters and phased introduction |
| **Regional model is scaled too quickly** | Regional accountability is central to success | Pilot before scaling |
| **Staff authority concerns** | Execution authority requires governance guardrails | Clear decision rights |
| **Legacy structures continue alongside new ones** | Creates duplication | Planned transition and knowledge transfer |
| **Standards are inconsistent** | Reduces confidence and scalability | Fixed/Flexible/Freestyle framework |

## How We Will Measure Success

Success is measured by whether the new architecture helps EO deliver greater member value, healthier Chapters, stronger leadership pathways, and clearer accountability.


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| Domain | Leading Indicators | Lagging Indicators |
|---|---|---|
| **Chapter Health** | Baselines, standards adoption | Improved chapter health outcomes |
| **Member Experience** | Sentiment, participation | Retention, consistency |
| **Volunteer Engagement** | Workload, engagement | Sustainability |
| **Leadership Pipeline** | Candidate readiness | Fill rates |
| **Regional Performance** | Capability milestones | Chapter outcomes |
| **Governance Effectiveness** | Decision clarity | Reduced operational confusion |

## Assumptions and Sequencing Considerations

Include:

- Implementation Roadmap Planning begins October 2026.
- Timing aligns with leadership cycles.
- Staff and volunteer capacity must be considered.
- If readiness is not achieved, sequencing should adjust rather than compress.

## What This Roadmap Does Not Define

This roadmap defines the implementation journey. It does not define every operational detail.

It does not define:

- The final member leader and staff organizational structure.
- Individual job descriptions.
- Detailed operating cadence and processes.
- Every transition decision for current leaders and bodies.

Those elements will be developed through implementation design as the architecture moves into practice.

## Closing Principle

The architecture defines where EO is going. This roadmap defines how EO will move there thoughtfully.

By taking the time to build understanding, capability, and confidence, EO can create an operating model that honors its history while preparing the organization for its next chapter of growth.


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