

Form S - Explanation

Form S has **6 parts to it**. Each part may be filled out by a separate officer or chairman within the chapter. *Once all parts are completed, the Active and Alumni Organization Presidents should review the work to make sure the chapter will have one coherent plan.* **This form should be completed and mailed to the National Office within 2 weeks of the beginning of the academic year and within 2 weeks of chapter elections.**

Each part of Form S collects information which aids both the National Office and the Chapter. Too often we try to set goals and make progress before we know where we are as an organization. This form will help prevent that from happening. The information within each part of this form will help you assess where your chapter currently is (your strong and weak areas, as well as areas you may never have considered before). Once you have gathered the data, you can then set realistic goals which will help you improve your chapter. Further, by keeping a copy of this form, you can look back and determine if you have made progress as a chapter.

The National Office will utilize this form to help monitor progress at our chapters, and we will also use it to spot trends across all of the chapters. These trends will be needed to develop resources and programming which will help everyone improve. Further, we will use this form to disseminate good ideas between chapters, and allow you to help each other. Here are the six parts of this form:

Personnel - A chapter is made up of members. You need to understand all aspects of this area to be able to accurately plan for the future of your chapter - without manpower you will not be able to accomplish your goals or maintain a chapter. **This part of the form should be filled out by the Rush Chairman.**

Chapter House - Your physical structure is your home. It should be a source of pride and an aid in helping you do well in other areas - scholarship, rush, alumni and campus relations, etc. **This part of the form should be filled out by the House Manager.**

Member Development - Regardless of your chapter's size, you need to develop your members to make sure that your chapter always functions smoothly. Further, individuals who come to Triangle should leave better off than they came in. We want their fraternity experience to always mean something to them and last a lifetime. If they receive proper training and guidance from the beginning, they will pass this on to other new members. **This part of the form should be filled out by the Pledge Educator and Member Development Chairman.**

Campus Involvement - We are a part of larger communities and we need to ensure that we always conduct ourselves in an appropriate manner and get involved. Only by being involved can you have a voice in larger decisions which will affect your life. And only through involvement can you build positive PR and improve your rush effort. **This part of the form should be filled out by the Public Relations Chairman.**

Finances - Like manpower, money is an important resource. If we manage it well, we can do wonderful things. Without it, it is much more difficult to accomplish our goals. **This part of the form should be filled out by the Treasurer.**

Officer Organization - You are the elected leaders of the chapter. You have the responsibility to leave the chapter better off than it was before you took office. By being organized you can plan and accomplish goals. **This part of the form should be filled out by the Active Organization President.**

Form S - Active Organization Program

Chapter: _____ President: _____ Term of Office: _____

Part I. Chapter Personnel - To be completed by the Rush Chairman

a. What is the chapter's present class balance (class balance is the percentage of members in each academic class, i.e. 10% freshman, etc.)? To determine this, you need to know how many members are in each class level, then divide the individual class levels by the total number of members within your chapter.

number of members:	freshman _____	sophomores _____	juniors _____	seniors _____	other _____	total _____
% of membership:	freshman _____	sophomores _____	juniors _____	seniors _____	other _____	total 100%

Is this class balance the ideal balance for your chapter (factors to consider: Is there a large class about to graduate? Are there a lot of young members and no upperclassmen to properly train them and pass down knowledge? How long can your chapter survive with this balance - what will the chapter look like next year, two years from now?)?

Circle one answer: Yes No. If you answered no, what steps can the chapter take to help correct the problem? Who will be in charge of this effort?

b. What is the chapter's current active and pledge total? _____ What will the chapter's active and pledge total be at the end of your term in office? _____
What steps will you take in order for the chapter to achieve this goal?

c. How many living Honorary and Associate Members does the chapter have? _____ Do you keep these individuals involved with the chapter? Yes No
If you answered yes, how? If you answered no, why not?

d. How many Honorary and Associate Members do you plan to initiate during your term of office? _____ If you answered 0, please explain why.

Part 2. Chapter House - To be completed by the House Manager

a. What is the capacity of your chapter's house? (If your chapter does not have a house, please place an X on the space provided.) _____
What is the present occupancy of your chapter's house (people actually living in the chapter house)? Actives _____ + Pledges _____ + Alumni _____ + Others _____
= Total Occupancy _____

What is the break even point for your chapter (the minimum number of people living in the chapter house in order for the chapter not to lose money)? _____

What will the occupancy of the chapter house be at the end of your term in office? _____

What steps will you take in order for the chapter to achieve this goal?

b. On a scale of 1-10 (1 being extremely poor and 10 being excellent) how would you rate the following:
the condition of the exterior (including the grounds) of your chapter house? _____ the condition of the interior of your chapter house? _____

c. What steps will you take in order to improve the physical plant (interior and exterior) of your chapter house?

d. Does the chapter have a regular cleaning schedule? _____ How often does this cleaning take place (i.e. once a day)? _____ Are all members of the chapter involved in the house cleaning? _____ If not, please explain how the cleaning system works at your chapter (i.e. it is the responsibility of the pledges, there is a rotating schedule where all brothers take turns from week to week, etc.)

e. Does the chapter have a list of major projects and renovations which would improve the physical plant (i.e. new furniture, new roof, new plumbing and electrical systems, etc.)? _____ Does the chapter budget for these projects or save up for them over a period of years? _____ What other sources of funding are used for these projects (i.e. alumni board, fundraising, etc.)?

f. How are alumni involved in maintaining and improving the chapter home (i.e. alumni work days, utilize their special skills for projects, financing, etc.)?

Part 3. Member Development - To be completed by the Pledge Educator and Membership Development Chairman

a. Does your chapter follow the model pledge program suggested by National (circle one)? Yes No If you answered no, please explain why?

b. What resources or activities does your chapter use to supplement the pledge education process and member manual? Please indicate where you obtained the resources and submit copies for the resource library; and for the activities please state the purpose of the activity along with a brief explanation. You may attach extra paper if necessary, or submit a copy of your written pledge program.

c. Does your chapter provide members with continuing education and member development following initiation (circle one)? Yes No If you answered yes, please tell us what resources and activities are used (provide the same information requested under question b). If you answered no, please explain why?

d. Are local alumni involved in either the pledge education or continuing member development (circle one)? Yes No.

e. How many members were there at the beginning of your last pledge class? _____ How many of these men were initiated? _____ This equals _____ %
Of those not initiated, how many: quit _____ were de-pledged by the active chapter _____ were carried over (are to be initiated later) _____

f. Does the chapter have a process to meet with all individuals who quit to find out their reasons for quitting? If so, please describe it. If no, why not?

g. Does the chapter have a process for meeting with all individual who were de-pledged to inform them (and possibly explain why)? If so, please describe it.

h. Is the percentage of initiated members (from 3e above) higher or lower than: the previous pledge classes? _____ the average on your campus? _____

i. What steps will you take to improve member development at your chapter?

Part 4. Campus Involvement - To be completed by the Public Relations Chair

- a. How many chapter members are currently involved in engineering, architectural, scientific or other honor groups on campus? _____
- b. How many are allied with technical societies and organizations? _____
- c. How many are involved in other campus activities? _____ Please list these activities and write down any offices members hold in campus organizations.

d. Does the chapter participate in Intramural or Greek league sports? _____ Which ones? _____

e. Does your campus have awards programs for individuals, fraternities, or student organizations? _____ If yes, will you be participating in these award programs this year (specify which ones and how you will be participating)? When is the last time that either an individual from your chapter or your chapter won any of these awards?

f. Does your chapter sponsor any activities which are open to the entire campus (parties, philanthropy, sporting events, etc.)? _____ If yes, please list and briefly describe the activities. If not, please explain why not.

g. Does your chapter participate in any events sponsored by other organizations? _____ If yes, please list them. If not, please explain why.

Part 5. Finances - To be completed by the Treasurer

- a. At the end of the last academic year, we had \$ _____ in our treasury, \$ _____ accounts receivable, of which \$ _____ was covered by promissory notes, and \$ _____ accounts payable.
At the end of this academic year we aim to have \$ _____ in our treasury, \$ _____ accounts receivable (all of which should be covered by promissory notes), and \$ _____ accounts payable.
- b. Does your chapter budget money for Triangle National Events (Regional Workshops, Leadership School, Convention, etc.)? _____ If so, please list how much and how you determine this figure. If not, please explain why.

- c. Does your chapter budget money for members to attend regional conferences or national conferences (sponsored by groups other than Triangle). If so, please list how much you budget for this and how your members and chapter benefit from attendance at these conferences. If not, please explain why.

- d. Does your chapter have a policy for collecting outstanding debt owed to the chapter? _____ Does it work? _____ If so, please attach a copy to this form.
- e. Does the active organization work closely with the alumni organization on financial issues like collection of outstanding debt, saving money for physical plant improvements or other projects, rent or other payments, etc.? _____ If so, please explain the steps you have taken to establish this relationship with your alumni and how you work together. If not, why?

- f. Please describe how you determine the housebills for your chapter (what amount should be paid for room and board, for members who live out of house, etc.)

- g. Are the housebills broken down by cost per item so that each member knows what he is paying for (i.e. \$1000 for room, \$500 for board, \$12.50 social dues, \$10 sportswear purchase, etc.)? _____

Part 6. Officer Organization - To be completed by the Active Organization President

a. Does your chapter have a well-organized active organization office (including proper facilities and resources for all correspondence and keeping records)? _____

b. Does your chapter provide for officer transition? _____ If so, how (turnover files, meetings, retreat, etc.)? _____

c. What steps does your chapter take to identify and develop future officers?

d. What steps will your chapter take to promote alumni relations (i.e. publish 3 chapter newsletters, utilize a web page which will be updated every 2 weeks, etc.)?

e. Other goals for your term of office not identified earlier on this sheet include:

f. We would like help from National of the following:

Signed: _____ date: _____

Active Organization President
My term of office runs from _____ to _____

Alumni Organization President
My term of office runs from _____ to _____