

2003

# Strategic Plan Workbook 2003-2004

Will Turner

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## **II. Implementing The Strategic Plan**

1. Rewards
2. Consequences
3. Obstacles
4. Possible Solutions
5. Using The Workbook As A Tool
6. Strategies For Ongoing Success

# I. Developing A Strategic Plan

## Components Of The Strategic Plan

### 1. The Basic Foundation

Philosophy

Values

Principles

### 2. Vision Statement

### 3. External Assessment

Market Segments

Competitive Analysis

Trend Analysis

### 4. Internal Appraisal

### 5. Mission Statement

### 6. Critical Success Factors

### 7. Goals

### 8. Action Steps

# **Building Your Chapter's Strategic Plan**

**Presented At The 2003  
Sigma Phi Epsilon Conclave**

**Presented By Will Turner  
Dancing Elephants Achievement Group**

[Will@dancingelephants.net](mailto:Will@dancingelephants.net)

## Sigma Phi Epsilon Fraternity Statement on Chapter & Individual Responsibility

The possession and/or use of alcoholic beverages while participating in any fraternity event, or in any situation sponsored or endorsed by the chapter, will be consistent with all campus, city, county, state laws and the policies of the Fraternity. Every chapter event must ensure that no alcohol can be consumed by minors.

The direct or indirect purchase of alcoholic beverages by the chapter using chapter funds or by any member on behalf of the chapter or through any type of fund is against Sigma Phi Epsilon's risk management policies. The purchase and/or use of a bulk quantity of alcoholic beverages (i.e., kegs or case(s) of beer/wine) are prohibited.

There will be no possession, use, and/or sale of illegal drugs or controlled substances at any chapter facility, fraternity event, or any event associated with the Fraternity.

No chapter should associate the Fraternity's name with any event sponsored by an alcohol distributor, charitable organization, or tavern where alcohol is given away, sold, or otherwise provided to those present.

No chapter should co-sponsor or co-finance a function where alcohol is purchased by any of the host chapters, groups, or organizations.

There should never be any alcohol available during membership recruitment activities.

Open parties, meaning those with unrestricted access by non-members, are not in the best interest of the chapter or the Fraternity and should not occur.

No brother or new member should condone, tolerate, encourage, or participate in the abuse of alcohol.

There should never be any alcohol available during any membership education program/event.

Failure to comply with these guidelines will result in disciplinary action including revocation of the chapter's charter. Additionally, failure to follow these guidelines could jeopardize a chapter's (or individual member's) general liability insurance coverage.

Year	# of Members
Spring 95	91
Fall 95	95
Spring 96	90
Fall 96	80
Spring 97	76
Fall 97	109
Spring 98	104



## Alumni Board Goals:

### Illinois Nu's Report Card

The following table illustrates Illinois Nu's Academic Performance over the past six semesters.

Term	Average	Initiates	New Member	Rank
Spring 95	2.7	2.74	2.51	
Fall 95	2.65	2.68	2.56	
Spring 96	2.86	2.89	2.64	
Fall 96	2.8	2.79	2.87	
Spring 97	2.82	2.8	2.95	2/11
Fall 97	2.68	2.8	2.53	2/11

The Following information is offered for comparative purposes:

<u>Group</u>	<u>Semester</u>
All Campus.....	2.89
All Greek.....	2.75
All Fraternity.....	2.53
All Male.....	2.75
All Sorority.....	2.90
All Female.....	2.99

## Manpower

### Historical Performance

In order for an undergraduate chapter to survive membership must be a top priority. The table below illustrates the history of Illinois Nu's manpower.

# Contents

## Overview

- Belief.....1
- Goals.....1
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Eatern Illinois University, Charleston, Illinois

Sigma Phi Epsilon - Illinois Nu

# **Five Year Strategic Plan**

## Appendix H

### House Rules

Chapter Facility (if applicable):

#### Chapter Facility Maintenance

The Illinois Nu chapter house is located on the campus of Eastern Illinois University, thus being owned by the University. It is located in Greek Court along with the other fraternity and sorority houses and the facility maintenance is carried out by university Building Service Workers (BSW's). Chapter members are assigned each week to be responsible for assisting the BSW by making sure the hallways are clear during the week and weekends. They are also in charge of helping keep the recreation areas tidy and taking out any excess garbage in the house. The chapter home, which was constructed in 1965, can house up to 42 men and is the largest house in Greek court.

Since the Chapter House has is owned by the university there is a regular maintenance check every day by the Building Service Workers (BSW) from Eastern Illinois University. These workers check smoke detectors, fire extinguishers, and look for any other safety hazards. The BSW's also perform essential cleaning duties in the bathroom, vacuuming the first and second floor hallways, and mopping the basement floor, Sunday through Friday. In addition to this, a member from each floor is assigned each week, to make sure that there is no excessive garbage in the hallways or bathrooms and to perform any cleaning duties that may be needed. These members are also responsible to keep the outside of the chapter house clean. Our chapter facility is first floor handicap accessible thanks to the wheel chair ramp that was added on the north side of the building in the spring of 2005.

The chapter house enforces quiet hours throughout the week. Quiet hours are Sunday through Thursday, 11 p.m. to 10 a.m. During this time members living in the house are required to keep all noises coming from their room to a level that cannot be heard by another member two doors down. Friday and Saturday quiet hours are from 2 a.m. to 12 p.m. These hours are enforced and anyone in violation will be brought to the Standards Board for further consequences.

Yes. Our chapter's last risk management seminar was held in January of 2009. The Risk Management chair and the Executive Board gathered all the men in the basement of the chapter house to review procedures. The men explained what to say and what not to say when approached by the media. After all men were informed on what to do in a situation like that, "what-if " questions were asked to make sure that members knew what to do and how to react. In addition to this, Dr. Eberly gives a speech to all new members the night that they join Sigma Phi Epsilon that addresses risk management issues. Rather than lecturing us he uses real-life experiences to instill the importance of risk management. For example, Dr. Eberly also evaluated the Crisis Management behavior of other fraternities all over the country who were involved in difficult situations. He then discussed his evaluation with the chapter and related it to our crisis management procedures.

with the Grand Chapter Bylaws and Administrative Policies and Procedures, Section E, No. 30.

## **ARTICLE X**

### **Residency Requirements**

- Section 1* All members will be required to live in the Sigma Phi Epsilon house for at least two semesters, so long as they are considered a full-time student and in good standing with Eastern Illinois University. This only applies to those members who affiliate prior to entering their junior year (academic) at Eastern Illinois University.
- Section 2* If the Sigma Phi Epsilon house is not voluntarily filled to the minimum capacity of 42 Sigma Phi Epsilon members, those members who have not fulfilled their residency requirement shall be selected by random selection. A member's name will not be included in the selection after he has fulfilled his residency requirement.
- Section 3* The random selection process will be a weighted lottery pick which operates as follows: A Sigma Phi Epsilon member who has not fulfilled the minimum two semesters of obligation as stated by Article X, Section 1 will have two chances for selection; a member who has one semester of obligation remaining of the residency requirement will have one chance for selection. The lottery will continue until 42 Sigma Phi Epsilon members are committed to a Sigma Phi Epsilon housing contract.
- Section 4* All members who fail/refuse to live in the Sigma Phi Epsilon house and/or are suspected of intentionally avoiding living in the house at any time while enrolled at Eastern Illinois University as a full-time student will be placed before the Standards Board and given the appropriate fine (\$500.00 year/\$250.00 semester) for any household improvements, recreational equipment, or Eastern Illinois University Housing imposed fines for under capacity of the chapter house throughout the given year.
- Section 5* The House Manager shall be responsible for keeping a record of who has fulfilled their residency requirement to the Chapter and shall inform the Vice President of Finance of those individuals who are in violation of this policy.

# SIGMA PHI EPSILON CHAPTER BYLAWS

## ILLINOIS NU CHAPTER

### **ARTICLE I**

#### **Name and Purpose**

*Section 1* This chapter shall be known as the Illinois Nu chapter of the Sigma Phi Epsilon Fraternity.

*Section 2* The objectives of this organization are:

- a. To impress upon its members the true significance of fraternal relationships and to create and perpetuate friendship among all persons.
- b. To develop and strengthen the character of its members, promote the principles of Virtue, Diligence, and Brotherly Love, and preserve the ideals and principles upon which the Fraternity was founded.
- c. To instill those principles which are the responsibilities of an individual as a member of society.
- d. To create and shape its members into Balanced Men.

*Section 3* This chapter shall be governed at all times by the provisions of these Bylaws, the Constitution and Bylaws of the Grand Chapter of the Sigma Phi Epsilon Fraternity and the Eastern Illinois Interfraternity Council Bylaws and Constitution.

### **ARTICLE II**

#### **Membership/Recruitment**

*Section 1* Membership in this chapter shall be subjected to the provisions of the Grand Chapter Bylaws, Article I, Sections 1 to 7 inclusive.

- a. Prospective members must have a minimum 2.6 to be eligible for membership.
- b. All members must maintain a minimum 2.5 to remain in good standing.

*Section 2* A member of any other chapter of Sigma Phi Epsilon attending the University shall be permitted to affiliate with this chapter in accordance

We are hoping to be able to use the new chapter room for small group lectures by professors or study tables.

By achieving the status as an RLC this will give us access to Grant money to further improve the facility. <http://www.sigep.org/rlc/foundationgrants.asp>

The alumni are willing to make the financial obligations to make these improvements happen over the next three years. With the help of EIU, specifically Kelly and Robyn we know this can happen.

Joe and I are going to speak with the undergrads to "make a deal" with them on improvements that are going to take place. We would like to implement a stricter rule for property damage and other immature behavior towards the facility. I don't want to spend the alumni's hard earned money and your time and effort to watch it get ruined.

Lastly, when all improvements are complete we would expect to maintain an above average number of undergrads who are living in the facility semester after semester.

## Sigma Phi Epsilon House Improvements

### 2-3 year plan

2009:

Chapter room: New paint, wood floors (or laminate floors), French doors (or a sliding door), new furniture (couches, board room table, trophy case)

Basement: New blinds on the windows, fix the wiring for the "entertainment" area

2010:

Plans and proposals for the kitchen in the basement

Landscaping improvements

2011:

Install improvements to kitchen or install new kitchen

Along with these, Joe and I are going to be working with the Undergrads to become a Resident Learning Community (RLC). <http://www.sigep.org/rlc/Accreditation.asp>

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# ΣΦΕ

## Sigma Phi Epsilon Rush Information

Name \_\_\_\_\_

Cell Phone \_\_\_\_\_

School Address \_\_\_\_\_

Year In School \_\_\_\_\_

Major/Minor \_\_\_\_\_

High School GPA \_\_\_\_\_ College GPA \_\_\_\_\_

Athletic Involvement (past or present) \_\_\_\_\_

\_\_\_\_\_

Group Activity (community service, leadership involvement) \_\_\_\_\_

\_\_\_\_\_

Awards or Achievements (athletic, academic, or social) \_\_\_\_\_

\_\_\_\_\_

Interests in this Fraternity (why would you like to join?)

\_\_\_\_\_

How did you here about this Open House Informational?

\_\_\_\_\_

night during the formal recruitment week. It is the duty of the members on each team to report to their respective captain about which potential recruits they would vote yes or no to. At the end of each night, the captain of each team meets with the V.P. of Recruitment to vote on potential members. The V.P. of Recruitment asks each captain their vote on the potential member being discussed. The V.P. of Recruitment votes only if there is a tie amongst the captains, and his vote will be the deciding vote. Recruitment is not just restricted to these teams. Any member in the house can approach the V.P. of Recruitment at any time and voice their opinion on a potential member.

### III. Balanced Man Scholarship

- A. The Balanced Man Scholarships are sent out each year by March 1<sup>st</sup>, with the much appreciated help of the Greek Life Office. The V.P. of recruitment along with his BMS chairman and the Executive board narrow the applicants down to approximately 50-100 semi-finalists, depending on the quality of the applicants. These semi-finalists will then be interviewed over the summer by teams that are set up by region to do the interviews. The teams meet with the family and semifinalists. The teams present statistics, videos, and pictures about the Illinois Nu chapter to allow the candidate and family to have a better understanding of what we have to offer. Those applicants not able to be interviewed over the summer are interviewed immediately upon arrival on campus in the fall. The Balanced Man Banquet is held each year at the Charleston Country Club, in the fall, and the date varies from year to year. The semi-finalists are then narrowed down to approximately 20 to 25 finalists that will attend the banquet. At the banquet, two scholarships in the amount of \$250 per scholarship are awarded to the winners along with a formal certificate recognizing their accomplishments.

## Appendix A

### Year Round Recruitment Plan

#### I. Recruitment Standards

- A. Must have the requirements of a Balanced Man.
  - 1. Must have a 2.7 college GPA or 3.0 High School GPA.
    - a) If a potential recruit does not hold these academic standings, then he shall not even be considered for membership in Sigma Phi Epsilon
  - 2. Must be an athlete
    - a) Participated in at least one varsity sport during high school or college.
  - 3. Must be a gentleman
    - a) This is found out from talking with ladies who know the recruit.
    - b) Also through talking with the recruit about women and analyzing his response.
- B. Must have someone in the chapter who knows the recruit well enough to vouch for his character
- C. Must show that he is willing to make a strong commitment to the Chapter.

#### II. Selection Process of New Members

- A. Informal Recruitment
  - 1. Members give V.P. of Recruitment names of potential recruits
  - 2. The names of the potential recruits are posted by the V.P. of Recruitment and members who know these individuals are asked to invite them to upcoming events (i.e. IM games, Greek Week activities, Homecoming activities, Dinners, etc.)
  - 3. If the recruits meet the chapter's minimum standards to get in, the V.P. of Recruitment holds a meeting where we vote on the candidate to extend a bid to him. As long as the recruit does not receive three objections to him becoming a member, then a bid is given to him. If he does receive three rejections, the V.P. of Recruitment and the Executive Board can override the decision and extend a bid to him with a 75% vote.
- B. Formal Recruitment
  - 1. Prospective members visit the Chapter house and fill out a short questionnaire with information pertaining to academics, athletics, leadership experience, and community service involvement.
  - 2. After that, we take the potential members into a room and get a short video clip of them. They answer a few easy and short questions for us. We tell each candidate before that it is nothing to be nervous about; we just like to get a face with a name so we can remember them better.
  - 3. Our recruitment process has changed from past years so that we can involve more members in the recruitment process. There are six recruitment teams and each team has a captain. Each team captain is then assigned five members in the house to make a team of six individuals. So there are 36 members actively participating in the voting process. The teams watch the videos of the prospective member every

management. The brothers then have three other “checkpoint” meetings to track their progress. We have found that more brothers are improving their graders with this program than with study hours. This has not only become our main aspect of the Illinois Nu academic program, but the IFC has followed our lead and adapted our program to all fraternity members under a 2.25 gpa. In a way, Illinois Nu has set the bar of how to achieve academic success. We have become the role model for the rest of our Greek Community.

Sigma Phi Epsilon has raised the bar at Eastern Illinois University by allowing bids to be granted to those individuals above a 3.0 from high school, or a 2.7 college GPA. This is the highest standard for membership amongst fraternities on the Eastern Illinois University campus. Illinois Nu does in fact run the Balanced Man Scholarship Program each summer and into the fall. This scholarship gives Sig Ep a huge advantage over other fraternities because this reaches out to those individuals who will bring high academic standards to the chapter. Each fall, Illinois Nu offers two \$250 scholarships to incoming males based on their credentials from high school with no obligations to join Sigma Phi Epsilon. Illinois Nu is also currently working with our alumni to create another scholarship called the “Sigma Phi Epsilon Emerging Leader Award”. Like the Balanced Man Scholarship, we are targeting non-greeks who have achieved academic success. This award will go to a man at EIU who is of sophomore standing or greater and maintains the characteristics of the Balanced Man.

Dr. Charles Eberly, Chapter Advisor, presents those men in Sigma Phi Epsilon who received a 4.0 GPA with an engraved cross pen with the Coat of Arms on the clip and also the member’s name, semester and 4.0 are engraved on it. Men receiving a 4.0 GPA for a second semester receive a matching Cross Pencil. As the amount of 4.0’s increase the gift goes up in value. We currently have 2 men who have have been at a 4.0 for the past 5 semesters. These awards are presented at the Balanced Man Banquet as well as the Greek Week Parents Banquet. The names of those members who receive a GPA of 3.0 or higher are included in a Sigma Phi Epsilon grade advertisement in the school’s newspaper, The Daily Eastern News. The advertisement is broken down into 3.0 to 3.25, 3.26 to 3.49, 3.5 to 3.74, 3.75 to 3.99 and 4.0.

## **Appendix D**

## Academic Plan

The men of Illinois Nu know that their number one priority of being at school is to get an education. The men constantly strive to be first in grades, and one can see that by our academic success over the past two years. To join Illinois Nu a young man must have a 3.0 high school GPA or a 2.75 college GPA. In order to hold an executive office, or be on good standings, a man must achieve a minimum 2.75 each semester.

Since Illinois Nu's installation at Eastern Illinois University in 1992, Sig Eps have ranked consistently within the top three fraternities on campus. Illinois Nu has also maintained their a cumulative chapter GPA above the University's all-men's average all but four semesters since being established as a colony in 1990. Sig Ep's at Eastern Illinois have also ranked first amongst fraternities twenty six times since being founded in 1990. We ranked first in grades in both the spring and fall semesters of 2007 and 2008 which led to Sigma Phi Epsilon being ranked first in grades for the yet another entire year at EIU. With the past four semesters being added to our academic record, we have maintained being number one in grades of all fraternities at Eastern Illinois University for the past 15 out of 16 strait semesters.

Scholarship is a major concern for Sigma Phi Epsilon and it plays a big role during our Recruitment Weeks in the spring and fall. This concern is considered a big factor because of the Balanced Man Project that Sigma Phi Epsilon has implemented to keep members involved throughout their entire college career. Each semester an updated list of every member as well as their major is received from the Student Life Office. Copies are made and posted in the house for all members to be able to view so that they know who they can look to for help if needed. One of the main goals our Vice President of Recruitment implements in the recruiting process is to look for potential members with a GPA above our house average. The men of Illinois Nu constantly remind our new members as well as initiated members that our mission is our academic success, something that has become a tradition at Eastern Illinois with Sig Ep. For the past two years the Interfraternity Council at Eastern has continued a place known as Study Town. It is a meeting place for new members of the greek community to study with a place that has tutors, wireless internet, and other students to help out with your academic needs. We require that our new members as well as some members in poor academic standing to attend at least 10 hours a week. During midterm and finals week the president and academic chair turn the ritual/entertainment room into a quiet study center. Tables, chairs, and couches are brought in to make a comfortable study environment. During this time the house maintains constant quiet hours so that the space is conducive to studying. There is also a library in the basement and the entire house has Ethernet ready stations as well as wireless internet.

As grades are our number one concern, our Academics Chair as well as our Standards Board work closely to monitor grades. The Academic Chair provides a list of those brothers who have fallen below the chapter minimum of 2.7 to the Standards Board. The Standards Board assigns hours to individuals based on the severity of their GPA for that semester.

Though additional study hours are beneficial to some brothers, we have found that simply repeating the same bad study habits but doubling your efforts is one of the worst things you can do. We do not feel that punishing an individual should be our job. Rather, a brother should be the one to offer a helping hand. With this mentality in mind, Illinois Nu has enlisted the help of a counselor at the Academic Success Center at EIU. Each brother is required to make four meetings with her. At the first meeting she sits down with the individual and they take a Study Habits Assessment that targets each brother's individual study needs. She then reviews how they can improve their weak study habits by using their strengths to improve their knowledge retention as well as time

### Community

- participate as a leader in a campus organization
- continue participate in community service(minimum is participation in the chapter's service project).

- complete the epsilon challenge action plan with your mentor
- develop three personal written goals
- participate in a mentor development program
- address values and ethics
- enhance your appreciation of the arts( language,classics,fine arts)
- complete the milestone section of this challenge
- recruit your mentor for the Brother Mentor Challenge

### Chapter

- serve as a member of a chapter committee
- participate in the planning of a chapter's service project
- be an active participant in the chapter's recruitment efforts
- volunteer as a mentor to a member of the Phi challenge

### Community

- Design and implement an individual service project (minimum 30 hours)
- Serve as a leader in another organization
- Enhance your knowledge of at least one aspect of community operations as attending a city council meeting

### Brother Mentor Challenge

Objective: To develop and utilize the skills of a servant leader

Duration: Until graduation,provided the member continues to meet the requirements of membership

This aspect of the Balanced Man Program is geared towards members who are close to graduation and would like to stay involved with the chapter. Typically, seniors and graduate level students choose to become involved with this program

### Expectations

#### Self

- complete the brother mentor challenge action plan with your mentor
- develop three personal written goals
- work on your resume each semester
- complete the milestone section of this challenge
- OPTIONAL: declare intent to become a fellow

### Chapter

- serve in some capacity as a chapter leader
- continue your intramural involvement
- be an active participant in the chapters recruitment efforts
- volunteer as a mentor to a member of the Epsilon Challenge



these responsibilities are to become a mentor to a new member active in the Sigma challenge, and to obtain a cabinet position under one of the executive board members. Furthermore, these are members who should be determining if they would like to take up more responsibility and to be elected to the executive board.

This challenge is designed to give the member time to complete the challenge at their own pace. Although most members choose to complete this challenge as fast as possible, they are given one year to complete the challenge. Typically, sophomore and junior members are involved with this aspect of the balanced man project, and ultimately to become a full brother.

### Expectations

#### Self

- complete the phi challenge action plan with your mentor
- develop three personal written goals
- address "respect for self and others" issues
- develop gentlemanly behavior: etiquette and sportsmanship
- complete the milestone section of this challenge
- recruit your mentor of the epsilon challenge

### Chapter

- participate in the planning of the chapter's experiential learning event
- be an active participant in the chapter's recruitment efforts
- discuss chapter operations with your mentor
- volunteer as a mentor of the sigma challenge
- become involved in intramurals

### Community

- participate in a community service project
- be actively involved in at least one campus organization
- attend an IFC/NPHC meeting or executive committee meeting
- meet with the greek advisor

### Epsilon Challenge

Objective: to explore the issues a servant leader faces

Duration: 12 weeks to 1 year

This stage in the Balanced Man Program is designed towards the older members in the house who have already completed their duty of becoming a full brother. Also, keeping such older members involved is important in order to remember our roots as a fraternity. It is an important task to keep these knowledgeable members involved, as they will be the leaders who will continue the traditions that come along with becoming a member.

### Expectations

#### Self

## Sigma Challenge

The Sigma challenge of the Balanced Man Program is designed to educate new members about the history of our fraternity as well as to get them involved with the ongoing activities in the house. Typically, the first year of college is when most members choose to join a fraternity. This first year of membership is critical in obtaining the correct way to accomplish our goals as students in a higher education setting. Men that choose to join Sigma Phi Epsilon have a higher rate of graduation as well as a higher grade point average, due to higher standards.

Objective: To adjust and assimilate into the chapter and campus community

Duration: The first six weeks of membership after a new member class is formed  
Is designated to the education and incorporation of such members.

## Expectations

### Self

- complete the sigma challenge action plan with your mentor.
- develop three personal written goals.
- review and understand the symbols of the fraternity.
- view the "academic success" video. Discuss it and complete "The Keys to Success" with your mentor.
- complete the milestone section of this challenge.
- Recruit your mentor for the Phi Challenge.

### Chapter

- complete the covenant on the inside cover of the quest
- complete and send to headquarters the new member form
- be an active participant in the chapter's recruitment efforts
- become acquainted with the men of the chapter
- review "Part III-Responsibility: Sigma Phi Epsilon" in the lifetime responsibility of brotherhood with your mentor

### Community

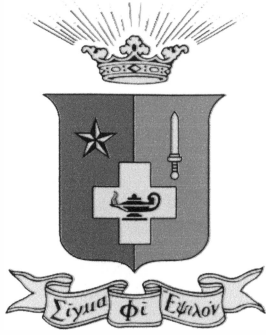
- participate in a community service project
- participate in the chapter's campus orientation program

## Phi Challenge

Objective: to understand the benefits of fraternalism

Duration: 12 weeks-1 year

The Phi challenge of our Balanced Man Program is designed to give newly initiated members responsibilities that will keep them involved with the chapter. Among



Sigma Phi Epsilon: The Balanced Man Program  
V.P. of Membership Development

Balanced Man Program Overview

Starting in 1992 , many of the chapters of Sigma Phi Epsilon have been incorporating the Balanced Man Program as their membership education tool. This program has been designed to keep all members involved throughout their years of college. The continuing education and involvement is to ensure the interest of all members, and to incorporate interaction of older members and new members.

There are many aspects of the Balanced Man Program that keep relations between members strong. Among these is the mentoring program that takes place in the Sigma and Phi challenges. As a requirement of the Sigma challenge, new members are paired up with an older member who is usually of the same major of study. Through this relationship, both members benefit greatly. New members can use their mentor as a source of knowledge about the house and activities that take place, and the older members are given the responsibility to help the newer member succeed.

Community Involvement

Becoming a member of a fraternity may be viewed as a sense of seclusion or constriction, however this is untrue for Sigma Phi Epsilon. Something that sets our fraternity apart from others is our strive to expand to outside into the community. It is a requirement of our Phi challenge ,that members become involved in an on campus organization. This requirement is to encourage networking that will fallow us into our years after college.

Community Service is a very important part of our chapter, as we strive to be viewed as an asset to the community rather than the typical “frat” that most would think to view us. Throughout the year we require each member to perform and document at least 10 hours of community service each semester. This is a great deal of work for the community ,that we hope will alter their first impression of us. A community involvement project that we regularly perform would be our Adopt a Highway project. This requires our house to adopt a highway outside of town, and to regularly keep it clean by picking up the littered trash throughout the highway. All of the projects we choose to do as a fraternity are designed to educate and implement correct attitude and action that will help us in the future.

## Appendix E

### Illinois Nu Undergraduate Budget

Provide a budget of revenue and expenses for undergraduate operations for the current year.

FALL 2008 BUDGET				SPRING 2009 BUDGET			
Members	TOTAL	PER MAN	% TOTAL	Members	TOTAL	PER MAN	% TOTAL
82				72			
<b>Revenue</b>	\$26,650	\$325		<b>Revenue</b>	\$23,400	\$325.00	
<b>Expenses</b>	\$29,603.75	\$361.02		<b>Expense</b>	\$25,343.45	\$238.94	
National Dues	\$10,733.75	\$130.90	36.3%	Risk Insurance	\$10,873.70	\$151.02	42.9%
Alumni Board	\$2,000	\$24.39	6.7%	Alumni Board	\$2,000	\$27.78	7.9%
Composite	\$1,000	\$12.20	3.4%	Composite	\$2054.75	\$28.54	8.1%
Recruitment	\$3,200	\$39.02	10.8%	Recruitment	\$1,000	\$13.89	3.9%
Scholarship	\$500	\$6.10	1.7%	Savings	\$0	\$0	0%
Savings	\$0	\$0	0%	Greek Week	\$2,000	\$27.78	7.9%
A/P	\$1,500	\$18.29	5.1%	Misc. Supplies	\$250	\$3.47	0.9%
Homecoming	\$2,500	\$30.49	8.4%	IFC Dues	\$1,215	\$16.88	4.8%
Misc. Supplies	\$500	\$6.10	1.7%	Social	\$2,500	\$34.72	9.9%
IFC Dues	\$1,395	\$17.01	4.7%	Philanthropy	\$200	\$2.78	0.8%
Social	\$3,500	\$42.68	11.8%	Unpaid Dues	\$1500	\$2.83	1.0%
Unpaid Dues	\$0	\$0	0%	Donations	\$250	\$113.12	0.9%
Balanced Man Banquet	\$825	\$10.06	2.8%	EIU News	\$0	\$0	0%
Donations	\$250	\$3.05	0.8%	Parent's Weekend	\$500	\$6.94	2.0%
EIU News	\$200	\$2.44	0.7%	Carlson Academy	\$1,000	\$13.89	3.9%
			100%				100%

### Illinois Nu Alumni and Volunteer Corporation Budget

Provide a budget of revenue and expenses for AVC operations for the current year.











What can we do to ensure the active engagement of our brothers (and alumni/volunteers) in realizing our Goals and completing our Action Steps?

What process will we implement to review and update our Mission, Critical Success Factors, Goals and Action Steps on an annual basis?

## Critical Success Factor #8

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Chapter Goals (S.M.A.R.T)	Responsibility	Date Due	Priority

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### **ACTION STEPS**

*Action Steps are the specific tasks and activities that need to be accomplished to realize the Chapter Goals. Each Chapter Goal will have numerous Action Steps. Each Action Step should have a deadline (target date). Each Action Step should be assigned to someone who will be held responsible for its completion. Be mindful to spread the responsibility out by delegating different Action Steps to different people.*

How are we going to determine the specific Action Steps of each Goal?

How will we keep track of and monitor the progress of all the Action Step items?

What type of review system will be implemented to hold individuals accountable?

What are the consequences, if any, for not completing Action Steps on time? Will there be any enforcement? If so, how will that work?

**Critical Success Factor #4**

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Chapter Goals (S.M.A.R.T)	Responsibility	Date Due	Priority

**Critical Success Factor #5**

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Chapter Goals (S.M.A.R.T)	Responsibility	Date Due	Priority

**Critical Success Factor #6**

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Chapter Goals (S.M.A.R.T)	Responsibility	Date Due	Priority

**Critical Success Factor #7**

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Chapter Goals (S.M.A.R.T)	Responsibility	Date Due	Priority

# CHAPTER GOALS

*Chapter Goals should be developed from your Critical Success Factors. There may be more than one Goal for each Critical Success Factor. Your Chapter Goals should be S.M.A.R.T Goals (i.e. Specific, Measurable, Action-Oriented, Realistic, Timely)*

*Like your Critical Success Factors, you should prioritize your Chapter Goals. Priority depends on importance and how many other Critical Success Factors the Goal impacts. Priority can be noted by using the following scale: A – Critical; B – Very Important; C – Important; D – Somewhat Important and E – Not Important. In addition, each Goal should have someone who is assigned overall responsibility with a due date.*

## Critical Success Factor #1

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Chapter Goals (S.M.A.R.T)	Responsibility	Date Due	Priority

## Critical Success Factor #2

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Chapter Goals (S.M.A.R.T)	Responsibility	Date Due	Priority

## Critical Success Factor #3

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Chapter Goals (S.M.A.R.T)	Responsibility	Date Due	Priority

**Our Mission Statement:**

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**CRITICAL SUCCESS FACTORS**

*Critical Success Factors are those things that must be addressed to make sure your Mission becomes a reality. They are broad categories that serve as the foundation for achieving your Mission. From these broad categories, more specific Goals will be identified and established.*

*At any given time, there should be no more than eight Critical Success Factors. Your Critical Success Factors should be specific to your chapter based on the analysis you've conducted. Once established, your Critical Success Factors should be prioritized.*

*List your Critical Success Factors. Some of the areas your chapter may choose to focus include growth/recruitment, housing, brother development, alumni/volunteer engagement, community involvement, funding, communication, etc.*

**Critical Success Factors:**

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

## **MISSION STATEMENT**

*The Mission is a statement of what the chapter will achieve in a specific time period. It defines the boundaries of the organization, the population served, what must be accomplished and how the accomplishments will be measured. The Mission Statement takes your Vision and makes it more specific. Your Mission can be defined for a one-year period, so it will help the brothers focus on those things that are critical to reaching your overall Vision.*

Based on your analysis, what do you see as the Mission of your chapter in the coming year?

What capital requirements are needed to achieve our Mission?

How will this capital be acquired?

What are our operational finances?

Who will be responsible for developing a Financial Plan and Budget?

Are our current services and structure adequate to meet our alumni, volunteers and supporters needs?

What additional resources are needed in the following areas?

Recruiting

Facilities

Equipment

People

Other

How can we get the additional resources needed?

What is the level of effective communication between the following areas:

	Communication Level (Good – Fair – Poor)	Specific Issues
Brothers		
New Members		
Alumni/Volunteers		
Headquarter Staff		

## **INTERNAL APPRAISAL**

*The Internal Appraisal examines your chapter's structure as it relates to the people you serve, the resources you have available or need to be made available, and an understanding of your chapter's strengths and limitations.*

Is our chapter effectively structured to respond to the needs of our brothers, new members and alumni?

Is it easy for brothers to enjoy and actively engage in the chapter?

Are we as responsive to our brothers' expectations as we would like to be, or is there an opportunity for improvement. If there is an opportunity to improve, what should we do?

Have clear expectation measurements been established for new members and are they monitored effectively?

Are our current services and structure adequate to meet our recruiting needs?

Are our current services and structure adequate to meet our brothers' needs?



What will be different in the near future (3-5 years)?

How can these changes influence the services you offer?

What are the trends taking place within the populations served?

What emerging trends in demographics, economic, political, environmental, or technical factors will affect us in the short and long-term?

What are the trends and changes taking place among fraternities and universities throughout the country?

What potential opportunities and risks are inherent in these trends?

What specific issues need to be addressed based on the opportunities and risks listed above?

Ethics and Beliefs (character of brothers)

Campus involvement (leadership)

Recruitment performance (growth and size of chapter)

Community involvement (good citizens, fundraising for causes)

Housing (facilities)

Other

Based on an analysis of the above, what specific issues do we need to address?

How are we going to maintain and/or improve our competitive positioning?

### **Trend Analysis**

*As part of the external appraisal, you need to understand the trends that are shaping your chapter, university and the community in general. This understanding will enable you to best position your chapter for future success.*

What's different today about the markets you serve and the markets served by your competition?

How many other fraternities are on campus?

What are the top five fraternities or other organizations (list more if appropriate based on competition) on campus that we must compete against to attract the quality undergraduates?

Fraternity	Number of Brothers	Strengths	Weaknesses
1.			
2.			
3.			
4.			
5.			

What are our chapter's strengths relative to the other five top fraternities?

What distinguishes us from the other top fraternities?

What distinguishes our competitors from us?

How competitive are we in the following areas?

Academic performance (sound mind)

Athletic performance (sound body)

Are there other recruiting strategies we should consider? If so, what are the resources needed?

What are our keys to success in recruiting?

How are recruiting responsibilities assigned and measured?

How are our recruiting goals set? How should they be?

How will we measure our recruiting goals?

What kind of communications do we need from the brothers to insure that we are in a position to respond quickly and appropriately to recruiting opportunities?

### **Competitive Analysis**

*When making a decision to join or not join the fraternity, potential recruits will compare Sigma Phi Epsilon to other fraternities and organizations on campus. This section is designed to examine your chapter's competitiveness with the other options available to interested and qualified individuals.*

What is the track record and reputation of other fraternities on campus?

What is the size of our defined market?

What is our market share? What do we want our market share to be?

What is our competitors' market share?

Are there different segments of the market? If so, what are they?

What specifically do our recruits, new members and brothers consider to be of value in the services we offer?

What is our chapter's track record and reputation?

How could it be improved?

What strategies do we employ to recruit new members?

**Our Vision Statement:**

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**EXTERNAL ASSESSMENT**

*The External Assessment focuses on the people you serve in your Market Segments, your Competitive Analysis and your Trend Analysis.*

**Market Segments**

*The purpose of defining market segments is to identify those areas where you have potential recruits and how you can best serve those recruits. Understanding who makes the best brothers and what you need to do to attract and retain them will allow the chapter to build a competitive advantage.*

What services do we offer?

Who do our services satisfy?

Are there other ways of satisfying these needs?

Are these needs growing, stable or declining?

Our headquarter staff?

Our university?

Our fellow Greek organizations?

Our community?

All others with whom we interact?

## **VISION STATEMENT**

*The Vision is a statement of your chapter's potential. It is a statement of what your chapter can become. When your Vision is effectively communicated to all brothers, it should provide a common focus and direction. Your Vision should be concise and meaningful. It should be derived from examining your Basic Foundation and what you want your chapter to be in the future.*

*Since your Vision will guide your chapter into the future, it is critical that it is well-crafted and meaningful to all your brothers. To make it powerful and useful, work hard on editing it down to its bare essentials. In other words, boil it down to what is memorable and poignant.*

What do we want our chapter look like in the future (next 3-5 years)?

## **BASIC FOUNDATION – PHILOSOPHY, VALUES & PRINCIPLES**

*The Basic Foundation includes the chapter's philosophy, values and principles. This foundation should drive the behavior and decisions within the organization and shape the Vision of the chapter. While each chapter is unique, there are some underlying values and principles that are shared among all the chapters; these include the Cardinal Principles of Virtue, Diligence and Brotherly Love. The values and principles developed by the chapter should be in alignment with these Cardinal Principles. The following are some questions to help you shape your chapter's Basic Foundation.*

Why does our chapter exist? .

What are the short and long-term objectives of our brothers?

What are our underlying values and principles?

Do these values and principles align with the national fraternity's Cardinal Principles?

How do we see our relationship with...

Our brothers?

Our alumni?

Our volunteers and other supporters?



## **OVERVIEW & PURPOSE**

*“Would you tell me, please which way I ought to go from here?” said Alice.*

*“That depends a good deal on where you want to get to,” said the Cat.*

*“I don’t much care where --” said Alice.*

*“Then, it doesn’t matter which way you go,” said the Cat.*

**- From Alice In Wonderland by Lewis Carroll**

The purpose of this workbook is to provide you with a tool to create and realize your chapter’s potential. It’s a workbook designed to walk you through a thoughtful analysis to determine where your chapter is today. In doing so, you will determine what you must do to become the chapter you want to be in the future.

The end result should be a strategic plan that will inspire your brothers, alumni and volunteers with a shared Vision of your chapter’s future success. Success as it is uniquely defined for your chapter by those people who will be responsible for shaping it.

Achieving success for your chapter is an ongoing process; it’s not a destination. So completing this workbook should not be viewed as a one-time exercise. In developing your chapter’s strategic plan, you should look at a three to five year horizon. This workbook will help you shape the Vision for the coming years, but your Mission, Critical Success Factors, Goals and Action Steps will have to be updated annually, if not more frequently.

This workbook will provide you with important questions to consider. Be aware, however, that there may be other questions to answer that are not explicitly asked in this workbook. The process of determining a strategic plan is organic. As some questions are answered, others may surface. As you start down the path of setting and working on specific goals, new obstacles or opportunities may present themselves.

There is no singular ‘right way’ to proceed with developing your chapter’s strategic plan, but you may gain some valuable insights by first answering a few questions:

- Who should be involved in this process?
- How should we get the right people involved?
- How can we create a plan that will be embraced by the brothers?
- Who is ultimately responsible for the plan?
- What role should I play in the plan?
- Is there a skilled facilitator who can assist us?
- How do we start?
- When do we get started?

**Enjoy your journey...realize your vision... create your destiny.**

Highlights of the past year include:

- Over \$20,000 contributed
- Paid for two officers to attend National IFC conference
- Awarded 22 scholarships to undergraduates
- Remodeled third floor of house into a library
- Purchased computer
- Paid expenses for 12 men to attend regional leadership academy
- Contributed \$1,500 to BSU Alumni Center
- An increase in membership to about 160

## Alumni Hall of Fame

In April of 1995, the Alumni Board approved the establishment of an Alumni Hall of Fame for Indiana Gamma. The program was initiated in the Fall of 1995, with the first class inducted at Homecoming '96.

The purpose of the hall of fame is to build pride among undergraduates, remind members of the rich history at Ball State and get Alumni involved.

The charter inductees were:

- Kent "Oz" Nelson, Retired Chairman & CEO of UPS
- Don L. Park, Vice President of University Advancement, Ball State University
- Larry Conrad (deceased), past Secretary of State
- Thomas Shoppell, Business Manager, Mt. - Vernon Community School Corporation
- Dr. Charles Slaven, retired dentist

Alumni to be inducted at Homecoming '97 are:

- Dan Van Treese
- Richard Hutson
- Larry Yazel

Pendleton, J Gordon*	Petit, Ray*
Pferrer, Eric	Phillabaum, Paul*
Pickhardt, David*	Pinkerton, Larry*
Pozdol, Martin*	Prescott, Richard
Quick, Ted*	Rathka, Steve*
Ray, Ralph*	Read, Steven
Redmon, Samuel	Reed, Robert
Roe, Steve*	Roesener, Charles*
Rossiter, Ronald*	Roth, Richard
Scagnolli, Joe*	Schenkel, Greg*
Schurr, K. Terry	Sharpe, Donald
Shelby, Philip	Shiple, Edwin*
Shoemaker, Sam*	Shoppell, Tom*
Silverburg, H A*	Sizelove, Phil*
Skelton, John*	Smith, W. Allen
Snyder, Paul*	Stouffer, Steve*
Strohl, William*	Sutton, J Russell*
Sweet, R Gerald*	Thatcher, James
Throgmartin, Jerry*	Tolman, Harry*
Tribbett, Roy*	Van Treese, Dan*
Walling, Donn*	Weinerman, David*
Weiss, Ron*	Welch, Chris*
Welter, Edward*	Wetnight, Robert
Wheeler, Timothy	Whitlock, Jack*
Whitlock, Bob*	Wolfe, Leland
Wolverton, Stephen*	Wood, Mel "J"*
Woods, Robert C.	Woodworth, Jack*
Yaney, E Ned*	Yazel, Larry*
Yount, John	* = charter member

Estep, Lance*	Faust, Richard*
Fields, Donald*	Finn, Mike*
Florin, Wilfried*	Garringer, Charles
Gorsuch, Dean*	Gullion, Alvin*
Gullion, Calvin*	Gullion, Clarence*
Hachet, Richard*	Hamilton, Fred*
Hancock, Frank*	Hassel, Dr. Charles*
Henry, Myron*	Hettwer, John*
Hibschman, Richard*	Hilgendorf, Thomas*
Himelick, Byron*	Hinkle, Ronald*
Hitchcock, Larry	Holder, Roger
Horein, James*	Hutson, Richard*
Ingle, Bob*	Jackson, Terry
Jenkins, John	Jennings, Gerald*
Jones, J. Norman	Keppler, Michael*
Kiefer, Larry	Kinzel, Robert, Jr.
Klee, Jeff*	Kozma, Joseph
Lantz, William*	Lazart, Mark*
Lengyel, Phillip	Linder, Paul*
Logan, John, Jr.	Lower, Terry*
Lynch, Max	Mason, Jeff*
Matthews, Bryant J.*	Mauck, Randall*
Mawbey, Basil	McCarthy, Joseph*
McCay, Frank, Jr.	McGee, William*
McGrew, Scott*	McQuillian, David*
Medland, Richard*	Meilstrup, Thomas*
Mendenhall, Phillip	Midkiff, Steve*
Murr, Tom*	Nash, Stan*
Neat, Dennis*	Neat, Thomas*
Nelson, Kent*	Nephew, Stephen*
Newell, George*	Newlund, Scott*
O'Conner, Donald	Oberlin, Daniel*
Oertel, David*	Otolski, Richard*
Palmer, Rhodes*	Park, David*
Park, Don*	Payne, Kenneth*

# ALUMNI

## Martin-Riverside Society

During the Fall of 1995, Alumnus Don Park, '61, began work on the Martin-Riverside Society. The purpose of this society was to raise money through alumni donations. These moneys would be used for undergraduate scholarships and other educational related expenses of the fraternity. The Society's name is derived from the names of the two streets that Indiana Gamma has been located.

The M-RS is organized through Ball State University's foundation, making donations eligible for federal tax deductions and employer matching programs. Additionally, residents of Indiana can claim these contributions for the Indiana tax credit.

The condition of membership is a donation of \$100.

The following table lists the current members of the Martin-Riverside Society:

Alumnus Name	Alumnus Name
Adams, William	Adee, Eugene*
Allen, Doug*	Augsburger, Jerry*
Badger, Jack*	Banta, James*
Bare, Richard	Bayless, Hal
Bennett, Keith	Biennas, Frank*
Bookout, Darl	Botts, Gary
Bradley, James*	Brand, James*
Brown, Tom*	Brunso, John*
Burns, Edmund	Campanella, Peter
Clark, Donald*	Combs, Mark*
Conkright, John*	Constantinou, Michael
Cook, Henry*	Costin, Patrick*
Cougill, Thomas	Crousore, Paul
DeCraene, Dick*	Delladio, Michael*
DeReu, Steve*	Dotson, Hugh*
Dubie, Kenneth*	Eichenauer, Roger

## Risk Management

Property and casualty insurance is carried by Westfield Insurance through Insurance & Risk Management (AM Best rating of A++). Replacement insurance in the amount of \$750,000 is carried on the structure.

An umbrella policy covering the actions of members of the Alumni Board is carried through the brokerage firm of Palmer & Cay/Carswell of Georgia.

The position of Alumni Board treasurer and all undergraduate offices are bonded by Westfield in the amount of \$25,000, each.

In addition to this, Indiana Gamma fully endorses and abides by Sigma Phi Epsilon's Risk Management Program. This program emphasizes undergraduate responsibility and includes provisions for yearly risk management speakers.

## Rental Comparisons

The following chart illustrates comparable rental data.

Rental #	Location	Unit Size	# of Bedrooms	Monthly Rent	Services Included	Appliances	\$ Per Bed
ΣΦΕ	1515 W. Riverside			\$270	W,S,E,G	R,O,M,G,L	\$270
1	Cardinal Nest	806 sq ft	2	\$600	W,S	R,O,M,G,L	\$300
	1024 W. Bethel	704 sq ft	2	\$600	W,S	R,O,M,G,L	\$300
2	Chesterfield	900 sq ft	2	\$690-	S	R,O,D,M,G	\$345 -
	551 N. Dicks			\$720			\$360
3	Kensington	770 sq ft	2	\$500	none	R,O,D,M,G	\$250
	518 N. Dill						
4	Gilbert Place	767 sq ft	2	\$650	none	R,O,D,M,G	\$325
	220 N. McKinley						
5	University Village Apts	800 sq ft	2	\$630	W,S	R,O,D,G,M	\$315
	1501 W. Univ.						

Services legend: W = water; S = sewer; E = electric; G = gas

Appliances legend: R = refridgerator; O = oven/stove; D = dishwasher; M = microwave; G = garbage disposal; L = laundry room

Rental comparison amounts are from 1993 compared to Sig Ep rent rate for the 1997/1998 school year.

## Projection Assumptions

Some of the major assumptions used in the projections are as follows:

	June 1998	June 1999	June 2000	June 2001	June 2002
# In House/sem.	46/41	46/41	46/41	46/41	46/41
Rent/Month	270	281	292	304	316
(% increase)	4.00%	4.00%	4.00%	4.00%	4.00%



## Projected NOI & DSC

	June 1998	June 1999	June 2000	June 2001	June 2002
Gross Revenue	110,620	120,635	131,017	136,658	142,571
(House vacancy - 5%)	<u>(4,935)</u>	<u>(5,182)</u>	<u>(5,441)</u>	<u>(5,713)</u>	<u>(5,999)</u>
EGI	105,685	115,453	125,576	130,945	136,572
Operating Exp	61,204	64,971	63,515	67,085	66,185
Replacement Reserve	6,000	6,000	6,000	6,000	6,000
Mortgage Reserve	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>	<u>6,000</u>
	73,204	76,971	75,515	79,085	78,185
NOI	32,481	38,482	50,061	51,860	58,387
Debt Service	42,952	42,952	42,952	42,952	42,952
DSC	.76	.90	1.17	1.21	1.36

Replacement reserve deposit amount is based on \$.38 per square foot assuming approximately 15,000 square feet.

# Unrestricted Cash Projections

The following table represents adjustments to unrestricted cash accounts.

	June 1998	June 1999	June 2000	June 2001	June 2002
Cash flow provided by operating activities					
Net income	6,275	14,023	27,361	30,932	39,245
Adjustments to reconcile net earnings to net cash provided by (used in) operating activities					
Add depreciation	13,785	13,785	13,785	13,785	13,785
Changes in assets and liabilities					
Accounts receivable decrease (increase)	0	0	0	0	0
Accounts payable increase (decrease)	0	0	0	0	0
Net cash provided by (used in) operating activities	0	0	0	0	0
Cash flow (used in) provided by investing activities					
Transfer from mortgage reserve	0	0	0	0	0
Transfer from replacement reserve	0	0	0	0	0
Transfer from Alumni account	0	0	0	0	0
Transfer to mortgage reserve	(6,000)	(6,000)	(6,000)	(6,000)	(6,000)
Transfer to replacement reserve	<u>(6,000)</u>	<u>(6,000)</u>	<u>(6,000)</u>	<u>(6,000)</u>	<u>(6,000)</u>
Net cash (used in) provided by investing activities	(12,000)	(12,000)	(12,000)	(12,000)	(12,000)
Cash flow provided by (used in) financing activities					
Payments on mortgage	(13,596)	(15,096)	(16,596)	(18,096)	(19,596)
Net cash used in financing activities	(13,596)	(15,096)	(16,596)	(18,096)	(19,596)
Net increase (decrease) in unrestricted cash	(5,536)	712	12,550	14,621	21,434
Unrestricted cash at beginning of year	11,900	6,364	7,076	19,626	34,247
Unrestricted cash at end of year	6,364	7,076	19,626	34,247	55,681

# Balance Sheet Projections

	Actual 6/30/96	Projected 6/30/97	Projected 6/30/98	Projected 6/30/99	Projected 6/30/00	Projected 6/30/01	Projected 6/30/02
<b>Assets</b>							
Cash & Bank Accounts							
Alumni	1,600	1,650	1,690	1,720	1,750	1,780	1,810
Checking	4,895	10,000	4,424	5,106	17,626	32,217	53,621
House Manager	250	250	250	250	250	250	250
CIF	5,409	7,600	9,580	11,560	13,540	15,520	17,500
Mortgage Reserve	4,150	15,000	21,000	27,000	33,000	39,000	45,000
Replacement Reserve	<u>12,378</u>	<u>6,200</u>	<u>12,200</u>	<u>18,200</u>	<u>24,200</u>	<u>30,200</u>	<u>36,200</u>
Total Cash & Bank Accounts	28,682	45,700	49,144	63,836	90,366	118,967	154,381
Other Assets							
A/R - Estes	5,659	0	0	0	0	0	0
A/R - UG Loan	0	0	0	0	0	0	0
A/R - Utility Deposits	<u>900</u>	<u>900</u>	<u>900</u>	<u>900</u>	<u>900</u>	<u>900</u>	<u>900</u>
Total Other Assets	6,559	900	900	900	900	900	900
Building & Property:							
Fixed Assets	538,719	538,719	538,719	538,719	538,719	538,719	538,719
(Accumulated Dep)	<u>(37,346)</u>	<u>(51,131)</u>	<u>(64,916)</u>	<u>(78,701)</u>	<u>(92,486)</u>	<u>(106,271)</u>	<u>(120,056)</u>
Total Building & Property	501,373	487,588	436,457	385,326	334,195	283,064	231,933
Total Assets	<u>536,614</u>	<u>534,188</u>	<u>486,501</u>	<u>450,062</u>	<u>425,461</u>	<u>402,931</u>	<u>387,214</u>
<b>Liabilities</b>							
Current							
Security Deposits	6,250	6,250	6,250	6,250	6,250	6,250	6,250
CPLTD	<u>18,460</u>	<u>13,596</u>	<u>15,096</u>	<u>16,596</u>	<u>18,096</u>	<u>19,596</u>	<u>21,096</u>
Total Current Liabilities	24,710	19,846	21,346	22,846	24,346	25,846	27,346
Long-Term							
Mortgage Payable	<u>313,674</u>	<u>326,404</u>	<u>297,712</u>	<u>266,020</u>	<u>231,328</u>	<u>193,636</u>	<u>152,944</u>
Total Long-Term	313,674	326,404	297,712	266,020	231,328	193,636	152,944
Total Liabilities	338,384	346,250	319,058	288,866	255,674	219,482	180,290
Fund Balance	<u>198,230</u>	<u>187,938</u>	<u>167,443</u>	<u>161,196</u>	<u>169,787</u>	<u>183,449</u>	<u>206,924</u>
Total Liabilities & Fund Balance	<u>536,614</u>	<u>534,188</u>	<u>486,501</u>	<u>450,062</u>	<u>425,461</u>	<u>402,931</u>	<u>387,214</u>

## Projected Income/Expense 1998-2002

The following table represents full year projections for the FYE 6/98 through 6/02.

Account	6/98	6/99	6/00	6/01	6/02
Rent	98,700	103,635	108,817	114,258	119,971
Parlor	10,000	15,000	20,000	20,000	20,000
Other	<u>1,920</u>	<u>2,000</u>	<u>2,200</u>	<u>2,400</u>	<u>2,600</u>
Total Income	110,620	120,635	131,017	136,658	142,571
Accounting	1,400	1,500	1,500	1,600	1,600
Depreciation	13,785	13,785	13,785	13,785	13,785
Conferences	1,000	3,500	1,000	3,500	1,000
Disposal	2,800	2,800	2,900	2,900	3,000
Fire/Security	3,884	4,000	4,000	4,000	4,000
Homecoming	500	500	500	500	500
Maintenance	8,000	8,000	8,000	8,000	8,000
Improvements	7,800	7,800	7,800	7,800	7,800
Insurance	4,056	4,100	4,200	4,300	4,400
Manager	1,200	1,200	1,200	1,200	1,200
Interest	29,356	27,856	26,356	24,856	23,356
Postage	384	390	400	410	420
House Supplies	3,500	3,500	3,500	3,500	3,500
Office Supplies	3,500	3,500	3,500	3,500	3,500
Telephone	800	900	1,000	1,100	1,200
Electric	9,720	10,108	10,513	10,934	11,371
Gas	3,900	4,056	4,218	4,387	4,562
Sewage	1,980	2,059	2,142	2,227	2,316
Water	1,980	2,058	2,142	2,227	2,316
Other Categories	<u>4,800</u>	<u>5,000</u>	<u>5,000</u>	<u>5,000</u>	<u>5,500</u>
Total Expenses	104,345	106,612	103,656	105,726	103,326
Income/(Loss)	6,275	14,023	27,361	30,932	39,245

## Projected Income/Expense FYE 6/98

The following table represents the quarterly projections for the fiscal year July 1, 1997 through June 30, 1998.

Account	9/97	12/97	3/98	6/98	Year
Rent	14,650	37,950	33,825	12,275	98,700
Parlor	1,250	3,750	3,750	1,250	10,000
Other	<u>480</u>	<u>480</u>	<u>480</u>	<u>480</u>	<u>1,920</u>
Total Income	16,380	42,180	38,055	14,005	110,620
Accounting	300	300	300	500	1,400
Depreciation	0	0	0	13,785	13,785
Conferences	0	0	0	1,000	1,000
Disposal	700	700	700	700	2,800
Fire/Security	971	971	971	971	3,884
Homecoming	0	500	0	0	500
Maintenance	2,000	2,000	2,000	2,000	8,000
Improvements	1,950	1,950	1,950	1,950	7,800
Insurance	1,014	1,014	1,014	1,014	4,056
Manager	150	450	450	150	1,200
Interest	3,725	11,081	10,937	3,613	29,356
Postage	96	96	96	96	384
House Supplies	350	1,050	1,050	1,050	3,500
Office Supplies	350	1,050	1,050	1,050	3,500
Telephone	200	200	200	200	800
Electric	2,430	2,430	2,430	2,430	9,720
Gas	975	975	975	975	3,900
Sewage	495	495	495	495	1,980
Water	495	495	495	495	1,980
Other Categories	<u>1,200</u>	<u>1,200</u>	<u>1,200</u>	<u>1,200</u>	<u>4,800</u>
Total Expenses	17,401	26,957	26,313	33,674	104,345
Income/(Loss)	(1,021)	15,223	11,742	(19,669)	6,275

Electric	5,030	4,917	7,053	8,629	8,721
Gas	4,087	3,782	4,769	3,597	5,006
Sewage	898	640	126	1,964	1,274
Water	946	1,141	1,171	1,477	1,558
Other Categories	<u>2,190</u>	<u>2,146</u>	<u>2,478</u>	<u>2,134</u>	<u>11,459</u>
Total Expenses	67,695	78,235	66,718	74,112	104,424
Income/(Loss)	7,210	(45,775)	(2,187)	5,558	2,930

Some items of interest:

- Rent income for FYE 6/93 is reduced from prior year due to expulsion of approximately 60 members;
- Security for FYE 6/92 was high due to around-the-clock security during the expulsion process;
- Improvements in FYE 6/92 were zero due to being included in renovation expenses;
- Legal expense in FYE 6/94 due to settlement of lawsuit incurred during renovation;
- Interest Expense increased in 6/96 due to higher average borrowings;
- Maintenance and Improvements increased due to funding prior periods deferred maintenance

# FINANCE

## Historical Income/Expense Statement

The following table represents a comparison of fiscal years. The fiscal year for Indiana Gamma is July 1 through June 30.

Account	6/92	6/93	6/94	6/95	6/96
Rent	62,200	22,850	60,675	52,350	90,900
Alumni	1,530	7,340	1,981	16,085	7,113
Other	<u>11,175</u>	<u>2,269</u>	<u>1,876</u>	<u>11,236</u>	<u>9,341</u>
Total Income	74,905	32,459	64,532	79,671	107,354
Accounting	1,200	1,200	1,200	1,200	1,200
Bad Debts	10,000	7,512	2,809	0	1,878
Conferences	0	1,579	2,029	2,868	3,926
Depreciation	0	0	0	11,964	13,418
Disposal	2,217	1,306	1,417	2,077	2,505
Fire/Security	6,164	850	1,354	1,164	1,260
Homecoming	2,038	348	1,639	300	833
Maintenance	1,868	7,919	2,629	2,768	7,324
Improvements	0	2,421	3,053	2,945	5,583
Insurance	4,478	4,293	4,048	3,779	3,229
Interest	14,416	21,440	15,048	19,553	28,629
Legal	2,354	908	5,453	0	503
Manager	800	800	900	800	1,400
Payroll	3,371	3,622	2,533	0	0
Postage	428	653	511	652	236
Recruitment	0	4,000	3,000	1,816	0
Scholarship	0	250	738	1,185	1,435
House Supplies	1,063	3,441	1,028	1,533	1,012
Office Supplies	2,556	1,654	491	915	1,264
Telephone	1,591	1,413	1,241	792	771

Most people know, or think they know, that becoming a member in a fraternity often involves physical and mental challenges. Indeed, fraternal history is littered with stories, some true, some not, about outrageous and often injurious acts required of a fraternity pledge.

Sigma Phi Epsilon does not believe these methods are constructive. In fact we believe they are counterproductive. That is why the National Headquarters of Sigma Phi Epsilon developed the "Balanced Man Project."

"The Balanced Man Project is a program based on the concept that life is a continuous journey. The Journey will be marked by many challenges. Sigma Phi Epsilon is striving to better prepare its member to face and surmount these challenges by providing one of the most innovative programs in the fraternity world."

The Balanced Man Project's key components are:

- Mentoring
- Community Involvement
- Experiential Learning
- Brotherhood

This program has been accepted, indeed praised, by university administrators nationwide as the only program designed to enhance a young man's life and build him into a leader.

This program has actually received a grant from the US Department of Education. This is the only grant ever awarded to a fraternity for the development of this type. Universities across the country are calling for copies of the materials and reports of our progress. In December, 1994, the Balanced Man Project was recognized by the Association of Fraternity Advisors as the most significant fraternal leadership program today.

It is the goal of Sigma Phi Epsilon nationally and Indiana Gamma locally to rush, pledge, build and retain the highest quantity and quality of young men of any fraternity in the world. We believe the Balanced Man Project can and will accomplish this goal.

See also the section on the Balanced Man Scholarship program.



# MANPOWER

## BSU Historical Performance

The undergraduate manpower of any fraternity is the lifeblood of the organization. The table below illustrates the manpower levels attained by Indiana Gamma.

Year	# of Members
1988/89	76
1989/90	109
1990/91	123
1991/92	111
1992/93	30
1993/94	43
1994/95	73
1995/96	106 (#1)
1996/97	110 (#1)

In March of 1992, approximately 60 men were expelled from Indiana Gamma for various reasons, mostly due to poor character. In addition to these 60 men, another 20 or so dropped out due to the expulsion of their friends. This obviously left a manpower shortage which is only recently been recovered from.

We feel we have reached our "cruising altitude" and do not anticipate this level of membership to increase. Our goal from here on is to replace the men graduating. According to undergraduate executives, we could have accepted approximately 60 new members in the Fall of 1996; however, we chose to accept 29.

For the past two years, we have retained approximately 95%. "Retain" is defined as a member one year returning for a second year.

## Balanced Man Project

Beginning with the Fall 1995 pledge class, Indiana Gamma implemented the "Balanced Man Project."

## Indiana Gamma's Report Card

The following information demonstrates our academic performance (cumulative).

Term	Average	Initiates	New Members	Rank
Fall, 1993	2.341	2.428	2.105	16/16
Spring, 1994	2.500	2.593	1.840	10/16
Fall, 1994	2.487	2.501	2.465	6/16
Spring, 1995	2.787	2.825	2.717	2/16
Spring, 1996	2.799	2.789	2.917 (#1)	3/18
Fall, 1996	2.744	2.779	2.736 (#1)	3/18

The following Fall, 1997 information is offered for comparative purposes:

	Semester/Cumulative
All female	2.798/2.902
All Sorority	2.806/2.901
All Campus	2.661/2.797
All Greek	2.646/2.778
All Male	2.503/2.674
All Fraternity	2.456/2.639

# ACADEMICS

## National Academic Performance

On a national level, Sig Ep's efforts to improve academic performance are evident in the following chart:

	Spring 1992	Fall 1992	Spring 1993	Fall 1993	Spring 1994	Fall 1994	Spring 1995
Top quartile on campus	29%	26%	24%	30%	32%	38%	37%
#1 among fraternities on campus	10%	13%	14%	11%	14%	19%	17%
Above the all - campus average	28%	22%	22%	17%	23%	24%	28%
Bottom quartile on campus	12%	13%	10%	12%	10%	8%	7%

## Balanced Man Scholarship

Beginning with the Fall '93 semester, Indiana Gamma began using the "Balanced Man Scholarship" program. This program offers a scholarship to an incoming freshman male based upon certain criteria. Although becoming a Sig Ep is not a requirement of the scholarship, the application and approval process exposes Sigma Phi Epsilon to quality freshman. First implemented nationally in 1992 with eight chapters, those chapters report the following:

- The average GPA has improved from 2.53 to 2.86.
- The average chapter size has increased by 8%.

## Other Incentives

Through the Alumni Board and the Martin-Riverside Society, Indiana Gamma makes available financial incentives for various academic achievements. These include monetary rewards for anyone over a 3.5 GPA semesterly, most improved GPA and highest overall GPA.

These awards are given yearly at the Balanced Man banquet. This banquet includes the awarding of the Balanced Man Scholarship and is held as the last recruitment function for the first semester.

## Alumni Board Goals

- The Alumni Board will provide various tools to promote learning and education. These tools include scholarships and educational material (97 results: achieved, see "Aumni" Section);
- The Alumni Board will provide a physical structure that is both physically safe and conducive to personal growth (97 results: achieved);
- The Alumni Board will provide mentorship and guidance to undergraduates (97 results: both the Chapter Counselor and Faculty Advisor along with other Alumni regularly counsel undergraduates on a variety of issues);
- The Alumni Board will actively recruit new members for the board in an effort to remain "fresh" (97 results: currently two new Alumni are becoming active with the Board)
- The Alumni Board will actively recruit new members for the Martin-Riverside Society (97 results: membership in the Martin-Riverside Society increased approximately 10%).

By striving for and achieving these goals, the personal growth and development of alumni and undergraduates is inevitable.

## Alumni Board Members

Name	Position	Occupation
Dan Van Treese	President	Managing partner of Insurance & Risk Managment
Jim Banta	Vice President	Loss Control, American States Insurance
John Skelton	Treasurer & Chapter Counselor	Assistant Vice President, National City Bank
Steve DeReu	Secretary	Account executive, Aetna Plywood
Don L. Park	Director & Faculty Advisor	Vice President for University Advancement, Ball State University

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# OVERVIEW

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## Belief

The Alumni and Undergraduates of the Indiana Gamma Chapter of Sigma Phi Epsilon Fraternity believe wholeheartedly that our chapter must achieve excellence in academics, brotherhood, financial responsibility and alumni involvement. Along with stating this belief, we realize certain goals must be established and an action plan developed that will achieve the realization of this belief.

## Goals

Goals are an important part of life and business. Consistent with that, we have established the following ongoing goals for the undergraduate chapter and the Alumni Board for Indiana Gamma.

### Undergraduate Goals

- Undergraduate GPA will be at or above the all campus average (97 results: unavailable at this writing);
- Undergraduates will accept 35 new men per school year. Of these, 95% will be retained (97 results: );
- Undergraduate participation in campus and community activities and philanthropic projects will be among the top quartile of all fraternities on campus (97 results: as measured by dollars and hours contributed; Sig Ep was number one);
- Undergraduates will live in the Fraternity House as provided for in the Membership Agreement (97 results: occupancy met budget);
- Receive the "Buchanan Cup" for outstanding chapter as awarded by our National headquarters in two of the following three years: 1997, 1999 or 2001 (97 results: winners of the 1997 Buchanan Cup have not been announced as of this writing).

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SIGMA PHI EPSILON - INDIANA GAMMA

# Five Year Strategic Plan



Year	# of Members
Spring 95	91
Fall 95	95
Spring 96	90
Fall 96	80
Spring 97	76
Fall 97	109
Spring 98	104



## Alumni Board Goals:

### Illinois Nu's Report Card

The following table illustrates Illinois Nu's Academic Performance over the past six semesters.

Term	Average	Initiates	New Member	Rank
Spring 95	2.7	2.74	2.51	
Fall 95	2.65	2.68	2.56	
Spring 96	2.86	2.89	2.64	
Fall 96	2.8	2.79	2.87	
Spring 97	2.82	2.8	2.95	2/11
Fall 97	2.68	2.8	2.53	2/11

The Following information is offered for comparative purposes:

<u>Group</u>	<u>Semester</u>
All Campus.....	2.89
All Greek.....	2.75
All Fraternity.....	2.53
All Male.....	2.75
All Sorority.....	2.90
All Female.....	2.99

## Manpower

### Historical Performance

In order for an undergraduate chapter to survive membership must be a top priority. The table below illustrates the history of Illinois Nu's manpower.

# Overview

## Belief:

The Alumni and Undergraduates of the Illinois Nu chapter of Sigma Phi Epsilon believe that in order to achieve success in the areas of academics, alumni involvement, brotherhood, financial responsibility and community service a plan must be implemented to reach optimal performance. Therefore by stating this belief this strategic plan has been developed to help guide the chapter in operation over the next five years.

## Goals:

Goals give a chapter direction and purpose and it with this understanding that we have established the following as a guide for the next five years.

### **Undergraduate Goals:**

- Undergraduate GPA will be at or above the all campus average.
- Undergraduates will accept 40 new men per school year. Of these 97% will be retained.
- Undergraduate participation in campus and community activities and philanthropic events will be in the top quartile of all fraternities.
- Undergraduates will live in the fraternity house as stated in the Membership Agreement.
- The Undergraduates will receive the "Buchanan Cup" for outstanding chapter as awarded by our National headquarters in the next consecutive three years: 1999, 2001, 2003.

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$N = 144$

## Five Year Strategic Plan

- 1) www.switchboard.com - update alum list to mid-Sept.
- 2) Alum. Bd. - mentoring - give people a role to carry out
- 3) Alumni Home Page - Chad ? - Early to e-mail  
ultimate: Hist /
  - a. level - Ill Newslett, etc. CC: garrinkay@comergys.com
  - b. level with member ID -  
private e-mail w. data base, Jason.d.mcgrayhey@boeing.com  
- address list, & personal info., etc.
  - c. level - Chat room to discuss issues
  - d. send update information (like IU Alpha.)
- 4) Claybrook - arr. NetMeeting possibility -
- 5) By-laws - Jerry (Jennifer) Schmidt to develop.
  - a) Nick Carrillo to assist -  
review/edit initial draft.
- 6) Property Management Inventory - Brian Bushur / Ryniak ?
  - get list of properties/photos, property number.
  - Shapiro will contact Bushur.
7. ΣΦΕ Action Trackers. - develop.
  - Kanwisher - a project management activity.
- 7) 5-year Strategic Plan - Alum Bd. (Home Page) -
  - get ideas on paper & write a draft.
- 8) Effective Programming. -

Highlights of the past year include:

- Over \$20,000 contributed
- Paid for two officers to attend National IFC conference
- Awarded 22 scholarships to undergraduates
- Remodeled third floor of house into a library
- Purchased computer
- Paid expenses for 12 men to attend regional leadership academy
- Contributed \$1,500 to BSU Alumni Center
- An increase in membership to about 160

## Alumni Hall of Fame

In April of 1995, the Alumni Board approved the establishment of an Alumni Hall of Fame for Indiana Gamma. The program was initiated in the Fall of 1995, with the first class inducted at Homecoming '96.

The purpose of the hall of fame is to build pride among undergraduates, remind members of the rich history at Ball State and get Alumni involved.

The charter inductees were:

- Kent "Oz" Nelson, Retired Chairman & CEO of UPS
- Don L. Park, Vice President of University Advancement, Ball State University
- Larry Conrad (deceased), past Secretary of State
- Thomas Shoppell, Business Manager, Mt. Vernon Community School Corporation
- Dr. Charles Slaven, retired dentist

Alumni to be inducted at Homecoming '97 are:

- Dan Van Treese
- Richard Hutson
- Larry Yazel

Estep, Lance*	Faust, Richard*
Fields, Donald*	Finn, Mike*
Florin, Wilfried*	Garringer, Charles
Gorsuch, Dean*	Gullion, Alvin*
Gullion, Calvin*	Gullion, Clarence*
Hachet, Richard*	Hamilton, Fred*
Hancock, Frank*	Hassel, Dr. Charles*
Henry, Myron*	Hettwer, John*
Hibschman, Richard*	Hilgendorf, Thomas*
Himelick, Byron*	Hinkle, Ronald*
Hitchcock, Larry	Holder, Roger
Horein, James*	Hutson, Richard*
Ingle, Bob*	Jackson, Terry
Jenkins, John	Jennings, Gerald*
Jones, J. Norman	Keppler, Michael*
Kiefer, Larry	Kinzel, Robert, Jr.
Klee, Jeff*	Kozma, Joseph
Lantz, William*	Lazart, Mark*
Lengyel, Phillip	Linder, Paul*
Logan, John, Jr.	Lower, Terry*
Lynch, Max	Mason, Jeff*
Matthews, Bryant J.*	Mauck, Randall*
Mawbey, Basil	McCarthy, Joseph*
McCay, Frank, Jr.	McGee, William*
McGrew, Scott*	McQuillian, David*
Medland, Richard*	Meilstrup, Thomas*
Mendenhall, Phillip	Midkiff, Steve*
Murr, Tom*	Nash, Stan*
Neat, Dennis*	Neat, Thomas*
Nelson, Kent*	Nephew, Stephen*
Newell, George*	Newlund, Scott*
O'Conner, Donald	Oberlin, Daniel*
Oertel, David*	Otolski, Richard*
Palmer, Rhodes*	Park, David*
Park, Don*	Payne, Kenneth*

## Risk Management

Property and casualty insurance is carried by Westfield Insurance through Insurance & Risk Management (AM Best rating of A++). Replacement insurance in the amount of \$750,000 is carried on the structure.

An umbrella policy covering the actions of members of the Alumni Board is carried through the brokerage firm of Palmer & Cay/Carswell of Georgia.

The position of Alumni Board treasurer and all undergraduate offices are bonded by Westfield in the amount of \$25,000, each.

In addition to this, Indiana Gamma fully endorses and abides by Sigma Phi Epsilon's Risk Management Program. This program emphasizes undergraduate responsibility and includes provisions for yearly risk management speakers.

# Projection Assumptions

Some of the major assumptions used in the projections are as follows:

	June 1998	June 1999	June 2000	June 2001	June 2002
# In House/sem.	46/41	46/41	46/41	46/41	46/41
Rent/Month (% increase)	270 4.00%	281 4.00%	292 4.00%	304 4.00%	316 4.00%



# Unrestricted Cash Projections

The following table represents adjustments to unrestricted cash accounts.

	June 1998	June 1999	June 2000	June 2001	June 2002
Cash flow provided by operating activities					
Net income	6,275	14,023	27,361	30,932	39,245
Adjustments to reconcile net earnings to net cash provided by (used in) operating activities					
Add depreciation	13,785	13,785	13,785	13,785	13,785
Changes in assets and liabilities					
Accounts receivable decrease (increase)	0	0	0	0	0
Accounts payable increase (decrease)	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Net cash provided by (used in) operating activities	0	0	0	0	0
Cash flow (used in) provided by investing activities					
Transfer from mortgage reserve	0	0	0	0	0
Transfer from replacement reserve	0	0	0	0	0
Transfer from Alumni account	0	0	0	0	0
Transfer to mortgage reserve	(6,000)	(6,000)	(6,000)	(6,000)	(6,000)
Transfer to replacement reserve	<u>(6,000)</u>	<u>(6,000)</u>	<u>(6,000)</u>	<u>(6,000)</u>	<u>(6,000)</u>
Net cash (used in) provided by investing activities	(12,000)	(12,000)	(12,000)	(12,000)	(12,000)
Cash flow provided by (used in) financing activities					
Payments on mortgage	(13,596)	(15,096)	(16,596)	(18,096)	(19,596)
Net cash used in financing activities	(13,596)	(15,096)	(16,596)	(18,096)	(19,596)
Net increase (decrease) in unrestricted cash	(5,536)	712	12,550	14,621	21,434
Unrestricted cash at beginning of year	11,900	6,364	7,076	19,626	34,247
Unrestricted cash at end of year	6,364	7,076	19,626	34,247	55,681

## Projected Income/Expense 1998-2002

The following table represents full year projections for the FYE 6/98 through 6/02.

Account	6/98	6/99	6/00	6/01	6/02
Rent	98,700	103,635	108,817	114,258	119,971
Parlor	10,000	15,000	20,000	20,000	20,000
Other	<u>1,920</u>	<u>2,000</u>	<u>2,200</u>	<u>2,400</u>	<u>2,600</u>
Total Income	110,620	120,635	131,017	136,658	142,571
Accounting	1,400	1,500	1,500	1,600	1,600
Depreciation	13,785	13,785	13,785	13,785	13,785
Conferences	1,000	3,500	1,000	3,500	1,000
Disposal	2,800	2,800	2,900	2,900	3,000
Fire/Security	3,884	4,000	4,000	4,000	4,000
Homecoming	500	500	500	500	500
Maintenance	8,000	8,000	8,000	8,000	8,000
Improvements	7,800	7,800	7,800	7,800	7,800
Insurance	4,056	4,100	4,200	4,300	4,400
Manager	1,200	1,200	1,200	1,200	1,200
Interest	29,356	27,856	26,356	24,856	23,356
Postage	384	390	400	410	420
House Supplies	3,500	3,500	3,500	3,500	3,500
Office Supplies	3,500	3,500	3,500	3,500	3,500
Telephone	800	900	1,000	1,100	1,200
Electric	9,720	10,108	10,513	10,934	11,371
Gas	3,900	4,056	4,218	4,387	4,562
Sewage	1,980	2,059	2,142	2,227	2,316
Water	1,980	2,058	2,142	2,227	2,316
Other Categories	<u>4,800</u>	<u>5,000</u>	<u>5,000</u>	<u>5,000</u>	<u>5,500</u>
Total Expenses	104,345	106,612	103,656	105,726	103,326
Income/(Loss)	6,275	14,023	27,361	30,932	39,245

Electric	5,030	4,917	7,053	8,629	8,721
Gas	4,087	3,782	4,769	3,597	5,006
Sewage	898	640	126	1,964	1,274
Water	946	1,141	1,171	1,477	1,558
Other Categories	<u>2,190</u>	<u>2,146</u>	<u>2,478</u>	<u>2,134</u>	<u>11,459</u>
Total Expenses	67,695	78,235	66,718	74,112	104,424
Income/(Loss)	7,210	(45,775)	(2,187)	5,558	2,930

Some items of interest:

- Rent income for FYE 6/93 is reduced from prior year due to expulsion of approximately 60 members;
- Security for FYE 6/92 was high due to around-the-clock security during the expulsion process;
- Improvements in FYE 6/92 were zero due to being included in renovation expenses;
- Legal expense in FYE 6/94 due to settlement of lawsuit incurred during renovation;
- Interest Expense increased in 6/96 due to higher average borrowings;
- Maintenance and Improvements increased due to funding prior periods deferred maintenance

# FINANCE

## Historical Income/Expense Statement

The following table represents a comparison of fiscal years. The fiscal year for Indiana Gamma is July 1 through June 30.

Account	6/92	6/93	6/94	6/95	6/96
Rent	62,200	22,850	60,675	52,350	90,900
Alumni	1,530	7,340	1,981	16,085	7,113
Other	<u>11,175</u>	<u>2,269</u>	<u>1,876</u>	<u>11,236</u>	<u>9,341</u>
Total Income	74,905	32,459	64,532	79,671	107,354
Accounting	1,200	1,200	1,200	1,200	1,200
Bad Debts	10,000	7,512	2,809	0	1,878
Conferences	0	1,579	2,029	2,868	3,926
Depreciation	0	0	0	11,964	13,418
Disposal	2,217	1,306	1,417	2,077	2,505
Fire/Security	6,164	850	1,354	1,164	1,260
Homecoming	2,038	348	1,639	300	833
Maintenance	1,868	7,919	2,629	2,768	7,324
Improvements	0	2,421	3,053	2,945	5,583
Insurance	4,478	4,293	4,048	3,779	3,229
Interest	14,416	21,440	15,048	19,553	28,629
Legal	2,354	908	5,453	0	503
Manager	800	800	900	800	1,400
Payroll	3,371	3,622	2,533	0	0
Postage	428	653	511	652	236
Recruitment	0	4,000	3,000	1,816	0
Scholarship	0	250	738	1,185	1,435
House Supplies	1,063	3,441	1,028	1,533	1,012
Office Supplies	2,556	1,654	491	915	1,264
Telephone	1,591	1,413	1,241	792	771

Most people know, or think they know, that becoming a member in a fraternity often involves physical and mental challenges. Indeed, fraternal history is littered with stories, some true, some not, about outrageous and often injurious acts required of a fraternity pledge.

Sigma Phi Epsilon does not believe these methods are constructive. In fact we believe they are counterproductive. That is why the National Headquarters of Sigma Phi Epsilon developed the "Balanced Man Project."

"The Balanced Man Project is a program based on the concept that life is a continuous journey. The Journey will be marked by many challenges. Sigma Phi Epsilon is striving to better prepare its member to face and surmount these challenges by providing one of the most innovative programs in the fraternity world."

The Balanced Man Project's key components are:

- Mentoring
- Community Involvement
- Experiential Learning
- Brotherhood

This program has been accepted, indeed praised, by university administrators nationwide as the only program designed to enhance a young man's life and build him into a leader.

This program has actually received a grant from the US Department of Education. This is the only grant ever awarded to a fraternity for the development of this type. Universities across the country are calling for copies of the materials and reports of our progress. In December, 1994, the Balanced Man Project was recognized by the Association of Fraternity Advisors as the most significant fraternal leadership program today.

It is the goal of Sigma Phi Epsilon nationally and Indiana Gamma locally to rush, pledge, build and retain the highest quantity and quality of young men of any fraternity in the world. We believe the Balanced Man Project can and will accomplish this goal.

See also the section on the Balanced Man Scholarship program.

# MANPOWER

## BSU Historical Performance

The undergraduate manpower of any fraternity is the lifeblood of the organization. The table below illustrates the manpower levels attained by Indiana Gamma.

Year	# of Members
1988/89	76
1989/90	109
1990/91	123
1991/92	111
1992/93	30
1993/94	43
1994/95	73
1995/96	106 (#1)
1996/97	110 (#1)

In March of 1992, approximately 60 men were expelled from Indiana Gamma for various reasons, mostly due to poor character. In addition to these 60 men, another 20 or so dropped out due to the expulsion of their friends. This obviously left a manpower shortage which is only recently been recovered from.

We feel we have reached our "cruising altitude" and do not anticipate this level of membership to increase. Our goal from here on is to replace the men graduating. According to undergraduate executives, we could have accepted approximately 60 new members in the Fall of 1996; however, we chose to accept 29.

For the past two years, we have retained approximately 95%. "Retain" is defined as a member one year returning for a second year.

## Balanced Man Project

Beginning with the Fall 1995 pledge class, Indiana Gamma implemented the "Balanced Man Project."

# Indiana Gamma's Report Card

The following information demonstrates our academic performance (cumulative).

Term	Average	Initiates	New Members	Rank
Fall, 1993	2.341	2.428	2.105	16/16
Spring, 1994	2.500	2.593	1.840	10/16
Fall, 1994	2.487	2.501	2.465	6/16
Spring, 1995	2.787	2.825	2.717	2/16
Spring, 1996	2.799	2.789	2.917 (#1)	3/18
Fall, 1996	2.744	2.779	2.736 (#1)	3/18

The following Fall, 1997 information is offered for comparative purposes:

	Semester/Cumulative
All female	2.798/2.902
All Sorority	2.806/2.901
All Campus	2.661/2.797
All Greek	2.646/2.778
All Male	2.503/2.674
All Fraternity	2.456/2.639

# ACADEMICS

## National Academic Performance

On a national level, Sig Ep's efforts to improve academic performance are evident in the following chart:

	Spring 1992	Fall 1992	Spring 1993	Fall 1993	Spring 1994	Fall 1994	Spring 1995
Top quartile on campus	29%	26%	24%	30%	32%	38%	37%
#1 among fraternities on campus	10%	13%	14%	11%	14%	19%	17%
Above the all - campus average	28%	22%	22%	17%	23%	24%	28%
Bottom quartile on campus	12%	13%	10%	12%	10%	8%	7%

## Balanced Man Scholarship

Beginning with the Fall '93 semester, Indiana Gamma began using the "Balanced Man Scholarship" program. This program offers a scholarship to an incoming freshman male based upon certain criteria. Although becoming a Sig Ep is not a requirement of the scholarship, the application and approval process exposes Sigma Phi Epsilon to quality freshman. First implemented nationally in 1992 with eight chapters, those chapters report the following:

- The average GPA has improved from 2.53 to 2.86.
- The average chapter size has increased by 8%.

## Other Incentives

Through the Alumni Board and the Martin-Riverside Society, Indiana Gamma makes available financial incentives for various academic achievements. These include monetary rewards for anyone over a 3.5 GPA semesterly, most improved GPA and highest overall GPA.

These awards are given yearly at the Balanced Man banquet. This banquet includes the awarding of the Balanced Man Scholarship and is held as the last recruitment function for the first semester.



## Alumni Board Goals

- The Alumni Board will provide various tools to promote learning and education. These tools include scholarships and educational material (97 results: achieved, see "Aumni" Section);
- The Alumni Board will provide a physical structure that is both physically safe and conducive to personal growth (97 results: achieved);
- The Alumni Board will provide mentorship and guidance to undergraduates (97 results: both the Chapter Counselor and Faculty Advisor along with other Alumni regularly counsel undergraduates on a variety of issues);
- The Alumni Board will actively recruit new members for the board in an effort to remain "fresh" (97 results: currently two new Alumni are becoming active with the Board)
- The Alumni Board will actively recruit new members for the Martin-Riverside Society (97 results: membership in the Martin-Riverside Society increased approximately 10%).

By striving for and achieving these goals, the personal growth and development of alumni and undergraduates is inevitable.

## Alumni Board Members

Name	Position	Occupation
Dan Van Treese	President	Managing partner of Insurance & Risk Managment
Jim Banta	Vice President	Loss Control, American States Insurance
John Skelton	Treasurer & Chapter Counselor	Assistant Vice President, National City Bank
Steve DeReu	Secretary	Account executive, Aetna Plywood
Don L. Park	Director & Faculty Advisor	Vice President for University Advancement, Ball State University

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# OVERVIEW

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## Belief

The Alumni and Undergraduates of the Indiana Gamma Chapter of Sigma Phi Epsilon Fraternity believe wholeheartedly that our chapter must achieve excellence in academics, brotherhood, financial responsibility and alumni involvement. Along with stating this belief, we realize certain goals must be established and an action plan developed that will achieve the realization of this belief.

## Goals

Goals are an important part of life and business. Consistent with that, we have established the following ongoing goals for the undergraduate chapter and the Alumni Board for Indiana Gamma.

### Undergraduate Goals

- Undergraduate GPA will be at or above the all campus average (97 results: unavailable at this writing);
- Undergraduates will accept 35 new men per school year. Of these, 95% will be retained (97 results: );
- Undergraduate participation in campus and community activities and philanthropic projects will be among the top quartile of all fraternities on campus (97 results: as measured by dollars and hours contributed, Sig Ep was number one);
- Undergraduates will live in the Fraternity House as provided for in the Membership Agreement (97 results: occupancy met budget);
- Receive the "Buchanan Cup" for outstanding chapter as awarded by our National headquarters in two of the following three years: 1997, 1999 or 2001 (97 results: winners of the 1997 Buchanan Cup have not been announced as of this writing).

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BALL STATE UNIVERSITY, MUNCIE, INDIANA

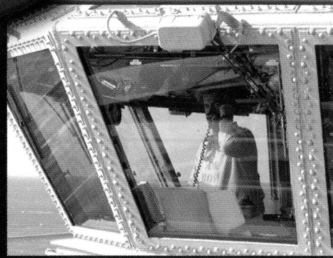
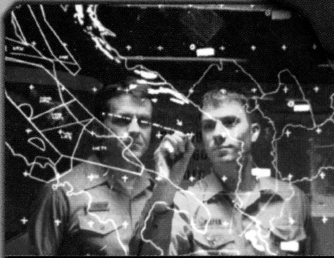
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SIGMA PHI EPSILON - INDIANA GAMMA

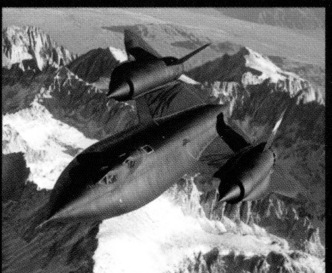
# Five Year Strategic Plan



# AFTERBURNER



## PROGRAM GUIDE



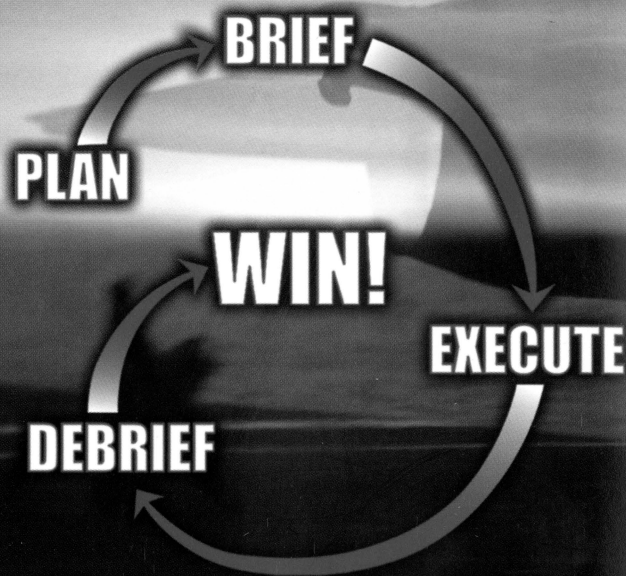
## WHAT IS FLAWLESS EXECUTION?

Picture yourself as an F-18 Fighter Pilot. You're flying at over 700 miles per hour just 300 feet above the ground. You're tracking the bandits with your radar, you're communicating with your seven wingmen on the radio, you're monitoring over 300 cockpit instruments---all while you're sustaining nine bone-crushing Gs! That's just for starters.

A Fighter Pilot may have to takeoff, meet other aircraft at certain checkpoints, air-to-air refuel prior to attacking their target, engage enemy aircraft, deliver ordnance on the objective, and finally land on a moving aircraft carrier in the middle of the night---all in one mission! What's the secret that allows Fighter Pilots to fly missions like this flawlessly?

### The Flawless Execution Model<sup>SM</sup>

Fighter Pilots follow a rigorous, but simple process of Planning, Briefing, Executing, and Debriefing their missions to ensure success every single time. We call this the Flawless Execution



FIGHTER PILOTS FOLLOW A RIGOROUS, BUT SIMPLE PROCESS OF PLANNING, BRIEFING, EXECUTING, AND DEBRIEFING THEIR MISSIONS TO ENSURE SUCCESS EVERY SINGLE TIME.

Model. At Afterburner, we know that the same process that makes a military Fighter Pilot successful will make a "Business Fighter Pilot" successful. Whether you're a member of the Sales Team, a District Manager, or even a CEO, the tools and techniques of Flawless Execution can dramatically enhance your performance.

## - PLAN -

### DEFINE THE MISSION OBJECTIVE

- Clear
- Measurable
- Attainable
- Supports the Overall Vision

### IDENTIFY THE THREATS

- Competitive threats
- Internal threats
- Hidden threats: Policies, regulations, etc.

### IDENTIFY SUPPORT ASSETS

- Know what the members of your team can do to help you win!
- Get to know your company from the bottom up

### COMPARE YOUR CAPABILITIES

- Know your personal / your team's strengths
- Analyze the competition and exploit weaknesses

### PRIORITIZE

- Set your timing
- Develop a timeline as though everything was going to go as planned

### PLAN FOR CONTINGENCIES

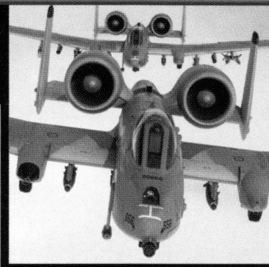
- Expect the unexpected
- Evaluate possible scenarios and your responses
- Ask the "What ifs"



# L E S S E X E C U T I

## - BRIEF -

1. **FIRST IMPRESSIONS.** Set the standard. Start and end on time. Have visuals prepared.
2. **ESTABLISH THE MISSION OBJECTIVE.** The mission objective must be clear, measurable, attainable, and support the overall vision.
3. **THE TIME HACK.** Set the pace of execution. Determine the timeline for the mission.
4. **WEATHER AND ENVIRONMENT.** The physical environment, the economic situation, and other "X" factors that will affect the mission.
5. **MOTHERHOOD.** The Standard Operating Procedures for the mission.
6. **THE THREAT.** Physical and mental description of the competition.
7. **THE TACTICS.** Focus on the specifics of the engagement. Who, what, when, where, why, and how.
8. **THE CONTINGENCIES.** Plan for contingencies in all phases of the mission.
9. **CONCLUSION.** Summarize key points. Encourage questions.



## - EXECUTE -



AVOID TASK SATURATION<sup>SM</sup> BY USING:

- **CHECKLISTS.** These memory joggers reinforce training and help you remember key procedures during periods of Task Saturation.
- **CROSSCHECKS.** At the center of every instrument panel is the attitude indicator. While there are hundreds of dials in a cockpit, pilots must stay focused on this instrument...it's their #1 priority.
- **CHECK SIX.** Never, never leave your wingman. The mutual support of our wingmen ensures we always accomplish the mission.

# - DEBRIEF -

# DEBRIEF YOUR MISSION

**SET TIME AND LOCATION.** Schedule when and where the debrief takes place and how long it should last.

**STONE.** Hold a nameless, rankless debrief that allows open communication. Leaders set the tone by example.

**EXECUTION.** Analyze your team's execution versus the objective.

**ANALYZE ERRORS.** Identify execution errors, their causes, and deeper root causes.

**LESSONS LEARNED.** Pick out recurring root causes that can affect the outcome of future missions.

**TRANSFER LESSONS LEARNED.** Accelerate learning and experience by transferring lessons learned throughout your organization.

**HIGH NOTE.** End with a positive summary and outlook. Move forward with positive energy.

What event did you attend?:  Afterburner Day  
 Leaning Forward  Brief to Win!  
 Other \_\_\_\_\_

How would you rate this program? Please rate the overall program from 1 (poor) to 10 (excellent).  
1 2 3 4 5 6 7 8 9 10

Who was your Main Speaker?  
(Fighter Pilot that led the event)

How would you rate your Main Speaker's performance? Please rate the Main Speaker from 1 (poor) to 10 (excellent).  
1 2 3 4 5 6 7 8 9 10

Who was your Facilitator?  
(Fighter Pilot that led the Breakout Session)

How would you rate your Facilitator's overall performance? Please rate the Facilitator from 1 (poor) to 10 (excellent).  
1 2 3 4 5 6 7 8 9 10

Comments. How can we improve?  
What did you like? Dislike?

Sign me up for the Afterburner Intelligence Report Monthly e-newsletter (Fill in email address below)

Send me more information on Afterburner  
 Seminars  Leadership Programs  
 Youth Programs  Health Care Programs

Name \_\_\_\_\_

Company \_\_\_\_\_

Title \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

How well does YOUR company execute?

Please rate your company from 1 (poor) to 10 (excellent).

Planning 1 2 3 4 5 6 7 8 9 10

Briefing 1 2 3 4 5 6 7 8 9 10

Executing 1 2 3 4 5 6 7 8 9 10

Debriefing 1 2 3 4 5 6 7 8 9 10





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# - WIN -

Winning itself is not our goal. Our goal is to win by implementing a disciplined management process. We only really win if we have planned carefully, briefed our plan thoroughly, executed our plan with discipline, and debriefed the mission so we can improve tomorrow. Luck can get results some of the time, but it can't be easily duplicated. A disciplined process can. In the end, real winning happens when we apply the tools of Flawless Execution—whether in the air in a supersonic fighter jet or on your "business battlefield".

# DEBRIEF YOUR MISSION

# PROGRAMS

## - AFTERBURNER DAY<sup>SM</sup> -

**PLAN. BRIEF. EXECUTE. DEBRIEF. = WIN!**  
4-6 Hours - 10 to 1,500 participants

The Afterburner Day is an interactive corporate event in which your team learns, via lecture and experiential learning, how Fighter Pilots strive for Flawless Execution in every single mission. Your group will work side-by-side with some of America's top Fighter Pilots, learning how those pilots excel in the business of combat. Using a multimedia presentation, a role playing breakout session with experienced military Fighter Pilots as facilitators, and a riveting final hour that some say is the best in the business, our Afterburner team brings these lessons to your own business environment in living color.

## - LEANING FORWARD -

**HARNESSING THE POWER OF PLANNING AND DEBRIEFING**

4-6 Hours - 10 to 1,500 participants

If you don't have time for a full Afterburner Day, but still want to lead your group through an awesome team building event, then our high energy, fast-paced Leaning Forward Program is for you. This event captures the essentials of the Afterburner Day in a compact format, with a focus on planning and debriefing.

## - BRIEF TO WIN - NEW!

**LEADING TEAMS TO FLAWLESS EXECUTION**

4-6 Hours - 10 to 1,500 participants

Why do the plans of so many talented and motivated business people fall short? Because the plan is not properly communicated to those who must execute it. Through the experience of combat, Fighter Pilots have developed a life saving, mission perfecting formula for communicating the plan that we call: Brief to Win! This is not a seminar on conducting better meetings; it's an experience that will teach you the power of operational mission briefings. During the Brief to Win! experience, your team will learn the lessons of effective briefings in an attention-riveting, real time simulation of a complex air battle. Armed with the strategies and tactics learned from this battle, your team members will develop and deliver a tactical briefing based upon your company's unique mission objective.

## - KEYNOTE PRESENTATIONS -

**ARE YOU READY FOR SOMETHING COMPLETELY DIFFERENT?**  
60-90 minutes, group size unlimited

With an Afterburner Keynote, you experience a highly customized presentation, not just a one-size-fits-all speech. The presentation is accompanied by cutting-edge, high impact multimedia graphics and video footage. Our speakers will have you on the edge of your seat with one of the most high energy presentations you have ever heard! **Keynote Topics Include:**

- Plan. Brief. Execute. Debrief.=Win!: A Fighter Pilots Secret to Business Success
- Overcoming Task Saturation<sup>SM</sup>
- The Power of Debriefing

## - LEADERSHIP PROGRAMS -

**MAKING FLAWLESS EXECUTION PART OF YOUR COMPANY**

Afterburner seminars help people understand the concepts of Flawless Execution, but to truly improve corporate execution, more in-depth programs are needed. Afterburner Leadership Programs are designed to meet this need—to enhance your company's ability to execute with speed, agility, and effectiveness.

- Afterburner Organizational Assessments help you identify your leadership bench strength and pinpoint areas that contribute to poor execution.
- Leadership Assessments identify the strengths and weaknesses of your managers to help them enhance their performance as leaders and as a team.
- Our Corporate Wingman Program provides execution enhancement coaching to corporate leaders—the back bone of any serious corporate improvement process.
- Workshops on strategy, leadership, and Flawless Execution methodologies give your people the skills needed to improve execution at every level in the company.

## - YOUTH PROGRAMS -

**GIVING YOUTH A FLIGHT PLAN FOR LIFE**  
60-90 minutes, group size unlimited

The Flight Plan for Life<sup>SM</sup> Program is designed to arm our young people with the same smart decision making skills used by the nation's top Fighter Pilots. We give today's youth the situational awareness they need when confronted by life's ever increasing challenges. This program provides a compass for our youth, giving them direction, and equipping them with the tools they need to navigate the challenging mission of life.



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