



STEVEN L. MILLER

PRESIDENTS' LEADERSHIP ACADEMY

2020 PARTICIPANT WORKBOOK



PROGRAM SCHEDULE

FRIDAY JANUARY 17, 2020		
TIME	SESSION	LOCATION
4:00 p.m. – 11:00 p.m.	Check-in open	Jameson Center
5:00 p.m. – 5:30 p.m.	LTW kick-off and welcome	Jameson Center
5:30 p.m. – 6:30 p.m.	Group dinner	Jameson Center
6:30 p.m. – 7:00 p.m.	Announcements & Updates	Breakout spaces
7:00 p.m. – 8:00 p.m.	Round Tables Part 1	Breakout spaces
8:00 p.m. – 10:00 p.m.	Officer Tracks	Breakout Spaces
10:00 p.m.	Day 1 concludes / Free time	Various locations

SATURDAY JANUARY 18, 2020		
TIME	SESSION	LOCATION
8:00 a.m. – 9:00 a.m.	Breakfast	Jameson Center
9:00 a.m. – 10:00 p.m.	Round Tables Part 2	Breakout spaces
10:00 a.m. – 12:00 p.m.	Officer Tracks	Breakout spaces
12:00 p.m. – 1:00 p.m.	Lunch	Jameson Center
1:00 p.m. – 1:30 p.m.	TEF Thank You Letter Writing	Breakout spaces
1:30 p.m. – 2:30 p.m.	Round Tables Part 3	Breakout spaces
2:30 p.m. – 5:30 p.m.	Officer Tracks	Breakout spaces
5:30 p.m. – 6:30 p.m.	Dinner	Jameson Center
6:30 p.m. – 7:00 p.m.	Announcements	Jameson Center
7:00 p.m. – 9:00 p.m.	Officer Tracks	Breakout spaces
9:00 p.m. – 10:00 p.m.	Treats & Talks with National Council	Main Building
10:00 p.m.	Day 2 concludes / Free time	Various locations

SUNDAY JANUARY 19, 2020		
TIME	SESSION	LOCATION
8:00 a.m. – 10:00 a.m.	Officer Tracks	Breakout spaces
10 a.m. – 11:00 a.m.	Brunch	Jameson Center
11:00 a.m. – 12:00 p.m.	Keynote Speaker: TBD	Jameson Center
12:00 p.m. – 12:30 p.m.	Wrap Up & Final Announcements	Jameson Center
12:30 p.m. – 12:45 p.m.	Group photo	Jameson Center
12:45 p.m.	LTW conclusion/dismissal	Jameson Center
1:00 p.m. – 2:30 p.m.	Optional HQ tours	Triangle HQ



EXECUTIVE DIRECTOR WELCOME



Welcome to Indiana and to the Leadership Training Weekend, Triangle's officer education program! Over the next couple days, you'll spend time making new friends, discussing ideas and issues, meeting staff and national officers and, I hop, thinking about how you can apply what you've learned to make your chapter stronger.

LTW is an investment in our chapter/campus leaders, offering tracks in the areas most critical to chapter success so that you can learn, return to your chapters and lead. Don't just leave behind the energy and enthusiasm you find here' take it back! A good idea introduced and executed is far more valuable than a great idea never acted upon.

Many of the resources used this weekend will be available to you and your members after the weekend is over. Share what you've learned here – make sure your other chapter officers have access to you and these materials. Keep in touch with the peers at other campuses – they do what you do and can be a great support system.

Finally, build a partnership with the staff and volunteers who support our chapters every day. This network of ideas and excitement is one of Triangle's most valuable assets. All chapters do essentially the same things to operate, just with different people. Utilize those who have worked with chapters for years to help you make better decisions.

The last few years have been difficult for fraternities. Because of incidents and tragedies, many students are coming to campuses with event greater cynicism about the value of fraternity. The best way to counter stereotypes is to operate at a higher level. Grades, graduation rates and great jobs are what we should be doing better than others.

Triangle is the only men's STEM fraternity experience and offers an important support system for men pursuing STEM degrees. This must be a primary theme in our recruitment discussions, to attract the men we need to succeed. You will see more from us to support this theme, but our recruitment website (jointriangle.org) has a wealth of resources you can use right now.

Further, we can no longer depend only upon IFC rush processes. Successful chapters have strong relationships with the dean and faculty of the colleges from which our members come. We must be more visible to students in those colleges and have the trust of faculty and administrators to recommend Triangle to their students.

Enjoy your time in Indiana and start to plan a return in July for our Herb Scobie Leadership School at Butler!

Tom Pennington, Executive Director



PROGRAM NAMESAKE: STEVEN L. MILLER ILL64



Mr. Miller is Chairman and President of SLM Discovery Ventures, Inc., a company formed in 2002 pursuing a commercial venture in support of volunteerism, social outreach, and higher education academic achievement. SLM Discovery Ventures, Inc. is headquartered in Houston, Texas.

Mr. Miller is the retired chairman of the Board of Directors, President, and CEO of Shell Oil Company, holding that position from July 1999 until his retirement on September 1, 2002.

A native of Kansas City, Missouri, Mr. Miller graduated with a B.S. in chemical engineering from the University of Illinois. During this time, Steve serves as the Active President of the Illinois Chapter of Triangle Fraternity. He began his career with Shell in 1967 at Shell's Deep Park Refinery near Houston. After various field, head office, and overseas assignments in manufacturing and marketing, he was named Vice President of Refining and Marketing for Shell Oil in 1988.

In 1992, Mr. Miller joined the Royal Dutch/Shell Group of Companies Management team in London with responsibility for global supply and marketing. In 1996, he was named a Managing Director of Royal Dutch Petroleum Company and a Managing Director of the Royal Dutch/Shell Group Companies.

Active in both the business and not for profit communities, Mr. Miller serves on the boards of a number of local and national organizations and institutions. He is a trustee and 2003/2005 chairman for the United Way of the Texas Gulf Coast and is chairman of the Points of Light Foundation (2003/2007), the nation's primary enabler of volunteer service. He also serves as a chair for the Center of Houston's Future and as a director of America's Promise, the Alliance for Children.

Mr. Miller is a member of the board of Reliant Energy based in Houston, Texas. He is a director and chairman of the University of Illinois Foundation and a senior member of the University of Texas M.D. Anderson Cancer Center Board of Visitors in Houston. He serves on Rice University's board of trustees and Rice University James A. Baker III Institute for Public Policy Board of Advisors.

Married with two children, Mr. Miller has served as an elder in three Presbyterian churches and he and his wife Sheila are now members of Memorial Drive Presbyterian Church, Houston. He has interests in American history, antiques and gold.

As a side note - we are extremely appreciative and grateful for Brother Miller's continued support of our Active President's and both our Leadership & Training Weekend and through the year via our online programming.



CODE OF ETHICS

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

1.
Observe the Fraternity as set forth in the Ritual;
2.
Accept cheerfully my full share of any task, however menial, involved in maintaining a chapter home;
3.
Preserve and promote the chosen ideals of my Fraternity;
4.
Pay all personal bills promptly and always live within my means;
5.
Help create in my chapter home an environment in which enduring friendships may be formed;
6.
Maintain a creditable scholastic record;
7.
Promote the welfare of my profession;
8.
Maintain my self-respect by proper conduct at all times;
9.
Uphold faithfully the traditions and program of my Alma Mater;
10.
Pay the price of success in honest effort.



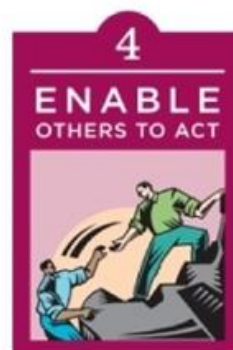
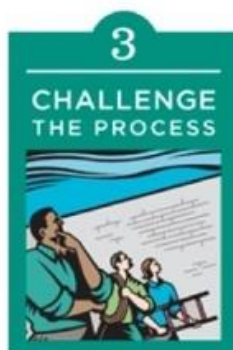
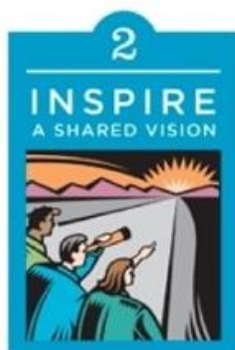
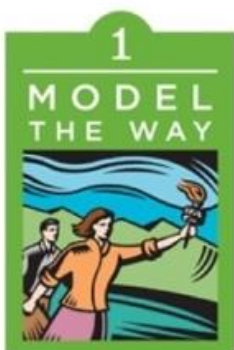
LEADERSHIP 101

- What are your expectations of LTW, and specifically of SLMPLA?
- What motivated you to attend?
- What can we expect from you this weekend?
- What do you expect from others?
- What support do you need?



LEADERSHIP 101

- How do you define leadership?
- What does it look like in action?
- Do you believe that you are born a leader or made a leader?





LEADERSHIP 101

1. Model the Way

Leaders establish principles concerning the way people should be treated and the way goals should be pursued. They create standards of excellence and then set an example for others to follow. Because the prospect of complex change can overwhelm people and stifle action, they set interim goals so that people can achieve small wins as they work toward larger objectives.

2. Inspire a Shared Vision

Leaders passionately believe that they can make a difference. They envision the future, creating an ideal and unique image of what the organization can become. Through their magnetism and quiet persuasion, leaders enlist others in their dreams. They breathe life into their visions and get people to see exciting possibilities for the future.

3. Challenge the Process

Leaders search for opportunities to change the status quo. They look for innovative ways to improve the organization. In doing so, they experiment and take risks. And because leaders know that risk taking involves mistakes and failures, they accept the inevitable disappointments as learning opportunities.

4. Enable Others to Act

Leaders foster collaboration and build spirited teams. They actively involve others. Leaders understand that mutual respect is what sustains extraordinary efforts; they strive to create an atmosphere of trust and human dignity. They strengthen others, making each person feel capable and powerful.

5. Encourage the Heart

Accomplishing extraordinary things in organizations is hard work. To keep hope and determination alive, leaders recognize contributions that individuals make. In every winning team, the members need to share in the rewards of their efforts, so leaders celebrate accomplishments. They make people feel like heroes.

- Which one do you feel resonates with you most?
- What practice do you want to commit to working on more throughout your presidency?
- How can you use these practices to leave a legacy within your organization?



LEADERSHIP 101

What do you want your legacy to be?



THE PRESIDENTIAL BACKPACK

- What does effective communication look like?
- What are some ways to effectively communicate to organization members?

Tips for Effective Communication

1. Listen
2. Be cognizant of non-verbal's
3. Be clear and concise
4. Be friendly
5. Have confidence
6. Be empathetic
7. Keep an open mind
8. Have respect
9. Give feedback
10. Be sure to pick the right medium



THE PRESIDENTIAL BACKPACK

Model for Effective Problem Solving

1. Identify the issue
2. Understand the interests of everyone involved
3. List the possible solutions
4. Evaluate the options
5. Select the options
6. Document the agreements
7. Agree on contingencies, monitoring and evaluation

Helpful Tips for Mediation

1. Keep the conversation on track
2. Make sure the conversation doesn't take a negative confrontational tone
3. Remain positive and encouraging
4. Make sure emotions are kept in check
5. Realize that it is okay for parties to disagree

What is a conflict or problem that I have or would potentially face that would require a mediation or resolution?

How can I use the models listed above to effectively mediate or solve said problem?



THE PRESIDENTIAL BACKPACK

Tips for balancing your various responsibilities:

1. Get a planner – or use your phone. Just make sure that you have all of your events, activities, assignments, and deadlines in one place.
2. Create a spreadsheet or use a project management tool to help you. Sometimes mapping everything out in one view can help you determine what you have due and when.
3. Create a separate email. Having an email for work/organization business that is different from schoolwork can help keep you on track.
4. Set “office hours”. You may start to see that you are spending way too much time on organization business or tending to member’s needs. It may not be a bad idea to set aside specific hours that you work on organization business, that way you don’t let academics or your personal needs slip through the cracks.
5. Develop a routine and get sleep.
6. Stay neat and declutter once a week.
7. Eliminate distractions. No matter the work you are doing – whether it is for the organization, or school – focus on only that. Close out Reddit, and Facebook and YouTube. Close the other email and do one thing at a time.
8. Learn to say no. Don’t feel like you need to be everything for everyone. You can say no, and the world will go on.



THE PRESIDENTIAL BACKPACK

Sample Meeting Agenda

- I. Roll call (secretary)
- II. Introduce guest speakers (president)
- III. Approval of minutes (secretary)
 - a. 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.
- IV. Correspondence received (secretary)
 - a. This would be the appropriate time to read all correspondence from HQ, University, other organizations, etc.
- V. Officer reports
 - a. Secretary
 - b. Treasurer
 - c. Recruitment chair
 - d. New member educator
 - e. Academic chair
 - f. Standards board
 - g. Misc.
 - h. Vice president
 - i. President
- VI. Advisor report
- VII. Old Business
 - a. This is a time for business that was referred to, but not addressed at a previous meeting and requires a vote
- VIII. New Business
 - a. This is used to present new business, which may need to be tabled to allow everyone to think about their decision
- IX. Announcements/upcoming deadlines
- X. Good & Welfare
 - a. This portion of the agenda can vary but should be used to allow members to address the chapter
- XI. Adjournment



THE PRESIDENTIAL BACKPACK

Tips for Effective Delegation:

1. **Be Patient**
The first time you delegate any task, it is almost certainly going to take longer than doing it yourself. That is normal. Over time it will get easier.
2. **Don't Over Delegate**
Delegation is not about shifting work to someone else's plate that you should be doing. It is about getting the tasks that you shouldn't off of yours. It is important to know the difference.
3. **Pick the Right People**
Make sure the person(s) you're delegating to are qualified to do the task. Better yet, try to delegate tasks that will make use of your team member's skills.
4. **Explain Why You Are Delegating**
When you select people to delegate to, tell them why you chose them specifically, and how you hope that this will 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."
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 connect with your team members.
8. **Don't Micromanage**
Once you have 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 time 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 that you're getting exactly what you need – and helping others get better over time will only help you in the long run.
10. **Say Thank You**
Your members are helping you and saving you time while adding value. Say thank you!
11. **Use More than 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 other's skills and abilities. And don't be afraid to delegate to new members – how do you think that they are going to learn?



HEALTH & SAFETY GUIDELINES

3.6.1 ALCOHOL AND DRUGS

In any activity sponsored or endorsed by any Triangle chapter or at any event that a reasonable, objective observer would associate with a chapter, including those that occur on or off chapter premises:

1. Chapters, members, and guests must comply with all federal, state, provincial, and local laws. No person under the legal drinking age may possess, consume, provide, or be provided alcoholic beverages.
2. Chapters, members, and guests must follow the federal law regarding illegal drugs and controlled substances. No person may possess, use, provide, distribute, sell, and/or manufacture illegal drugs or other controlled substances while at any chapter premises or at any activity or event sponsored or endorsed by the chapter.
3. Alcoholic beverages must either be: (a) provided and sold on a per-drink basis by a licensed and insured third-party vendor (e.g., restaurant, bar, caterer, etc.); or (b) brought by individual members and guests through a bring your own beverage ("BYOB") system. The presence of alcohol products above 15% alcohol by volume (ABV) is prohibited on any chapter premises or at any event, except when served by a licensed and insured third-party vendor.
4. Common sources of alcohol, including bulk quantities, which are not being served by a licensed, insured third-party vendor, are prohibited (i.e., amounts of alcohol greater than what a reasonable person should consume over the duration of an event).
5. Alcoholic beverages must not be purchased with chapter funds or funds pooled by members or guests (e.g. admission fees, cover fees, collecting funds through digital apps, etc.)
6. A chapter must not co-host or co-sponsor, or in any way participate in, an activity or event with another group or entity that purchases or provides alcohol.
7. A chapter must not co-host or co-sponsor an event with a bar, event promoter or alcohol distributor; however, a chapter may rent a bar, restaurant, or other licensed and insured third-party vendor to host a chapter event.
8. Attendance by non-members at any event where alcohol is present must be by invitation only, and the chapter must utilize a guest list system. Attendance at events with alcohol is limited to a 3:1 maximum guest-to-member ratio and must not exceed local fire or building code capacity of the chapter premises or event venue.
9. Any event or activity related to the new member joining process (e.g., recruitment, intake, rush, etc.) must be substance free. No alcohol or drugs may be present if the event or activity is related to new member activities, meetings, or initiation into an organization, including but not limited to "bid night," "big/little" events or activities, "family" events or activities, and any ritual or ceremony.
10. Chapters, members or guests must not permit, encourage, coerce, glorify or participate in any activities involving the rapid consumption of alcohol, such as drinking games.



HEALTH & SAFETY GUIDELINES

3.6.2 HAZING

The term “hazing” means any intentional, knowing, or reckless act committed by a person, whether individually or in concert with other persons, against any individual or group of individuals, regardless of affiliation, whether or not committed at a Triangle premises, for the purpose of recruiting, joining, pledging, initiating, admitting, affiliating, or for the purpose of continued membership or enhanced status in an organization that causes an individual or group of individuals to do any of the following, regardless of a person’s willingness to participate:

- a. Be coerced to violate federal, state, provincial, local law, or [organizational] policy.
- b. Be coerced to consume any food, liquid, alcoholic liquid, drug, or other substance in any non-customary manner which subjects the individual or group of individuals to a substantial risk of emotional or physical harm which includes but not limited to sickness, vomiting, intoxication, or unconsciousness.
- c. Endure brutality of a physical nature, including but not limited to whipping, beating, paddling, branding, dangerous physical activity, or exposure to elements or endure threats of such conduct that results in mental or physical harm.
- d. Endure brutality of a mental nature, including but not limited to activity adversely affecting the mental health or dignity of the individual, sleep deprivation, exclusion from social contact or conduct that could result in extreme embarrassment or endure threats of such conduct that results in mental or physical harm.
- e. Endure any other activity which adversely affects the health and safety of an individual, including but not limited to the disruption of academic performance or class attendance, required designated driving programs, line ups, calisthenics, or personal, physical, or financial servitude.

3.6.3 SEXUAL ABUSE AND MISCONDUCT

Triangle and its members must comply with all federal, state, provincial and local laws related to sexual misconduct. This is to include any actions, activities, or events, whether at a chapter facility or an off-site location, that are demeaning to women or men, This is including, but not limited to definitions around consent, sexual violence, sexual harassment, domestic violence, dating violence, stalking and sexual exploitation. The hiring or use of strippers, exotic dancers, or similar, whether professional or amateur, at a fraternity event as defined in this policy is prohibited.

3.6.4 RESPECT AND DIGNITY

Triangle expects its organizations, members and guests to respect the dignity of all persons. This includes, but is not limited to, the areas of gender, ethnicity, national origin, race, sexuality, religious or cultural practices or individuals with disabilities. Abusive, harassing or discriminatory behavior towards others is prohibited.

3.6.5 FIGHTING AND PHYSICAL ABUSE

The fraternity will not tolerate or condone any form of fighting or physically abusive behavior while on chapter premises or during a fraternity event, in any situation sponsored or endorsed by the chapter, or at any event a reasonable observer would associate with the fraternity.

3.6.6 FIRE, HEALTH & SAFETY

Chapter houses must meet all applicable fire and health codes and standards. Chapters should also comply with any recommendations as reported by the Fraternity’s insurance company or municipal authorities.



HEALTH & SAFETY

CASE STUDY: WHO KILLED JANE DOE?

Jane Doe, age 20, was dead on arrival. Several fraternity members, concerned by her unconscious vomiting, drove her to the emergency room at 2:30 a.m. But even before they pulled into the emergency drive, her breathing had stopped. Successive attempts by the hospital staff to revive her failed.

The sisters of Mu Epsilon were sorry. She had lived in the chapter house for two years. All her sisters knew about her drinking problem and more than a few had escorted/carried her home from past parties and held her hand as she threw-up all night.

Karen, her best friend and pledge mom was sorry. Jane and Karen had decided to get primed for the Alpha Lambda mixer later than evening. Each had done several shots at their favorite campus bar.

The brothers of Alpha Lambda were sorry. The chapter had successfully dodged their National Fraternity's risk management policy all year. No one else on campus was following it, so why should they? Besides, if they didn't provide alcohol and serve minors, no women would come to their parties.

Joe, an Aloha Lambda pledge and designated bartender, was sorry. Nobody ever told him not to serve people that were already drunk. Jane didn't look any drunker than anyone else at the party. Besides, Jane was hanging all over Mike, and a little more beer might have helped him get lucky.

The IFC was sorry. Twelve of the 15 chapters on campus have national risk management policies specifically prohibiting the purchase and serving of alcoholic beverages. The IFC rep from Beta Rho had brought up the idea of a unified IFC Risk Management Policy earlier in the year, but the idea had been voted down.

The Panhellenic Council was sorry. They voted to send flowers to Mu Epsilon to show their support. Men's fraternities are the source of the campus alcohol problem, so the Panhellenic didn't feel like there was much more they could have done.

The local bar staff members Jane and Karen had visited were sorry. They had stamped Jane's hand "underage" but hadn't bothered to monitor bar patrons beyond the front door. Underage dollars made up the largest percentage of their profit and they simply couldn't afford to enforce the drinking age when other bars didn't.

Jane's parents were sorry. She started drinking during her sophomore year of high school. But what could they do? All kids are going to drink with or without their parent's permission.

Who was to blame for the death of Jane Doe? Rank the nine in order of most to least.

- | | | |
|----|----|----|
| 1. | 4. | 7. |
| 2. | 5. | 8. |
| 3. | 6. | 9. |

Was bystander behavior involved in this scenario? Who could have intervened?

What provisions of the Risk Management Policy did Alpha Lambda violate in this scenario?

What could Alpha Lambda have done to reduce their risk in this situation?



IMPLEMENTING CHANGE

1. Form a guiding coalition
For change to be successful, leadership is critical, as is support from a team of influential people, including those who represent all important areas in the organization.
2. Create a vision for change
A vision is critical for helping to direct, align, and inspire your members. Leaders must define a clear and compelling statement that captures what they see as the future of the organization, as well as a strategy for executing that vision.
3. Communicate the vision
It is imperative to communicate the vision frequently and powerfully, and to embed in it everything you do. You must “walk the talk” and demonstrate the type of behavior that is desired of others.
4. Create a sense of urgency around the need for change
In order to really change behaviors, it is important to share information to influence a person’s feelings and not just their thoughts. Help your members see what the change will accomplish and why it is needed now.
5. Remove obstacles
Put in place the infrastructure to support the change. This might involve identifying those who are resisting the change and helping them to see what is needed.
6. Create short-term wins
It is important for members to experience some short-term wins that will build momentum. People need to see compelling evidence of benefits within 6 to 18 months.
7. Build on the change
Don’t stop after the first win. Analyze what went right and wrong, and then set new goals and targets. Keep focusing on continuous improvement.

- What is it that you need to do to empower your members to get them to “buy in” to the change(s)?
- Who are the people that you can invest in as a leader?
- What is it that you have to offer them?
- How can you determine what changed need to be made priorities?
- What can you do if your members are resistant to your ideas for change?
- How do we manage differing commitments, passions, and motivations among our members?
- How can collaborative leadership lead to change?
- Why is change important for our organizations?



SERVANT-BASED LEADERSHIP

Organizational Awareness

- Demonstrating an understanding of the organization's functions and responsibilities
- Considering the organizations mission, vision, values, and strategic goals and objectives
- Knowing the capabilities, capacities, and constraints of the organization
- Reviewing external information and news to learn about political and social issues that might affect the organization
- Identifies opportunities based on unique cultural needs

STAKEHOLDER ENGAGEMENT

1. Understanding

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. It's also important to understand that you're dealing with humans, and I think we can agree that humans don't always behave in a rational, reasonable, consistent or predictable way. You need to have an awareness and understanding 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.

2. Communication

Different stakeholders have different interests, attitudes and priorities. Effective communication ensures that they receive information that is relevant to their needs and builds positive attitudes to your organization. Furthermore, stakeholders must understand what you are trying to achieve. Communication builds an understanding of your goals and the benefits to the audience if they help you achieve those goals. Communication with stakeholders builds dialogue. By setting up forums or inviting other forms of feedback, you can gain a better understanding of your stakeholders' interests and attitudes helping you to build strong relationships.

3. Consulting

Stakeholder consultation involves the development of constructive, productive relationships over the long term. It results in a relationship of mutual benefit; it enables us to identify trends and emerging challenges which are currently or will in the future impact our organization. Listening to stakeholder concerns and feedback is a valuable source of information that can be used to improve project design and outcomes and help organizations identify and control external risks. It can also form the basis for future collaboration and partnerships.

4. Planning

A more conscious and measured approach to stakeholder engagement is essential. Investment in careful planning before engaging stakeholders can bring your organization significant benefits. Consistency in your meetings, agendas, and project management can have great value.



SERVANT-BASED LEADERSHIP

Who are your stakeholders and how will you work differently with each one?

STAKEHOLDER 1:

METHOD:

STAKEHOLDER 2:

METHOD:

STAKEHOLDER 3:

METHOD:

STAKEHOLDER 4:

METHOD:

STAKEHOLDER 5:

METHOD:



SERVANT-BASED LEADERSHIP

ORGANIZATIONAL EMPATHY

is an organizational commitment to developing a deeper understanding of their member's/stakeholder's needs and using that knowledge to serve those needs better. Empathetic organizations are more aware of the impression their behavior leaves on others and are able to modify their verbal and nonverbal behavior to create certain impressions.

What are ways that our organizations can display more organizational empathy?

What do you think having more organizational empathy would create for our organizations?



SERVANT-BASED LEADERSHIP

What does a servant leadership experience look like?

What can we be doing to align our organization experience to be that of a servant leadership organization?



PURPOSEFUL LEADERSHIP

What are the objects or things that all of your members have in common?

What is your Why as a member of your organization?

How can a better understanding of your Why help you to be more successful as an organization or as a leader?

How can we do a better job of focusing on our Why?

TIPS FOR SETTING ORGANIZATION GOALS

1. Know your strengths and weaknesses

Many organizations or businesses conduct a SWOT analysis where they identify their internal Strengths and Weaknesses as well as external Opportunities and Threats. This information will allow you to develop strategies that are relevant and realistic to your organization. Investigate what the future trends may be for your organization. You want to develop objectives that will give you a competitive advantage.

2. Ask yourself where you want to be in 3 months, 1 year, and 5 years

The vision that you have for your organization should be reflected in your organization's objectives. Organizational objectives can be a mixture of both short term and long-term goals. A great tip is to start with your 5-year goals. While you may not be there to experience, your goal should be to leave a legacy. With this mind, where you see your organization in 5 years? What do you want the organization to have achieved by then? Then think about the strategies you want to pursue in order to achieve those goals. These strategies are your 1-year objectives. What you have to do right now to support your organization strategies are your quarterly or monthly goals.

3. Use the SMART model to set your organizational objectives



Specific

Your goal should be clear and specific, otherwise you won't be able to focus your efforts or feel truly motivated to achieve it. When drafting your goal, try to answer the five "W" questions: "What do I want to accomplish?" "Why is this goal important?" "Who is involved?" "Where is it located?" "Which resources or limits are involved?"

Measurable

It's important to have measurable goals, so that you can track your progress and stay motivated. Assessing progress helps you to stay focused, meet your deadlines, and feel the excitement of getting closer to achieving your goal. A measurable goal should address questions such as: "How much?" "How many?" and "How will I know when it's accomplished?"

Achievable

Your goal also needs to be realistic and attainable to be successful. In other words, it should stretch your abilities but still remain possible. When you set an achievable goal, you may be able to identify previously overlooked opportunities or resources that can bring you close to it. An achievable goal will usually answer questions such as: "How can I accomplish this goal?" "How realistic is the goal, based on other constraints, such as financial factors?"

Relevant

This step is about ensuring that your goal matters to you, and that it also aligns with other relevant goals. We all need support and assistance in achieving our goals, but it's important to retain control over them. So, make sure that your plans drive everyone forward, but that you're still responsible for achieving your own goal. A relevant goal can answer "yes" to these questions: "Does this seem worthwhile?" "Is this the right time?" "Does this match our efforts/needs?" "Am I the right person to reach this goal?"

Time-bound

Every goal needs a target date, so that you can have a deadline to focus on and something to work toward. This part of the SMART goal criteria helps to prevent everyday tasks from taking priority over your long-term goals. A time-bound goal will usually answer these questions: "When?" "What can I do six months from now?" "What can I do six weeks from now?" "What can I do today?"



PURPOSEFUL LEADERSHIP

Exercise Instructions:

- Write down a problem or barrier you are currently experiencing.
- Use the SMART Goals Template to create a SMART Goal or SMART Objective.
- Answer the following questions to help create your SMART Goal or Objective. Remember that a goal is the desired outcome to overcome your barrier. Objectives are the smaller steps required to attain your goal.

What is your barrier?

What are you hoping to accomplish?

How will you accomplish it?

When will you accomplish it?

How will you know when it is accomplished?

Are you willing to do this now?

What is your baseline?

What do you want for an outcome?

By what specific date do you want to accomplish your goal?



ADDITIONAL RESOURCES

WHAT'S INSIDE?

- Pyramid overview and grading rubric sample
- Tips for becoming a successful chapter president
 - Suggested organizational flow chart
 - Suggested position descriptions
 - Code of Ethics
- 5 Practices of Exemplary Leadership
 - Be a great communicator
 - Guiding motto's
- Understanding management vs. leadership
 - Utilizing your support team
- Leading a committee to success
 - Planning first steps
 - First 30 days checklist
 - A week in the life as president
 - A year in the life as president
- Fraternity rules and regulations (hyper-linked)
- Administrative duties overview
- How to use ChapterSpot for Triangle membership status routes (hyper-link)
- 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 criterion 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.
4. 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.

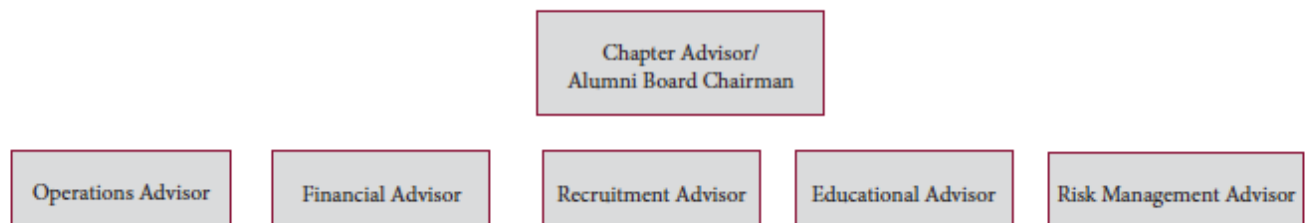
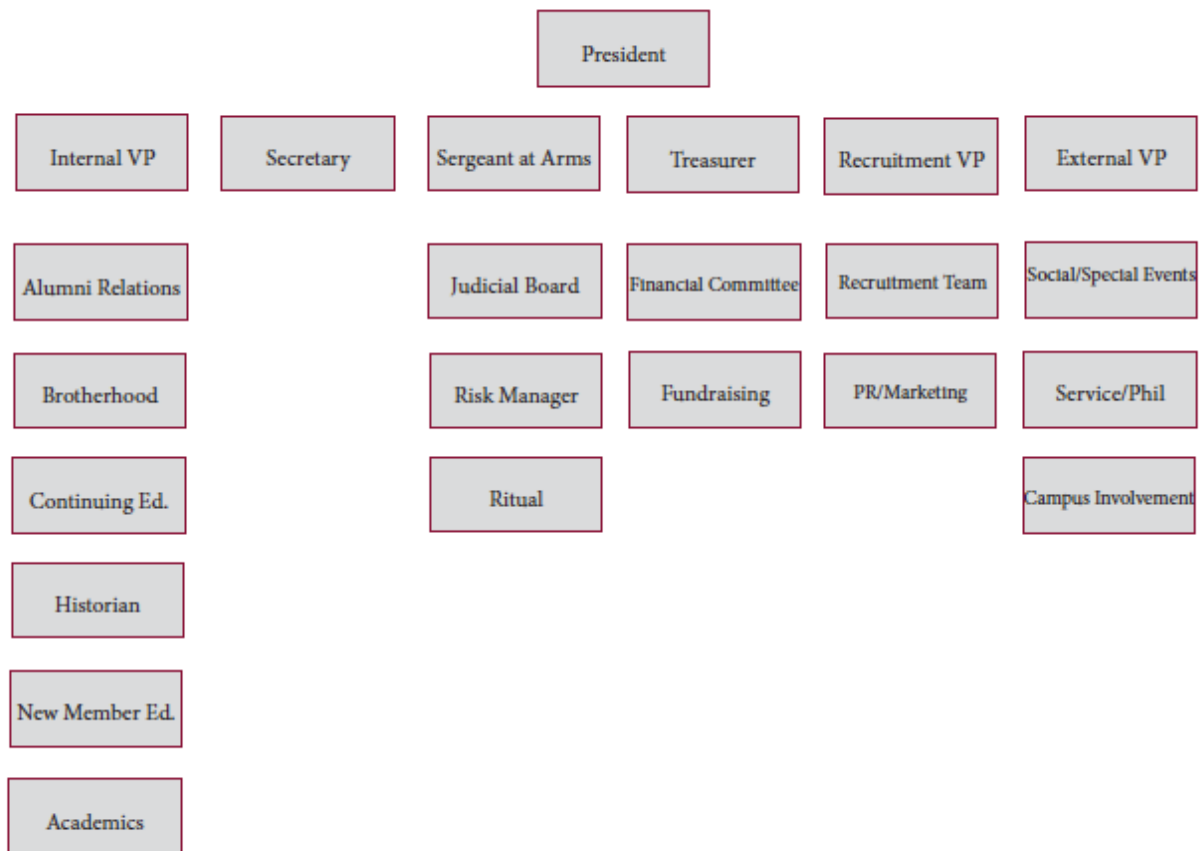
SAMPLE GRADING RUBRIC

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

Tips for 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), 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

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.

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?"

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 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 officer's goals and actions 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

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-DAY 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 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

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 meeting. 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 AS A PRESIDENT

Immediately following elections:

- 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 elections:

- 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.

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	https://www.triangle.org/gradereport/
Submit spring grades	Academic Chair	June 1st	https://www.triangle.org/gradereport/
Submit service hours for fall	Service Chair	February 1st	https://www.triangle.org/gradereport/
Submit service hours for spring	Service Chair	June 1st	https://www.triangle.org/gradereport/
Submit charitable dollars for fall	Philanthropy Chair	February 1st	https://www.triangle.org/gradereport/
Submit charitable dollars for spring	Philanthropy Chair	June 1st	https://www.triangle.org/gradereport/
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.

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Triangle

Let Triangle Save You Money on Graduate School!

Serve Triangle as a Regional Leadership Specialist (RLS) and get back thousands in savings to pursue your graduate degree. Here's how it works:

- 1) You will train in the summer with HQ in chapter management, recruitment and health & safety education. Summer training will occur July 1-August 15. Triangle will provide costs of lodging and a weekly stipend during training.
- 2) After training, you will be based regionally in a Triangle chapter house to assist that chapter and to provide support and programs to other regional chapters. Chapters will provide room and board and some positions will provide stipend or scholarship money for graduate study. Total package will vary by chapter, depending upon grant funds available.

Our goal is to have more well-trained chapter advisory volunteers working directly with our campus chapters, living in and working weekly with their chapter leaders. This position is intended to be 20-25 hours a week, so that you will have time to pursue a graduate degree while also serving Triangle.

Who Should Apply: Ideal Candidates are former Presidents, Treasurers or Recruitment Chairs, or those who have attended LTW officer tracks, Scobie Leadership School or other leadership programs. However, any seniors with chapter/campus leadership experience are welcome to apply. Applications should be received by March 15.

Currently, we expect RLS positions in Fall 2020 for Iowa State, Marquette, Nebraska, Oklahoma, Penn State and Purdue. Other campuses will be added as we receive commitments from their housing boards. Each of these campuses have world-class STEM graduate programs.

Learn more and apply online at <https://www.triangle.org/gradform/> or contact Executive Director Tom Pennington at tom@triangle.org.

Those selected would need to be available for training in Indianapolis July 1-August 15 and will join Triangle staff at Scobie. Pay package during training includes monthly compensation, food and lodging while traveling and all necessary software licenses for staff access.

The Regional Leadership Specialist is a new option to provide trained live-in advisors for more chapters while also allowing more Triangle members to pursue graduate studies at a lower cost. Those chosen will be best qualified to serve their chapter later as alumni chapter officers or to serve Triangle as a regional or national officer or committee member.

Triangle

Fraternity Staff and Duties

Tom Pennington

Executive Director

Email | tom@triangle.org

Phone | 317.837.9640 x 2003

Contact Tom regarding Fraternity operations, National Council or Convention, Triangle Constitution & Bylaws or Regulations, campus situations, or risk management concerns.

Rhonda Halcomb

Director of Operations

Email | rhonda@triangle.org

Phone | 317.837.9640 x 2002

Contact Rhonda for assistance with all fee and membership related issues, including chapter accounts, the financial operations of the Fraternity, questions about jewelry, National Fees, replacement of ritual equipment, membership manuals, pins and badges, as well as address/phone/email changes, Chapter Eternal notification, and pledge and initiation reporting procedures.

Jeff Hughes

Director of Alumni Engagement

Email | jeff@triangle.org

Phone | 317.837.9640

Contact Jeff with questions about TriangleConnect, alumni communications, events and programs, Founders Day events, advisor/volunteer training and resources, and anything else related to working with alumni. Also, Jeff is our liaison with the national FIRST organization.

Drew Hopson

Director of Chapter Services

Email | drew@triangle.org

Phone | 219.928.8633

Contact Drew with questions about chapter operations, officer duties and transitions, chapter planning and goal setting, new member education and chapter risk management. Drew can also help with FHSI programming and the *Tightrope* online education program.

Jim Phillips

Growth Specialist

Email | jim@triangle.org

Phone | 812.719.8132

Contact Jim with questions about chapter recruitment/growth, the Triangle Recruitment Coaches (TRC) program and expansion opportunities or recommendations.

Contact HQ by phone at 317-837-9640 | by email at HQ@triangle.org | or by postal mail at 120 S Center Street, Plainfield, IN 46168. We provide ideas, programs and support for all areas of chapter operations. Call us for assistance before your challenges become overwhelming!

ENGAGE ALUMNI WITH EASE

Developing and implementing a comprehensive plan to communicate with alumni is daunting. Triangle now offers a solution to get better results with half the hassle.



triangle
fraternity
ENGINEERS | ARCHITECTS | SCIENTISTS

Strengthen Your Chapter

It's a known fact that chapters with strong alumni support excel. The reason is because alumni have the wisdom, resources and talent that a chapter needs. Whether it's through donations, volunteer time or opening the door to networking opportunities, alumni are an untapped asset for any chapter success.

Get More for Less

The alumni communication program allows chapters to receive more benefits without having to manage it. The chapter simply provides some content for chapter personalization and can sit back and relax because everything else will be in capable hands.

Services Include



Website Support

Allievates the need to be tech savvy when your chapter has a expert to rely on.



Consistent Delivery

Materials are sent throughout the year on your chapter's behalf.



Easy Customization

Share content that is unique to your chapter.

FOR PRICING AND TO LEARN MORE

CONTACT ALUMNI@TRIANGLE.ORG

ALUMNI COMMUNICATION

PACKAGE OPTIONS	BASIC	EXTENDED	PREMIUM
4-PAGE, FULL COLOR MAILING Send a 4-page, full color customized newsletter to all alumni with valid addresses on file.			
DIGITAL COPY EMAILED Send a digital newsletter version to all alumni with valid email addresses on file.			
CHAPTER DATABASE REVIEW Are your alumni records out-of-date? Get help with cleaning and improving your alumni database.			
CHAPTER WEBSITE SUPPORT Tech support for fraternity sponsored website services and other services (e.g. hosting event registration pages online).			
ANNUAL POSTCARD Send one (1) full color customized postcard to all alumni with valid addresses on file. Design services, available for an additional fee.			
ANNUAL FUND SOLICITATION Includes donation solicitation(s) each year to help fund your chapter's scholarship or other educational needs. (Extended - 1; Premium - 2)			
CHAPTER SPECIFIC GIVING WEBSITE Get a personalized chapter landing page that accepts alumni donations for local dues, your Chapter Endowment Fund (CEF) and more.			
EVENT CONSULTATION Plan an epic alumni event through a one-on-one consultation.			
FULL SERVICE EVENT PLANNING Planning a successful event can be daunting. Let us handle all the heavy lifting for you, from marketing to registration to collecting funds.			
SOCIAL MEDIA STRATEGY & CONSULTATION Speak with our social media experts to help you design a social media strategy that fits your chapter's needs.			
SPEAKERS BUREAU Have an appropriate, well-regarded speaker for your event such as an alumni brother, national councilman, board or staff member.			
	<div>2</div> newsletters per year	<div>3</div> newsletters per year	<div>4</div> newsletters per year

FOR PRICING AND TO LEARN MORE

CONTACT ALUMNI@TRIANGLE.ORG

About FIRST

FIRST (For the Inspiration and Recognition of Science and technology) is a group of robotics programs designed to get K-12 students interested in STEM and develop their skills through mentorship and hands-on learning. FIRST is one of the largest and most successful organizations in the world dedicated to STEM education and careers. More than 480,000 students around the globe participate in FIRST's four programs. Triangle Fraternity is honored to be one of the newest Alliance Partners with FIRST



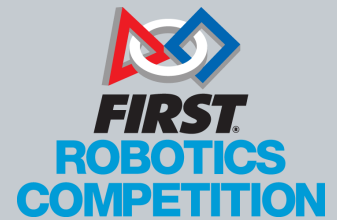
For ages 6-10, FLL Jr. is designed to be a first taste of STEM. Students build LEGO models and create posters to present what they learned at exposition-style competitions.



For grades 4-8, FLL introduces robotics and develops research skills. Students build a LEGO robot to complete challenges and complete a research project to develop a solution to a problem based on the challenge theme.



For grades 7-12, FTC provides a more complex challenge for participants. Students build a mid-size robot using design skills and participate in outreach to grow the FIRST program.



For grades 9-12, FRC is the "Sport of the mind." It combines intense competition and robotics. Students design and build large robots under strict time constraints and are leaders in the outreach efforts of FIRST.

How to Get Involved

FIRST robotics is made possible by its many volunteers. Competitions are run entirely by a volunteer staff and team mentors volunteer their time to work with students. There is always a need for more volunteers and mentors. For someone without prior FIRST experience, the best way to get involved is by volunteering at a competition.

As Alliance Partners of FIRST, Triangle is working to connect our members with FIRST events near them so they can get involved. There is a focus on FRC events because Triangle provides scholarships which FRC students are likely interested in. There are several options for Triangle members to get involved, and sign-up instructions as well as contact information can be found on the next page.

How to Sign Up

1. Visit FIRSTinspires.org and click “register” in the top right corner.
2. Fill out your information to set up your account.
3. Login to your account and view your dashboard. From the top right corner, view and update your profile, Select Triangle as your employer under the “my information” page.
4. From your dashboard, go to the Volunteer Registration tab and select “Volunteer at an event”
5. In the event search portal you can either enter your zip code or search for your event by name.
6. Select your event. Then fill out your availability.
7. Choose your preferred roles. (Recommended: Field reset, Team Queueing, Media, or choose “assign me as needed”)
8. Unless you mentor an FRC team, leave the Team Affiliation page blank.
9. Click the Complete button. On the next page, click “Begin Youth Protection Screening” (this will automatically appear if you are over 18 years old)
10. Complete the screening process as instructed. This may take some time to process, especially for out-of-state or international students. **Register early** so this doesn't become an issue.



More Information

Please reach out with any questions about events, volunteering, tabling, mentoring, or anything else you want to know about FIRST. FIRST also has a lot of great resources on their own website, including some fantastic promotional videos.

Email: Hailee@triangle.org

FIRST website: FIRSTinspires.org

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
2021 - 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 or
www.triangleef.org/scholarships

DEADLINE TO APPLY IS MARCH 1, 2020



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?



Chapter Endowment Funds

Triangle Education Foundation

Triangle Education Foundation Chapter Endowment Fund Program offers a Tax-Deductible way to financially support your chapter!

To address individual chapter needs, the Triangle Education Foundation has developed the Chapter Endowment Fund Program. This program was originally developed by members of local chapters wishing to support the educational and leadership needs of their local chapter. The Chapter Endowment Fund Program is looking to extend this service to all our chapters. The program will give potential donors the opportunity to make a significant gift to the educational programs of your chapter and a charitable tax deduction on your Federal income forms subject to the Federal Tax laws.

Your chapter can now establish its own Chapter Endowment Fund (CEF) with the Triangle Education Foundation. All gifts to the CEF will be held by the Foundation as restricted gifts for the benefit of your chapter for any of the following educational purposes:

1. Scholarship grants to members of your chapter.
2. Educational grants to cover portions of the registration travel and accommodation expenses of members of your chapter attending leadership conferences of Triangle or another accredited leadership development program.
3. Grants for educational resources in your fraternity structure, such as desks, bookcases, books, computers and software in the educational areas and for the construction, renovation, maintenance and equipment of Designated Educational Areas of your chapter home.
4. Educational grants to cover portions of the registration, travel and accommodation expenses of members of your chapter attending professional society meetings and education events.
5. Educational grants to underwrite portions of your chapter's Leadership Advantage session.
6. Educational grants to cover portions of the registration, travel, accommodations, supplies and equipment for academic competitions in which the chapter is participating.

Assets held by your CEF within the Foundation an individual account must reach \$25,000 in principal balance within three years from the date a fund agreement is executed. This exciting program provides opportunities to fund the educational purposes of your chapter and the educational and leadership needs of its undergraduate brothers. The Foundation Directors and staff look forward to hearing from you.

Triangle Chapters with Chapter Endowment Funds

Armour	Cal Poly Pomona	Clemson	Colorado State	Illinois
Iowa State	Kansas	Kansas State	Louisville	Marquette
Michigan	Michigan State	Michigan Tech	Missouri Mines	MSOE
Ohio State	Oklahoma	Penn State	Penn State Behrend	Purdue
Pittsburgh	Rose	South Dakota Mines	Toledo	Utah
Washington				

For information on how to contribute to your chapter's CEF or how to start a CEF for your chapter, please contact Foundation Vice President, Aaron Girson at agirson@triangle.org or call (317)203-4510.

Triangle Chapters with not yet complete Chapter Endowment Funds

The chapters listed below have Chapter Endowment Funds in the process of being funded. If you want to contribute to one of these funds please contact Foundation Vice President, Aaron Girson at agirson@triangle.org

Kentucky Nebraska UCLA

Chapters with a Chapter Endowment Fund via the Young Chapter Program

The chapters listed below do not have fully funded Chapter Endowment Funds, but the Foundation is providing these chapters with \$1,250 a year in CEF funds. In return they are asked to encourage alumni, friends and family to make donations to their fund and grow it over time. This program is open to chapters you are 15 years or younger from the date of their original chartering. To get more information on this program, contact the Foundation's President, Scott Bova at sbova@triangle.org.

Charlotte Virginia Tech

A great way to boost your Chapter Endowment Fund balance is to participation in the Garatoni Building Better Men program.

The Judy and Larry Garatoni Building Better Men Chapter Endowment Fund initiative is a program to recognize outstanding Triangle chapters that are making scholarship, service, leadership development and being a positive influence on their communities a priority. Each year \$100,000 is awarded to the top chapter, \$25,000 runner up chapter and \$25,000 to a young chapter (Rattle Award). Chapter Endowment Funds may be used by the chapters to fund educational programming, leadership development initiatives, academic achievement programs and scholarships.

The 2020 Judy and Larry Garatoni Building Better Men Chapter Endowment Fund competition is underway; all Triangle chapters and colonies are eligible to participate.

For more questions on the Garatoni Building Better Men program or general Triangle Education Foundation questions, please contact Scott Bova, CFRE, President of the Foundation at sbova@triangle.org or at 317- 837-9641.

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!





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.





Triangle Building and Housing Corporation Property Improvement Contest

Does your chapter want extra money to help improve your chapter house? Apply for your share of the \$10,000 awarded annually to chapters as part of the TBHC Property Improvement Contest!

Previous projects have included building workshops, replacing doors and windows, planting gardens, replacing driveways, improving bathrooms, rennovating rec spaces, and more!

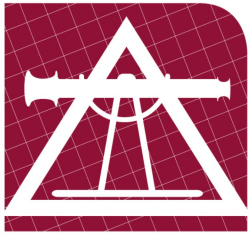


For 2019-20, the maximum individual grant award is \$1,000. There is \$10,000 available for all grants. All proposals will be considered against the following criteria:

1. We encourage alumni participation. Points will be awarded for including alumni, with maximum points for 4+ alumni participating in the project.
2. We encourage chapter members to be involved. Maximum points are awarded for 90% of the chapter being involved in the project.
3. We encourage members to take a hands-on role in projects whenever feasible. Maximum points are awarded for no third parties completing the work.
4. We believe that while functionality is important, so too are project appearances. Points will be awarded for aesthetic value.
5. We encourage the improvement of things that will impact the most people. Points are awarded for improving or adding items that are significantly used. For example, a common room improvement for a chapter house will earn more points than a single bedroom.
6. We encourage chapters to improve safety and well-being. Points will be awarded for projects that may have a positive effect on safety or on insurance rates.
7. We all strive to make the world a better place. Points will be awarded for improvements that impact the greater community beyond the chapter.
8. All project proposals will also be evaluated for their overall organization and "wow" factor.

To apply, scan the QR code to be taken to the application form or go to <https://www.triangle.org/activities/property-improvement-contest/>. After applying your proposal will be evaluated and grant money will be awarded to winners. If awarded funding, you must submit photos of the completed project as well as a short summary of how the project went to pic@trianglebhc.org. Please direct any questions to pic@trianglebhc.org or mfouts@trianglebhc.org.





TRIANGLE BUILDING & HOUSING CORP.

BUILDING TRIANGLE'S FUTURE

Fall 2019

Oklahoma's Friendship Extends Beyond Their Walls and Into the Community

The men of the Oklahoma Chapter have transformed a turbulent history with their residential neighbors into a great example of how to reach out and serve the surrounding community.

The historic, architecturally significant chapter house was originally built in 1930 for another fraternity. A couple of years later, it was sold to a sorority. Purchased in 1959 by a religious organization, it was then transitioned

for use as a retirement home and served as such for more than 40 years.

Triangle acquired the property at auction in 2000, with help from the TBHC. With 22 bedrooms, a commercial kitchen and other useful common spaces, this was viewed as a good investment for a fraternity of modest size. Its location close to campus engineering facilities was seen as a convenient plus.

Since the house sits in a residential area composed largely of single-family dwellings, the local neighborhood organization objected to Triangle's purchase from the very beginning. The neighbors had hoped that the house would be converted to a



The Oklahoma Chapter Home.

Contact Mike Fouts at mfouts@trianglebhc.org or (317) 203-4506

Check out triangle.org/tbhc for more info

Oklahoma's Friendship Extends Beyond Their Walls and Into the Community (cont.)

private residence. The concerns associated with the purchase eventually led the neighborhood group to bring suit, attempting to prevent the fraternity from occupying the property. The TBHC helped to fund the legal defense of our property rights.

Attorneys for Triangle based their response to the suit on the argument that use of the structure as a fraternity was essentially the same as its prior use as a retirement home. Additionally, they pled the case for its original 1930 zoning exception to operate as a fraternal organization [see Property Wars article in last TBHC newsletter, and Supreme Court case *Euclid v Ambler Realty* 272 US 365 (1926)].

Despite their efforts, the City of Norman declined to continue the zoning exception. The case then proceeded to progress through several courts.

In the first two years after Triangle's purchase of the house, it was occupied by the maximum allowed number of three brothers. Because that did not produce enough income to pay expenses, the building was temporarily leased out to another organization. The legal case finally reached the Oklahoma Supreme Court in 2002.

In a surprising turn of events, the state supreme court rendered a decision in favor of Triangle Fraternity (*Triangle v City of Norman* 2002 OK 80). By overturning previous decisions, a judgement was entered against the City of Norman to allow occupation of the house by the fraternity. Thus it happened that, in January of 2003, a total of 12 men moved into the chapter house. Plans were put into place for necessary renovations to the 73-year-old property.

As one might imagine, relationships with the long-standing residents of the surrounding neighborhood were rough. The community



A farewell cookout for one of the neighbors .

Contact Mike Fouts at mfouts@trianglebhc.org or (317) 203-4506

Check out triangle.org/tbhc for more info

Oklahoma's Friendship Extends Beyond Their Walls and Into the Community (cont.)

association was not happy about the fraternity utilizing their property, fearing that a Greek organization might make modifications to a historic landmark cherished by the neighborhood. Triangle men, all too aware of their neighbors' opposition to the presence of a fraternity, kept to themselves and their own interests while seeking to recruit and build the Oklahoma Chapter.

It turns out, Maintaining a Chapter Home has a way of healing wounds.

Neal Helfrey rit08, a transplanted alumnus, has lived in the Oklahoma house as superintendent for the past two years. He describes his first contact with a neighborhood homeowner. "I was working hard at the house when I assumed the role of superintendent. Gutting some of the interior areas for renovation, painting outside and in, cleaning and so on. It was a big job! A lot had been neglected for quite a while. I loved it, but it was hard work." As he toiled outside the building one day, a neighbor ambled over to chat and compliment him on the effort he was making to improve the property. That conversation was a beginning. "That was Lee Hall, president of the neighborhood association. She had only lived across the street for a couple of years, but was aware of the troublesome history between the residents and the Chapter. We started talking and hit it off right from the beginning! That conversation opened up the opportunity to continue speaking to each other occasionally."

When people start talking, things change. It wasn't long before Hall reached out to the chapter president with an idea. She tells the story with great enthusiasm. "I asked if he (the president) would be interested in hosting a neighborhood get-together at the house. They have a big front yard which I thought would make a great gathering place for everyone. He was very willing!" The event was scheduled and the neighbors turned out in good number, along with many of the Triangle men. Hall adds, "And the fraternity was so gracious. They provided ice cream for the event. It was a wonderful time."

The next thing that evolved from those first



Pumpkin carving event for the neighborhood.

Contact Mike Fouts at mfouts@trianglebhc.org or (317) 203-4506

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Oklahoma's Friendship Extends Beyond Their Walls and Into the Community (cont.)

steps toward reconciliation was a Halloween event for the neighborhood children. Helfrey recalls the conversation when Hall broached the idea. "She came to us and asked if we would mind them doing a pumpkin-carving party on the lawn. Our

answer was 'Yes. Can we help?' " Hall nostalgically remembers the involvement of the Chapter at that event. "It was fun for the neighbors, a safe place for the kids to trick-or-treat. When we reached out to the men, they were – once again – very willing. They helped get pumpkins ready for carving, they set up tables, they played with the kids. It felt like we were really building a relationship."

The Active President to whom Hall originally reached out with her idea for neighborhood events was Trevor Cooper ok15. He echoes her sentiments regarding those early gatherings and the subsequent impact of bringing everyone together. "The men of Triangle and I believed that having and supporting the neighborhood events was a great way to show our neighbors that we could have a positive influence on the community. The biggest influence



Lee Hall, Chautauqua
Homeowners Association

in our relationship is our neighbors Lee and Rick Hall. In reality, the only steps I had to take were to support the neighborhood programming and encourage Triangle members to assist at these events. Due to this, most of the neighbors who were originally against us occupying the house eventually seemed content to have us live there..."

Those first couple of neighborhood gatherings proved to be the launch pad for additional events. In 2017, Triangle opened up the house for a tour and a hamburger cookout on that big front yard. Local families from 15 different households showed up, along with most of the active members and several alumni who had been actives during the court cases. The event was successful at shedding light on both sides of the earlier issue, and brought everyone together.

Hall said, "Because the old house had not been properly maintained, Neal did a lot of interior renovations, selling off lots of stuff that had been left behind, replacing old stuff with new furnishings, refinishing the floor, painting. There were lots of updates to increase membership. He did everything under the sun to create a good environment. It was a wonder to watch! Everyone was very impressed. We all loved what he tried to do.

"Neal was just such a positive representative of the chapter. Great guy, so responsible in trying to take care of the house and model that for the guys. The neighbors now try to support all of them during finals week with snacks. We make a concerted effort to get to know the Active Presidents and the guys

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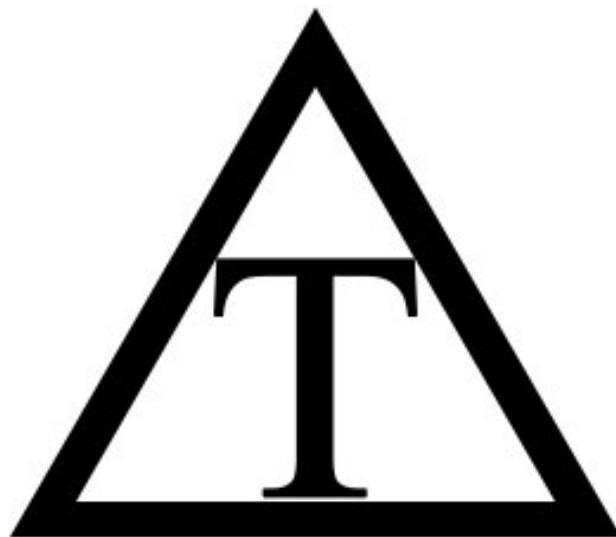
we've worked with. We all make great neighbors now! It is truly an intergenerational, very diverse neighborhood."

There are more necessary improvements and upgrades needed for the house, and the chapter continues to work with the TBHC to accomplish those goals within a fiscally responsible and budget-conscious timeline. It is a journey that includes investment from the National level, a belief in the sustainability of the chapter, and open lines of communication every step of the way. Even long-term observers of the process freely acknowledge the impact of a good relationship between all parties involved.

Cooper, now serving as president of the Alumni Board, sums up the past

experiences and the impact those have on the future. "I see the relationship continuing to grow, moving forward. It is my goal as Alumni Board President to express the importance of building these relationships. I am still very local, in graduate school at the University of Oklahoma. Since I am a five-minute drive from the house, I have made it a point to be there multiple times a month, if not multiple times a week. I am definitely planning on joining them for their now-annual pumpkin-carving event later this month! Whenever my time as Chairman is complete, I plan on educating my successor about the importance of these relationships."

The feeling of friendship and mutual support within a group is certainly a good definition of a fraternity. In the case of Triangle Oklahoma, it also defines an entire neighborhood.



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National Convention 2019 – Indianapolis

The Triangle Building and Housing Corporation hosted dinner at Victory Field during the National Convention on July 19. Traditional baseball stadium fare was provided, along with tickets for the ball game: the AAA Indianapolis Indians, the farm team for the Pittsburgh Pirates, played against the Durham Bulls. We hosted this event to do our part during the Convention, as well as expose more people to the services of the TBHC. As a bonus, everyone received an extra serving of Brotherhood as well.



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The TBHC Strategic Plan

Many don't know or understand the Triangle Building and Housing Corporation's role. To this end, we formed a Strategic Plan as we converted from a fund within the Fraternity to our current, separate organization.

Some years prior, we were challenged to do more. We foresaw not only to do more, but to do something that no other branch of Triangle could do.

Owning a Chapter Home is far more difficult than being a homeowner, and to make it worse is now fraught with legal issues as well. This complexity distracts Alumni and Actives from concentrating on their Brotherhood.

In response, we developed a simple four-point Strategic Plan which we have operated under since before our formal recognition as the TBHC. As the Fraternity, the Education Foundation, and the Building & Housing Corporation work together to develop a new Strategic Plan, we believe these points are still appropriate :

- **Ease or remove burden on actives/alumni for housing**
(This allows Chapters to refocus resources on mentoring, personal development and Brotherhood.)
- **Provide an enhanced role for management of fraternity housing**
(To improve the Chapter's environment, safety and appeal to actives/alumni/future actives.)
- **Increase Services to enhance Chapter Life**
(We help support services to Alumni through the other branches of Triangle)
- **Reposition Triangle Assets to improve liability exposure**
(To avoid keeping all your "eggs in a single basket")

We help with the housing business.

You can focus on your Chapter's business!

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