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# WAKERLY SERVICE LEARNING WORKSHOP

2020 PARTICIPANT WORKBOOK

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## 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

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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](http://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



## CODE OF ETHICS

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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.

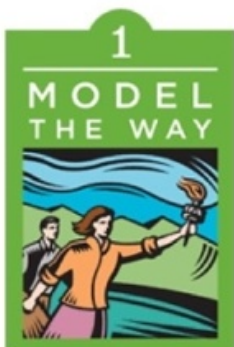




## LEADERSHIP 101

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- 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

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### 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?

## Helping, Fixing or Serving?

By Rachel Naomi Remen

"Fixing and helping create a distance between people, but we cannot serve at a distance. We can only serve that to which we are profoundly connected."

Helping, fixing and serving represent three different ways of seeing life. When you help, you see life as weak. When you fix, you see life as broken. When you serve, you see life as whole. Fixing and helping may be the work of the ego, and service the work of the soul.

Service rests on the premise that the nature of life is sacred, that life is a holy mystery which has an unknown purpose. When we serve, we know that we belong to life and to that purpose. From the perspective of service, we are all connected: All suffering is like my suffering and all joy is like my joy. The impulse to serve emerges naturally and inevitably from this way of seeing.

Serving is different from helping. Helping is not a relationship between equals. A helper may see others as weaker than they are, needier than they are, and people often feel this inequality. The danger in helping is that we may inadvertently take away from people more than we could ever give them; we may diminish their self-esteem, their sense of worth, integrity or even wholeness.

When we help, we become aware of our own strength. But when we serve, we don't serve with our strength; we serve with ourselves, and we draw from all of our experiences. Our limitations serve; our wounds serve; even our darkness can serve. My pain is the source of my compassion; my woundedness is the key to my empathy.

Serving makes us aware of our wholeness and its power. The wholeness in us serves the wholeness in others and the wholeness in life. The wholeness in you is the same as the wholeness in me. Service is a relationship between equals: our service strengthens us as well as others. Fixing and helping are draining, and over time we may burn out, but service is renewing. When we serve, our work itself will renew us. In helping we may find a sense of satisfaction; in serving we find a sense of gratitude.

Harry, an emergency physician, tells a story about discovering this. One evening on his shift in a busy emergency room, a woman was brought in about to give birth. When he examined her, Harry realized immediately that her obstetrician would not be able to get there in time and he was going to deliver this baby himself. Harry likes the technical challenge of delivering babies, and he was pleased. The team swung into action, one nurse hastily opening the instrument packs and two others standing at the foot of the table on either side of Harry, supporting the woman's legs on their shoulders and murmuring reassurance. The baby was born almost immediately.

While the infant was still attached to her mother, Harry laid her along his left forearm. Holding the back of her head in his left hand, he took a suction bulb in his right and began to clear her mouth and nose of mucous. Suddenly, the baby opened her eyes and looked directly at him. In that instant, Harry stepped past all of his training and realized a very simple thing: that he was the first human being this baby girl had ever seen. He felt his heart go out to her in welcome from all people everywhere, and tears came to his eyes.

Harry has delivered hundreds of babies and has always enjoyed the excitement of making rapid decisions and testing his own competency. But he says that he had never let himself experience the meaning of what he was doing before or recognize what he was serving with his expertise. In that flash of recognition, he felt years of cynicism and fatigue fall away and remembered why he had chosen this work in the first place. All his hard work and personal sacrifice suddenly seemed to him to be worth it.

He feels now that, in a certain sense, this was the first baby he ever delivered. In the past he had been preoccupied with his expertise, assessing and responding to needs and dangers. He had been there many times as an expert, but never

before as a human being. He wonders how many other such moments of connection to life he has missed. He suspects there have been many.

As Harry discovered, serving is different from fixing. In fixing, we see others as broken, and respond to this perception with our expertise. Fixers trust their own expertise but may not see the wholeness in another person or trust the integrity of the life in them. When we serve we see and trust that wholeness. We respond to it and collaborate with it. And when we see the wholeness in another, we strengthen it. They may then be able to see it for themselves for the first time.

One woman who served me profoundly is probably unaware of the difference she made in my life. In fact, I do not even know her last name and I am sure she has long forgotten mine.

At twenty-nine, because of Crohn's Disease, much of my intestine was removed surgically and I was left with an ileostomy. A loop of bowel opens on my abdomen and an ingeniously designed plastic appliance which I remove and replace every few days covers it. Not an easy thing for a young woman to live with, and I was not at all sure that I would be able to do this. While this surgery had given me back much of my vitality, the appliance and the profound change in my body made me feel hopelessly different, permanently shut out of the world of femininity and elegance.

At the beginning, before I could change my appliance myself, it was changed for me by nurse specialists called enterostomal therapists. These white-coated experts were women my own age. They would enter my hospital room, put on an apron, a mask and gloves, and then remove and replace my appliance. The task completed, they would strip off all their protective clothing. Then they would carefully wash their hands. This elaborate ritual made it harder for me. I felt shamed.

One day a woman I had never met before came to do this task. It was late in the day and she was dressed not in a white coat but in a silk dress, heels and stockings. She looked as if she was about to meet someone for dinner. In a friendly way she told me her first name and asked if I wished to have my ileostomy changed. When I nodded, she pulled back my covers, produced a new appliance, and in the most simple and natural way imaginable removed my old one and replaced it, without putting on gloves. I remember watching her hands. She had washed them carefully before she touched me. They were soft and gentle and beautifully cared for. She was wearing a pale pink nail polish and her delicate rings were gold.

At first, I was stunned by this break in professional procedure. But as she laughed and spoke with me in the most ordinary and easy way, I suddenly felt a great wave of unsuspected strength come up from someplace deep in me, and I knew without the slightest doubt that I could do this. I could find a way. It was going to be all right.

I doubt that she ever knew what her willingness to touch me in such a natural way meant to me. In ten minutes she not only tended my body, but healed my wounds. What is most professional is not always what best serves and strengthens the wholeness in others. Fixing and helping create a distance between people, an experience of difference. We cannot serve at a distance. We can only serve that to which we are profoundly connected, that which we are willing to touch. Fixing and helping are strategies to repair life. We serve life not because it is broken but because it is holy.

Serving requires us to know that our humanity is more powerful than our expertise. In forty-five years of chronic illness I have been helped by a great number of people, and fixed by a great many others who did not recognize my wholeness. All that fixing and helping left me wounded in some important and fundamental ways. Only service heals. Service is not an experience of strength or expertise; service is an experience of mystery, surrender and awe. Helpers and fixers feel causal. Servers may experience from time to time a sense of being used by larger unknown forces. Those who serve have traded a sense of mastery for an experience of mystery, and in doing so have transformed their work and their lives into practice.

Rachel Naomi Remen, M.D. is Associate Clinical Professor of Family and Community Medicine at U.C.S.F. Medical School and co-founder and medical director of the Commonweal Cancer Help Program. She is author of the bestseller, *Kitchen Table Wisdom: Stories That Heal*.  
Helping, Fixing or Serving?, Rachel Naomi Remen, Shambhala Sun, September 1999.



## DEFINING SERVICE

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How many of you have heard of the concept of a servant leader?

What do you think would be some qualities of a servant leader?

# 6 QUALITIES OF SERVICE LEARNING

## 1. INTEGRATIVE

The service-learning experience goes beyond traditional ideas of classroom learning, practicum training or off-campus volunteering. Service-learning holistically integrates class learning objectives, faculty guidance, as well as community perspective and priorities. When engaged in genuine service students participate as both learners as community members. Students demonstrate success both academically and interpersonally.

## 2. REFLECTIVE

The process of reflection is a core component of service-learning. Service-learning practitioners and researchers alike have concluded that the most effective service-learning experiences are those that provide structured opportunities for learners to critically reflect upon their service experience. Structured opportunities for reflection can enable learners to examine and form the beliefs, values, opinions, assumptions, judgments and practices related to an action or experience, gain a deeper understanding of them and construct their own meaning and significance for future actions.” (Moon, 1999, as cited in Conner & Seifer, 2005)

## 3. CONTEXTUALIZED

Service-learning provides students a unique opportunity to access knowledge and expertise that resides in the context of community. There is opportunity to connect the knowledge of a discipline, as explored in class, to the knowledge in practice, as evidenced in communities. Learning experiences in community settings immerse students in the unpredictable and complex nature of real world situations. Working alongside community members and experienced professionals, the opportunity to construct learning and responses can be immediate and uncontrived.

## 4. STRENGTHS-BASED

Service-learning draws upon existing community strengths and resources, and honors community members and organizations as co-educators of students. Communities are never built from the outside in. A strength-based approach focuses on the capacity and expertise in every community, rather than on what is absent. By shifting away from a deficit mentality, students learn partnership strategies to identify and develop each community’s unique strengths.

## 5. RECIPROCAL

The service-learning relationship offers all parties involved some measure of benefits; it is a two way street. Students give time, talent and intellectual capital in order to gain a deeper understanding of learning objectives and the nuanced nature of social issues. Community members and organizations invest time as co-educators and in turn accomplish more toward their mission and goals through the work of the students.

## 6. LIFELONG

Service-learning is learning that sticks. By synthesizing theory and practice, this educational method provides a distinctive, meaningful and influential life experience. Students build relationships, solve problems, value a sense of community and gain self-awareness. Service-learning is beyond memorable; it can influence one’s career path and enhance civic responsibility. Service-learning lays the foundation for continual personal growth throughout the participants experience and beyond.

*M. Clevenger-Bright, K. Hays, L. Henricksen, D. Hlebain, J. Maglalang, M. Packard, K. Pursch Cornforth, D. Raftus. UW, 2012.*



## 5 CRITICAL ELEMENTS OF MEANINGFUL SERVICE

### 1. COMMUNITY VOICE

Community voice includes the consideration for the voice and the needs of the community. You have to allow the community to define what needs to be done before developing a project.

Community voice is essential to building connections, making changes and solving problems.

### 2. ORIENTATION & TRAINING

Leaders should provide information to volunteers about the community. Information should cover necessary protocol to ensure proper behavior at service site.

It is important that before you get on site that you have been briefed on the history and background of the organization you are partnering with. Not only will these help prepare you for proper protocols and behaviors but it will create a deeper connection to the cause in each of your members.

### 3. MEANINGFUL ACTION

The service that you are doing needs to be necessary and valuable to the community served so that volunteers feel their actions are making a difference, and so that a difference is actually being made.

So, what does this look like? Say your campus is near a beach and it has always been the tradition to do monthly beach sweeps. In August at the end of “vacation season” it would make sense to offer this service. But in December or other winter months when the beach doesn’t see a lot of traffic, the service is almost wasted.

Members don’t want to waste their time by walking up and down a beach pretending to make a difference. Give your members and you community something that matters.

### 4. REFLECTION

Participants should share stories, thoughts, and reactions immediately after the experience. Similarly to the idea of service-learning, reflection may dispel stereotypes of groups served or address individual’s alienation. Reflection also offers an opportunity to place the experience in a broader concept.

Going into some service events you may have a perception - sometimes negative, of what the experience and people will be like. But then you get there and you hear their stories and see how appreciative they are of you spending your Saturday afternoon with them. You walk out feeling completely different and inspired. Those are the situations and the feelings that should be reflected upon and shared.

### 5. EVALUATION

Evaluation measures the impact and effectiveness of participants’ service. Participants should evaluate what was learned and agencies should evaluate the results of contribution by participants. Evaluation gives direction for improvement and change.

It is critical to evaluate and measure the impact of the service event that you participated in. Like all programs, assessing the execution will help you plan & improve for the future.

For example, everything about your program may have been great except that it was outside on the hottest day of the year and you didn’t have water for your members. Small things like that could vastly improve the experience of your members, so it’s important to make note of it!



# ΑΣΦ

## ALPHA SIGMA PHI

alphasigmaphi.org

### COMMUNITY SERVICE vs. PHILANTHROPY

Philanthropy is the act of raising money for charity (e.g. carwash to benefit RAINN). Community service is the act of doing hands-on service to a charity or for a cause (e.g. food pantry).

If you have any questions regarding the difference between community service and philanthropy, please contact Alpha Sigma Phi Headquarters.

#### COMMUNITY SERVICE IDEAS

##### Senior citizens

- Adopt a "grand friend" from a local nursing home.
- Volunteer at a nursing home for a day or even each week.
- Host a senior citizens prom where men are escorts for the elderly women and sorority women are escorts for the elderly men. Get a band to play classic tunes.
- Hold a play or "lip sync" for the nursing home.
- Have dance lessons set up where the people from the nursing homes teach students dances from "back in the day."
- On holidays make cards, bake cookies, have a secret Santa, or host a holiday party at the nursing home.
- Develop a monthly classic movie night at the nursing home.
- Have a game afternoon where you play cards or board games with a senior citizen at the nursing home.

##### Animals

- Volunteer at the local animal shelter by walking dogs or cleaning kennels.
- With a local vet organize a neuter and spay program for a reduced rate.
- Organize a community dog wash with donations going to a local shelter.
- Organize and host an "adopt a pet" at your school where a local shelter will bring up some of the animals to your school to get them noticed by students, faculty, and administration in hopes of someone adopting them.

##### Special Needs

- Volunteer at the Special Olympics.
- Set up a buddy system at a local school.
- Read books for children.
- Make gifts, cards, or cookies and visit kids in the hospital during the holidays; they look up to college students.
- Have a toy drive for children in the Hospital over the Holidays.
- Participate in Up 'til Dawn if your school already has one.
- Participate in a marathon for a sickness or disability.
- Participate in Relay for Life.
- Participate in or organize a Toys for Tots program. This is a toy drive for families who can't afford to give their children a good Christmas.

##### Veterans/Military

- Volunteer to help at your American Legion.
- Place small American flags on veteran's graves.
- Write thank you cards to veterans in the area.
- Develop a "Care Package" for troops. Have people donate things troops may need food, batteries, toilet paper, razors, shampoo, toothpaste, etc. Then mail the shoeboxes across seas to troops.



## COMMUNITY SERVICE vs. PHILANTHROPY

### Neighborhood

- Volunteer with Habitat for Humanity.
- Volunteer to clean up a park.
- Adopt a highway or portion of road and keep it litter free.
- Host a community carnival.
- Adopt a billboard and use it for a public service announcement.
- Adopt, repair, and clean up a local playground.
- Have a supplies drive for families who have lost their possessions in a house fire and collect things such as clothes, non-perishable food, furniture, etc.
- Shovel walkways and driveways in your neighborhood, for free, after a snow storm.

### School

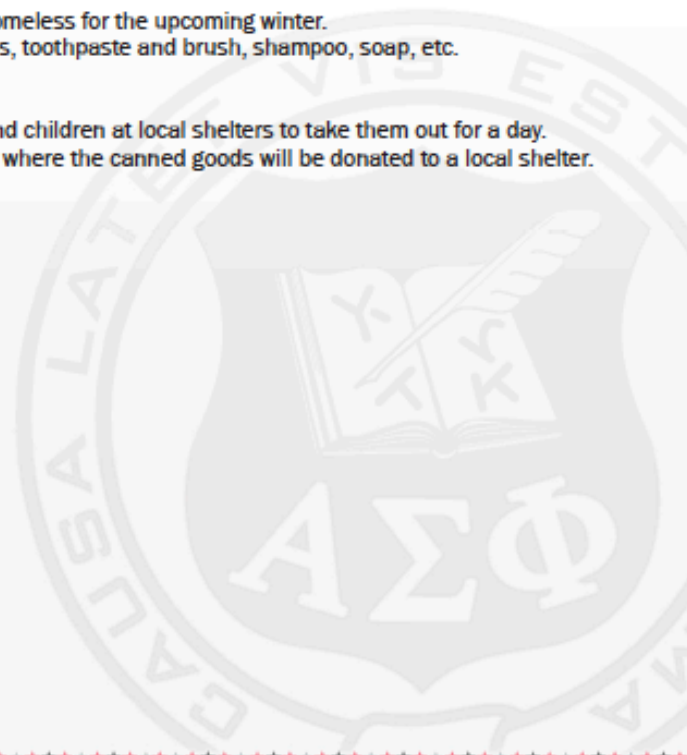
- Create "New Student Survival Kits" to hand out on move-in weekends to new students.
- Volunteer tutoring services.
- Contact the dining facilities to collect unused food to donate to a local homeless shelter.
- Collect school supplies for needy children at a local school.
- Volunteer your service at local schools help with ESL (English as a Second Language students learn English
- Volunteer for an afterschool program at a local school to play, read, or tutor children.
- Develop, organize, and host a "Spring Clean" for your campus where volunteers help clean up campus, plant flowers, de-weed flower beds, etc.
- Hold a blood drive for the American Red Cross.
- Bring in a guest speaker from MADD (Mothers Against Drunk Driving) to speak or raise money for this program.
- Organize a Spring Break trip where you go somewhere to do missionary work or other community services activities across the U.S.
- Develop a recycling program if your school doesn't have one.
- Volunteer your time to visit Middle School and High Schools to talk about your college /university experiences and how important it is to go to college.

### Hungry/Homeless

- Help cook/serve meals at a local shelter.
- Have an non-perishable food drive for a local shelter or families who need food.
- Have a clothing drive for the homeless.
- Have a coat drive in the fall to collect coats for the homeless for the upcoming winter.
- Make "I Care" kits to give to the homeless with combs, toothpaste and brush, shampoo, soap, etc.
- Pack and hand out food at a local food bank.
- Bake food to donate to a local shelter
- Develop a "Big Buddy" program with the members and children at local shelters to take them out for a day.
- Trick-or-Treat for cans instead of candy on Halloween where the canned goods will be donated to a local shelter.

### Ten Places to Volunteer:

- Animal shelters
- National or local parks
- Food pantries or food banks
- Habitat for Humanity
- Local libraries
- Museums
- Political campaigns
- YMCA
- Red Cross
- Retirement homes



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## PHILANTHROPY/CHARITIES IDEAS

Your chapter can raise funds in support of any of the organizations listed below:

### Habitat for Humanity

- Raise money to support a volunteer weekend to help build a house.

### Canine for Companions

- Raise money to support the local animal shelter.
- Set up a donation drive at your school for people to donate dog/cat food, toys, bowls, leashes, etc. for a local animal shelter.
- Raise money for animals through a photo with your pet event where the proceeds go to the shelter.

### St. Jude's Children's Research Hospital

- Organize and host "Up 'til Dawn" at your campus for St. Jude's Children's Research Hospital, a hospital for children with cancer where all children receive free treatment and no child is turned away.

### Amazon Rain Forest

- Sell acres of the rainforest to students to help save the rainforest.

### Relay For Life

- Set up a team and participate while raising money for the team.

### MADD (Mothers Against Drunk Driving)

- Have a 3 on 3 basketball tournament where all funds raised go to MADD.

### Red Cross

- Raise money to help sponsor a blood drive at your school.

### American Cancer Society

- Raise money and participate in a marathon/5k/walk for cancer.

### Goodwill

- Have a clothing drive at your school where all the donated clothes/money goes to Goodwill.

### Boys and Girls Club

- Raise money to support the Boys and Girls Club and spend time with them after they receive the donation.

### Make a Wish Foundation

- Have a dance where you sell tickets and possibly have a silent auction with all mproceeds going to one child's wish.

### Local Wildlife Center

- Volunteer your time feeding the animals and cleaning cages.
- Raise money and awareness by having one of the center's handlers bring in some of the animals and do a presentation at the school. Sell tickets, have an adopt an animal fund, sell merchandise, sell pictures with student's favorite animal.

### Boy Scouts of America

- Volunteer your time to speak with them or participate in one of their events.

### Food for the Poor

- Have a canned food drive.
- Volunteer your time at the soup kitchen.

### American Heart Association

- Have an Healthy Heart awareness week at your school with a week full of events.

### Special Olympics

- Volunteer your time with events at your local special Olympics.

### Toys for Tots

- Raise money through a silent auction and donate the funds.

### Additional Philanthropic Organizations:

American Lung Association, AmeriCares, Big Brothers/Big Sisters, Bill and Melinda Gates Foundation, CARE USA, Children's Miracle Network, Cleveland Clinic Foundation, Disabled American Veterans, Feed America, Feed the Children, Ford Foundation, Local Museum, March of Dimes, Mayo Foundation, National Wildlife Federation, Ronald McDonald House, Salvation Army, Shriners Hospital for Children, SOS Children, Susan G Komen Breast Cancer Foundation, United Way, Wildlife Conservation Society, World Vision, World Wildlife Fund





## HISTORY OF LEADERSHIP ADVANTAGE

Leadership Advantage was conceived and brought to life at Iowa State University in 1997 by Triangle Fraternity, The Society of Women Engineers, and the Iowa State Student Activities Center Brothers Matt Ostanik and Chris Moe evolved the program tremendously during the first 4 years. The first year the program held one session. Fifteen participants stayed at the Triangle Fraternity house during the program and interacted in a variety of activities.

Participants were broken into three teams, each lead by two student facilitators, and did challenge course activities, visited with two local engineering firms, lunched with representatives from different colleges, did a written leadership evaluation, and engaged in presentations by different college student organization. In addition, participants worked in teams on two different design projects. Participants used on-campus resources including studios, computer labs, and architecture professors to develop projects. The results were then presented on the final day of the seminar.

Response was so great to the programs first year that the following two sessions were offered and filled, reaching a total of 44 students in 1998. Since then, the program has continued to grow each year, completing its seventh session over four years at Iowa State in June 2000. Students at other universities have started to organize Leadership Advantage on their campuses as well. Leadership Advantage began at the University of Louisville in 2000 and has received campus life awards for Best Collaboration and Best New Program.







## SAMPLE LA FACILITATOR SCHEDULE (MSU)

PROGRAM SCHEDULE 2017	
Day 1 - Wednesday, August 23rd	
10:00am - 3:00pm	Participant Move-In
7:00pm - 10:00pm	Evening Activity
Day 2 - Thursday, August 24th	
9:00am - 9:40am	Breakfast
9:40am - 10:00am	Program Introduction
10:00am - 10:20am	Lawnchair Design/Brainstorming
10:20am - 11:10am	Lawnchair Presentations (4 min per group)
11:15am - 11:55am	Design Project Intro
12:00pm - 1:00pm	Lunch - WIE
1:30pm - 2:30pm	Cyclotron Presentation and Virtual Tour
2:40pm - 2:55pm	Leadership and Teamwork Exercise 1 - Rotation 1
3:00pm - 3:15pm	Leadership and Teamwork Exercise 1 - Rotation 2
3:20pm - 3:35pm	Leadership and Teamwork Exercise 1 - Rotation 3
3:45pm - 5:00pm	Trebuchet Design Break-out
5:00pm - 6:00pm	Major Dinner
8:00pm - 10:00pm	Evening Activity
Day 3 - Friday, August 25th	
9:00am - 9:40am	Breakfast
9:45am - 10:40am	Egg Drop Design/Brainstorming
10:45am - 11:15am	Egg Drop Design Competition
11:15am - 12:00pm	Trebuchet Design Break-out
12:00pm - 1:00pm	Lunch
1:10pm - 1:25pm	Leadership and Teamwork Exercise 2- Rotation 1
1:30pm - 1:40pm	Leadership and Teamwork Exercise 2 - Rotation 2
1:45pm - 1:55pm	Leadership and Teamwork Exercise 2 - Rotation 3
2:00pm - 2:15pm	Leadership and Teamwork Exercise 2 - Rotation 4
2:30pm - 4:00pm	Campus Photo Tour
4:00pm - 6:00pm	Trebuchet Design Break-out
6:00pm - 7:00pm	Dinner with Student Panel
7:00pm - 8:00pm	Resume Building Presentation
8:00pm - 10:00pm	Evening Activity
Day 4 - Saturday, August 26th	
9:00am - 9:40am	Breakfast
9:45am - 10:50am	Trebuchet Design Break-out
11:00am - 11:30am	Newspaper Bridge Design/Brainstorming
11:30am - 12:00pm	Newspaper Bridge Design Competition
12:00pm - 1:00pm	Lunch

1:00pm - 2:20pm	Final Trebuchet Design Breakout
2:30pm - 3:00pm	Distance/Accuracy Bracket 1
3:00pm - 3:30pm	Distance/Accuracy Finalists
3:30pm - 4:30pm	Trebuchet War Competition
4:30pm - 5:00pm	Clean-Up
7:00pm - end	Banquet



## SAMPLE LA PARTICIPANT SCHEDULE (MSU)

PROGRAM SCHEDULE 2017	
Day 1 - Wednesday, August 23rd	
10:00am - 3:00pm	Participant Move-In
7:00pm - 10:00pm	Evening Activity
Day 2 - Thursday, August 24th	
9:00am - 10:00am	Breakfast/ Program Introduction
10:00am - 11:15am	Lawn Chair Design Competition
11:15am - 12:00pm	Design Project Introduction
12:00pm - 1:00pm	Lunch - WIE
1:30pm - 2:30pm	Cyclotron Presentation and Virtual Tour
2:30pm - 3:30pm	Leadership and Teamwork Exercises I
3:30pm - 5:00pm	Trebuchet Design Break-out
5:00pm - 6:00pm	Major Dinner
8:00pm - 10:00pm	Evening Activity
Day 3 - Friday, August 25th	
9:00am - 9:45am	Breakfast
9:45am - 11:15am	Egg Drop Design Competition
11:15am - 12:00pm	Trebuchet Design Break-out
12:00pm - 1:00pm	Lunch
1:00pm - 2:00pm	Leadership and Teamwork Exercises II
2:30pm - 4:00pm	Campus Photo Tour
4:00pm - 6:00pm	Trebuchet Design Break-out
6:00pm - 7:00pm	Dinner with Student Panel
7:00pm - 8:00pm	Resume Building Presentation
8:00pm - 10:00pm	Evening Activity
Day 4 - Saturday, August 26th	
9:00am - 9:45pm	Breakfast
9:45am - 11:00am	Trebuchet Design Break-out
11:00am - 12:00pm	Newspaper Bridge Design Competition
12:00pm - 1:00pm	Lunch
1:00pm - 2:30pm	Final Trebuchet Design Breakout
2:30pm - 4:30pm	Trebuchet Challenge and Presentations
4:30pm - 5:00pm	Clean-Up
7:00pm - end	Banquet
12:00pm - 1:00pm	Lunch
1:00pm - 2:30pm	Final Trebuchet Design Breakout
2:30pm - 4:30pm	Trebuchet Challenge and Presentations
4:30pm - 5:00pm	Clean-Up
7:00pm - end	Banquet



## LEADERSHIP ADVANTAGE TIME-LINE

### 6 TO 12 MONTHS OUT

- Determine event dates
- Identify planning committee and/or key players for planning process
- Establish planning meeting frequency and times' schedule remaining planning
- Develop event goals, objectives, program outline, and any key communication messages for printed and web-based materials
- Submit and confirm venue reservations
- Submit and confirm lodging reservations
- Identify constituencies for guest lists
- Confirm date with VIPs
- Identify possible emcee, keynote speakers, etc.
- Prepare budget estimate
- Discuss invitation list and estimate yield
- Confirm invitation lists for events and meals; vet with necessary senior officers
- Design and develop event database for mailing invitations and tracking RSVPs
- Outline ceremony and dinner program to review with key officers
- Brainstorm gift ideas; identify gift vendors; work on design; and determine costs
- Contact designer for invitation and program designs; initiate design process; determine deadlines and costs; include accessibility information
- Identify specific speakers and program pieces; begin discussing AV needs
- Get signs offs on event program ideas

### 3 TO 6 MONTHS OUT

- Initiate "save the date" mailing (if needed)
- Gather speaker biographies (if needed for printed program)
- Obtain final approval of invitation design and copy
- Discuss press coverage and PR (if needed)
- Identify and reserve caterer
- Reserve photographer
- Reserve entertainment

### 3 MONTHS OUT

- Order gifts
- Check and order necessary supplies (i.e. name badge holders, pens, stamps, envelopes, notebooks, wrapping paper, ribbons, etc.)
- Finalize guest lists for ceremony and dinner
- Send invitation to printer
- Receive invitations from printer
- Confirm speakers and speaking order for ceremony and dinner; confirm topic, length of presentation, and AV requirements
- Contact guests requiring lodging; confirm arrangements/needs
- Contact caterer to discuss menu and event
- Reserve security



## LEADERSHIP ADVANTAGE TIME-LINE CONT.

### 2 MONTHS OUT

- Address envelopes and assemble mailing
- Mail invitations (8 to 10 weeks out if list includes out-of-towner's, 6 to 8 weeks if guests are all local)
- Obtain final approval of ceremony program copy
- Facility walk-through with Conference & Events, Classroom Technology Services, Safety & Security, facility management, and/or vendors (as needed)
- Determine if any direction signage will be needed at the event to assist guiding guests

### MONTH OF EVENT

- RSVPs due (2-3 weeks prior to the event)
- Send rooming list
- Release unneeded rooms by appropriate deadline
- Make any needed publicity/press arrangements
- Arrange to have any directional signage designed/printed
- Forward setup requests, including AV to Conference & Events and others needed
- Send ceremony program to printer
- Send agenda, suggested dress, directions, map and parking instructions to participants
- Make follow-up phone calls/emails to pending guests
- Run first batch of name badges and place cards
- Wrap gifts
- Develop scripts for key speakers
- Make list of photo arrangements
- Re-confirm entertainment
- Confirm catering
- Confirm set up, AV, and media production orders
- Confirm safety & security's role
- Confirm transportation of guests & VIP's
- Distribute guest list to appropriate parties
- Run final name badges
- Make confirmation phone calls/emails
- Set up an on-site run-through
- Set up sound checks for speakers

### POST-EVENT

- Deliver gifts and thank-you's to facilitators
- Distribute evaluations
- Hold event debrief meeting
- Complete comparison of actual versus budgeted costs
- Update final event attendance
- Update final event attendance
- Distribute photographs





## PROGRAM TASKING

[illegible]



## TRIANGLE'S PARTNERSHIP WITH FIRST

### FIRST LEGO LEAGUE JR.

The first program, FIRST Lego League Jr. is designed to introduce STEM concepts to kids ages 6 to 10 while exciting them through a brand they know and love - LEGO.

Guided by adult coaches, students build models using LEGO Education WeDo 2.0 and create Show Me posters to present what they learned. The program focuses on building interest in science, technology, engineering, and math through a real-world challenge - to be solved by research, critical thinking and imagination.

### FIRST LEGO LEAGUE

Tomorrow's innovators practice imaginative thinking and teamwork. Guided by two or more adult Coaches, FIRST LEGO League teams (up to 10 members, grades 4-8; ages 9-14) research a real-world problem such as food safety, recycling, energy, etc., and are challenged to develop a solution. They also must design, build, program, a robot using LEGO MINDSTORMS, then compete on a table-top playing field.

It all adds up to tons of fun while they learn to apply science, technology, engineering, and math concepts plus a big dose of imagination, to solve a problem. Along their journey, they develop critical thinking and team-building skills, basic STEM applications, and even presentation skills, as they must present their solutions with a dash of creativity to judges. They also practice the Program's Core Values, which emphasize discovery, teamwork and good sportsmanship.

Each FIRST LEGO League season culminates with regional tournaments and championships where teams show off what they learned and invented, and compete with their robots. Some teams earn an invitation to FIRST LEGO League World Festival as a part of FIRST Championship Houston or FIRST Championship Detroit, where teams from all over the world meet and compete.

### FIRST TECH CHALLENGE

FIRST Tech Challenge teams (up to 15 team members, grades 7-12) are challenged to design, build, program and operate robots to compete in a head-to-head challenge in an alliance format. Participants call it "The hardest fun you'll ever have."

Guided by adult coaches, students develop STEM skills and practice engineering principles (like keeping an engineering notebook), while realizing the value of hard work, innovation, and sharing ideas. The robot kit is reusable from year-to-year and can be programmed using a variety of languages, including Java. Teams also must raise funds, design and market their team brand, and do community outreach for which they can win awards. Participants have access to tens of millions of dollars in college scholarships. Each season concludes with regional championship events and an exciting FIRST Championship.

### FIRST ROBOTICS

For grades 9-12, FIRST Robotics is under strict rules, limited resources, and an intense six-week time limit, teams of students are challenged to raise funds, design a team "brand," hone teamwork skills, and build a program industrial-size robot to play a difficult field game against like-minded competitors. It's as close to real-world engineering as a student can get. Volunteer professional mentors lend their time and talent to guide each team. Each season ends with an exciting FIRST Championship.



## WAYS TO GET INVOLVED

### FIRST LEGO LEAGUE JR.

FIRST LEGO League Jr. teams need (just covering what is needed from the volunteer perspective, or what the volunteer could assist with):

- 2 or more adult coaches willing and motivated to guide the team through the discovery and exhibition season (and beyond) - no special technical experience is required
- A community sponsor(s) that will help fund your efforts and provide other support

FIRST LEGO League Jr. registration opens in **May** and information for the season challenge is released in early **August**. The discovery project season runs from **August through May**, and Expo season runs **October through June**. Expos allow teams the chance to show off what they have learned. Some teams will receive invitations to the FIRST LEGO League Jr. World Festival Expos at the end of **April**.

As a coach or adult volunteer, you should be meeting with your team at least once per week during the discovery and creation season (12 sessions). You and your family can decide together how much time you can devote to the program.

The most successful team coaches are people with at least an interest in science and technology, and in helping kids discover and learn. Anyone who wants to be a coach will receive all the training and help they need.

### FIRST LEGO LEAGUE

The FIRST LEGO League season Challenge information is released in late **August**. Teams generally form and register from **May through October**. The Project and build season begins after Challenge is released. Tournament dates vary by region, but begin a minimum of 8 weeks after Challenge is released. Check with your local Partner for more details. Tournaments help determine which teams will earn spots at the FIRST Championship at the end of **April**. There are also many off-season events in which teams can participate, strategize, hone their skills, learn new technology, meet other teams, and have fun.

FIRST LEGO League needs 2 or more adult coaches willing and motivated to guide the team through the discovery and competition season (and beyond).

As a coach or volunteer, you should be meeting with your team once per week during the build and competition season (September - April). Many mature teams also meet throughout the school year, and some compete in off-season events during the summer. You, your family, and your available free time can decide together how much time you can devote to the program.





## WAYS TO GET INVOLVED

### FIRST TECH CHALLENGE

The FIRST Tech Challenge needs 2 or more adult mentors who are willing and motivated to coach the team through the build and competition season and beyond. The challenge season starts in **May**, when teams generally form and registration opens. Season kick-off is in early **September** when the season's game is announced. The design and build season runs from **September to January**. Tournament season varies by region and can begin as early as **October and continues through April**. State and Regional Tournaments advance teams to Super Regional Championship Tournaments, and winners earn spots at FIRST Championship at the end of **April**.

### FIRST ROBOTICS

There are 7 essential steps to starting a FIRST Robotics Competition team

1. Find support resources
2. Enlist coaches & mentors
3. Register & pay
4. Build the team
5. Raise funds
6. Learn about safety
7. Build the robot

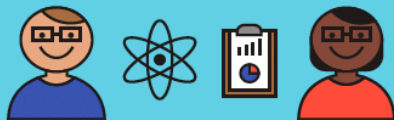
Each team needs at least one adult mentor with technical expertise willing and motivated to coach the team through the build and competition season (and beyond). Also highly recommended are two or more other adults to help with administration, fundraising, community outreach, and other tasks.

Teams will need a steady supply of funds. We are talking Ten's of thousands of dollars to build these robots. This is another great opportunity for groups that may not be able to contribute their time but their treasure.



## THE IMPACT

SUBSTANTIAL INCREASE IN STEM INTEREST.



**FIRST®** participants are  
**SIGNIFICANTLY  
MORE LIKELY** to  
show gains in interest in:

- ☒ STEM
  - ☒ STEM CAREERS
  - ☒ UNDERSTANDING OF STEM
- (than a matched comparison group of students)



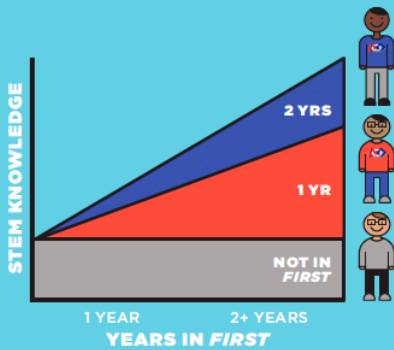
**as likely to show gains in  
their interest of STEM**

(than a matched comparison group of students)

**87%** OF PARTICIPANTS PLAN TO TAKE A  
**MORE CHALLENGING**  
MATH OR SCIENCE COURSE

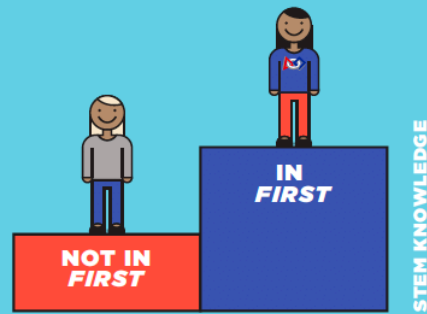


SUBSTANTIAL INCREASE IN STEM UNDERSTANDING.



### STEM KNOWLEDGE CONTINUES TO GROW THE LONGER YOU STAY

Students who persist in *FIRST* for more than one year show significantly greater gains than those who left after a single year.



### THE IMPACT ON GIRLS IS SIGNIFICANT

Females in *FIRST* have a dramatically increased understanding of STEM compared to females in the comparison group.

**“Through *FIRST*, I was able to discover my passion for robotics and gain some amazing life opportunities that have led me to the path that I am on now.”**

- Jordan Burkland, *FIRST* Alumnus

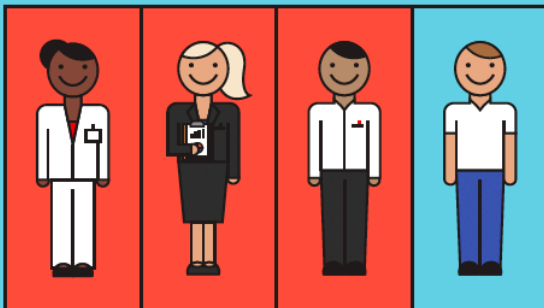
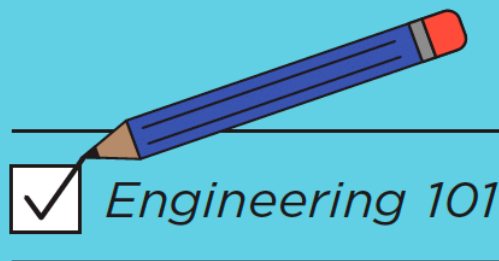
READY FOR A CAREER IN STEM.

***FIRST* ALUMNI ARE**

**2.6x**

more likely to enroll in an **ENGINEERING** course their freshman year

(than a matched comparison group of students)



**OVER 75%**

of *FIRST* Alumni are in a **STEM FIELD AS A STUDENT OR PROFESSIONAL**

## GAINS IN WORKFORCE SKILLS.



### COMMUNICATION

76% of students reported gains



### CONFLICT RESOLUTION

93% of students reported gains



### TIME MANAGEMENT

95% of students reported gains



### PROBLEM-SOLVING

98% of students reported gains



**LEARN MORE AT**  
**[firstinspires.org/impact](http://firstinspires.org/impact)**

Based on decades of findings from external evaluations, external studies as well as internal surveys. Comparison claims based on data from *FIRST*® Longitudinal Study comparing average gains for *FIRST* participants vs. comparison students taking into account differences between the groups at baseline.

#### SOURCES:

Brandeis University (2016). *FIRST*® Longitudinal Study: Finding at Follow-Up. Waltham, MA.

*FIRST*®, 2015 *FIRST* Alumni Survey.

Brandeis University, 2011 *FIRST*® Tech Challenge – *FIRST*® Robotics Competition Evaluation & 2013 *FIRST*® LEGO® League Evaluation.



# MOTIVATING YOUR MEMBERS

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TOP THIRD MEMBERS

MIDDLE THIRD

BOTTOM THIRD

Member Minimum Expectations





## 10 QUALITIES OF SUCCESSFUL EVENT MANAGERS

### 1. THEY HAVE PEOPLE SKILLS

The number one quality shared by successful event managers? People skills. You need to be comfortable connecting with all different types of people: active and new members, alumni, faculty, staff, upper-administration, potential members, other students, and outside stakeholders. To successfully work with this wide range of people, you'll need to be able to nimbly resolve conflicts, be a confident but pleasant negotiator, and maintain your sense of humor.

Remember to try and have fun with the work you do, and the people you work with, and they'll want to work with you again. You can't do it all by yourself, so building relationships is key.

### 2. THEY ARE FLEXIBLE

Event managers must double as janitors and firemen. Cleaning up messes and putting out fires - quickly, quietly, and efficiently - is part of the job. Stay calm, get it done, then get back to running the show.

### 3. THEY ARE GOOD LISTENERS

The ability to understand what key stakeholders want from your event is critical. These folks may not be as skilled in this arena as you are, so they might not speak the lingo or know what's realistic. You have to be able to discern their needs and make sure all parties share the same expectations. Pay attention to what's said - and what's not said - in key conversations. Tapping into these spoken (and unspoken) needs throughout your planning process will help you stay one step ahead.

### 4. THEY'RE ORGANIZED

To successfully run any event, you need to be able to juggle about 50 things at once. This multi-tasking prowess is required for both smooth planning and flawless execution of an event or program. The best planners have foolproof systems, step-by-step checklists, and handy tech tools. Working in events requires the ability to focus on the big picture while keeping track of all the little details. To avoid burnout, get comfortable delegating some of your more time-consuming tasks. And if things don't go according to plan, don't be afraid to switch to plan "B."

### 5. THEY'RE PASSIONATE

With all the stress of the job, you have to really love what you do. Genuine passion helps you overcome bumps in the road and stay cool when all seems lost. It also leads to bursts of creativity and the inspiration to create something great instead of just trying to get through the day. Things like time management can be learned, but you can't teach passion, and you'll need it in order to succeed. Being an event manager can, at times, be a thankless job.

### 6. THEY'RE GOOD COMMUNICATORS

Clear, firm and kind communication establishes you as a leader of the team, keeps everyone on track, and ensures that the goals of the event are clear to everyone involved. It also allows you to effectively share your vision and get others excited about it, too. Communicate in a way that is respectful to everyone and doesn't put anyone down. Accept criticism and be open to new ideas. Everyone plays a part in the success of an event, so make sure you're communicating with them in a clear, confident, and empowering way.

7. **THEY'RE CALM UNDER PRESSURE**  
Your team will look to you for answers for almost everything. In moments of stress, the last thing they need is a shaky leader who makes poor decisions because they're cracking under the pressure. Successful event managers stay level-headed and continue to treat everyone with respect, no matter what. Try to remain cool, calm and collected when dealing with other people, even if you're a bundle of nerves inside.
8. **THEY ARE CREATIVE PROBLEM-SOLVERS**  
Whether it's tracking down some emergency duct tape or reworking a keynote presentation at the last minute, you have to be resourceful with what you have. No matter how well you plan, something will go wrong. And it will be a lot easier to address if you enjoy finding creative solutions to the challenges that arise.
9. **THEY'RE DECISIVE**  
Event managers need to be able to make several decisions at once, and make them quickly. And, perhaps more importantly, they need to be able to recognize when it's too late to change those decisions - and have the resolve to stand by them.
9. **THEY'RE DETAIL ORIENTED**  
Making sure events are running smoothly requires a keen attention to detail that some people struggle with. Many of us are "big picture" thinkers, and get bored or delegate away the nitty-gritty tasks. If you're not involved at every stage of your event planning, including smaller tasks such as booking speakers, arranging seating plans or drafting marketing emails, you might find yourself becoming detached from your event.
10. **THEY'RE DECISIVE**  
Event managers need to be able to make several decisions at once, and make them quickly. And, perhaps more importantly, they need to be able to recognize when it's too late to change those decisions - and have the resolve to stand by them.

# WORKING

## ON BUILDING A BETTER ME.

WHAT EVENT MANAGER SKILLS DO I ALREADY POSSESS?

WHAT SKILLS COULD USE SOME PRACTICE?

WHEN COULD I SEE SOME OF THESE SKILLS BE USED IN MY ROLE?



# THE STAGES OF PROJECT MANAGEMENT

## 1. PROJECT INITIATION

This is the start of the project, and the goal of this phase is to define the project at a board level. This phase usually begins with a business case. So, is the project feasible and should it be undertaken? This is where you will want to outline the requirements and needs of the project (resources, people, money, time, logistics, etc.)

## 2. PROJECT PLANNING

This phase is key to successful project management and focuses on developing a road map that everyone will follow. This phase typically begins with setting goals.

If you want your organization to be successful, you need to set goals. Without goals you lack focus and direction. Goal setting not only allows you to take control of your organization's direction; it also provides you a benchmark for determining whether you are actually succeeding.

You want to set goals that motivate you and that are SMART.

## 3. PROJECT EXECUTION

This is the phase where deliverables are developed and completed. This often feels like the meat of the project since a lot is happening during this time, like the status reports and meetings, development updates, and performance reports.

TASKS THAT WOULD BE COMPLETED DURING THE EXECUTION PHASE OF MY EVENT/PROGRAM

## 4. PROJECT PERFORMANCE/MONITORING

This is all about measuring project progression and performance and ensuring that everything happening aligns with the project management plan. Project managers will use key performance indicators (KPIs) to determine if the project is on track.

## 5. PROJECT CLOSURE

This phase represents the completed project. There may still be things to accomplish like closing out the budget, doing an assessment, and recognizing contributors, but in general your project is complete.



### **SPECIFIC GOALS**

Your goal must be clear and well defined. Vague or generalize goals are unhelpful because they don't provide sufficient direction. Remember, you need goals to show you the way. Make is as easy as you can to get where you want to go by defining precisely where you want to end up.

### **MEASURABLE GOALS**

Include precise amounts, dates, and so on in your goals so you can measure your degree of success. If you goal is simply defined as "to reduce expenses" how will you know when you have been successful? Without a way to measure your success you miss out on the celebration that comes with knowing you have actually achieved something.

### **ATTAINABLE GOALS**

Make sure that it's possible to achieve the goals you set. If you set a goal that you have no hope of achieving, you will only demoralize yourself and erode your confidence.

However, resist the urge to set goals that are too easy. Accomplishing a goal that you didn't have to work hard for can be anticlimactic at best, and can also make you fear setting future goals that carry a risk of non-achievement. By setting realistic yet challenging goals, you hit the balance you need. These are the types of goals that require you to "raise the bar" and they bring the greatest personal satisfaction.

### **RELEVANT GOALS**

Goals should be relevant to the direction you want your organization to take. By keeping goals aligned with this, you'll develop the focus you need to get ahead and do what you want. Set widely scattered and inconsistent goals, and you'll fritter your time - and your life - away.

### **TIME-BOUND GOALS**

Your goals must have a deadline. Again, this means that you know when you can celebrate success. When you are working on a deadline, your sense of urgency increases achievement will come that much quicker.

During this phase, the scope of the project is defined and a project management plan is developed. It involves identifying the cost, quality, available resources, and a realistic timetable.



# STAKEHOLDER ENGAGEMENT

## 1. UNDERSTAND

Before aiming to engage and influence stakeholders, it's crucial to seek to understand the people you will be working with and relying on throughout the phases of the project. Sharing information with stakeholders is important, but it is equally important to first gather information about your stakeholders.

## 2. COMMUNICATE

There have been numerous studies into why projects fail, with “bad communication” often pointed to as the most common reason. Across all sectors and sizes of project, ineffective or insufficient communication is at the root of project problems such as unclear objectives, misunderstanding the problem, poorly coordinated teamwork and ineffective risk management. The fundamental challenge of effective communication is based on the clear evidence that “what you say is not the same as what they hear”, even with people you know very well. It is therefore easy for communications to be misinterpreted. Good communication requires relentless and time-consuming effort to ensure the intended message is understood and the desired response achieved, which, especially on large projects, sometimes justifies the assistance of communication professionals.

## 3. CONSULT EARLY & OFTEN

The rewards of early and efficient stakeholder consultation should be clear to anyone that has worked on a project where this has not been done well. If you have ever felt “I wish I'd known that at the start of the project,” then consider that even just a few, well-timed questions can be very valuable. Questions about who the relevant stakeholders are (i.e. Who else's views should we be considering?), and once these have been identified, questions about the stakeholders objectives, success criteria, constraints, key concerns, their stakeholders (i.e. customers), etc., usually provide information that easily justifies the time spent investigating.

## 4. THEY ARE HUMAN TOO

Accept that humans do not always behave in a rational, reasonable, consistent or predictable way and operate with an awareness of human feelings and potential personal agendas. By understanding the root cause of stakeholder behavior, you can assess if there is a better way to work together to maintain a productive relationship.





5. **PLAN IT!**  
A more conscientious and measured approach to stakeholder engagement is essential and therefore encouraged. Investment in careful planning before engaging stakeholders can bring significant benefits. What kind of regular meetings have value? How are they structured? Formal meetings with meeting minutes, or informal ones? This is what stakeholder management is.
6. **RELATIONSHIPS ARE KEY**  
Developing relationships result in increased trust. And where there is trust, people work together more easily and effectively. Investing effort in identifying and building stakeholder relationships can increase confidence across the project environment, minimize uncertainty, and increase the speed of problem-solving and decision-making..
7. **JUST PART OF MANAGING RISK**  
Stakeholders are important influential resources and should be treated as potential sources of risk and opportunity within the project. Over and above conventional planning, using foresight to anticipate hazards, and taking simple and timely actions with stakeholders can significantly improve project delivery.
8. **COMPROMISE**  
The initial step is to establish the most acceptable baseline across a set of stakeholders' diverging expectations and priorities. Assess the relative importance of all stakeholders to establish a weighted hierarchy of the project requirements and outcomes. Having ranked the stakeholders in order of importance, their differing interest can then be weighed accordingly with the best compromise solution being at the "center of gravity". As the leader of the project, it is your judgment as to what this solution is with the rationale and decision being communicated to all parties where appropriate.
9. **UNDERSTAND WHAT SUCCESS IS**  
Project success means different things to different people and you need to establish what your stakeholders perceive as a success for them in the context of project delivery.
10. **TAKE RESPONSIBILITY**  
Stakeholder engagement is not the job of one member of the project team. It is the responsibility of everyone to understand their role and to follow the right approach to communication and engagement. Good project teams have clarity about stakeholder engagement roles and responsibilities and what is expected of people involved in the project.

## WHO ARE OUR STAKEHOLDERS?



## MAREKTING & PROMOTION

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1. What are our marketing efforts expected to accomplish?
2. What medium(s) will help us market the program and brand most effectively?
3. Whom are we marketing to?
4. What's our message?
5. What do we want people to think or feel?
6. What justification are we providing as support?
7. How is this different from another brands/events messaging?
8. Which practical considerations or restrictions are there?





## NOTES

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## NOTES

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## NOTES

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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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto:ALUMNI@TRIANGLE.ORG)



# ALUMNI COMMUNICATION

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



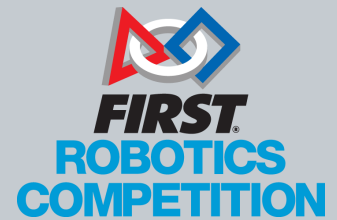
For ages 6-10, FLL Jr. is designed to be a first taste of STEM. Students build LEGO models and create posters to present what they learned at exposition-style competitions.



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](http://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](mailto:Hailee@triangle.org)

**FIRST website:** [FIRSTinspires.org](http://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](mailto:TEF@triangle.org) or  
[www.triangleef.org/scholarships](http://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

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## 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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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!

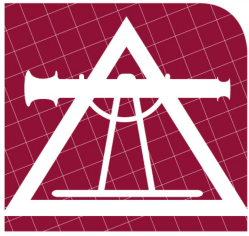


For 2019-20, the maximum individual grant award is \$1,000. There is \$10,000 available for all grants. All proposals will be considered against the following criteria:

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](mailto:pic@trianglebhc.org). Please direct any questions to [pic@trianglebhc.org](mailto:pic@trianglebhc.org) or [mfouts@trianglebhc.org](mailto: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](mailto:mfouts@trianglebhc.org) or (317) 203-4506

Check out [triangle.org/tbhc](http://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](mailto:mfouts@trianglebhc.org) or (317) 203-4506

Check out [triangle.org/tbhc](http://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, 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](mailto:mfouts@trianglebhc.org) or (317) 203-4506

Check out [triangle.org/tbhc](http://triangle.org/tbhc) for more info



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

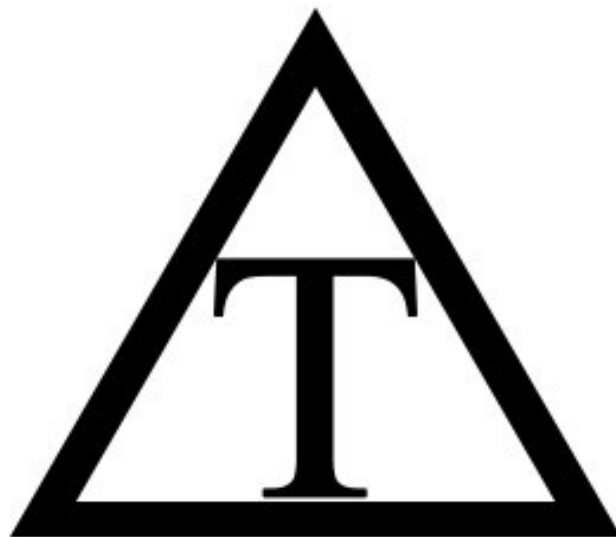
we've worked with. We all make great neighbors now! It is truly an intergenerational, very diverse neighborhood."

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.



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

Check out [triangle.org/tbhc](http://triangle.org/tbhc) for more info

## 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.



Contact Mike Fouts at [mfouts@trianglebhc.org](mailto:mfouts@trianglebhc.org) or (317) 203-4506  
Check out [triangle.org/tbhc](http://triangle.org/tbhc) for more info



# 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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**Check out [triangle.org/tbhc](http://triangle.org/tbhc) for more info**