

# House/Alumni Corporation President & Chapter Adviser REPORT FORM

*For the Leadership & Education Consultant*

**NAME:** \_\_\_\_\_ **CHAPTER:** \_\_\_\_\_

**Your Role with the chapter:** \_\_\_\_\_

**CELL PHONE:** \_\_\_\_\_ **E-MAIL:** \_\_\_\_\_

**DATE:** \_\_\_\_\_ **TERM EXPIRES:** \_\_\_\_\_

***Please complete this report for the Consultant prior to his arrival.***

For the following section, please circle the appropriate answer or rating as it pertains to your chapter. Rating key: E=Excellent, AA=Above Average, A=Average, BA=Below Average, P=Poor. If a question does not apply to the chapter, please leave it blank.

**Please rank the following in terms of the house/alumni corporation.**

**HOUSE/ALUMNI CORPORATION**

- House/alumni corporation meets at least four times per year..... Yes No
- House/alumni corporation meeting minutes are kept ..... Yes No
- All tax, insurance, and health code information is securely kept ..... Yes No
- House/alumni corporation is composed of at least five individuals, with a separate title and a list of responsibilities ..... Yes No
- The house/alumni corporation assists the chapter with chapter operations and programming..... Yes No
- The house/alumni corporation oversees the chapter's finances..... Yes No
- The house/alumni corporation produces an alumni newsletter at least two times per year ..... Yes No

**Please rank the following in terms of the chapter**

**CHAPTER LEADERSHIP AND ORGANIZATION**

Review

- Chapter bylaws have been review and updated in the last 2 years..... Yes No
- Chapter has written Code of Conduct ..... Yes No
- Chapter has an active Judicial/Standards Board..... Yes No
- Executive Council meetings held weekly ..... Yes No
- Written meeting agendas are used ..... Yes No
- Meetings are free of tobacco, alcohol, and food..... Yes No
- Committee meetings are held weekly ..... Yes No
- All fees and forms are sent to the International Headquarters at the appropriate time..... Yes No

Assessment

- Executive Council effectiveness with the chapter..... E AA A BA P
- Meetings are run in an orderly manner ..... E AA A BA P
- Committee report forms are used..... E AA A BA P
- Documented officer training and transition program..... E AA A BA P
- Officer notebooks are current and utilized ..... E AA A BA P

OVERALL RATING ..... E AA A BA P

**BROTHERHOOD AND MOTIVATION**

Review

- Brotherhood Building Activities are held periodically ..... Yes No
- A chapter retreat is held once or twice a year ..... Yes No
- Are there minimum standards to remain in good standing?..... Yes No

Assessment

- Member participation in chapter activities..... E AA A BA P
- Respect shown toward others property ..... E AA A BA P
- The morale of the chapter ..... E AA A BA P
- Members are held accountable for personal behavior ..... E AA A BA P
- Goals are clearly defined ..... E AA A BA P
- Goals are followed through and achieved..... E AA A BA P
- Meeting attendance is ..... E AA A BA P

OVERALL RATING ..... E AA A BA P

**ADVISERS AND REGIONAL COUNSELORS**

Review

Chapter has an chapter adviser ..... Yes No  
Chapter has a faculty adviser ..... Yes No  
Chapter has a financial adviser ..... Yes No  
Chapter has a Chapter Advisory Board (CAB) ..... Yes No  
Chapter invites regional counselor to meetings and special events ..... Yes No

Assessment

Utilization of advisers ..... E AA A BA P  
Advisers provide support to the chapter ..... E AA A BA P  
Communication with the regional counselor ..... E AA A BA P

OVERALL RATING ..... E AA A BA P

**RELATIONS WITH THE INTERNATIONAL FRATERNITY**

Assessment

Communications with the International Headquarters ..... E AA A BA P  
Attitude towards the Headquarters ..... E AA A BA P  
Chapter attendance at National sponsored events ..... E AA A BA P  
Relations with nearby chapters ..... E AA A BA P

OVERALL RATING ..... E AA A BA P

**SOCIAL RESPONSIBILITY AND RISK MANAGEMENT**

Review

Chapter has social programs without alcohol (number of) ..... Yes No ( )  
Chapter educates members on social responsibility ..... Yes No

Assessment

Chapter culture regarding use of alcohol/drugs ..... E AA A BA P  
Education of members on liability, alcohol, and drug awareness ..... E AA A BA P  
Avoidance of tasteless or insensitive themes and advertising ..... E AA A BA P  
Education on crisis management ..... E AA A BA P  
Education on rape awareness ..... E AA A BA P  
Education on FIPG ..... E AA A BA P

OVERALL RATING ..... E AA A BA P

**OVERALL CHAPTER ASSESSMENT**

Chapter assessment in relation to the campus ..... E AA A BA P  
Chapter assessment in relation to Theta Chi and Alter Award standards ..... E AA A BA P  
Chapter assessment in comparison to potential ..... E AA A BA P

**Please answer each of these questions as thoroughly as possible.**

**House/Alumni Corporation Officers**

**President:** \_\_\_\_\_ Phone #: \_\_\_\_ (\_\_\_\_) \_\_\_\_\_

Address: \_\_\_\_\_

E-mail Address (if applicable): \_\_\_\_\_

**Vice President:** \_\_\_\_\_ Phone #: \_\_\_\_ (\_\_\_\_) \_\_\_\_\_

Address: \_\_\_\_\_

E-mail Address (if applicable): \_\_\_\_\_

**Secretary:** \_\_\_\_\_ Phone #: \_\_\_\_ (\_\_\_\_) \_\_\_\_\_

Address: \_\_\_\_\_

E-mail Address (if applicable): \_\_\_\_\_

**Treasurer:** \_\_\_\_\_ Phone #: \_\_\_\_ (\_\_\_\_) \_\_\_\_\_

Address: \_\_\_\_\_

E-mail Address (if applicable): \_\_\_\_\_

Property Insurance Carrier (if applicable): \_\_\_\_\_

Assessed value of house: \$ \_\_\_\_\_ Amount of Coverage: \$ \_\_\_\_\_

**PLEASE DESCRIBE YOUR ROLE, including title.**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**WHAT GOALS DO YOU HAVE FOR YOUR TERM IN OFFICE AND WHAT PROGRESS HAVE YOU MADE?**

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**LIST THE STRENGTHS OF THE CHAPTER AND THE HOUSE/ALUMNI CORPORATION.**

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**LIST THREE AREAS WHERE THE CHAPTER AND THE HOUSE/ALUMNI CORPORATION COULD IMPROVE.**

- (1) \_\_\_\_\_
- (2) \_\_\_\_\_
- (3) \_\_\_\_\_

**LIST ANY AREAS WHERE THE CONSULTANT CAN ASSIST THE CHAPTER, YOU, AND/OR CORPORATION.**

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**WHAT ARE YOUR PERCEPTIONS OF THE HEADQUARTER'S STAFF?**

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**WHAT ARE YOUR PERCEPTIONS OF THE GRAND CHAPTER?**

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**PLEASE LIST THE MOST SUCCESSFUL ALUMNI FROM YOUR CHAPTER (BUSINESS, SPORTS, CIVIC LEADERS, EDUCATION, ETC.).**

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**PLEASE LIST ANY ALUMNI FROM YOUR CHAPTER WHO MAY BE INTERESTED IN SERVING AS A REGIONAL COUNSELOR (INCLUDE CONTACT INFO).**

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**HOW CAN THE HEADQUARTERS STAFF BETTER SERVE THE HOUSE/ALUMNI CORPORATION?**

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**ARE THERE ANY COMMUNICATIONS WITH THE HEADQUARTERS STAFF THAT HAVE BEEN UNANSWERED?**

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**If you have the opportunity to meet with the Consultant, could you bring the following items with you?:**

- Alumni Meeting Minutes
- House/alumni corporation Budget
- A list of alumnus members who might be interested in becoming a Regional Counselor