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STEVEN L. MILLER

PRESIDENTS' LEADERSHIP ACADEMY

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PRESIDENT'S MANUAL

# TABLE OF CONTENTS

## **PART 1: INTRODUCTION**

Tips for Becoming a Successful Chapter President	33
Suggested Organizational Flow Chart	34
Suggested Position Descriptions	35

## **PART 2: CONCEPT & SKILLS**

Code of Ethics	36
5 Practices of Exemplary Leadership	37
Be a Great Communicator	37
Guiding Motto's	37
Understanding Management vs. Leadership	38
Measuring Chapter Potential	39
How to Effectively Delegate	40
Key Principles of Stakeholder Engagement	41
Utilizing Your Support Team	42
Leading a Committee to Success	42
Running an Effective Meeting	43

## **PART 3: PLANNING**

First steps	44
First 30 Days Checklist	45
A Week in the Life as President	47
A Year in the Life as President	48

## **PART 4: RESOURCES**

The Pyramid Overview and Grading Rubric Sample	50
Fraternity Rules & Regulations (hyper-link)	49
Administrative Duties Overview	52
How to Use ChapterSpot for Triangle Membership Status Routes (hyper-link)	49
Roberts Rules a Primer (adapted from Pi Kappa Phi)	53
Sample Meeting Agenda	55



# INTRODUCTION

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## INTRODUCTION

May we begin by first congratulating you on being elected President of your chapter. Being the chapter President is the highest honor and responsibility you can achieve as an undergraduate, so be proud of your accomplishment! As President, your primary duties involve overseeing all aspects of the chapter (good and bad) and making sure all areas of operation run smoothly. Try not to feel overwhelmed by all the responsibilities you have accepted. Many Presidents have come and gone before you and, they all felt panicky about taking the plunge into the executive role. The intention of this manual is to help ease your anxiety and give you guidance.

As President, your main objective involves keeping the chapter focused and committed to the Fraternity mission. While the Constitution and Bylaws contain concrete evidence of the Fraternity's mission and values, you are the physical force that upholds these goals and maintains high morale among chapter members. Although this responsibility may seem simple, it will be one of your most demanding tasks. It's not easy to keep all of your chapter members focused at all times. From time to time, you will find that some members may begin to stray. It's your job to pull them back in and remind them of the oath they have pledged. You, therefore, are not only a leader, but an advisor. You must motivate, educate, console, and insist. You must be friendly but firm as you guide each member toward the goals.

Now that you have an idea of what to expect, let's examine what you will gain personally as President. During your time in office, you will acquire several skills that can be beneficial when searching for a job after school. As President, you will be responsible for leading meetings, being an ambassador, setting goals, and organization operations. These experiences will impress an employer with whom you are interviewing. More importantly, they will serve you well once you land the job.

Besides having a valuable educational experience, serving as President is one more way of proving your commitment to Triangle - your commitment to perform and accept challenges that will help you grow and excel.

### **As chapter President, what are my main expectations?**

- To support and uphold chapter by-laws, the Ritual and Constitution of Triangle Fraternity
- To oversee chapter operations and general membership
- To manage crisis situations
- To promote positive relations with surrounding neighborhoods, the university, and Greek community
- To represent the chapter on a regular basis with university, community, alumni, and National staff
- To conduct a successful transition with successor

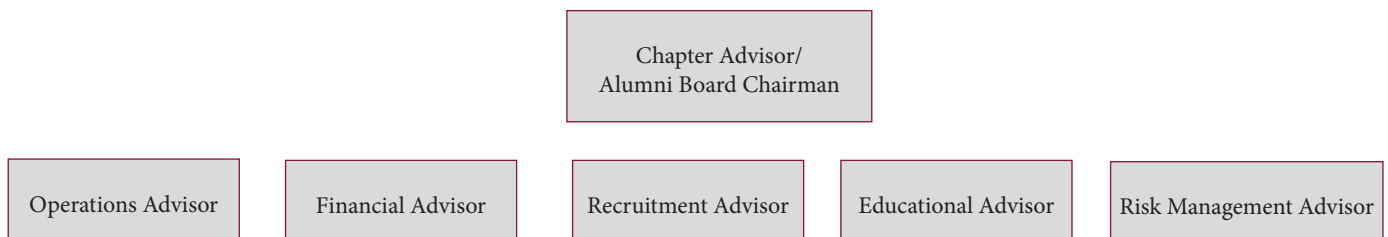
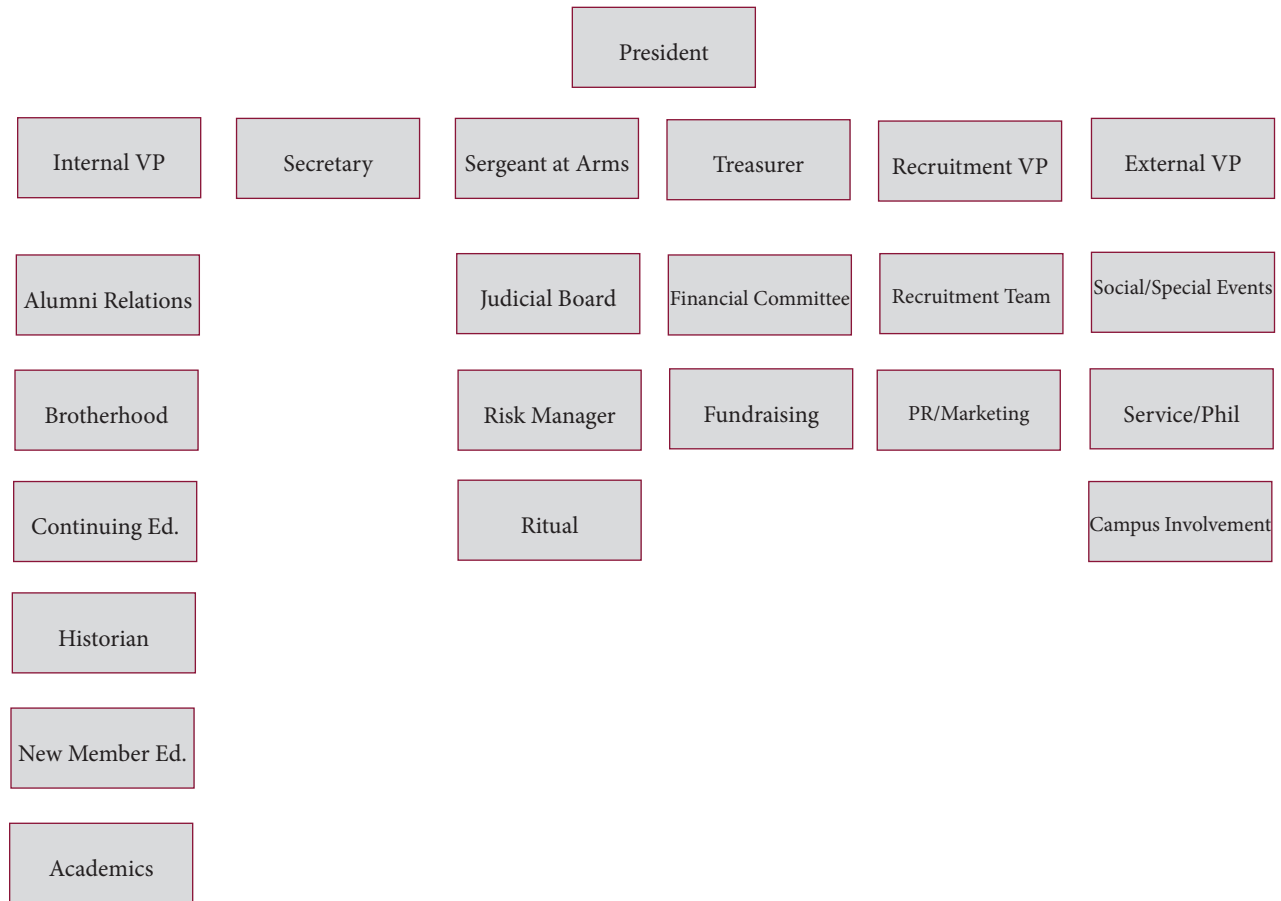
While serving as chapter President, you will work with many diverse groups within and outside of your chapter. Your role as chapter President involves maintaining constant communication with members of the fraternity and individuals who assist the chapter on a regular basis. Maintaining these crucial relationships is the foundation of developing a successful chapter and the idea fraternity experience.

## TIPS FOR BECOMING A SUCCESSFUL CHAPTER PRESIDENT

The following are a few suggestions that will assist you in your efforts to becoming a successful chapter President:

1. **Lead and motivate by example.** While chapter President, always strive to represent the highest ideals of appropriate conduct for all members of your chapter. Since you are the foremost representative of the fraternity, people will tend to model their behavior after the example you provide.
2. **Utilize your resources.** Local alumni (chapter advisor, alumni advisory boards, house corporations), University officials (Greek Advisor, Dean of Students, Student Government, College Deans), Headquarters Staff ([www.triangle.org](http://www.triangle.org)), are all great resources that are readily available to assist you on a daily basis.
3. **Utilize your executive board.** Use the executive board to review the progress and operations of the chapter to make certain that everything is being accomplished. This makes for a great forum to discuss issues within the chapter, as well as to delegate tasks amongst chapter officers.
4. **Stay consistent.** A large responsibility of being a chapter President involves the ability to maintain impartiality. In order to be successful and impartial, you must stay consistent with decision-making judgments of members' behaviors. No respected leader is ever accused of being a hypocrite.
5. **Be accessible.** At times, problems or situations can be resolved with immediate intervention. Being easily accessible allows a chapter president to build better relationships with all members of the chapter, and in turn, will put you in a better position to assist with any chapter conflicts.
6. **Learn from your mistakes.** Nobody is perfect, so recognize that not everyone will make the right decisions all the time.
7. **Recognize your own personal shortcomings and strive to improve in those areas.** For example, if you have problems managing your time, make sure you are delegating tasks to the appropriate officers or chairmen, and continue staying organized with the assistance of a daily planner or calendar.
8. **Take a personal interest in members.** Keeping members motivated is a constant battle. By taking a personal interest in the different activities of the members, the chapter president will be better suited to encourage the efforts of chapter members and can better motivate brothers to be active contributors in the fraternity.
9. **Help others solve their problems.** To encourage friendship and accountability within the chapter, assist others with solving problems. Provide advice, but don't intervene to solve the problems for them.
10. **Delegate responsibilities and tasks, then trust the outcome.** Delegation is the key to success with any organization. The ability to delegate, and accept the subsequent outcome, is essential for the successful management and operations of a chapter.

## SUGGESTED ORGANIZATIONAL FLOWCHART



## CHAPTER ORGANIZATION

A fraternity chapter is an extremely complex organization to operate, and one man cannot be expected to manage it alone. With this in mind, your most valuable source of assistance is the executive board. In order to have consistently successful events, these activities require excellent planning that is performed well in advance. The executive board is charged with this basic expectation.

A great deal of flexibility is permissible with the composition of the executive board, but there are several standard members that are suggested to be involved: the chapter president, vice presidents, treasurer, secretary, judicial, and chapter advisor. The chapter may want to include the recruitment, risk management and/or member education chairs on the executive board because of their vital relationship with their chapter success. The next page includes a brief summary of some expectations for all chapter officers and committee chairmen.

## POSITION DESCRIPTIONS

**Vice President:** performs the duties of the president in his absence; is in charge of overseeing all committees; serves as personal representative of the executive board; reports to the committee chairmen to assess the progress and goals of each chairman; upholds and is familiar with all chapter by-laws, and university policies or procedures; assists in the facilitation of chapter goal setting and transition retreats.

**Treasurer:** develops an extensive chapter budget complete with separate accounts for housing, kitchen, and general expenses; submits monthly budget statements to the chapter; collects all dues and fees associated with membership; appoints a chapter finance committee; files and saves all receipts; attains services for an annual audit; completes the annual IRS 990 form; develops membership contracts for all chapter members.

**Secretary:** reports all pledgings and initiations to Headquarters; keeps an accurate and detailed roster of chapter members and new members; keeps a record of minutes for all chapter meetings; orders all necessary materials from the Headquarters.

**Sergeant-at-Arms:** maintains order during chapter meetings; oversees all Ritual ceremonies; prepares the chapter room for meetings; stores and cleans all regalia; supervises the chapter judicial committee; serves as the chapter's Ritual educator; upholds and is familiar with all chapter by-laws, and university policy or procedures.

**Continuing Educator:** assists the chapter president and vice presidents in conducting a chapter goal setting retreat; works to schedule member development programming and professional development workshops; encourages members participation in The Journey; supports the vice presidents in the transition of new officers and committee chairmen; works with the sergeant-at-arms to develop a comprehensive post-initiation program.

**New Member Educator:** organizes and administers the formal new member education program; facilitates the new member retreat; implements and oversees requirements for initiation into full membership; assists the recruitment chairman in rush evaluations; organizes guest speakers for new member meetings; coordinates documenting new member information to National Headquarters; educates and informs new members on the Fraternity's Code of Ethics.

**Recruitment:** develops a budget detailing the estimated expenses for the upcoming term; emphasizes a year-round recruitment philosophy amongst the chapter; coordinates workshops and retreats to promote recruitment; develops and maintains an extensive record keeping system to document all information on potential members; coordinates a summer recruitment program to target potential members; develops a recruitment scholarship program; appoints a recruitment committee with recruitment captains; assist with recruitment committee in developing the chapter's rush manual; coordinate sorority presentations; has the final say in the bid process; assists the new member educator in conducting rush evaluations.

**Risk Awareness:** develops a comprehensive chapter risk awareness policy to be submitted to the chapter for approval and implementation; ensures that the chapter is educated and adheres to the Code of Ethics, and university policies and procedures; coordinates the facilitation of one FHSI module per year with National Headquarters; oversees and informs the membership of the crisis management plan; pro-actively educates chapter members on issues affecting fraternity and Greek Life.

**Chapter Advisor:** meets weekly with the chapter president and executive board to discuss progress within the fraternity; attends chapter meetings once a month; assists the chapter in times of crisis; maintains constant communication with the chapter for purposes of providing insight and advice in programming areas; attends many chapter events; serves as a direct representative of the chapter with university and community officials; operates as a liaison with the National Headquarters staff.



## CONCEPTS & SKILLS

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### INTRODUCTION

An effective President is a leader. Many Triangle Presidents are elected because they consistently showed their brothers they are doers who set goals and accomplish and exceed those goals. As demonstrated in officer description section of this manual, each member of your executive board has a lot of responsibilities. You will be much more successful this year if you lead your team to execute those responsibilities, rather than try to accomplish everything on your own.

Being a leader is complex. People of all ages strive to be better leaders. Countless articles and books have been written about leadership. Fortunately, Triangle provides you an opportunity to improve your leadership skills at a young age, making you more prepared than many undergraduates. Countless theories and approaches to leadership exist. This *Concepts & Skills* section will outline some of those theories and approaches. After reviewing this manual, please challenge yourself further and research other leadership education opportunities.

### IMPORTANT CONCEPTS

#### Stay True to the Code of Ethics

Triangle's Code of Ethics and Core Values should guide your decision-making as President and as a Triangle for life

As a member of Triangle, I recognize my obligation to:

- Observe the precepts of the Fraternity as set forth in the Ritual;
- Accept cheerfully my full share of any task, however menial, involved in maintaining a chapter home;
- Preserve and promote the chosen ideal of my Fraternity;
- Pay all personal bills promptly, and always live within my means;
- Help create in my chapter home an environment in which enduring friendships may be formed;
- Maintain a creditable scholastic record;
- Promote the welfare of my profession;
- Maintain my self-respect by proper conduct at all times;
- Uphold faithfully the traditions and program of my Alma Mater;
- Pay the price of success in honest effort.

Great Presidents do their best to consider the Ritual before acting. *They live the Ritual.*

## **The Five Practices of Exemplary Leadership**

After years of studying leadership, Barry Posner and James Kouzes created the five practices of exemplary leadership. Posner and Kouzes collected information from thousands of people and found a consistent pattern in the behavior many people identified as leadership. These five practices are widely accepted and crucial to being an effective leader.

**Model the Way** - Set the example by aligning your actions with shared values.

**Inspire a Shared Vision** - Envision the future by imagining the exciting possibilities. Enlist others in a common vision by appealing to shared aspirations.

**Challenge the Process** - Search for opportunities by seeking innovative ways to change, grow and improve. Experiment and take risks by constantly generating small wins and learning from mistakes.

**Enable Others to Act** - Foster collaboration and strengthen others by sharing power.

**Encourage the Heart** - Recognize contributions by showing appreciation for individual excellence. Celebrate wins publicly.

## **Be a Great Communicator**

Have you ever heard someone say, “uncertainty breeds doubt?” It’s true. Regardless of your chapter’s reputation, you and your chapter’s past success, and accomplishments, if your constituents don’t hear from you, they may question or doubt your progress. But don’t take it personally...this is human nature.

Great companies and organizations communicate frequently to their constituents. They provide regular status updates that celebrate big wins, share goals and priorities and provide updates on those goals.

As President, it is your responsibility to communicate with your constituents or audiences. Your stakeholders all want to hear from you. They want to hear about your goals and the obstacles that you are running into. They want to help you!

Set clear expectations with each stakeholder at the beginning of your term. How frequently do you want to check in with them? Is it a meeting, a phone call, or an email? What will these check-ins include? Be deliberate and consistent with your communication.

Be a great communicator. Communicate consistently and deliberately. Share you and your chapter’s wins and opportunities to improve. Your audiences will appreciate it and you will be a better leader because of it.

## **Great Leaders Have a Guiding Motto**

You are going to be faced with difficult decisions. You and your fellow leaders should develop a motto to guide you and your teams through the decision-making process. These mottoes come from our shared beliefs, values and ethical norms. They help us understand the basis for making tough decisions, and provide a moral ground to stand upon.

What will your motto be? It should be grounded in the values of Triangle, and it should set you up to fulfill your oath as an officer.



## Understanding Management vs. Leadership

There are very distinct differences between the two concepts. Management provides the systems that create order out of chaos. Leadership inspires chaos to improve the human condition and allow for the growth and development of people. Much like a muscle that grows stronger with a great degree of challenge, the human spirit and its ability to accomplish extraordinary things develops with each opportunity to challenge one's comfort zones, allowing people to dream bigger, achieve more and be fulfilled.

### Management

- **Planning and Budgeting** - Establishing detailed steps and timetables for achieving needed results, then allocating resources necessary to make it happen.
- **Organizing and Staffing** - Establishing structure for accomplishing the plan, staffing that structure, delegating responsibility/authority for carrying out the plan, providing policies/procedures to help guide people and creating methods and systems to monitor implementation
- **Controlling and Problem-Solving** - Monitoring results, identifying deviations from plan, then planning and organizing to solve these problems.

### Leadership

- **Establishing Direction** - Developing a vision of the future - often the distant future - and strategies for producing the changes needed to achieve that vision.
- **Aligning People** - Communicating direction in words and deeds to all those whose cooperation may be needed, as to influence the creation of teams and coalitions that understand the vision and strategies and that accept their validity.
- **Motivating and Inspiring** - Energizing people to overcome major political, bureaucratic, and resource barriers to change by satisfying basic, but often, unfulfilled human needs.

From the book, "*On Becoming a Leader*" by Warren Bennis:

The manager administers; the leader innovates.  
The manager is a copy; the leader is an original.  
The manager maintains; the leader develops.  
The manager focuses on systems and structure; the leader focuses on people.  
The manager relies on control; the leader inspires trust.  
The manager has a short-range view; the leader has a long-range perspective.  
The manager asks how and when; the leader asks what and why.  
The manager has his or her eye always on the bottom line; the leader's eye is on the horizon.  
The manager imitates; the leader originates.  
The manager accepts the status quo; the leader challenges it.  
The manager is the classic good soldier; the leader is his or her own person.  
The manager does things right' the leader does the right thing.

Both leadership and management are important skills for a President. Before you approach your next challenge, ask yourself, "should I be a manager or a leader in this situation? Which approach will lead to success?"

## Measure Your Chapter Against Your Potential, Not Your Peers

Don't let yourself or your brothers get consumed with what the other chapters on your campus are doing. Success is measured by what you are capable of, not what your neighbor is doing.

As a chapter leader, you represent yourself and your organization every day. There is a direct correlation between your attitude and your ability to improve your chapter. To perform your best every day, it's important to have a guiding philosophy.

A simple philosophy is **CADIF: Commitment, Attention to Detail, Immediate Follow Up.**

CADIF is a behavior that guides your work and your approach to life. Living by CADIF will show friends, family, chapter brothers, alumni, volunteers, and Greek life professionals that you are dependable and reliable.

**Commitment** - Dedication to your elected office, fellow chapter leaders, brothers and your university.

Example behaviors that demonstrate Commitment:

- Model the Way - Represent the Code of Ethics in all that you do
- Master your time management skills by planning ahead and mapping out your week each Sunday night.
- Set SMART goals and hold yourself accountable to completing them.
- Create a vision and always be striving to achieve it.
- Be consistent with attendance. Presence matters.
- Class work and officer responsibilities are balanced with social life, involvement outside of Triangle and personal health.
- Always seek guidance and be open to constructive feedback.

**Attention to Detail** - Thoroughness and accuracy when accomplishing a task through concern for all the areas involved.

Example behaviors that demonstrate Attention to Detail:

- Before starting a task or project, lay out all the steps necessary for completion.
- Take detailed notes during meetings.
- Keep your room, work space, and other areas clean and organized.
- Proper attire is worn for chapter-related meetings.
- Manners and etiquette are part of every interaction.
- Use proper grammar and punctuation in emails or agendas.
- Understand that any action can set a precedent or create a perception, both positive and negative.
- Set up a professional voice mail.

**Immediate Follow Up** - Timely and consistent communication.

Example behaviors that demonstrate Immediate Follow-Up:

- Following a meeting, send out a detailed email with key points and action items.
- Send hand-written thank you notes.
- Be prompt with your response:
  - Always answer your phone when available.
  - Return phone calls within 24 hours.
  - Reply to emails within 48 hours.
  - Notify an individual if you need more time to reply.

## How to Effectively Delegate

### 1. Be Patient

The first time you delegate any task, it is almost certainly going to take longer than doing it yourself. That's normal. Over time, it will get easier.

### 2. Don't Over Delegate

Delegation is not shifting work that you should be doing to someone else's plate - it is getting those tasks you shouldn't be doing off of yours. It is important to know the difference.

### 3. Pick the Right People

Make sure the person(s) you're delegating to is qualified to do the task. Better yet, try to delegate tasks that will make use of your team members skills.

### 4. Explain Why You're Delegating

When you select people to delegate to, tell them why you chose them specifically, and how you hope to see this help them grow. Help them see each delegated task as an opportunity to take on more responsibilities or grow new skills.

### 5. Be Specific

Be specific with your asks, including why a task needs to be done, the deadlines and the expected results. Vague instructions beget vaguely terrible output.

### 6. Provide Training

Delegation doesn't just mean handing off a task - make sure your team members have the resources they need to do the job. A good training rule of thumb is "I do, we do, you do." (i.e. watch me do this, then let's do it together, now you try.)

### 7. Touch Base

Throughout the course of the project or task, always schedule time to touch base. The more complex the task, the more often you may need to touch base.

### 8. Don't Micromanage

Once you've delegated, trained, and set up a schedule for touching base, back away from the project. To succeed (and to help your members succeed), you have to let go.

### 9. Offer Feedback

Any time you delegate something, provide feedback on the end result (both positive and constructive). It's an extra step, but making sure you're getting exactly what you need - and helping others get better over time will only help you in the long run.

### 10. Say Thanks

Your member is helping you, and saving you time while adding value. Say thanks!

### 11. Go Beyond Your Exec

Make sure you involve members other than your executive board. It will seem easier because you have more trust in them to complete the task, so this is where it will take patience and work in getting to know others skills and abilities. And don't be afraid to delegate to new members - how do you think they are going to learn?

## Key Principles of Stakeholder Engagement

Stakeholder engagement is the practice of influencing a variety of outcomes through consultation, communication, negotiation, compromise, and relationship building.

1. **Understand:** Before aiming to engage and influence stakeholders, it's crucial to seek to understand the people you will be working with and relying on throughout the phases of the project. Sharing information with stakeholders is important, but it's equally important to first gather information about your stakeholders.
2. **Communicate:** There have been numerous studies into why projects fail, with "bad communication" often pointed to as the most common reason. Across all sectors and sizes of project, ineffective or insufficient communication is at the root of project problems such as unclear objectives, misunderstanding the problem, poorly coordinated teamwork and ineffective risk management. The fundamental challenge of effective communication is based on the clear evidence that "what you say is not the same as what they hear", even with people you know very well. It is therefore easy for communications to be misinterpreted. Good communication requires relentless and time-consuming effort to ensure the intended message is understood and the desired response achieved, which, especially on large projects, sometimes justifies the assistance of communication professionals.
3. **Consult early and often:** The rewards of early and efficient stakeholder consultation should be clear to anyone that has worked on a project where this has not been done well. If you have ever felt "I wish I'd known that at the start of the project," then consider that even just a few, well-timed questions can be very valuable. Questions about who the relevant stakeholders are (i.e. Who else's views should we be considering?), and once these have been identified, questions about the stakeholders objectives, success criteria, constraints, key concerns, their stakeholders (i.e. customers), etc., usually provide information that easily justifies the time spent investigating.
4. **They are human too:** Accept that humans do not always behave in a rational, reasonable, consistent or predictable way and operate with an awareness of human feelings and potential personal agendas. By understanding the root cause of stakeholder behavior, you can assess if there is a better way to work together to maintain a productive relationship.
5. **Plan it!** A more conscientious and measured approach to stakeholder engagement is essential and therefore encouraged. Investment in careful planning before engaging stakeholders can bring significant benefits. What kind of regular meetings have value? How are they structured? Formal meetings with meeting minutes, or informal ones? This is what stakeholder management is.
6. **Relationship are key:** Developing relationships result in increased trust. And where there is trust, people work together more easily and effectively. Investing effort in identifying and building stakeholder relationships can increase confidence across the project environment, minimize uncertainty, and increase the speed of problem-solving and decision-making.
7. **Just a part of managing risk:** Stakeholders are important influential resources and should be treated as potential sources of risk and opportunity within the project. Over and above conventional planning, using foresight to anticipate hazards, and taking simple and timely actions with stakeholders can significantly improve project delivery.
8. **Compromise:** The initial step is to establish the most acceptable baseline across a set of stakeholders' diverging expectations and priorities. Assess the relative importance of all stakeholders to establish a weighted hierarchy of the project requirements and outcomes. Having ranked the stakeholders in order of importance, their differing interest can then be weighed accordingly with the best compromise solution being at the "center of gravity". As the leader of the project, it is your judgment as to what this solution is with the rationale and decision being communicated to all parties where appropriate.
9. **Understand what success is:** Project success means different things to different people and you need to establish what your stakeholders perceive as a success for them in the context of project delivery.
10. **Take responsibility:** Stakeholder engagement is not the job of one member of the project team. It is the responsibility of everyone to understand their role and to follow the right approach to communication and engagement. Good project teams have clarity about stakeholder engagement roles and responsibilities and what is expected of people involved in the project.

## Utilize Your Support Team

You are surrounded by people that want to see you succeed. Take advantage of these key resources:

### University

- Establish relationships with key university officials and understand their vision for the Greek community.
- Develop a relationship with the leaders of your governing council and learn about their vision.

### National Headquarters

- Reach out to the staff at National Headquarters and introduce yourself.
- Make a list of things they can do to help you and your executive board accomplish your goals.

### Volunteers

- Reach out to members of your alumni board and build a relationship with them.
- Outline your vision and goals for the chapter and seek their feedback on what you can do to improve.

## IMPORTANT SKILLS

### Leading a Committee to Success

As President, you are chairman of the executive board, which is your committee. While you do not select your committee members, it's important that you build a strong working relationship with each member of the executive board.

### Transition and Goal Setting Retreat

One of the first things you should do as President is schedule your transition retreat. Utilize the resources located in the resource section of this manual or in the resource library on triangle.org. These will help you ensure that this important process is successful.

### Managing Your Committee

After holding your transition retreat and setting SMART goals with each officer, it is important to maintain consistent communication, check-ins and feedback. Here are some suggestions:

- **Hold a weekly executive board meeting** - Use this meeting to check in on each officer's progress on their SMART goals. Each officer should be prepared to provide a thoughtful and concise update, to answer questions, to receive feedback and to outline next steps.
- **Work as a team** - While each officer has his own responsibilities, your executive board is an intelligent and experienced team. Do your best to create an environment where all officers are asking questions and providing feedback on officers' goals and action plans.
- **Delegate to your committee** - The President can't do everything. Find projects that other officers and brothers will be excited to own and execute. Your role is a communicator and coordinator. With that said, be careful you aren't perceived as the leader who delegates all of his responsibilities.
- **Follow up** - Make sure meeting minutes are sent by the vice president of communications.

### Leading Your Committee

As explained earlier, management and leadership are very different. It's important that you are both managing and leading your committee. Some examples of leading your committee are:

- **Set your vision and repeat it often** - Your executive board should have created a team motto at your transition retreat. Don't leave that motto behind. Repeat it at your meetings. Write it on flip chart paper and hang it on the wall. When you run into a tough decision, refer back to your vision.

- **Think big picture and long term** - Leave a legacy. What will you implement or initiate that will leave a lasting mark on your chapter? What will you and your executive board be remembered for? Write it down. Don't allow day-to-day tasks to slow you down from accomplishing your goals and achieving your vision.
- **Be dynamic and thoughtful in your leadership of each individual officer** - Each of your officers and brothers is different. If you are going to be successful, you will probably need to encourage, empower and recognize each of them differently. You will hold each officer accountable differently.
- **Be a team player** - Give credit to others whenever possible. Praise in public; criticize in private.

### Running an Effective Meeting

Having effective meetings are an essential part to achieving the goals of your chapter. Meetings are one of the most efficient ways for our chapters to manage tasks, hold each other accountable, move projects forward and have open conversations that solve problems.

However, meetings can also waste time if they are not executed properly. According to a survey of U.S. professionals by Salary.com, meetings ranked as the number one office productivity killer. As leaders, we must be cognizant to prepare meetings that have a clear purpose that leave our brothers feeling energized and excited to make our organization better.

Suggestions for running an effective meeting:

- **Set clear outcomes and objectives** - There should be a clear purpose for calling the meeting. Know exactly what you want to accomplish before sending out meeting times and agendas.
- **Be deliberate and with whom you invite** - Everyone who is in attendance should feel relevant or they will consider the meeting a waste of time.
- **Distribute an agenda before the meeting** - Having an agenda will give the meeting a direction and save time by keeping everyone focused. Agendas sent in advance also help attendees prepare for the meeting.
- **Set expectation** - Establish a framework for how the meeting is going to run. Facilitate the meeting when discussions begin to get off-topic. People speaking out of turn or talking too long can derail a meeting.
- **Start and end on time** - People will respect you if you respect their time. Sixty minutes is usually the longest time any group will stay fully engaged. Avoid surpassing 60 minutes for a regular or weekly meeting.
- **Assign a scribe** - Notes that accurately reflect the discussion and result are important. Send follow-up. This should help avoid discussing the same topics at multiple meetings.
- **Ban technology** - Technology can be a huge distraction. Unless a computer is necessary, have everyone put it away.
- **Summarize decisions and assigned action items** - Decisions, next steps and responsibilities should be clear. Assign an owner to each action item.
- **Follow up** - Summarize the key points and action items of the meeting. Remember CADIF. Send the follow up via email in the 24 hours following the meeting.





# PLANNING

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## INTRODUCTION

Proper planning is essential for all chapter leaders, especially chapter Presidents. This section provides an outline and initial steps for what you will need to plan your year as President.

## FIRST STEPS

Below is a list of the first steps a President should take once his term begins. These steps do not have to be completed in this exact order, but all should be done in a timely manner after being elected.

- Review this officer guide and the supporting resources.
- Review the Officer Transition Guide and develop a plan to execute an effective transition process.
- Attend and support the execution of the officer transition retreat.
- Review and be familiar with your chapter's local bylaws, your chapter's membership agreement, and the National Constitution & Bylaws .
- Read Triangle's Rules & Regulations and your university's risk management policies.
- Set up weekly chapter meetings and executive board meetings.
- Schedule meetings or calls with the following people to introduce yourself, set expectations for working together and communicating, share your goals and build your relationship with each:
  - Advisor
  - Alumni President
  - University Greek life professional
  - Faculty advisor
  - Chapter consultant
  - IFC president
- Meet with each officer on the executive board to build or continue to build your working relationship with them.
- Work with the officer responsible for programming to build a calendar with major events and deadlines. This includes member development events, university deadlines and meetings, leadership events, Ritual, and major recruitment periods.
- Plan to participate in Triangle's leadership events. All executive board officers should attend Leadership & Training Weekend in January.
- Review officer guides for each of the officers to build an understanding of what success looks like for each of your team members.

# FIRST 30 DAYS CHECKLIST

## Complete Transition Paperwork

- Make sure that your officers and chapter roster is updated on ChapterSpot
- Register for Leadership & Training Weekend

## Meet With Your Contacts

- Meet with the outgoing President to transition your roles
  - Review the chapter's current strategic plan, as well as any upcoming projects and events
  - Review the chapters' previous Pyramid scores and suggestions for improvements
  - Discuss successes, challenges, and other issues encountered during his term in office
  - Gather suggestions on how to effectively lead the chapter in the coming year
- Contact your Chapter Advisor
  - Set up a time to meet/talk in the next two weeks
  - Review your position description and set expectations together
  - Provide the contact information for all newly elected or re-elected officers
  - Share the date, time, and location for the chapter's officer transition meeting, and invite your advisor to attend
  - Set up a time and method for weekly communication
- Contact your Housing Corporation President (if applicable)
  - Set up a time to meet/talk in the next two weeks
  - Review your position description and set expectations together
  - Provide the contact information for all newly elected or re-elected officers
  - Review any outstanding balances with the Housing Corporation and establish clear payment deadlines
  - Set up a time and method for ongoing communication
  - Ensure the treasurer also meets/talks to the Housing Corporation President
- Contact your Alumni Chapter President (if applicable)
  - Set up a time to meet/talk in the next two weeks
  - Review your position description and set expectations together
  - Provide the contact information for all newly elected or re-elected officers
  - Set up a time and method for ongoing communication
  - Ensure the historian also meets/talks to the Alumni Chapter President
- Contact your Fraternity/Sorority Life Advisor
  - Set up a time to meet/talk in the next two weeks
  - Review your position description and set expectations together
  - Provide the contact information for all newly elected or re-elected officers
  - Review any campus-specific standards of excellence or minimum expectations for chapters
  - Set up a time to meet on a regular basis
- Attend an IFC meeting and introduce yourself to other community leaders
- Introduce yourself to current sorority chapter presidents, Panhellenic council officers, and leaders of other campus organizations with whom you will work on a regular basis
- Contact your Leadership Consultant to introduce yourself

## Review the Chapter's Status

- Obtain (from your Leadership Consultant or outgoing officers) and review copies of your chapter's current:
  - Constitution & Bylaws
  - Strategic Plan
  - Budget
  - Most recent Consultant visit Report
  - Pyramid Scores



- Event calendar and campus calendar and activities calendar
- Membership roster on ChapterSpot
- If applicable, any current risk management sanctions/action plans from the university, IFC, or Triangle
- Check your chapter's account balance with IFC or any other campus board/council (i.e. All-Greek programming board, Greek Council, Multi-Cultural Council, etc.)
- Check current account balances for check, savings, and misc. accounts (housing, funds, scholarship fund, Greek Bill Pay)
- Make signature changes for checking account at the bank
- Schedule and lead the officer transition retreat

### **Learn the Ropes**

- The Pyramid
- The Code of Ethics
- The Rules & Regulations
- The Constitution & Bylaws
- Review any campus fraternity/sorority life standards or awards programs
- The Building Better Men Program

## A WEEK IN THE LIFE OF A PRESIDENT

Following is a list of activities that most Presidents do on a weekly basis. Throughout the year, the President's weekly activities will likely change as different events arise, such as finals week, recruitment or homecoming week.

- Chair the executive board meeting with a focus on the following:
  - Follow up on office action items from the previous week
  - Review the chapter calendar for the week
  - Openly discuss new projects and ideas with other officers
  - Coordinate and schedule chapter events
  - Set chapter priorities for the week that are in-line with the chapter's goals and vision
  - Review and track your weekly, monthly, semester progress against your goals
  - Prepare for chapter meeting by creating and reviewing agenda items
  - Ensure that all officers understand their responsibilities for the week ahead
- Preside over the chapter meeting. Follow the prescribed order of business. A chapter meeting should last no more than 60 minutes.
- Ensure each executive board officer holds a committee weekly meetings. Ensure the judicial board meetings are happening.
- Speak with the following individuals about current issues, chapter happenings, upcoming programs, recruitment development, standards board, finances:
  - University Greek life professional
  - Chapter advisor
  - Staff representative
- Follow up on action requested of you and action you requested.
- Assess the safety of your chapter environment and events. Ensure all policies and procedures are followed.
- Ensure the chapter is represented at the IFC/All- Greek Council meeting.
- Ensure all forms and necessary materials are sent to Headquarters and the university in a timely manner.
- Make sure the chapter is represented at all appropriate functions and meetings on campus and in the community.

# A YEAR IN THE LIFE OF A PRESIDENT

## Immediately Following Election:

- Meet with outgoing president to discuss transition
- Meet with chapter advisor to discuss chapter goals and objectives for the upcoming semester
- Review chapter presidents handbook
- Register for LTW
- Inform University Greek Advisor of your recent election to the position and organize a time to discuss chapter goals and objectives for the upcoming semester
- Notify local alumni association/house corporation president of newly elected officers
- Review Constitution/bylaws, and university policies for student organizations & fraternities

## Within Two Weeks of Election:

- Hold executive board retreat to discuss and set goals for the year
- Appoint new officers/committee chairs and delegate responsibilities
- Organize and assist in the facilitation of an office training retreat
- Set personal goals for your term as chapter president
- Review the Fraternity rules and regulations with the chapter, sign appropriate forms, and return them to National Headquarters
- Assist the continuing education chair with any programming needs

## Weekly Tasks

- Conduct weekly chapter meetings
- Conduct weekly executive board meetings to monitor progress of the chapter
- Meet and communicate with chapter advisor
- Attend all possible chapter events and functions - motivate others' attendance as well
- Attend chapter events and necessary university/Greek community meetings
- Ensure the secretary is sending out weekly notices of the chapter's activities

## Monthly Tasks

- Review chapter and personal goals
- Review and get updates on the budget with the treasurer, recruitment with the recruitment chair, and pledging with the new member educator
- Plan for and review next month's chapter calendar
- Meet with University Greek advisor/dean of students

## Semesterly/Quarterly Expectations

- Contact staff representative to inform him/her of the chapter's progress
- Plan and coordinate Ritual events (initiation/graduation ceremonies)
- Supervise the completion of appropriate secretary and treasurer forms/payments

## Annual Expectations

- Organize the chapter consultant visit
- Submit Pyramid data
- Apply for awards including the Building Better Men Program
- Attend the National Convention, Herb Scobie Leadership School, Leadership & Training Weekend
- Maintain sound risk awareness practices and continually educate the chapter on best practices
- Stay motivated by attempting to achieve the goals you set at the beginning of the year. Do not lose focus or make excuses
- Leave the chapter in a better position than when you found it and set up the next president for success.



## RESOURCES

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### CONCLUSION

The President is crucial to a chapter's success. Great Presidents align their officers and chapter members behind a vision for the chapter and make significant progress toward that vision. Different years may call for a President to focus on different areas of chapter operations. For example, your chapter may need you to focus on standards and spend extra time supporting the standards board this year and next year's President may spend more time on member programming. Regardless of which areas you focus on, it is your commitment to the Ritual, your leadership skills and your communication skills that will help you be successful.

### Additional Resources

In addition to this document, you have a host of other resources at your disposal to help guide you during your time as President. Following is a list of resources mentioned in this officer guide.

- The Pyramid
- [Fraternity Rules & Regulations](#)
- Administrative Duties
- [How to Use ChapterSpot for Triangle Membership Status Routes](#)
- Roberts Rules a Primer (*adapted from Pi Kappa Phi*)
- Sample Meeting Agenda



## **THE PYRAMID | JUDY & LARRY GARATONI BUILDING BETTER MEN PROGRAM | NATIONAL AWARDS**

### **Blue: Exceptional Chapter Operations**

- Item Score: 4 points
- Overall Ranking: 76-100%
- Exceptional chapter operations and likely to win Building Better Men Program & National Chapter Awards

### **Green: Exceeds Chapter Operations**

- Item Score: 3 points
- Overall Ranking: 51-75%
- Meets expectations and could potentially win Building Better Men Program & National Chapter Awards

### **Yellow: Meets Expectations**

- Item Score: 2 points
- Overall Ranking: 25-50%
- Meets expectations but should create a plan of action to strive for improvement

### **Red: Meets Minimum Expectations**

- Item Score: 1 point
- Overall ranking: 1-24%
- Meets minimum expectations required to remain in good standing with National Fraternity; will work with National consultant to create plan of action for improvement

## **Frequently Asked Questions**

- 1. Where do we submit this information?** A majority of the information will be covered with your National consultant through your scheduled visit and through yearly check points. There will be some information that is submitted via online through ChapterSpot.
- 2. What if our chapter doesn't receive a visit?** It is our goal that every chapter and colony receives a chapter visit, however if you don't, it will still be your goal to fulfill the items listed in the pages below. A member of staff will still reach out to you throughout the year to check on your progress and you will still be required to submit the required forms and fees on the given deadlines.
- 3. Is this criteria scored objectively or subjectively?** Red & yellow tiers are all scored objectively. you will be scored based on if you did or did not do something or if you did or did not meet the requirement. Because the green the blue tier will more than likely hold the winners of our National Awards and Judy & Larry Garatoni Building Better Men program there will be a combination of items that are judged both objectively and subjectively.
- 4. What are the incentives of this program?** By offering outlined criteria for each tier, chapters will now be scored consistently no matter what National staff member is conducting the site-visit or assessing materials submitted on ChapterSpot. Chapters will also receive better support from staff by way of issue-focused on-site consultations and custom-made educational programs. Furthermore, this plan will serve as a road map for chapters helping them identify what areas they should focus on.

## SAMPLE GRADING RUBRIC

Academics										
Item	Possible Pts.	Pts.	0	1	2	3	4	Notes	Award	Code of Ethic
Average GPA	4			Ch. average GPA is a 2.7 or higher	Ch. average GPA is a 2.8 or higher	Ch. average GPA is a 3.0 or higher	Every chapter member has a 3.0 or higher		Kahlert Academic Excellence Award	Pay the price in honest effort
Campus Comparisons	4			Ch. average GPA is equal to the all-male average	Ch. average GPA is higher than all-male and is at or above the all-IFC average	Chapter average GPA is above the all-male and all-IFC averages	Chapter average is above the all-male average			Maintain a credible scholastic record
New Member GPA	4			New members will have a 2.7 or higher in order to join	New member class will achieve an overall GPA for its full current membership that is at the all-new member average	New member class will achieve an overall GPA for its full current membership that is above the all-new member average	Every new member will have a 3.0 or higher following their pledging term			Maintain a credible scholastic record
Academic Policies	4			Chapter submits academic report every term	Chapter follows all National and university policies and procedures as it relates to academics	Chapter has created an implemented a written academic policy for all members	Chapter has created and implemented an academic program that includes policies on standards, accountability, incentives, and resources for support		Outstanding Chapter Operations	Maintain a credible scholastic record
Academic Education	4			Chapter has a committee chair dedicated to academics	Chapter academic chair will have attended the Melissa & John Gargani Academic U	Chapter will host at least one program during the academic year that focuses on academic achievement and chair + 2 members will attend Academic U	Chapter will host or attend 2 programs every 6 months that focuses on academic achievement and will create a plan of action based on Academic U		Outstanding Chapter Operations	Maintain a credible scholastic record
Average GPA	4			Chapter average GPA is a 2.7 or higher	Chapter average GPA is a 2.8 or higher	Chapter average GPA is a 3.0 or higher	Every chapter member has a 3.0 or higher		Kahlert Academic Excellence Award	Pay the price in honest effort

# ADMINISTRATIVE DUTIES

Item to be Completed	Person Responsible	Due Date	Note
Order bid cards	Recruitment chair		
Order recruitment tabling kit	Recruitment chair		Can select from different options
Pay National Pledge Fee (\$90)	Treasurer	Within 14 days of becoming a new member	Fee provides each new member with a new member manual and pin.
Plan consultant visit	President		
Submit new member education program to Headquarters	New Member Educator	One month prior to new member pinning	
Report new members on ChapterSpot	Secretary	Within 48 hours of pinning	
Pay National Initiation Fee (\$250)	Treasurer	14 days prior to initiation	Fee provides each brother with membership badge, certificate, and Review subscription
Report initiates on ChapterSpot	Secretary	Within 48 hours of initiation	
Update advisor information on ChapterSpot	Secretary	Within 48 hours of changes	
Update roster on ChapterSpot	Secretary	Within 48 hours of changes	
Submit fall grades	Academic Chair	February 1st	<a href="https://www.triangle.org/gradereport/">https://www.triangle.org/gradereport/</a>
Submit spring grades	Academic Chair	June 1st	<a href="https://www.triangle.org/gradereport/">https://www.triangle.org/gradereport/</a>
Submit service hours for fall	Service Chair	February 1st	<a href="https://www.triangle.org/gradereport/">https://www.triangle.org/gradereport/</a>
Submit service hours for spring	Service Chair	June 1st	<a href="https://www.triangle.org/gradereport/">https://www.triangle.org/gradereport/</a>
Submit charitable dollars for fall	Philanthropy Chair	February 1st	<a href="https://www.triangle.org/gradereport/">https://www.triangle.org/gradereport/</a>
Submit charitable dollars for spring	Philanthropy Chair	June 1st	<a href="https://www.triangle.org/gradereport/">https://www.triangle.org/gradereport/</a>
Submit member involvement	Secretary	June 1st	ChapterSpot
Sign anti-hazing form fall	President	September 1st	
Sign anti-hazing form spring	President	February 1st	
Pay Risk Management Program Fee (\$15)	Treasurer	September 15th	Base rate due once a year
Perform Ritual of Initiation for new member class	President		
Register for any National leadership event	President		
Pay Active Chapter Fee (\$1,150)	Treasurer	30 days from bill date	\$575 per term
Review governing documents & most recent chapter visit report	All Exec	Immediately upon election	
Hold a founders' day event	Alumni Chair	April 15	

# ROBERT'S RULES OF ORDER

## A PRIMER

### Call to Order

This occurs at the beginning of the meeting, once quorum has been attained. Quorum is at least a majority (50%) of all members.

### Motions

Business is resolved at meetings by voting on propositions put forward by members. Such propositions are called *motions*. Any person who is eligible to vote at a meeting may make a motion. Depending on the type of motion, another member is usually needed to *second* the motion. Motions are then debated and voted upon. **No member may speak more than once to any motion** (although the speaker may choose not to enforce this rule if he deems it appropriate). A member must raise his hand. A speaker's list is kept acknowledging individuals in the order in which they have raised their hands.

### Amendments

A motion may be amended by a subsequent motion. If the mover and seconder of the original motion consent to the amendment, the amendment is deemed "friendly" and it does not require a seconder and is not subject to debate. If an amendment is not deemed friendly, it does require a seconder. Such a motion must then be debated and voted upon before the debate resumes on the original motion.

### Motions That Take Precedence

Normally, a motion cannot be made while another motion is being debated. There are, however, certain types of motions that take precedence over "normal" motions.

- **Motion to Amend** (as above)
- **Motion to Table** - This is a motion to defer further debate on the main motion until some future time. The motion requires a seconder and is debatable only as to the length of time that the main motion will remain tabled
- **Motion to Refer** - This is similar to a Motion to Table, except that instead of deferring a motion for a specific amount of time, it is deferred until advice can be sought from another body
- **Motion to Call the Question** - This is a motion to cease debate and proceed to the vote on the main motion. If there is an objection to the motion, the motion requires a seconder and must pass by a two-thirds vote. The motion is not debatable
- **Motion to Reconsider** - This is a motion to re-open debate on a motion that has already been voted upon earlier in the same meeting. This motion requires a seconder
- **Motion to Adjourn** - A motion to end the meeting; requires a seconder and is not debatable.

### Points

There are several special motions called "Points" that have priority over all other motions or discussion. Points are considered serious enough that a speaker may be interrupted by another individual who wished to make a Point. Points do not require a seconder.

- **Point of Order** - An individual may raise on a point of order if they feel that business is proceeding incorrectly. The speaker must either agree or disagree with the point raised. An individual may also use this point if they do not understand the proceedings and/or wish to have a clarification made on a specific ruling.



- **Point of Privilege** - Individuals may raise Points of Privilege if it is felt that their rights as members of the assembly have been violated. This Point can also be used if an individual is unable to participate in the discussion due to an inability to hear the speaker, because the room is too hot or cold, or because s/he is unclear on matters of procedure. If you do not understand what is happening, you can interrupt the speaker and request clarification on a Point of Privilege.
- **Point of Information** - This point is the most misused one in the book. This Point is used to ask for information that you feel is essential to your understanding of the debate. It may not be used to give information. The member may decide not to answer the question by refusing to yield the floor. Again, it is not in order to give someone information on a point of information.
- **Challenge to the Speaker** - This Point is used when an individual disagrees with the Speaker's ruling. The mover must state why he or she disagrees with the ruling. The Speaker may then give the reasoning behind the ruling. A vote is then taken to affirm the Speaker's ruling.

### Voting

Voting on motions normally requires a simple majority. Voting is normally done by a show of hands, however, anyone eligible to vote has the right to demand a vote by roll call. Voting by secret ballot normally occurs only when an election to fill a position is required, and the assembly does not desire to conduct the election by a show of hands.

To ensure smooth discussion:

- **Raise your hand if you wish to speak.** The Speaker will take note and ask you to speak at the appropriate time.
- **State your name and department before speaking to the topic at hand.**
- **Speak to the topic or motion at hand.** If you wish to raise something not on the agenda, there are always the "Question Period" or "New Business" agenda items.
- **If you wish to make a suggestion regarding the motion on the floor, form it in terms of an amendment.** Your amendment will need seconding, after which it will become the current item on the floor.
- **Try not to repeat points other people have already made** unless you have something new to add to the point.

# SAMPLE MEETING AGENDA

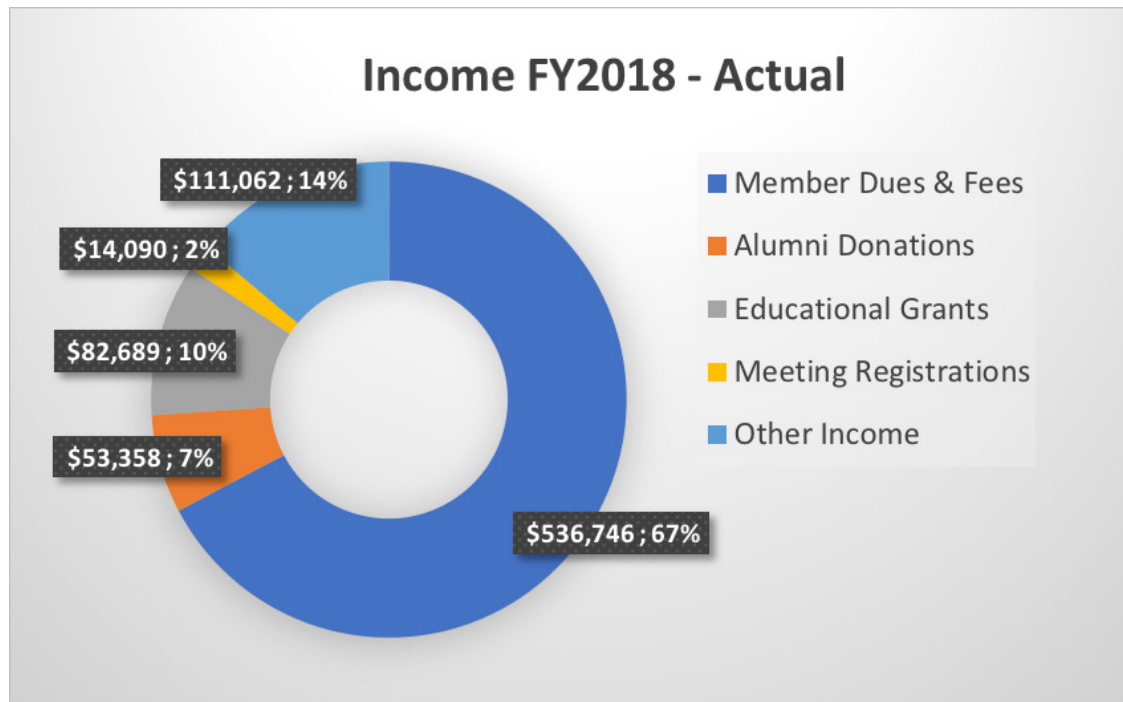
- Roll call (secretary)
- Introduce guest speakers (president)
- Approval of minutes (secretary)
  - Minutes from the previous meeting should have been distributed prior to the meeting. Additions and corrections should be noted and corrected as a condition of approval.
- Correspondence received (secretary)
  - This would be the appropriate time to read all correspondence from Triangle Headquarters, University, other Greek organizations, etc.
- Report of secretary
- Report of the treasurer
- Report of the recruitment chair
- Report of the new member educator
- Report of the academic chair
- Report of the standards board
- Report of other officers/directors/chairs
  - Brotherhood chair
  - Social chair
  - Risk manager
  - Fundraising
  - Service/philanthropy
  - House manager
- Report of the vice president
- Report of the president
  - IFC report
- Chapter advisor report
- Old business
  - This is a time for business that was referred to, but not addressed at a previous meeting and requires a vote
- New business
  - This time is used to present new business, which may need to be tabled to allow everyone to think about their decision
- Announcements/upcoming deadlines
- Good & Welfare
  - This portion of the agenda can vary, but should be used to allow members to address the chapter
- Adjournment

# TRIANGLE FRATERNITY FINANCIAL SUMMARY - FISCAL YEAR 2018

The National Council and its Financial Committee review budgets annually and approve final budgets before the start of each fiscal year in July. For FY 2018 Triangle Fraternity had an annual operating budget of around \$850,000. The summary below will provide insight as to our income sources and how the funds are spent.

**Income** comes from five sources:

1. Chapter/Member fees (about 67% of income)
2. Alumni Donations/Voluntary Alumni National Dues (VNADs) (about 7% of income)
3. Grants from the Triangle Education Foundation for approved educational programs (about 10% of income)
4. Registration fees from meetings such as LTW, Convention, etc. (about 2% of income)
5. Other (royalties, jewelry/merchandise sales, interest, etc.) (about 14% of income)

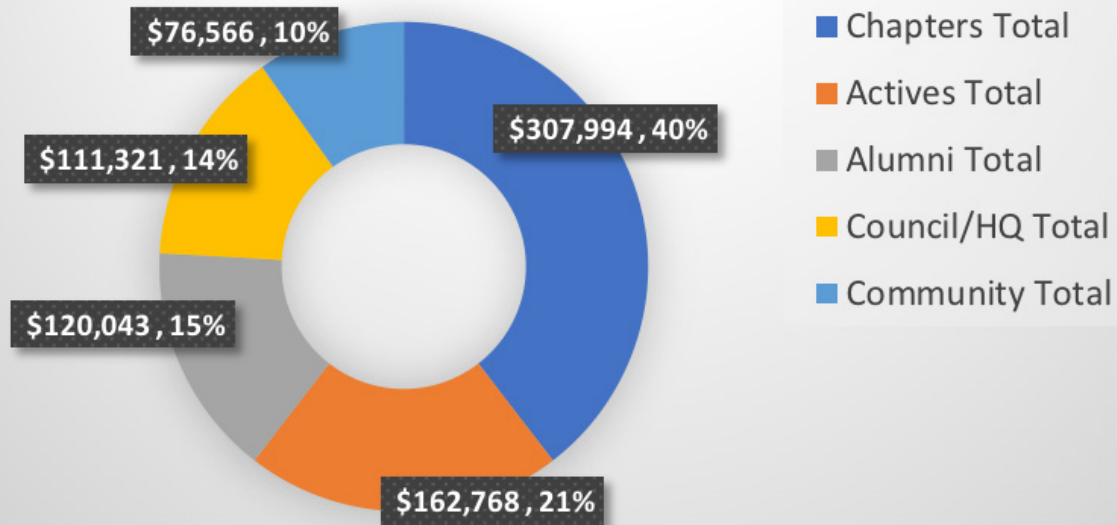


**Note:** Because the bulk of our income (67%) comes from Chapter/Member fees, the drop in members over the last two years has been a significant challenge. The only sure way to stabilize or reduce these fees over time is for chapters to grow, so we're providing a growth incentive for this year. Just as with chapter operations, more men paying fees will allow lower fees.

**Expenses** are accounted for in five categories, related to our overall Strategic Plan. Those categories are as follows, with a sample of the activities involved in each:

1. Chapters – chapter support and visitation, recruitment and expansion, ChapterSpot online chapter management (about 40% of expenses).
2. Actives – member-focused education, training and programs such as The Journey, New Member Education, LTW, Herb Scobie Leadership School (about 21% of expenses).
3. Alumni – alumni support programs and events, The REVIEW magazine, Career Contacts and our alumni database (about 15% of expenses).
4. HQ/Council – administrative services, the HQ building, equipment and software, National Council meetings and work with TEF and TBHC (about 14% of expenses).
5. Community – FIRST programs/support, outreach to college contacts, parents, education and professional organizations (about 10% of expenses).

## Expenses - FY2018 Actual



We receive approximately 74% of income from members (alumni and undergraduates) and spend approximately 76% of expenses for chapter/active/alumni (member) services. The remainder are for expenses necessary for Fraternity operations and our outreach to, and partnerships with, our important education, charity and community partners. These expenses have benefits to all Triangle members.

**Growth Initiative:** We hear your concerns about fees and dues and want to provide support. National Active Fees (NAFs) are directly impacted by undergraduate membership. If member numbers go down (as they have for the last two years) the NAF has to increase to provide the same income. But if you grow, those fees can stabilize or reduce. Therefore, we are announcing **credits to chapter accounts based on your success in growing your chapter**. Here's how it works:

Chapters that increase overall membership by 3 men will receive a credit to their chapter account of \$15 per member; growth by 5-9 men and you will receive a credit of \$25 per member or; grow your chapter by 10 or more and receive a credit of \$50 per member. Keep in mind, the credit is based on total member numbers, not just the new members you pledge. For most to grow, you need to bring in new members AND keep current members active. Here's how the credit can work for various chapter sizes:

Chapter Size	Grow by 3-4	Grow by 5-9	Grow by 10+
15 men	\$225	\$375	\$750
30 men	\$450	\$750	\$1,500
50 men	\$750	\$1,250	\$2,500

If you need ideas or assistance, contact Director of Growth Augie Farwig at [augie@triangle.org](mailto:augie@triangle.org).

In addition to outlining our annual income/expenses, we thought it important to share how our national fees compare to other North-American Interfraternity Conference (NIC) fraternities with a similar number of chapter (30-60) as Triangle.

PLFee	InitFee	Dues	4YR	INS	4YR+INS	
\$220.00	\$380.00	\$385.00	\$1,665.00	\$315.00	\$2,316.00	
\$145.00	\$330.00	\$375.00	\$1,480.00	\$300.00	\$1,995.00	
\$100.00	\$320.00	\$345.00	\$1,455.00	\$250.00	\$1,930.00	
\$100.00	\$300.00	\$290.00	\$1,215.00	\$246.00	\$1,815.00	
\$100.00	\$290.00	\$210.00	\$1,150.00	\$217.00	\$1,705.00	
\$91.00	\$275.00	\$179.00	\$950.00	\$210.00	\$1,698.00	
\$90.00	\$250.00	\$155.00	\$824.00	\$210.00	\$1,697.00	
\$90.00	\$250.00	\$154.00	\$805.00	\$200.00	\$1,580.00	
\$75.00	\$240.00	\$130.00	\$798.00	\$185.00	\$1,435.00	
\$25.00	\$230.00	\$130.00	\$780.00	\$180.00	\$1,259.25	
	\$200.00	\$91.00	\$752.00	\$150.00	\$780.00	
	\$200.00		\$521.25			
Triangle	\$170.00					
\$103.60	\$286.50	\$235.30	\$1,112.20	\$231.30	\$1,743.03	Average
\$95.50	\$282.50	\$194.50	\$1,050.00	\$213.50	\$1,701.50	Median

According to the cost comparisons above, Triangle is below average for pledge, initiation and Insurance fees and above average on active fees, resulting in a 4-year cost with insurance that is slightly below the average of these men's groups.

A discussion was held several years ago at Convention regarding all Triangle fees. At that meeting, it was agreed that National Active Fees (NAFs) would increase rather than pledge and initiation fees. It was felt once men were pledged and initiated at a lower fee, they would be more likely to continue membership even with slightly higher NAFs.

But the primary factor in pricing is active membership. Just like your chapter, if there are more members, the cost to run the organization is less per member. With fewer men, the price per man goes up. The best way to insure NAFs stabilize or even decrease is to increase your chapter size every year.

That is the ethos behind this year's Growth Initiative – a plan that credits your Fall 2019 chapter account according to your chapter's growth. This effectively reduces your NAFs from \$15 to \$50 per man. Ask staff about this program while you're at LTW.

Membership in any fraternity is an investment in one's future. The lifetime of friendship, support during the college years and introduction to a worldwide network of alumni are things you can't put a price on. Even if you do add up all the costs associated, it's a minor increase (3-5%) of what a four-year education costs – it's not about price, it's about value. These are discussions you should have with your members.

As always, contact Fraternity staff for help growing or educating your chapter!



# SCHOLARSHIPS

**YOU WANT THEM. WE HAVE THEM.**

**THERE ARE FIVE NEW \$1,500.00  
SCHOLARSHIPS AVAILABLE TO MEMBERS  
WITH A 2.7 GPA OR HIGHER.**

This year the Triangle Education Foundation is giving away  
over \$80,000 in scholarships for the  
2019 - 2020 school year!

We would love nothing more than to award one to YOU!

Questions about how to apply?  
Email us at [TEF@triangle.org](mailto:TEF@triangle.org) or  
visit [www.triangleef.org/scholarships](http://www.triangleef.org/scholarships)

**DEADLINE TO APPLY IS FEBRUARY 15, 2019.**

**WHILE YOU'RE OVER AT THE FOUNDATION BOOTH, SIGN UP FOR  
PRESIDENT'S MEN! IN EXCHANGE FOR YOUR GENEROSITY WE'LL  
GIVE YOU A LIMITED-EDITION T-SHIRT AND FREE CANDY! WHAT'S  
NOT TO LOVE?**



**Triangle**  
Education Foundation

How you can help the



- Use your Chapter Endowment Fund disbursement every year
- Apply for scholarships
- Communicate with your Alumni and be good hosts when they attend your chapter events
- Join President's Men
  - It's EASY
  - Make your gift with a debit/credit card or cash
  - Get your limited-edition t-shirt
  - Get your President's Men ribbon
  - Pay it forward for the next generation of brothers



## How to Complete the Triangle Education Foundation Chapter Endowment Fund Grant Application

1. Before applying make sure you watch the how-to video online. The video is at <https://www.youtube.com/watch?v=FBPXetVtIOI>
2. Go to <http://www.tfaforms.com/workflows/start/2295>
3. There are two forms this process will take you through. Once you have completed Form #1, you will automatically be directed to Form #2. Do not complete Form #2 without following the steps outlined below. The two forms are for the following purposes:
  - a. Form #1 is the grant application. The first two pages contain detailed instructions. It is very important to read through these carefully.
  - b. Form #2 is the reimbursement request for your specific grant request. It is important that you choose the option at the top of the form to "Save my progress and resume later". This will allow you to return to Form #2 after all purchases have been completed.
4. Complete form #1. Make sure the email address used for the grant coordinator matches what we have on file.
5. **VERY IMPORTANT:** Remember to use the option "Save my progress and resume later" at the top of the form.
6. Once you have completed Form #1 I will review the request within 5 business days.
7. If approved (I would anticipate this request would be approved) the chapter should proceed with purchases.
8. After all purchases are completed, you return to the form and log back in. You will now complete Form #2 for reimbursement.
9. After the reimbursement is complete and all is in order we will process payment which normally takes 7 to 14 business days.
10. All grant applications must be submitted no later than May 30 to be considered in the current school year.
11. All grant reimbursements are due by June 15, failure to meet this deadline will forfeit reimbursement.

Any questions please contact Scott Bova at [Sbova@Triangle.org](mailto:Sbova@Triangle.org).





# HOW TO USE CHAPTER ENDOWMENT FUND MONEY

LET US HELP YOU FIGURE OUT THE BEST USE OF YOUR FUNDS!

Confused by how to best use your Chapter Endowment Funds (CEF)? Let the Triangle Education Foundation (TEF) help you navigate all the ways you can maximize your funding!

## **BEST WAY TO USE YOUR FUNDS:**

Have them automatically applied to Triangle's National Programs! Never have to worry about finding money to send guys to Scobie, Leadership Training Weekend or Convention- and travel costs can be covered with your CEF as well! TEF makes this process painless and easy- we work with the Fraternity on payments and you just have to submit your travel expenses to us and get reimbursed. Easy Peasy!!

## **OTHER WAYS TO USE YOUR FUNDS:**

Have a chapter house with a study room? Use your funds to refresh and upgrade the room to be one brothers actually want to study in! Desks, chairs, tables, bookshelves, filing cabinets, new lighting, carpet and paint can all be covered by your CEF!

Need faster internet in the house? Use your funds to upgrade your modems and routers! Need to be hard-wired into the school's system? Yep, that's covered too!

Want to bring in a speaker for Engineering Week on campus? That's easy! Your CEF can cover the speaker fees- travel, hotel, honorarium, etc. What better recruitment tool then having your chapter sponsor this speaker and have your name all over the publicity for the event! Remember to partner with your Engineering Department on getting this all worked out!

Are chapter brothers jealously eyeing the Engineering Department's new 3D printer? We can help your chapter get one! 3D printers are covered by CEF dollars as well as the materials needed to print. Want to get the best bang for your buck with that 3D printer- talk to the South Dakota Mines guys about their sexual assault prevention keychains they made on their 3D printer that got a write up in the Rapid City Journal!

Scholarships, Scholarships, Scholarships! A great way to reward those studious brothers or meet potential new members by offering the scholarship to incoming freshman! Talk to us to help set criteria for the scholarship and to make sure you don't get into trouble with how you award it!

Done all these things and still looking for ways to spend your CEF? Come talk to the friendly TEF folks at our booth- we're happy to answer any questions and provide you with some additional ideas on how to maximize your CEF!

