EO PROJECT MASTERPLAN COMPENDIUM

The Future Governance & Operating Architecture for EO

This document explains why EO is evolving, the problems Masterplan is designed to solve, the principles guiding the future architecture, the proposed governance and operating model, and how each component of that model works. It defines the architecture - the why and the what. It does not define implementation - the how and when.

A parallel phase of work will translate this architecture into an implementation roadmap, transition plan, detailed operating processes, staffing implications, and timeline.

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I. Why Are We Doing Masterplan?

Why EO Needs to Evolve

EO's organizational structure has evolved organically over decades, layering governance mechanisms, staff functions, and volunteer roles without a unifying design. As the network has grown, the interplay between governance, professional staff, and volunteer leadership has become increasingly complex, and the structures that once served a smaller organization now slow decision-making and blur accountability.

As EO has grown, many structures have continued to carry multiple legitimate priorities simultaneously. While this reflects the breadth and strength of EO, it can make accountability, prioritization, and repeatability more difficult. The future architecture is designed to create clearer purpose for each part of the organization so that leaders can focus their energy on where they create the greatest value.

The Masterplan opportunity is tied to EO's 2030 Strategic Direction, which targets 95 percent member renewal resulting in growth to 35,000 members, and a consistent, scalable member experience worldwide by 30 June 2030. Moreover, data indicates that a disproportionate share of members leave in their first or second year, underscoring the stakes of getting onboarding, community, and chapter health right. Six strategic priorities anchor this ambition: expanding EO's reach in strategic markets, strengthening key member relationships, cultivating thriving communities, elevating leadership development, unlocking strategic partnerships, and enhancing the digital member experience.

What Challenges Are We Solving?

1. The Global Board, Tier 1 Member Leaders and Senior Professional Staff identified four core problem areas driving the review:
2. Governance frameworks that lack clear boundaries, enforcement protocols and fast decision cycles.
3. A staff organization structure that has evolved organically and is not consistently aligned with portfolios, regions, and future organizational needs.
4. A volunteer member leadership system (Tiers 1 through 3 plus Leads) that grew without coordinated design.
5. Ambiguity in the authority and accountability relationship between Member Leaders and Professional Staff.

These are framed explicitly as design questions requiring intentional resolution rather than incremental fixes. They are not problems to patch; they are questions the organization must answer with the same entrepreneurial spirit that built EO.

Masterplan is not intended to solve every organizational frustration or redesign EO for the sake of change. It focuses only on structural challenges that limit EO's ability to deliver its 2030 ambition: unclear ownership, inconsistent accountability, scalability constraints, and insufficient alignment between governance, leadership, and execution.

How Masterplan Will Strengthen EO

Masterplan is not designed as a wholesale reinvention of EO. It is designed to clarify and strengthen the foundations that allow EO to scale. Many elements remain unchanged: Chapters remain central, Regions remain in place, EO remains member-led, and the Global Board retains governance authority. The implementation approach will need to recognize EO's capacity for change and prioritize sequencing, readiness, and sustainable adoption.

Implementation will intentionally balance organizational evolution with EO's ongoing commitments to members, Chapters, and strategic priorities. The purpose of the future architecture is not to create disruption for its own sake, but to provide greater clarity and effectiveness over time. The implementation phase will determine sequencing, readiness requirements, resource implications, and transition support needed to successfully adopt the future model.

What Are We Trying to Preserve?

Masterplan is designed to create **greater clarity, consistency, accountability, and scalability while protecting what makes EO unique**: entrepreneurs learning from and leading one another. EO is a member-led organization. Member-led, however, does not mean member-executed. The architecture is built to keep member leadership central where peer credibility and entrepreneurial judgment create unique value, while giving professional staff clear ownership where expertise, consistency, and operational capability drive success.

What Does Success Look Like?

Once implemented, EO will operate with faster decision cycles, greater transparency and role clarity, higher member satisfaction, sustainable staff capacity, and a clear pathway to its 2030 vision - with a foundation strong enough to support the architecture so it can scale well beyond the 2030 ambition.

Implementation will be staged over an estimated 18 months or longer, beginning with a staffing and operating-capability assessment. Implementation sequencing will intentionally balance Masterplan execution with EO's existing strategic priorities, including member retention, growth, and delivery commitments. FY 2027–28 will largely continue to operate in the current Path of Leadership format while transition work proceeds.

Success also means every staff and member leader - whether or not they were part of this journey - can read this document from beginning to end and understand why EO is changing, what problems the change solves, what principles guide the new architecture, what the model is, how each piece works, and what changes from today.

II. What Principles Are Guiding the Future Architecture?

Before introducing any structural component, EO's future architecture rests on six guiding principles. These principles explain the reasoning behind the model; the structures described in later sections exist only because they express one or more of these principles.

1. Chapter Health as a Strategic Priority

Member Value is EO's ultimate objective. Chapters are EO's primary delivery channel for creating that value. Chapters are where entrepreneurs first experience EO's purpose through connection, learning, leadership development, and community. Ensuring that chapters are healthy, sustainable, and consistently delivering a high-quality member experience is therefore a strategic priority because strong chapters enable stronger member outcomes.

EO requires a consistent way to define, measure, understand, and improve chapter health. Chapter health is a board-level concern, not simply a staff management matter. It belongs within the same tier of organizational responsibility as finance, governance, strategy, member value, and leadership.

Without a clear owner and a shared framework, chapter health risks becoming a collection of locally interpreted best practices, where standards and performance assessment may vary across regions. This can reduce confidence in the data, limit EO's ability to identify systemic opportunities for improvement, and undermine the Board's ability to exercise effective governance oversight.

2. Separation of Standards-Setting, Measurement, Accountability, and Execution

EO must clearly distinguish the roles of each part of the system: who sets standards, who develops the frameworks that translate those standards into measurable expectations, who measures performance, who owns improvement, and who executes delivery. Maintaining these distinctions - rather than concentrating multiple responsibilities within a single body - is what creates the clarity, accountability, and governance discipline required for EO to scale. Every permanent body in the architecture must have a distinct primary purpose that is not unnecessarily duplicated elsewhere in the system.

Distinct responsibilities must not, however, create disconnected silos. The future architecture depends on intentional connection points, feedback loops, and collaboration mechanisms between Governance, Standards, Measurement, Accountability, and Delivery layers. That is an issue to be resolved in optimizing Ways of Working and Decision-Making, and not by an Architecture alone.

3. Fixed, Flexible, and Freestyle

EO protects what must be consistent across the network while enabling local adaptation and innovation. **Fixed** elements are the standards, programs, and practices that must be consistent everywhere. **Flexible** elements are those where regions and chapters adapt within defined guardrails to reflect local market conditions and member needs. **Freestyle** innovations are local experiments that, when successful, can be evaluated, refined, and - where appropriate - transformed into scalable programs or standards adopted across the network. Without a mechanism to move ideas between these three categories, EO risks either rigid uniformity or fragmented local innovation with no path to scale.

4. Member Leadership and Professional Execution

EO is member-led. Member-led means that members hold meaningful decision authority in areas where entrepreneurial judgment, peer leadership, member experience, and stewardship are essential components of EO's value proposition. It does not mean that every activity is executed by members or that professional expertise is secondary.

Member-led, however, does not mean wholly member-executed. Members own areas where entrepreneurial judgment and peer credibility create unique value; professional staff are accountable where expertise, consistency, and operational capability drive success. The goal is to intentionally design where each creates unique value, with members shaping what is uniquely EO and staff executing where professional capability creates consistency, scalability, and sustainability.

5. Decisions and Delivery at the Right Level

EO should place decisions and delivery at the lowest practical level where the necessary capability, authority, and accountability exist, while recognizing where global scale, consistency, risk management, or stewardship create greater value.

Chapters should do what they can do well for their members. Regions should take on what Chapters cannot effectively deliver individually or what benefits from regional coordination and capability. Global should take on what Regions cannot effectively deliver individually or what requires enterprise-wide scale, consistency, risk management, or stewardship.

This should be applied function by function and decision by decision, rather than assuming that everything should naturally move upward or downward.

This principle does not mean that all decisions should move downward. It means that decisions should be made at the level where the necessary capability, authority, context, and accountability exist.

6. Clear Decision Rights, Supported by Governance Guardrails

Decision authority must be accompanied by governance guardrails, accountability, and escalation mechanisms. Every major decision needs one clearly identified final decision-maker, rather than shared or ambiguous co-decide authority. Likewise, strategic initiatives and enterprise-wide priorities (like Masterplan) also require clear ownership to ensure they are actively stewarded through implementation and ongoing operations.

Authority, accountability, and resources must travel together. No member leader or staff leader should be accountable for an outcome without the authority and resources required to meaningfully influence that outcome. Likewise, decision authority should carry corresponding accountability for the results of those decisions.

Decision authority does not eliminate the responsibility to seek relevant expertise. Whoever decides remains accountable for ensuring that appropriate member, staff, and subject-matter perspectives inform the decision.

Standards: Our Shared Guardrails

The above six principles will inform and shape the **standards** for all of EO's work. We define standards as the enterprise-level requirements, frameworks, and classifications - established by Functional Committees and approved through Board governance - that determine what must be consistent across EO versus where regions and chapters have latitude to adapt or innovate. Standards are expressed through the Fixed, Flexible, and Freestyle framework: **Fixed** standards are the principles, minimum requirements, safeguards, and outcomes that must be consistent everywhere; **Flexible** standards establish a common framework within which regions and chapters adapt delivery to local conditions; and **Freestyle** areas encourage local innovation within defined guardrails, with successful practices eligible to be evaluated and elevated into enterprise-wide standards over time.

III. What Is the Proposed Governance & Operating Model?

Before introducing the architecture graphic, it is important to understand what the graphic represents. The future architecture is organized into four connected layers, with a fifth element - the Path of Leadership - spanning across all of them as EO's leadership pipeline.

What Are the Layers?

1. **Governance Layer** - the Global Board and Board Advisory Committees, which set strategic direction and guardrails.
2. **Standards & Measurement Layer** - Functional Committees, EO's global standards-setting bodies, which define functional strategy, programs, and standards and determine what belongs in Fixed, Flexible, and Freestyle categories. The Global Chapter Health Council stewards chapter health measurement through the Chapter Health Framework.
3. **Chapter Success Accountability Layer** - Regional Councils, which are accountable for chapter success within their territories.
4. **Delivery Layer** - Global Delivery Teams and Chapters, which deliver member value directly to members.

The Path of Leadership runs across all four layers, providing a competency-based pipeline that develops leaders through Chapter, Regional, Functional Committee, GCHC, and other Global pathways, converging on a common set of Enterprise Leadership Competencies.

*Note: The committees, roles, and examples shown are illustrative to demonstrate how Chapter, Regional, and Global responsibilities may connect. The final list of Functional Committees, Regional Council roles, and advisory structures will be determined during implementation design based on approved principles, organizational needs, and workload requirements.

How Do the Pieces Work Together?

Standards flow down from the Governance and Standards & Measurement layers; accountability for outcomes sits with the Chapter Success Accountability layer; and delivery of the member experience happens in the Delivery layer.

In this model, Functional Committees (a sampling of committees is depicted above) determine the standards within their functional domains.

The Global Chapter Health Council measures chapter performance against all Fixed standards that apply to chapters, as established by the relevant Functional Committees and assembled into a single Chapter Health Framework; it does not set, override, or reclassify those standards. It monitors performance against that framework and reports findings to the Board through the Member Value Board Advisory Committee, feeding evidence back to Functional Committees to inform future refinement.

Regional Councils use that framework - together with direct coaching and support - for chapter performance management and to hold chapters accountable for delivering optimal member experience.

Chapters and Global Delivery Teams deliver the EO experience directly to members, informed by Fixed standards and shaped locally within Flexible guardrails. (Communities and other non-geographic member connection models may evolve over time and will require appropriate governance and health frameworks as they mature.)

CURRENT ORGANIZATIONAL STRUCTURE

Global Board of Directors

STANDING COMMITTEES
- Standing Finance Committee
- Standing Governance Committee

PORTFOLIOS
- Growth Portfolio
- Products Portfolio
- Leadership Development & Training Portfolio
- Marketing & Partnerships Portfolio

AD HOC COMMITTEES CHANGE PROJECTS
- Seamless Chapter Operations

ADVISORY COUNCILS
- Human Capital Advisory Council
- Organizational Strategy & Planning Council
- Technology Advisory Council
- Leadership Communications Advisory Council

REGIONAL COUNCILS

Regional Chair	Member Products Director	Marketing & Partnerships Director
Area Director(a)	Governance Director	Leadership Director
Growth Director	Regional Finance Director	

Chapter Health Advisory Council

CHAPTER BOARD

Accelerator	Chapter President	Chapter Launch
Communications	External Engagement	Forum
Governance	GSEA	Leadership
Learning	Membership	Member Engagement
MyEO	Strategic Alliances	Ad Hoc Chairs

EO Professional Staff
Represented across all organizational layers under the Global Board

Appears in both models (no significant change)
New in Revised Architecture (Model G)
In Current Structure (not in Revised)
Advisory/Support in both (no significant change)

PROPOSED GOVERNANCE & OPERATING MODEL (MODEL G)

Global Board of Directors
Board Advisory Committees: Finance, Governance, Strategy, Leadership, Member Value

GLOBAL STANDARDS & CHAPTER HEALTH FRAMEWORK SETTING

Functional Committees
Define standards and what belongs in the Fixed, Flexible, and Freestyle categories.

Global Chapter Health Council
Owns Chapter Health Framework and Chapter Health index, also responsible for monitoring, measuring and reporting

ADVISORY COUNCILS
- Advisory Councils

REGIONAL OPERATIONS & CHAPTER SUCCESS, REGIONAL DELIVERY & ACCOUNTABILITY

REGIONAL COUNCILS

11 Regions — Operationalize global standards and own chapter health accountability.

MEMBER EXPERIENCE DELIVERY

Global Delivery Team
GLC Exec Ed, Explorations, Global Events, Forum Training, Communications, Products

Chapters — core delivery units
Forum execution – retention – integration – measured on the Chapter Health Index

Communities / Virtual Forums
Non-geographic access layer (safety valve)

CHAPTER BOARD

Accelerator	Chapter President	Chapter Launch
Communications	External Engagement	Forum
Governance	GSEA	Leadership
Learning	Membership	Member Engagement
MyEO	Strategic Alliances	Ad Hoc Chairs

EO Professional Staff
Represented across all organizational layers under the Global Board

Member/Chapter Level (no significant change)
Regional Level (no significant change)
Staff/Operational (no significant change)
Advisory relationship to the Board

IV. An Architecture, Not an Implementation Plan

What this phase of Masterplan delivers is an architecture, not an implementation plan. The distinction matters for how this document should be read and used.

The architecture defines:

1. Purpose.
2. Accountabilities.
3. Decision rights.
4. Relationships.
5. Structural principles.

A subsequent phase of work, in collaboration with professional staff and member leaders, will define:

1. How EO implements the architecture.
2. When changes occur.
3. Transition plans.
4. Detailed operating processes.
5. Staffing implications.

Consistent with this distinction, this compendium intentionally does not prescribe staff roles or staffing structures for any component of the model. EO will first align on the architecture; the Executive Director, together with the Senior Leadership Team, will subsequently define the staffing needed to support it.

NOTE: The decision to separate architecture from implementation is intentional. It allows EO to first align on purpose, accountability, and decision rights before determining the detailed operating model required to support them. Implementation design will build from this foundation and will include broad engagement with the leaders and teams responsible for bringing the architecture to life.

Areas intentionally left for implementation design are not unresolved gaps; they are deliberate decisions to avoid prematurely prescribing operating details before the architecture is approved.

GOVERNANCE LAYER

4.1 Board of Directors and Board Advisory Committees

Guiding Principle

The Global Board of Directors is EO's ultimate governance authority, responsible for setting strategic direction, ensuring organizational sustainability, and protecting the long-term interests of the organization. It provides oversight without managing day-to-day execution.

Introduction

The Board exists to ensure EO remains aligned with its purpose, values, and long-term ambition while creating the conditions for sustainable growth and member value. It establishes the vision, priorities, and guardrails within which the rest of the architecture operates.

Board Advisory Committees, comprising current and past Global Board Directors, extend the Board's governance capacity by providing focused oversight, expertise, and recommendations in key areas such as Finance, Governance,

Strategy, Leadership, and Member Value. As EOs only Standing Committees, BACs sit within the Board's governance structure; they do not sit outside the Board and do not carry separate operational authority.

NOTE: Some governance changes are occurring independently of Masterplan and should be understood as part of EO's ongoing governance evolution. The current Finance and Governance Standing Committees are transitioning into separate future structures based on their purpose. Board-level financial oversight remains within Board Advisory Committees, while member-led functional responsibilities related to Finance (formerly SFC)and Member Conduct (formerly SGC) move into Functional Committees within the standards layer.



How It Works

The Board:

1. Sets EO's strategic direction and enterprise priorities.
2. Approves major organizational decisions, investments, and policies.
3. Establishes governance guardrails and accountability expectations.
4. Ensures appropriate oversight of organizational performance, risk, and sustainability.

Board Advisory Committees:

1. Provide strategic analysis and recommendations to the Board.
2. Support effective governance in their assigned domains.
3. Review and advise on matters requiring Board-level consideration.
4. Do not replace management responsibility or execute operational work.

Decision Rights and Accountability

The Board retains final decision authority on enterprise-level strategy, governance, major investments, and organizational matters requiring Board approval.

The Executive Director, Senior Leadership Team (SLT) and operational teams are accountable for execution within the strategic direction and governance framework established by the Board.

STANDARDS & CHAPTER HEALTH MEASUREMENT LAYER

Functional Committees define standards. The Global Chapter Health Council stewards the Chapter Health Framework and measures outcomes against those standards.

4.2 Functional Committees

Guiding Principle

Functional Committees are EO's global standards bodies. Each Functional Committee operates within a defined domain or "sandbox," with clear boundaries around what it owns, what it influences, and where accountability remains with other parts of the organization. They define strategy, programs, and standards within their domains, determine what belongs in the Fixed, Flexible, and Freestyle categories, and remain structurally independent of day-to-day operational accountability.

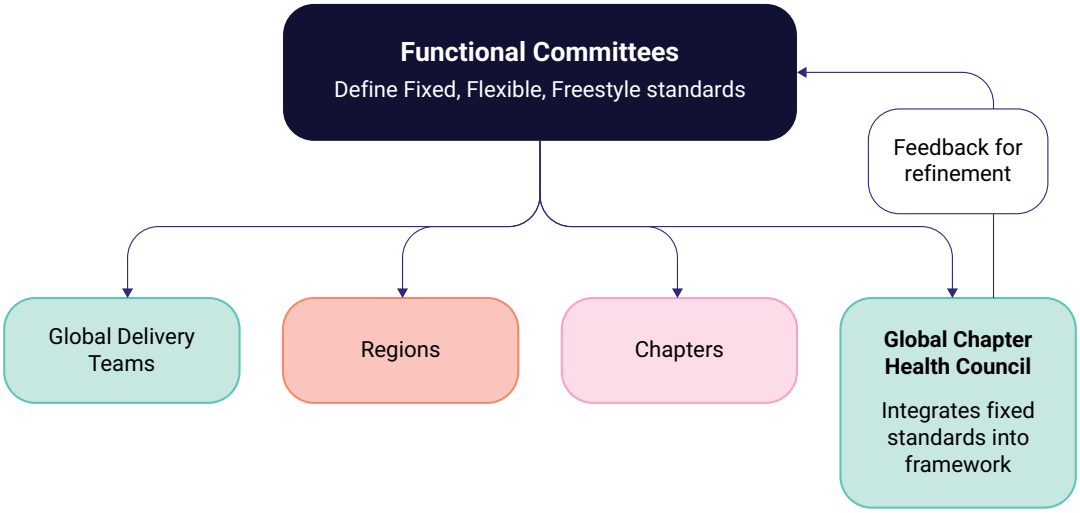
Introduction

If Functional Committees were removed from the future architecture, EO would lose the capability to develop, govern, and continuously improve the programs and standards that create a consistent member experience across the network. Committees are not intended to execute programs themselves; their role is to define the framework within which execution happens at the Global, Regional, or Chapter level.

Functional Committees are not simply the return of the prior committee structure. The move from committees to portfolios was originally intended to resolve unclear accountability and unclear purpose, but it did not fully resolve the connection between global functions, regions, chapters, and functional leadership roles, creating gaps in communication, accountability, and ownership.

The distinction between portfolios and committees via Masterplan is not the label; it is the purpose. Portfolios historically brought together broad areas of member activity. Functional Committees are designed to provide clearer stewardship of standards, quality, innovation, and functional evolution. Professional teams and delivery structures execute the work, while Functional Committees ensure that the work remains aligned with EO's standards and member needs.

For example, a Learning Committee may define learning strategy, programs, and standards. Regional Learning leadership may support adoption, coaching, and capability-building within Regions, while Chapter Learning Chairs deliver the member experience locally. Functional Committees provide expertise and standards within their domains; they do not create a parallel accountability structure over Regions or Chapters. The primary accountability chain remains Global Board –> Region –> Chapter.



How It Works

Functional Committees:

1. Define functional strategy, programs, and standards.
2. Determine Fixed, Flexible, and Freestyle elements within their domains.
3. Develop and evolve standards based on feedback from Chapters, Regions, Global Delivery Teams, and Communities.
4. Ensure that local innovation can inform future enterprise-wide practices.

Unlike today, Functional Committees do not execute programs. They establish the frameworks, standards, and guardrails within which delivery occurs at the Global, Regional, or Chapter level.

Decision Rights and Accountability

The Board establishes enterprise guardrails and retains approval authority for new, material, enterprise-wide standards. Within those boundaries, Functional Committees hold authority for functional standards within their domains, including amendments and refinements consistent with Board-approved guardrails. The Board's role is not to approve every functional standard individually; rather, it provides governance oversight through approval of enterprise-wide standards, policies, and material changes that require Board-level decision-making.

Where a Functional Committee's output feeds a cross-cutting framework owned by another body - i.e. chapter health - its role is to define the relevant Fixed standards and provide development input for the framework, while the Global Chapter Health Council is responsible for assembling those Fixed standards into the Chapter Health Framework, monitoring outcomes, and feeding implementation insights from Chapters and Regions back to Functional Committees for refinement.

Committees are accountable for ensuring that standards remain relevant, scalable, and aligned with EO's strategic direction, and for working in partnership with the Global Chapter Health Council wherever standards affect chapter health measurement and continuous improvement.

Additional note for implementation: Where Functional Committee outputs shape enterprise-wide standards or cross-functional frameworks, approval rights should be explicitly mapped to the Global Board through the appropriate BAC.

4.3 Global Chapter Health Council

Guiding Principle

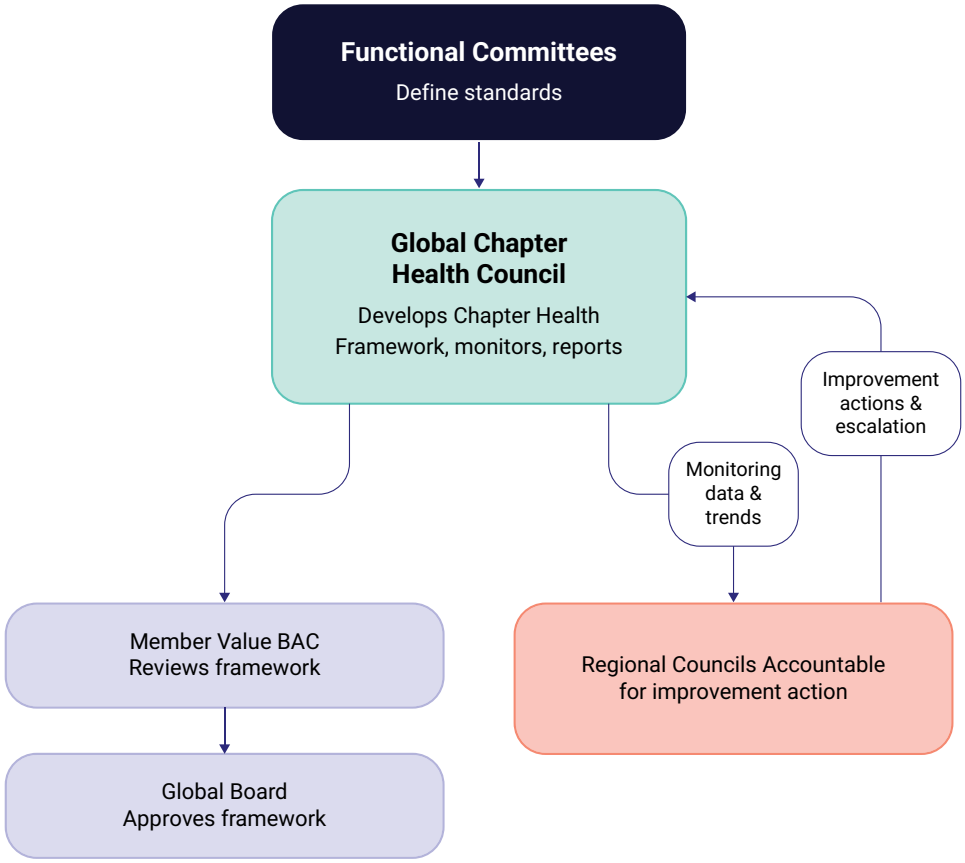
The Global Chapter Health Council (GCHC) provides EO with independent measurement, insight, and reporting on chapter health through a Board-approved Chapter Health Framework informed by standards established by Functional Committees.

The GCHC does not own chapter performance outcomes or replace Regional accountability. Regions remain accountable for improving chapter health and driving remediation where needed.

Introduction

The GCHC is not a new concept for EO. It is a deliberate evolution of existing work on chapter health, building directly on the Thriving Chapters Change Project and the Chapter Health Advisory Council (CHAC). Those efforts established the foundation and created meaningful progress, but they faced real limitations at the operational level: monitoring was inconsistent, authority was undefined, and the technical infrastructure for data-driven measurement was not yet in place.

The GCHC strengthens that foundation by providing a permanent, structurally independent body with clearer authority, a consistent Chapter Health Framework, and the data infrastructure to make monitoring and reporting genuinely possible. Unlike its predecessors, the GCHC has a defined governance position, a clear mandate, and explicit board-level visibility for its reporting. It is not advisory in the same informal sense as the current Chapter Health Advisory Council (CHAC). It also identifies high-performing chapters, emerging best practices, and success stories to encourage learning and continuous improvement across the network.



This body matters for the architecture's integrity in two ways. First, chapter health is a board-level concern. Second, the body responsible for independently assessing chapter health must have the credibility and structural independence to do so without conflicts of interest. Without that separation, chapter health risks becoming a metric that regions both set and grade (with inconsistency).

The GCHC is supervised by the Global Board's Member Value Board Advisory Committee, which provides board-level oversight of member experience and chapter health.

How It Works

The GCHC:

1. Measures chapter performance against all Fixed standards established by the Functional Committees and incorporated into the Chapter Health Framework; the GCHC does not set or reclassify standards, it measures performance against them.
2. Monitors chapter health trends and performance indicators. Measurement, however, is not the end goal. The purpose of the Chapter Health Framework is to create a continuous improvement loop: identifying opportunities and informing future refinement of standards and programs.
3. Provides independent reporting to the Member Value Board Advisory Committee and the Global Board.
4. The GCHC does not manage chapters or replace regional coaching and intervention responsibilities. Its mandate is development of the Chapter Health Framework, monitoring, reporting, identifying underperforming chapters, and triggering the accountability pathway by flagging concerns for regional remediation and Board visibility. It is not itself the enforcement body.

Composition

The Council should be composed of member leaders who bring credibility and chapter health expertise but who are not currently accountable for regional performance outcomes - for example, former Tier 1 leaders, former Regional Chairs or Area Directors, and former Board members, alongside the Chair of the Council of Regional Chairs (CRC) serving ex officio.

The GCHC owns the Chapter Health Framework and measurement approach, but not the underlying standards. For clarity: Functional Committees define the Fixed standards that apply to chapters; the GCHC assembles those standards into the Chapter Health Framework and measures chapter performance against them; the Member Value Board Advisory Committee reviews the framework; and the Global Board approves the framework.

The Global –> Region –> Chapter accountability line remains the primary operating accountability chain. The GCHC does not replace that line. Its independent role exists specifically to provide enterprise-level measurement, insight, and reporting so that accountability can be exercised using objective information. Regions remain accountable for chapter health outcomes and improvement actions. When chapter health concerns emerge, the accountability chain is clear:

1. Functional Committees define the standards.
2. GCHC measures performance against the Chapter Health Framework and reports findings.
3. Regional Councils own remediation and improvement actions.
4. The Global Board provides oversight where regional improvement efforts are insufficient.

Three boundaries keep this design clean: the GCHC does not replace Regional accountability for chapter health outcomes; it does not replace or subsume Board Liaisons (relationship-based support and connection between the Board and Regional leadership), whose relational, mentoring role for Regional Chairs is complementary, not redundant; and it is not the enforcement body for chapters.

CHAPTER SUCCESS ACCOUNTABILITY LAYER

4.4 Regions

Guiding Principle

The Regional Operating Layer exists to operationalize global standards and own chapter health enforcement, accountability, remediation, leadership development, and program delivery so that every chapter delivers a consistent, high-quality member experience while remaining locally relevant.

Introduction

The Regional layer serves as the operating bridge between EO's global standards and chapter execution. Its role is to operationalize global standards - not merely communicate them - so that every chapter delivers a consistent, high-quality member experience while retaining the flexibility to serve its local market. This layer strengthens and clarifies, rather than replaces, EO's existing regional infrastructure, and it maintains all eleven EO Operating Regions that exist today.

Regional leadership combines professional operating discipline with member leadership: professional staff provides operational execution and accountability, while member leadership - through the Regional Council - provides peer credibility, strategic partnership, and chapter-health judgment. Chapters remain the delivery units for the member experience; the region provides the operating bridge that owns chapter health monitoring, leadership coaching, and intervention when performance weakens.

Evolving the Regional Leadership Model

The future Regional Operating Layer consolidates chapter coaching, leadership development, and chapter-health support within the Regional Council rather than relying on separate Tier 3 and Lead roles.

Historically, EO created additional volunteer leadership layers to provide support, coaching, and connection between Chapters and the broader organization. These roles served an important purpose as EO grew; however, over time they also created complexity around accountability, role clarity, and how different leadership layers connected.

In the future architecture, the Regional Council becomes the primary member leadership body responsible for coaching, supporting, and developing Chapter leaders within the Region. This creates a clearer connection between Regional accountability and Chapter success.

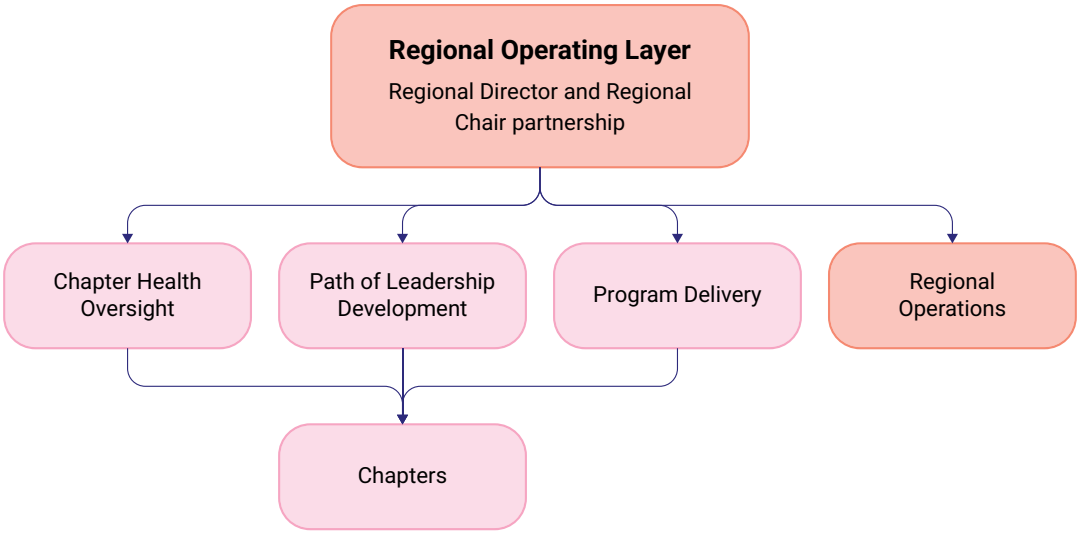
Under this model:

- Regional Council members provide coaching, mentoring, and functional expertise aligned with their areas of responsibility.
- Chapter leaders have clearer points of connection and support within the Region.
- Coaching responsibility is distributed across the Regional Council rather than concentrated in separate Tier 3 or Lead roles.
- Regional Council members are expected to develop the coaching capability required to effectively support Chapter leaders.
- Professional staff provide the operating support, resources, systems, and execution capability needed to enable the Regional Council and Chapters to succeed.

This change is not intended to reduce leadership opportunities. Rather, it creates a clearer leadership pathway where responsibility, authority, and contribution are aligned with the future needs of EO.

Existing leaders who have served in Tier 3 or Lead roles represent valuable experience and capability. Implementation design will determine how existing leadership experience transitions into future Regional, Functional Committee, Global Delivery, or other leadership opportunities.

Staffing structures and specific role definitions to support this layer are intentionally outside the scope of this architecture document. EO will first align on the Regional Operating Layer's purpose and accountabilities; the Executive Director, together with the Senior Leadership Team, will subsequently define the staffing model needed to support it.



How It Works

The Regional layer has four core purposes:

1. **Chapter health oversight** - monitoring, quality assurance, and escalation for chapter performance.
2. **Path of Leadership development** - coaching chapter officers and building the Path of Leadership pipeline, with coaching responsibility distributed across the full Regional Council. Coaching capability will be an essential expectation across the Regional Council. While Area Directors have historically played a significant coaching role for Presidents, the future model distributes chapter support responsibility across the Regional Council based on each Director's functional area. Implementation design will define the coaching expectations, training, and support required for Regional Council members to effectively develop and support Chapter leaders.
3. **Program delivery** - regional execution of cross chapter events, communications coordination, and supporting the rollout of global initiatives tied to chapters. Regions do not design new programs; functions better delivered across multiple regions should be evaluated for super-regional or global delivery rather than duplicated region by region.
4. **Regional operations** - the management discipline needed to run the region as a professional operating unit.

Member engagement, integration, retention, and renewal are the intended outcomes across all four purposes, keeping the region centered on the EO member as the ultimate beneficiary. Regional Councils are not intended to create additional layers of programming or duplicate chapter leadership or global functions. Their primary purpose is to strengthen chapter success through accountability, coaching, leadership development, and support.

The region connects to chapters through a structured, ongoing support model rather than episodic contact. Required relationship characteristics include: every chapter has a designated regional relationship owner; chapter health is reviewed on a consistent cadence; coaching is continuous rather than episodic; defined risk thresholds trigger escalation; and leadership and succession development are ongoing regional responsibilities. Specific cadence, meeting frequency, and process details will be determined during implementation design.

Regional Council Composition

Regional Councils are expected to include the Regional Chair, Area Directors, and Functional Directors whose roles align with those at chapter and committee level (for example, Forum Committee at the global level, Forum Director at the region, and Forum Chair at the chapter). Which of these roles should be Fixed on every Regional Council, and which can be added with Flexibility based on the region's most significant programs and activities, is an open design question to be resolved during the Implementation Design Phase rather than prescribed in this architecture.

Decision Rights and Accountability

Regional Councils and professional regional leadership must have sufficient authority and access to approved resources to address chapter needs. Accountability for chapter health must be accompanied by the ability to prioritize resources, coordinate support, and deploy appropriate interventions within established governance and financial guardrails.

Decision rights within the Regional Operating Layer should be defined by decision domain rather than by a general distinction between member-led and staff-led activity. Member leaders provide peer credibility, entrepreneurial judgment, chapter-health perspective, and member experience stewardship. Professional staff provide operational execution, resources, systems, and implementation capability. Each material decision should have one clearly identified decision owner, with exceptions and escalation pathways defined through RAPID-based decision rights.

The Regional Council's core function is chapter health; regional work plans should therefore remain limited primarily to work that materially advances chapter health, leadership development, and multichapter delivery.

DELIVERY LAYER

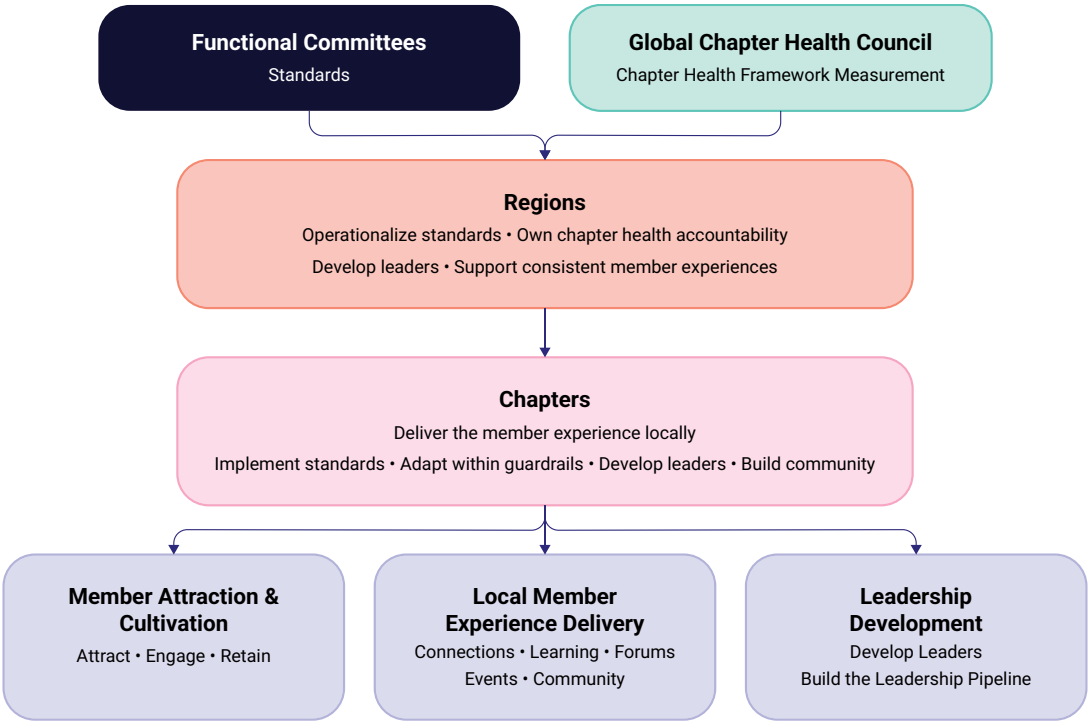
4.5 Chapters

Guiding Principle

Chapters remain the primary delivery mechanism for the EO member experience. The purpose of the future architecture is to strengthen their ability to create transformational experiences for entrepreneurs.

Introduction

Chapters are where EO's purpose comes to life through entrepreneur-to-entrepreneur connection, Forum experiences, learning opportunities, leadership development, and community and belonging. Every other layer in this architecture - governance, standards & chapter health measurement, and regional support - exists in service of what happens at the chapter level.



How It Works

Chapter Boards are responsible for:

1. Attracting and cultivating members.
2. Delivering the member experience locally.
3. Creating strong member engagement and connection.
4. Implementing EO Fixed standards while adapting Flexible standards appropriately to local context.
5. Developing future leaders to step into the Path of Leadership.

Chapters operate within the standards established by Functional Committees, measured through the Chapter Health Framework and enforced by the Region.

Decision Rights and Accountability

Chapter leaders own the local delivery of the member experience. Outside of fixed, enforceable standards, they have flexibility to adapt within defined Flexible standards and to innovate in Freestyle within guardrails, while remaining accountable for chapter health, member satisfaction, and alignment with EO's purpose and values.

4.6 Global Delivery Teams

Guiding Principle

Global Delivery Teams deliver products and experiences requiring a global solution. Their operating model should be intentionally designed based on where member decision authority is essential and where professional staff execution capability is the primary driver of success.

Introduction

In the future architecture, Global Delivery Teams become the primary execution mechanism for global products and experiences requiring enterprise-level delivery. Functional Committees define standards, programs, and quality expectations; Global Delivery Teams translate those decisions into delivered experiences for members.

Not every global program requires the same balance of member and staff involvement, however. The architecture defines three operating models so that the right level of member involvement is applied deliberately rather than by default.

How It Works

1. Staff-Led Execution

Professional staff own execution and day-to-day operational decisions where specialized expertise, operational capability, consistency, and scalability are the primary drivers of success.

This does not remove governance oversight. Major strategic decisions, investments, risk considerations, and performance accountability remain subject to defined governance guardrails and approval processes.

Examples: Technology infrastructure, data systems, legal/compliance.

2. Staff-Led Execution with Member Input

Professional staff own execution and operational decisions, while member leaders provide structured input to ensure relevance, adoption, and alignment with entrepreneur needs.

Member input informs the design and effectiveness of the experience, but accountability for execution remains with staff within defined governance guardrails.

Examples: Member communications, Virtual Global Events, Powerhouse Series.

3. Member-Governed Experience with Staff Execution

Members hold defined decision authority where member leadership, credibility, peer connection, or community ownership are essential components of the value being delivered.

Professional staff own operational execution, including logistics, resources, and implementation, within clearly defined decision rights, accountability measures, and escalation pathways.

Examples: Global Leadership Conference (GLC), Explorations, Forum Training.

Decision Rights and Accountability

Decision rights must always exist within a broader governance framework that establishes appropriate checks, balances, accountability, and escalation mechanisms.

Whether the decision owner is a member leader or a professional staff leader, EO must ensure that appropriate guardrails are in place, including:

- Clear strategic alignment with Board-approved priorities.
- Defined financial authority and investment approval thresholds.
- Appropriate oversight and reporting mechanisms.

- Defined success measures and accountability for outcomes.
- Escalation pathways when initiatives are not delivering expected results or are creating unacceptable organizational risk.

The purpose of assigning decision rights is not to remove oversight; it is to create clarity around who is accountable for making decisions within agreed boundaries.

A well-designed governance model does not rely on the assumption that members or staff will always make the right decisions. Instead, it creates a system where leaders are empowered to act while ensuring transparency, accountability, and appropriate checks and balances are maintained.

OTHER CRUCIAL COMPONENTS OF THE MODEL

4.7 Advisory, Subcommittee, and Time-Limited Structures

Guiding Principle

EO should default to the least permanent structure necessary to accomplish the work. Where a need is temporary or project-specific, a time-limited action group, task force, or sprint should generally be preferred over establishing an Advisory Council. Where ongoing specialized expertise is genuinely required and cannot be reasonably outsourced, a more durable structure may be warranted, but only with a clear mandate, defined authority limits, and sunset/renewal triggers. No structure should continue simply because it has historically existed; its continuation should reflect a current, distinct organizational need.

Introduction

As EO's governance architecture evolves, existing and future advisory and support bodies need a consistent framework for determining where work should reside.

Existing Advisory Councils and other specialized bodies will be reviewed against this framework during implementation design. Their absence from the future architecture graphic does not indicate an automatic conclusion that they will continue or discontinue. Each body will be evaluated based on its purpose, required expertise, decision authority, overlap with existing structures, and ongoing organizational need.

The objective is not to eliminate expertise or engagement, but to ensure that every structure has a clear purpose, appropriate authority, and the right level of permanence.

Definitions

1. Standing Committee: A permanent body (e.g., Board Advisory Committees).

2. BAC Subcommittee: Performs a defined portion of a BAC's work under authority delegated by, and accountability back to, that BAC. May be short-term/project-based or ongoing, depending on the need it serves.

3. Functional Committee: An ongoing standards-setting and design body, sized according to the work required, with a formal place in the Path of Leadership. Functional Committees carry substantive, ongoing responsibility for setting standards within their domain.

4. Advisory Council: Provides specialized expertise, perspective, or constituency input but does not hold governance or decision-making authority. Advisory Councils make recommendations; they do not set standards or make binding decisions.

5. Task Force: Created to accomplish a specific piece of work within a defined period, then disbands. This is the preferred structure for temporary or one-time needs.

6. External Subject-Matter Expertise: Contracted expertise used in place of a volunteer structure when the need is specialized, episodic, or more efficiently and consistently sourced externally.

NOTE: Change projects will continue to exist where EO needs focused effort to design, develop, or transition new capabilities. Where possible, change projects should be anchored within an existing Functional Committee, Global Delivery Team, or other appropriate structure rather than operating as disconnected bodies.

The following decision framework provides a consistent way to determine what structure, if any, is appropriate for the work.

How It Works

When the Global Board identifies a need for member expertise, input, or oversight capacity, it should work through a decision framework before creating or continuing any body, testing whether the need is ongoing or temporary; whether specialized member expertise is genuinely required; whether the work requires decision authority or only advice; whether there is enough substantive standards-setting work to justify a Functional Committee; whether the work already sits within an existing body's mandate; and whether the need could be met more cost-effectively through external subject-matter expertise. Based on the answers, the Board should place the need into one of six structures: an ongoing Advisory Council, a BAC Subcommittee, a short-term task force, external subject-matter expertise, placement within an existing Functional Committee, or no separate body at all.

Guardrails and Mandatory Charters

Unclear mandates create scope creep, confusion about authority, and disconnects between a smaller body and the full Board. Every Advisory Council, Subcommittee, or Functional Committee should operate under a written charter covering: purpose and distinct need; relationship to the Board and to staff; authority limits and escalation path; membership and expertise requirements; responsibilities and meeting expectations; whether the body carries Path of Leadership (POL) status; expected duration and sunset/renewal provisions; how advice or work product is captured, used, and reported back; and how responsibilities are reassigned when the body ends.

Decision authority always operates within EO's governance guardrails (financial processes, investment policy, and other established organizational standards). Holding decision authority on a matter does not exempt a decision-maker from those guardrails.

Decision Rights and Accountability

Advisory Councils and BAC Subcommittees do not hold independent governance or decision-making authority; they operate under authority delegated by and remain accountable to the Global Board. As an implementation action, EO should review and update its committee policy to clearly define who may establish a BAC Subcommittee, Advisory Council, or a Task Force; when Board approval is required; required charter elements; decision authority and its limitations; reporting relationships; membership and expertise requirements; POL status eligibility; and expected duration and sunset/renewal provisions.

As part of implementation design, each BAC will apply this screening framework to the bodies within its area of responsibility, drafts or revises charters for any body that continues, and sets sunset/renewal dates for everybody so continuation is periodically and deliberately reconsidered rather than assumed.

4.8 Path of Leadership

Guiding Principle

The positive impact of the proposed Masterplan Architecture on Path of Leadership is that it creates a clear, competency-based, merit-based leadership pipeline through Regional, Functional, and Committee pathways, all converging on a common set of Enterprise Leadership Competencies (to be finalized by the Leadership Committee) before Global Board eligibility is granted.

Introduction

The current leadership model gives members a single, easily bypassed route to senior leadership with unpredictable eligibility rules. The new Path of Leadership replaces that single, confusing map with three clear roads, anchored by one standard: a Functional Leadership Path and a Regional Leadership Path, each running from the chapter level through to a Tier 1 role.

Reaching a Tier 1 role or completing a pathway does not automatically confer Global Board eligibility. Each pathway's eligibility for the Global Board is explicitly conditioned on demonstrating Enterprise Leadership Competencies (as finalized by the Leadership Committee).

NOTE: As part of this evolution, the previous Tier 3 and Lead structures will transition into the future leadership architecture. Leadership opportunities will continue to exist, but they will be aligned with clearly defined accountabilities, decision rights, and contributions within the Regional and Functional pathways.

How It Works

A common five-stage vocabulary — Serve, Lead, Elevate, Lead at Scale, Represent — gives every pathway a shared language for leadership progression. The model is explicitly framed as a leadership development pipeline rather than a fixed ladder: members advance because their demonstrated experience and competencies prepare them for the next role, not simply because they completed the prior position.

Where the current model lets members apply directly to senior roles and frequently bypass the regional layer entirely, the proposed Functional and Regional paths both require a documented regional-level step before reaching a global committee or Regional Chair seat. At the same time, the model encourages - without mandating - that Regional Chairs gain experience in other pathways before pursuing the Global Board to ensure they have sufficient enterprise-wide perspective. This does not imply, however, that Regional Chairs must simultaneously hold Functional Committee roles or other global positions. The intent is to encourage enterprise-level perspective and exposure, not to create additional role requirements.

In short, EO believes meaningful Regional experience and enterprise-level exposure strengthen a leader's ability to contribute effectively at the global level. Implementation design should define the appropriate experience and competency expectations for Global Functional Committee and Global Board eligibility.

Decision Rights and Accountability

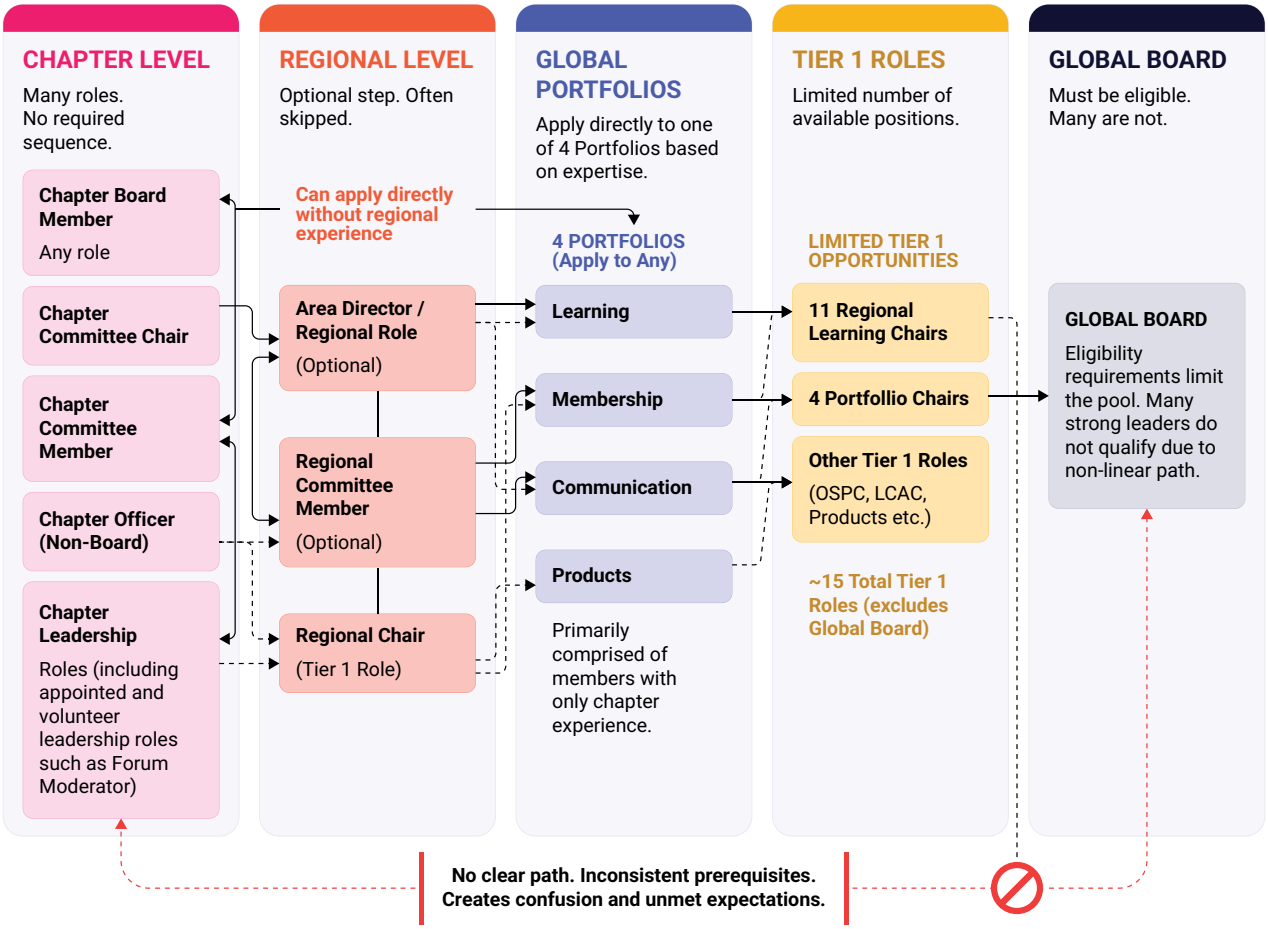
Functional Committees, Regional Councils, and the GCHC each own the development and coaching of leaders within their respective pathways, with coordinated tracking to ensure the competency standard is applied consistently across all pathways.

FUTURE ENTERPRISE LEADERSHIP COMPETENCIES

DISJOINTED. UNPREDICTABLE. FILLED WITH ROADBLOCKS.

THE CHALLENGE | Leadership pathways are not connected. Members can bypass key levels, hit a ceiling, and face inconsistent eligibility for Tier 1 and Board roles.

THE CURRENT JOURNEY: MULTIPLE ROUTES, NO CLEAR MAP



THE BOTTLENECK

Too few Tier 1 roles (15 total) create a ceiling.

Highly qualified leaders get stuck, creating frustration, turnover, and lost potential.

REDUCED LEADERSHIP PIPELINE
Limited opportunities to grow.

INCONSISTENT ELIGIBILITY
Exceptions required. Trust is impacted.

TALENT & POTENTIAL LEFT ON THE TABLE
Best people not always able to advance.

THE OUTCOMES OF OUR CURRENT STATE

CONFUSING & UNPREDICTABLE
No single, clear leadership journey.

EASY TO BYPASS THE REGION
Members skip a key development step.

HIT A CEILING
Strong leaders reach a dead end.

INCONSISTENT EXPERIENCE
Different paths lead to different outcomes.

WEAKER PIPELINE
Fewer eligible leaders for Tier 1 and Board.

WE CAN DO BETTER | A connected, merit-based, and predictable Path of Leadership will build a deeper bench of leaders and strengthen EO for the future.

A PROPOSED PATH OF LEADERSHIP MODEL

POTENTIAL ENTERPRISE LEADERSHIP COMPETENCIES (TO BE FINALIZED DURING IMPLEMENTATION).

GUIDING PRINCIPLE — A connected leadership ecosystem that develops leaders through multiple pathways, builds a deep bench of enterprise-ready leaders, and holds every leader to one standard.

THE LEADERSHIP JOURNEY

1. **SERVE** — Impact at the chapter level.
2. **LEAD** — Regional or functional/ committee role.
3. **ELEVATE** — Global functional committee; grow influence.
4. **LEAD AT SCALE** — Chair global committee or Regional Chair.
5. **REPRESENT** — Qualify for Global Board service.

Leadership is a development pipeline, not a fixed ladder - advancement is earned through demonstrated competencies, not just role completion. There is no Tier 3.

TWO PATHWAYS. ONE DESTINATION. ONE STANDARD.

FUNCTIONAL LEADERSHIP PATH

For Functional Committee Roles

CHAPTER	Functional officer or lead a functional area.
REGIONAL	Regional functional role in your area of expertise.
GLOBAL	Member of the global functional committee.
TIER 1	Chair the global functional committee.
GLOBAL BOARD ELIGIBLE	Subject to enterprise leadership competencies.

REGIONAL LEADERSHIP PATH

For Regional Council Roles

CHAPTER	President or key chapter board leader.
AREA/REGIONAL	Area Director or other regional leadership role.
REGIONAL	Regional Chair (Tier 1 role).
CROSS-PATH (ENCOURAGED)	Gain enterprise-wide/global governance expervence.
GLOBAL BOARD ELIGIBLE	Subject to enterprise leadership competencies.

Pathways are legitimate, independent routes to Tier 1 - not cumulative prerequisites. Cross-path experience broadens perspective for Global Board readiness: it is not required

TIER 1 LEADERSHIP BENCH — A deep, diverse bench of proven leaders - Regional Chairs, Functional Committee Chairs (7-10 anticipated), and other Tier 1 roles.

ENTERPRISE LEADERSHIP COMPETENCIES

Common capabilities every Tier 1 leader must demonstrate, regardless of pathway.

1. **ENTERPRISE THINKING**
2. **STRATEGIC JUDGMENT**
3. **LEADERSHIP AT SCALE**
4. **MEMBER-STAFF PARTNERSHIP**
5. **SYSTEMS & ORG THINKING**
6. **GLOBAL & CROSS-CULTURAL**
7. **STEWARDSHIP & COURAGE**

DIFFERENT PATHS. ONE STANDARD. GLOBAL BOARD — Representing the best of EO's leadership - member-led, prepared, proven, and purpose-driven.

WHY THIS MODEL IS STRONGER

- **CLEAR & PREDICTABLE** — Transparent, competency-based path.
- **MERIT-BASED** — Built on demonstrated experience & contributions.
- **DEEPER BENCH** — Broader range of meaningful Tier 1 roles.
- **CROSS-PATH READY** — Experience across pathways before the Board
- **ONE STANDARD** — All pathways converge on one competency set.

V. Recap: What Stays the Same or Changes for EO?

This section summarizes what stays the same, what changes, what decision rights move, what roles evolve, and what new capabilities are created. It is meant as a plain-language bridge between the architecture described above and the day-to-day experience of staff and member leaders across the network.

Understanding the Transition from Today to the Future Model

The future architecture is designed to clarify and strengthen EO, not simply replace existing structures. Many current roles and bodies were created for valid reasons as EO evolved. The question Masterplan addresses is whether those structures remain the clearest and most scalable way to support EO's future ambition.

For each significant change, implementation design will identify:

- What exists today
- What design challenges the current structure creates
- What changes in the future model
- Where the important work and accountability move

The goal is to ensure every capability EO needs has a clear future home, with the appropriate authority, resources, and accountability to succeed.

The Biggest Shifts in the Future Architecture

- From broad portfolios –> focused Functional Committees.
- From distributed chapter health responsibility –> clear measurement, accountability, and improvement roles.
- From layered Tier 3 / Lead structures –> Regional Council-centered coaching.
- From shared execution ownership –> clearer separation between standards, execution, accountability, and governance.
- From informal decision-making –> explicit decision rights and guardrails.

What Stays the Same

1. Chapters remain the primary delivery mechanism for the EO member experience.
2. All eleven EO Operating Regions remain in place.
3. EO remains a member-led organization; member leadership continues to shape what is uniquely EO.
4. The Global Board retains final authority over enterprise strategy, governance, and major organizational decisions.

What Changes

1. Chapter health becomes a permanent, board-level function with an independent measurement body (the Global Chapter Health Council), rather than a project-based or regionally self-graded activity.
2. The prior (committee then) Portfolio structure is replaced by Functional Committees with defined decision authority over standards, and an explicit Fixed, Flexible, and Freestyle framework for categorizing those standards.

3. Functional Committees design programs and standards. They do not execute programs.
4. Global Delivery Teams execute global programs/activities and operate through one of three explicit models - staff-led, staff-led with member input, or member-governed with staff execution, rather than an undifferentiated assumption of shared ownership that exists today.
5. The Path of Leadership moves from a single, loosely defined and often-bypassed, route to two parallel, competency-gated pathways (Functional and Regional) that converge on common Enterprise Leadership Competencies before Global Board eligibility.
6. Regional Director/Staff Liaison and Regional/Committee Chair roles move from ambiguous shared decision-making toward clearer, non-overlapping decision rights and accountability.

What Decision Rights Move

1. Standards decision authority within a functional domain moves explicitly to Functional Committees, bounded by Board guardrails, rather than being distributed unevenly across staff, portfolios and committees.
2. Chapter health measurement and reporting authority moves to the Global Chapter Health Council, with Regional Councils retaining accountability for improvement action, separating the measurement function from the accountability function.
3. Regional Councils gain clearer, non-overlapping authority over peer leadership, mentoring credibility, and chapter-health judgment and performance management.
4. Member leaders gain a defined, competency-based pathway to senior EO leadership through the broadened Committee and Regional Pathways.

What New Capabilities Are Created

1. A permanent, structurally independent Global Chapter Health Council with a consistent Chapter Health Framework and the data infrastructure to make monitoring and reporting genuinely possible.
2. Additional capability: a governance-screening framework for Advisory Councils, BAC Subcommittees, and other specialized bodies, helping EO use the least permanent structure necessary.
3. An explicit mechanism: the Fixed, Flexible, and Freestyle framework, helpful for scaling successful local innovations into enterprise-wide standards.
4. A single, competency-based leadership pipeline that gives EO a consistent standard for Global Board eligibility across all leadership pathways.

What This Masterplan Phase One Architecture Does Not Define

This phase of Masterplan intentionally focuses on the why and the what. It defines what each layer of the organization exists to accomplish, how the different parts of the system connect, and where accountability and decision authority sit.

It does not attempt to define every element required to implement the architecture. Those details will be developed in the next phase of work, in partnership with professional staff and member leaders.

Specifically, this Phase One Architecture does not define:

1. Staff Organizational Structure

This architecture defines the capabilities and accountabilities EO needs to support the future model. It does not determine the future staff organization structure, reporting lines, team design, or staffing levels required to enable the model.

Following approval of the architecture, the Executive Director and Senior Leadership Team will determine the appropriate staffing model, organizational design, and resources needed to support successful execution.

2. Individual Job Descriptions

This architecture defines organizational responsibilities and decision rights at the structural level. It does not define individual roles, job descriptions, titles, competencies, or detailed responsibilities for specific staff or member leader positions.

Those details will be developed during implementation design to ensure that roles align with the approved architecture and the capabilities required to operate it effectively.

3. Implementation Sequencing and Timing

This architecture does not define the sequence, timing, or pace of implementation.

The Implementation Design Phase will determine:

- What changes occur first.
- What changes require additional preparation.
- Dependencies between different parts of the model.
- Timing and milestones for transition.

The sequencing approach should balance organizational readiness, operational continuity, and the capacity of EO's leaders and teams to successfully adopt the future model.

4. Detailed Operating Cadence and Processes

This architecture defines accountabilities and relationships, but it does not prescribe the detailed ways of working required to operate the model.

Examples of items to be defined during implementation include:

- Meeting cadence and rhythms.
- Reporting processes.
- Planning cycles.
- Operating reviews.
- Communication flows.
- Tools and systems required to support execution.

The objective of Phase One is to create clarity around ownership and accountability. The next phase will determine the operating practices that bring the architecture to life.

5. Transition of Current Leaders and Bodies Into Future Roles

This architecture defines the future-state model; it does not determine how current leaders, committees, councils, or other bodies transition into the future structure.

Implementation design will need to address:

- How existing roles evolve or conclude.
- How current leaders are supported through change.
- How leadership continuity is maintained.
- How new leadership pathways are introduced.
- How existing committees and councils align with the future architecture.

The transition approach should honor EO's history and recognize the contributions of current leaders while creating the leadership system needed for EO's future.

Following approval of the architecture, implementation design will be developed collaboratively with the leaders and teams closest to the work. The Board determines the future architecture; implementation design determines how the organization brings that architecture to life while preserving institutional knowledge, aligning resources, and ensuring readiness.

Closing Principle

The distinction between architecture and implementation is intentional.

A strong architecture provides clarity on **purpose, accountability, decision rights, and relationships**.

A strong implementation plan determines **how and when the organization brings that architecture to life**.

By separating these two phases, EO can create a future model that is clear enough to guide decisions while remaining flexible enough to learn, adapt, and evolve during implementation.

Once the staffing model is complete, EO - supervised by the Global Board - will develop the implementation plan.

Implementation will be staged and sequencing will be determined through implementation design. The first major step is a staffing and operating-capability assessment led by the Executive Director and Senior Leadership Team. The resulting roadmap will align changes with EO's Path of Leadership, planning, recruitment, budget, and governance cycles; identify work that can proceed in parallel; and distinguish early transition actions from later structural activation.

This staged approach means Board and Tier 1 leaders should expect implementation to extend over an estimated 18 months or longer, with the possibility of staffing growth, advance hiring, and future revenue or dues implications to be evaluated as part of implementation design.