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# Alpha Phi Omega

National Service Fraternity

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## Annual Chapter Evaluation & H. Roe Bartle Chapter Award

Chapter Name: \_\_\_\_\_

Region: \_\_\_\_\_ Section: \_\_\_\_\_

College/University: \_\_\_\_\_

## THE ANNUAL CHAPTER EVALUATION

The Annual Chapter Evaluation was originally adopted by the 1978 National Convention and updated by subsequent conventions. While it is no longer a requirement to remain in good standing, it is a useful tool to evaluate your chapter's past program and to plan for the future. It is required if your chapter wishes to be eligible for the H. Roe Bartle Chapter Award.

The purpose of this evaluation is to make each chapter more effective in meeting the objectives of Alpha Phi Omega. Specifically, it provides you with an opportunity to:

- Evaluate what was accomplished during the past academic year;
- Establish goals for strengthening the program during the current year;
- Identify areas which may require increased effort or assistance on the part of sectional chairs and staff, the Board of Directors, and the National Office staff;
- Determine, through self-evaluation, whether the chapter believes it has qualified for the H. Roe Bartle Chapter Award.

The success of the Fraternity depends on the achievements of its members. As you establish challenging plans and goals of the academic year, you will create greater results that enhance Alpha Phi Omega, and enjoy the personal rewards of satisfaction and greater opportunities. Alpha Phi Omega believes it is very important for each chapter to have a better understanding of what constitutes a successful chapter. That is the function of the Annual Chapter Evaluation. It is designed to help your chapter arrive at this understanding. It provides you with a formal procedure allowing you to conduct a self-evaluation of your chapter's program and to create plans and objectives for greater achievements in the coming years.

You may wish to include this evaluation as part of your Chapter Assessment and Planning Session (CAPS) or in a meeting of the entire chapter. We request that all chapter officers and the advisory committee be involved with this review process. You may wish to invite your sectional chair or sectional representative to be present during the review. It is evident that there are many items which require discussion beyond the completion of this form. Your sectional chair and regional director will receive copies of your completed Annual Chapter Evaluation so that they can respond to your needs. When you have completed the evaluation and H. Roe Bartle Chapter Award, return it to the National Office by November 15.

(Completion of Pages 2-13 are required for the achievement of the HRB Award- See Page 15)

**LEADERSHIP**

	Results Past Year <u>(2011-12)</u>	Goals Current Year <u>(2012-13)</u>
1. Leadership is developed in individual brothers through: [Rank in order of importance: (1-7, 7 least important)]		
a. Delegation by Officers & Project Chairs	_____	_____
b. Officer Apprenticeships	_____	_____
c. Committee/Project Chairs	_____	_____
d. Committee Membership	_____	_____
e. Chapter Officer Orientation	_____	_____
f. Workshops and Seminars at Conferences	_____	_____
g. Use of "Leadership Series" Guides/Webinars	_____	_____
2. Our chapter has participated/will participate in the following programs conducted by the Fraternity: (Yes or No)		
a. Membership Academy	_____	_____
b. APO LEADS	_____	_____
c. Sectional Conferences	_____	_____
d. Regional/National Convention	_____	_____
3. Our chapter conducts/will conduct a "Chapter Assessment and Planning Session" (CAPS) at least annually: Yes _____ No _____		
4. Our chapter has/will have: (weekly, biweekly, monthly)		
a. Executive Committee Meetings	_____	_____
b. Chapter Meetings	_____	_____
c. Pledge Class Meetings	_____	_____
5. Chapter meetings are/will be conducted according to: (Check appropriate answer)		
a. An agenda planned by the president alone	_____	_____
b. An agenda planned by the executive committee	_____	_____
c. No agenda-whoever wants to raise an issue can	_____	_____
6. Chapter meetings generally last: (Circle one)		
Results (2011-2012): Less than 1 hour    1-2 hours    2-3 hours    More than 3 hours		
Goals (2012-2013): Less than 1 hour    1-2 hours    2-3 hours    More than 3 hours		
7. Chapter executive committee meetings are/will be open to: (Yes or No)		
a. Pledges	_____	_____
b. Non-officer brothers	_____	_____
c. Advisors	_____	_____
d. Others (Specify) _____	_____	_____

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Chapter Name: \_\_\_\_\_ Region: \_\_\_\_\_ Section: \_\_\_\_\_

8. How often do/will advisors:  
(weekly, biweekly, monthly, etc)
- a. Meet with other advisors as a committee \_\_\_\_\_
  - b. Meet with the president \_\_\_\_\_
  - c. Meet with the officers \_\_\_\_\_
  - d. Meet with the pledges \_\_\_\_\_
  - e. Meet with the entire chapter \_\_\_\_\_
9. On a scale from 1 (best) to 10 (worst) rate the effectiveness of:
- a. Executive committee \_\_\_\_\_
  - b. Service committee \_\_\_\_\_
  - c. Membership committee \_\_\_\_\_
  - d. Fellowship committee \_\_\_\_\_
  - e. Finance committee \_\_\_\_\_
10. Our chapter promotes/will promote communication and activity with the rest of the Fraternity through: (Check those which apply)
- a. Chapter newsletter \_\_\_\_\_
  - b. Article contributions to sectional/regional newsletter \_\_\_\_\_
  - c. Article contributions to *Torch & Trefoil* \_\_\_\_\_
  - d. Communication with the sectional chair  
(apart from conferences) \_\_\_\_\_
  - e. Communication with the regional director  
(apart from conferences) \_\_\_\_\_
  - f. Having a fund to assist chapter delegates to attend  
National Conventions \_\_\_\_\_
  - g. Participation in projects/activities with other chapters  
(apart from conferences) \_\_\_\_\_
11. Our chapter considers and uses/will use as resources: (Yes or No)
- a. Alumni \_\_\_\_\_
  - b. Advisors \_\_\_\_\_
  - c. Sectional/regional staff \_\_\_\_\_
  - d. Local Scouting volunteers \_\_\_\_\_
  - e. Faculty and staff \_\_\_\_\_
  - f. Others in community \_\_\_\_\_
12. (a)How many brothers hold campus leadership positions \_\_\_\_\_
- (b)The chapter attitude toward brothers holding such leadership positions can be best described as: (check one)
- a. Encouraging \_\_\_\_\_
  - b. Discouraging \_\_\_\_\_
  - c. Noncommittal \_\_\_\_\_

(Completion of Pages 2-13 are required for the achievement of the HRB Award- See Page 15)

Appendix H

Chapter Name: \_\_\_\_\_ Region: \_\_\_\_\_ Section: \_\_\_\_\_

## **CHAPTER LEADERSHIP PROGRAM**

Describe you chapter's plans for developing leadership within the chapter:

**CHAPTER OPERATIONS**

	Results Past Year <u>(2011-12)</u>	Goals Current Year <u>(2012-13)</u>
1. Our chapter operates/will operate within a written budget, approved by the brothers: (Yes or No)	_____	_____
2. Accurate financial records are/will be kept by our treasurer? (Yes or No)	_____	_____
3. Our chapter receives/will receive a report from the treasurer on the financial situation: (weekly, biweekly, monthly, once a semester, once a year, never)	_____	_____
4. These financial records are/will be audited by a qualified person at least once a year: (Yes or No)	_____	_____
5. Federal and state tax returns are/will be filled out and submitted on time: (Yes or No)	_____	_____
6. Our chapter has/will have a public relations program which		
a. Provides information to campus and community media about our activities	_____	_____
b. Maintains contact with college officials	_____	_____
c. Maintains contact with service organizations in the community	_____	_____
d. Other (describe): _____	_____	_____
7. Our chapter utilizes/will utilize the following to publicize its events: (Yes or No)		
a. Campus newspaper	_____	_____
b. Chapter newsletter	_____	_____
c. Community newspaper	_____	_____
d. Campus TV/Radio	_____	_____
e. Community TV/Radio	_____	_____
f. Posters	_____	_____
g. Word-of-mouth	_____	_____
h. Website	_____	_____
i. Other (explain): _____	_____	_____
8. Our chapter has/will actively work to achieve the Chapter of Excellence Award (COE)? (Yes or No)	_____	_____

**FRIENDSHIP/MEMBERSHIP**

	Results Past Year <u>(2011-12)</u>	Goals Current Year <u>(2012-13)</u>
1. Our recruiting program includes/will include: (Yes or No)		
a. Pre-rush orientation for the brothers	_____	_____
b. Fellowship activities	_____	_____
c. Service activities	_____	_____
d. Use of paid advertising	_____	_____
e. Use of rush materials provided by the Fraternity	_____	_____
f. Use of a website	_____	_____
g. Informational meeting (“rush”) for prospective on at least two different dates and times during the rush period	_____	_____
2. Our chapter makes/will make non-members feel welcome to attend service projects: (Yes or No)	_____	_____
3. Our pledge program last/will last: (Circle one)		
Results (2011-2012): 1-5 weeks                      6-10 weeks                      More than 10 weeks		
Goals (2012-2013): 1-5 weeks                      6-10 weeks                      More than 10 weeks		
4. During the pledge period, pledges are/will be asked to: (Yes or No)		
a. Attend pledge class meetings	_____	_____
b. Attend chapter meetings	_____	_____
c. Participate in chapter service projects	_____	_____
d. Plan their own service projects	_____	_____
e. Learn the history of the Fraternity	_____	_____
f. Learn the history of the chapter	_____	_____
g. Study the Fraternity’s Pledge Manual	_____	_____
h. Participate in the chapter fellowship activities	_____	_____
i. Plan their own fellowship activities	_____	_____
j. Meet all of the brothers	_____	_____
k. Attend various committee meetings	_____	_____
l. Attend executive committee meetings	_____	_____
m. Attend regional and/or sectional conferences	_____	_____
n. Participate in APO LEADS courses	_____	_____
o. Visit other chapters	_____	_____
5. In reference to the “National Pledging Standards”: (Yes or No)		
a. The chapter has a copy	_____	_____
b. The pledging standards are followed without exception	_____	_____
c. The entire chapter fully understands the pledging standards	_____	_____

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Chapter Name: \_\_\_\_\_ Region: \_\_\_\_\_ Section: \_\_\_\_\_

- d. Pledges are provided with a copy of the pledging standards at the beginning of the program \_\_\_\_\_
  
- 6. Our chapters has/will actively work to achieve the Pledge Program of Excellence Award (PPOE): (Yes or No) \_\_\_\_\_
  
- 7. What percentage of the brothers participate in the chapter activities? (Circle best answer)  
 10%                  25%                  50%                  75%                  100%                  NA
  
- 8. Our spirit of brotherhood and feeling of harmony can best be described as: (Circle best answer)  
 very weak                  weak                  fair                  strong                  very strong
  

	Results Past Year (2011-12)	Goals Current Year (2012-13)
9. Not including those brothers who have left campus, the chapter has retained the following percentage of its brothers: _____	_____	_____

  
- 10. We have an alumni program that encourages/will encourage alumni to participate in: (Yes or No)

  - a. Initiations/rituals \_\_\_\_\_
  - b. Banquets \_\_\_\_\_
  - c. Chapter meetings \_\_\_\_\_
  - d. Service projects \_\_\_\_\_
  - e. Fellowship activities \_\_\_\_\_
  - f. Other (Explain: \_\_\_\_\_) \_\_\_\_\_
  - g. Nothing \_\_\_\_\_

  
- 11. We help/will help alumni stay in contact with the Fraternity through: (Yes or No)

  - a. Chapter newsletter \_\_\_\_\_
  - b. Promotion of Life Membership \_\_\_\_\_
  - c. Annual alumni get-together \_\_\_\_\_
  - d. Other (Explain: \_\_\_\_\_) \_\_\_\_\_

  
- 12. Our advisor program includes/will include: (Yes or No)

  - a. Recruitment of faculty members \_\_\_\_\_
  - b. Key members of the administration \_\_\_\_\_
  - c. At least one Scouting advisor \_\_\_\_\_
  - d. Regular meetings between the advisory committee and the chapter president and/or executive committee \_\_\_\_\_
  - e. Regular meetings between the advisory chair and our president \_\_\_\_\_
  - f. Regular use of the advisors as a resource \_\_\_\_\_

(Completion of Pages 2-13 are required for the achievement of the HRB Award- See Page 15)



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**Chapter Name:** \_\_\_\_\_ **Region:** \_\_\_\_\_ **Section:** \_\_\_\_\_

**CHAPTER MEMBERSHIP RETENTION PROGRAM**

Explain what measures the chapter takes to ensure and develop membership retention:

**SERVICE**

	Results Past Year <u>(2011-12)</u>	Goals Current Year <u>(2012-13)</u>
1. Our service program includes service to: (Yes or No)	_____	_____
a. The Nation	_____	_____
b. The Community	_____	_____
c. The Campus	_____	_____
d. The Fraternity	_____	_____
e. Scouting	_____	_____
f. Any of our other national service partners	_____	_____
2. Our participation in National Service Week includes/will include: (Yes or No)		
a. Conducting a service project on the theme	_____	_____
b. Obtaining a governmental proclamation	_____	_____
c. Publicizing the event though campus and community	_____	_____
d. Involving other organizations in promoting and participating in National Service Week	_____	_____
e. Reporting the project to the National Office by November 15	_____	_____
3. Our participation in Spring Youth Service Day includes/will include: (Yes or No)		
a. Conducting a Youth Relater Service Project	_____	_____
b. Publicizing the event though campus and community	_____	_____
c. Involving other organizations in promoting and participating in Spring Youth Service Day	_____	_____
d. Reporting the project to the National Office by May 1	_____	_____
4. Our chapter has/will apply for a Youth Service Day Grant	_____	_____
5. We keep/will keep written records and evaluations of the projects, including what made each a success or failure	_____	_____
6. We review/will review the current service program to determine the value of the current projects and the need for different/additional projects: (Check appropriate response)		
a. After each project is completed	_____	_____
b. Once a semester/trimester/quarter	_____	_____
c. Once a year	_____	_____
d. Once in a while	_____	_____
e. Never	_____	_____
7. What proportion of the chapter's brothers contribute/will contribute a significant amount of time, effort and commitment to the service program: (Circle the best answer)		
Results (2011-2012):	10%	25%
	50%	75%
	100%	NA
Goals (2012-2013):	10%	25%
	50%	75%
	100%	NA

(Completion of Pages 2-13 are required for the achievement of the HRB Award- See Page 15)

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**Chapter Name:** \_\_\_\_\_ **Region:** \_\_\_\_\_ **Section:** \_\_\_\_\_

8. What proportion of the chapter's pledges contribute/will contribute a significant amount of time, effort and commitment to the service program: (Circle the best answer)

Results (2011-2012): 10%      25%      50%      75%      100%      NA  
 Goals (2012-2013): 10%      25%      50%      75%      100%      NA

9. Did the chapter raise funds for charitable organizations during the 2011-2012 year?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please list the charity and the amount contributed to each.

10. Please list the chapter's major service projects. Plan an \* by those which fall under the National Program of Emphasis.

<b>Accomplished 2011-2012</b>	<b>Planned 2012-2013</b>
CAMPUS	CAMPUS
COMMUNIUTY	COMMUNITY
SCOUTING	SCOUTING
NATION	NATION
FRATERNITY	FRATERNITY

(Completion of Pages 2-13 are required for the achievement of the HRB Award- See Page 15)

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**Chapter Name:**\_\_\_\_\_ **Region:**\_\_\_\_\_ **Section:**\_\_\_\_\_

**NOTE:** *The following is a “sample copy” of the National Service Week Report Form. Please complete the original form (mailed with the National Service Week Handbook) immediately after National Service Week, November 1-7, and mail before December 1.*

(Completion of Pages 2-13 are required for the achievement of the HRB Award- See Page 15)

**DIVERSITY**

1. How does your chapter's membership compare to your campus demographics in the following areas? (Please use statistical information provided by your college or university to compare the percentage of your chapter's membership in these areas to that of the overall population of the university.)

a. Academic Standing (Freshmen, sophomores, juniors, seniors, graduate students)

b. Majors

c. Male/Female Ratio

d. Race/Ethnicity

2. Does your chapter have a plan for increasing/promoting your diversity? (Check one)

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please explain.

If no, do you intend to develop one?

Yes \_\_\_\_\_ No \_\_\_\_\_

If you intend to develop a plan for increasing diversity, please explain what you're going to do.

3. Has your chapter participated in multicultural events within your campus or community?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please explain.

If no, do you intend to participate in any in the future?

Yes \_\_\_\_\_ No \_\_\_\_\_

If you intend to participate in any in this future, please explain your plans in that regard.

## THE H. ROE BARTLE CHAPTER AWARD

H. Roe Bartle, Alpha Phi Omega's second National President, was a major factor in the growth and prosperity of the Fraternity. The "Chief", as Brother Bartle was affectionately known, succeeded our founder, Frank Reed Horton, as National President in 1931. At that time there were 18 chapters of Alpha Phi Omega.

Brother Bartle served Alpha Phi Omega as National President for 16 years, until 1946 when, at his choosing, he relinquished this responsibility. His accomplishments are legendary. He led Alpha Phi Omega in nationwide growth; from chapters on 18 campuses, to 109 campuses in 1946. He secured the endorsement of the National Council of the Boy Scouts of America and obtained the approval of college presidents and deans in all parts of the nation. He established the Fraternity's National Office when Sidney S. North was employed as the first National Executive Secretary. His achievements were even more significant when one considers that our nation endured the depression and World War II during his term as President. The "Chief" continued to serve Alpha Phi Omega as a member of the Board of Directors, Chairman of the Endowment Trustees and Legal Counsel until he passed away May 9, 1974.

The H. Roe Bartle Chapter Award, which is a unique certificate, was established to recognize those chapters of Alpha Phi Omega which achieve and maintain high standards in all aspects of their operations. Brother Bartle stressed achievement and high standards in all of his endeavors and would ask no less of others. His leadership in Alpha Phi Omega during the times of national crisis inspired countless chapters and individuals to succeed in the face of adversity. The Fraternity was maintained and strengthened by his presence during those difficult days. During his last days among us, the "Chief" was approached with the concept of establishing an award in his honor. He consented with the provision that the award would be based upon a self-evaluation by each chapter.

The H. Roe Bartle Chapter Award is based upon the evaluation of the chapter operations, activities, and programs. It provides an opportunity to document what was accomplished during the last academic year and to establish goals for the current year. The members of each chapter will determine whether the chapter has earned this recognition. In the spirit of H. Roe Bartle, we commend this program to every chapter.

**H. ROE BARTLE CERTIFICATION**

1. The following participated in the Annual Chapter Evaluation:  
(Check the appropriate answers)  
 President  
 Advisory Chair  
 Chapter Officers  
 Other Advisors  
 Committee Chair  
 Entire Chapter
  
2. Based on this evaluation of our chapter program, we believe that we:  
 Have qualified for the H. Roe Bartle Chapter Award for the 2011-2012 year  
 Have not qualified for the H. Roe Bartle Chapter Award for the 2011-2012 year

We acknowledge that the chapter is required by the National Bylaws and Standard Chapter Articles of Association and certify our willingness to do so.

*Signed:*

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Chapter President Date

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Advisory Committee Chair Date

***PLEASE MAIL THIS CERTIFICATION, ALONG WITH THE ANNUAL CHAPTER EVALUATION, BY NOVEMBER 15, 2012 TO:***

**ALPHA PHI OMEGA  
NATIONAL SERVICE FRATERNITY  
14904 E. 42<sup>ND</sup> STREET S.  
INDEPENDENCE, MO 64055**



Chapter Name: \_\_\_\_\_ Region: \_\_\_\_\_ Section: \_\_\_\_\_

## INFORMATION REQUESTED BY THE NATIONAL SERVICE FRATERNITY

This section (pages 15-16) is NOT part of the Annual Chapter Evaluation or the H. Roe Bartle Chapter Award. It seeks information which will be of value to the Fraternity, as we hope to serve you better. It is attached to this evaluation simply to avoid additional mailing.

Please mail or fax (816-373-5975) this completed form to the National Office as soon as possible. We appreciate your responses to the following questions.

Chapter Name: \_\_\_\_\_

College or University: \_\_\_\_\_

Approximate Student Population: \_\_\_\_\_ Total number of brothers in your chapter: \_\_\_\_\_

Approximate Number of:

Seniors \_\_\_\_\_  
Juniors \_\_\_\_\_  
Sophomores \_\_\_\_\_  
Freshmen \_\_\_\_\_  
Graduate Students \_\_\_\_\_

Number of Advisors: \_\_\_\_\_

Office Telephone Number (if any) (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

E-mail or website: \_\_\_\_\_

Time, day and place of chapter meetings:

Describe the chapter's major source(s) of income:

The chapter's annual budget is approximately: \$ \_\_\_\_\_

Dates each semester begins: \_\_\_\_\_

Dates each semester ends: \_\_\_\_\_

(Completion of Pages 2-13 are required for the achievement of the HRB Award- See Page 15)

## CHAPTER STRUCTURE

1. List each of the chapter's elected offices:

2. List each of the chapter's appointed offices:

3. List each of the chapter's committees: