

LAMBDA ALPHA EPSILON

STRATEGIC PLAN

2007-2008

MOTIVATIONS, GOALS & ANALYSIS

Prepared by

Keith Cormier 2004

Jonathan "Jerry" Witter 1982

STATEMENT OF PURPOSE

The purpose of this document is to establish a plan for the continued existence of a chapter house for the New York Epsilon chapter of Sigma Alpha Epsilon. As the house corporation, and landlords of the current house, Lambda Alpha Epsilon is seeking to set goals and discover opportunities that will best benefit the brotherhood of the chapter.

The Mission Statement of LAE (developed Summer 2002):

Lambda Alpha Epsilon exists to provide and protect a beneficial undergraduate experience and meaningful member relationships through dedicated alumni participation and efficient use of alumni resources.

The Two Primary Stakeholders of LAE are:

Alumni Brothers
Active Brothers

Other secondary stakeholders identified include:

Parents
Families: wives, kids.
Sigma Alpha Epsilon National
The local community
Rensselaer Polytechnic Institute

Activities and services LAE provides to Alumni and Active Brothers include:

- A “home away from home”
- A safe home / facility
- A society for friendship
- Maintain relationships for the organization
- Teach and educate
- Guidance and resources
- Maintain tradition and benefits
- Long term vision
- Maintain the trust that LAE will keep the chapter going.

STAKEHOLDERS

- Potential Members
 - Question – The potential member questions why they would want to enter the organization, the costs and benefits of membership, and what the culture of the chapter is like.
 - Transition – The potential member looks to make the transition to membership under the guidance of the chapter and alumni body.
 - Perform – The potential member attempts to meet chapter expectations and perform all necessary responsibilities during membership.
- Active Members
 - Recruit – The active member recruits new members to ensure that the chapter will continue to survive. They must accurately communicate the goals & responsibilities of an active member to the potential member to ensure that their decision to join is well founded.
 - Operate – The active member participates in the operation of the chapter on a daily basis, is responsible for the general state of cleanliness of the chapter house, and interacts with the university, other students & Greek organizations.
 - Preserve – The active member preserves the values and positive traditions of the overall Sigma Alpha Epsilon fraternity and the New York Epsilon chapter. He also preserves the structure in which the chapter lives and operates.
 - Define – The active member defines the culture of the chapter during his time as an undergraduate, with an understanding of the heritage of his fore fathers. This impacts the ability of the chapter to operate, recruit and interact with the community, university and alumni.
- Chapter Executive Council
 - Set – The EC sets short-to-medium term chapter goals that are designed to enhance the prosperity and influence of the chapter.
 - Manage – The EC manages the active member body to efficiently operate and achieve their goals and maintain the standards of chapter excellence.
 - Facilitate – The EC facilitates contact with the alumni body. As the focal point of the chapter, the EC member is responsible for providing a sense of home to returning alumni and must coordinate with the LAE board to communicate effectively.
- LAE Board of Directors
 - Manage – The LAE Board of Directors manages and finances the maintenance of the structure in which the Chapter lives. It is also responsible for checking on the proficiency of chapter operations to protect its investment in the structure and individuals of the chapter.
 - Provide – The LAE Board provides basic lines of communication between the undergraduate member and the alumni body and resources for a beneficial undergraduate experience through scholarships and long term financial planning.

- Advise – The LAE Board advises the Chapter Executive Council. As the representation of the most active alumni members, it should seek to proactively offer council to any undergraduate and be an example for conduct becoming a gentleman.
- Plan – The LAE Board must plan for the long term prosperity of the chapter with stable finances, superior housing, and view towards trends in Rensselaer student life.
- Alumni Body
 - Impact – The alumni body impacts the culture and brotherhood of the active members through their deeds and words. It is an inherent obligation to give back to the organization which has given to them during their undergraduate year
 - Communicate – The alumni body communicates with the active members for the sake of friendship and also for networking in the professional sectors.
 - Support – The alumni body supports the chapter with its annual phonathon donations and its advice and mentoring based in their experiences as undergraduates and professionals.
- Sigma Alpha Epsilon National Fraternity
 - Impact – The Fraternity impacts the Chapter by promoting the core values of the Founding Fathers and offering opportunities for chapter and personal growth through leadership schools, conventions, scholarships, and visitations.
 - Communicate – The Fraternity communicates to the Chapter members the current trends and needs for modern fraternity membership as part of a nationwide organization.
- Parents/Families
 - Impact – The parents and families the core personalities and ethos of the members that serves as the backbone of the character of the potential of a rushee through the development of strong leaders and followers by the time they graduate from RPI.
 - Support – The parents/families support the Chapter by allowing their sons to participate with the Chapter and gain the full experience by living in the Chapter house and are willing to discuss with younger member's parents the benefits of NYEP to the development of their sons at RPI.
- Rensselaer Polytechnic Institute
 - Impact – The University impacts the rules and environment which govern the Chapter members and the culture in which they live. The 5-STAR accreditation process sets the standards for chapter excellence on campus.
 - Communicate – The University communicates its expectations for the Chapter to the chapter members via meetings, emails.

SHORT TERM ITEMS 2006-07

A Review of the past 2 year accomplishments, Green, Yellow, Red for ranking status. For this coming year will alter the formatting for trees and ease.

OBJECTIVE Recruit new chapter advisor & manage training/transition			
ACTION	WHO	WHEN	OUTCOME
Gather supply of interested alumni	LAE BOARD	NOW!!!	JT
Undergrad vote on candidates	CHAPTER		JT
Obtain SAE National Approval of the new advisor	CHAPTER		JT
Train & transition	WITTER		WORKING

OBJECTIVE Replace bathrooms & repair roof/walls to prevent further water damage			
ACTION	WHO	WHEN	OUTCOME
Get necessary estimates on each bathroom	CHAPTER HOUSE MANAGER	JAN 2006	COMPLETED
Prioritize and schedule work to be completed before Sep 2006	LAE BOARD	FEB 2006	DONE
Replace shower & floor in 2 nd floor middle head (\$5345)	CHAPTER HOUSE MANAGER	MAR 2006	DONE
Repair roof leaks near 3 rd floor rooms (estimates needed)	CHAPTER HOUSE MANAGER	MAY 2006	DONE SUMMER
Repair wall above 1 st floor bay window (estimates needed)	CHAPTER HOUSE MANAGER	MAY 2006	
Remove & replace tub in 2 nd floor private bathroom (\$2460)	CHAPTER HOUSE MANAGER	SEP 2006	DONE SUMMER
Remove & replace 3 rd floor showers (\$6445)	CHAPTER HOUSE MANAGER	SEP 2006	DEFERRED UNTIL 2007-2008

OBJECTIVE Additional bathroom work & house maintenance			
ACTION	WHO	WHEN	OUTCOME
Toilet & tile in Jane (estimates needed)	CHAPTER HOUSE MANAGER	SEP 2006	DEFER

Stabilize/replace main stair railings (estimates needed)	CHAPTER HOUSE MANAGER	SEP 2006	DEFER
Patch driveway potholes (known cost here) –	CHAPTER HOUSE MANAGER	SEP 2006	DEFER
Renovate the Servants Quarters Bathroom Shower (emergent work)	CHAPTER HOUSE MANAGER		DONE
Renovate the Garage Bathroom Shower and floor	HM		DONE
Replace/fix heater unit in Dining Room and fix air ducting to it to improve first floor heat			
Replace window well windows to seal up basement to reduce cold drafts.		SEPT 2007	
Replace broken windows to doors to basement and kitchen		SEPT 2007	
Perform preventative maintenance on the radiators, shutoff valves, and control valves.	HM CRISAFULLI	Sept 2006	DONE FALL 2006
Get contract to checkout the boiler, flush system, and to start it off in the fall to protect the investment and longevity of the boiler.	HM/LAE	SEPT 2007	
Paint the dining room	HM	SEPT 2006	DONE FALL 2006
Redo the ceiling in chapter/tv room from water damage and clean/paint walls	HM	SEPT 2006	DONE FALL 2006
Fix Basement Drain system for broken and backed up sewer line	HM	NOV	DONE FALL 2006
Replace door to the garage bathroom	HM	SEPT 2006	DONE FALL 2006
Hang the fire extinguishers	HM	NOV 2006	HANGERS HUNG

OBJECTIVE Phonathon enhancements & execution (also completed for 2007)			
ACTION	WHO	WHEN	OUTCOME
Schedule & execute pilot calls to known big donors around 150 th anniversary	LAE BOARD (JEFFERS LEAD)	9-MAR 2006	DONE
Set donation award tiers based on data from pilot calls	LAE BOARD (JEFFERS LEAD)	16-MAR 2006	DONE, NEED TO DISTRIBUTE
Advertise phonathon via website, e-mail and postcard	CHAPTER EC (LAE ADVISE)	18-FEB 2006	DONE
Pick & purchase donation awards	LAE BOARD (JEFFERS LEAD)	16-MAR 2006	DONE, NEED TO DISTRIBUTE
Book physical location for undergrad to make calls	LAE BOARD (JEFFERS LEAD)	18-FEB 2006	DONE

Establish "Alumni chair" for each class year to facilitate contact (update phonathon db)	LAE BOARD (WITTER LEAD)	25-FEB 2006	NOPE, BUT DAMORE, JEFFERS, BIRKS OFFERED TO CONTACT ONE FOR FALL - FOLLOWUP
Train undergrads & provide calling tips	LAE BOARD (JEFFERS LEAD)	9-MAR 2006	DONE
Track & execute follow-up calls/e-mails monthly with pledged but not collected donators	LAE BOARD (JEFFERS LEAD)	SEP 2006	NEED TO GET FIRST MONTH
Revisit for next year's – Todd Cieplinski offered to help,			
Support of SAE National Campaign of \$120k (Don Parsons)			

OBJECTIVE Website overhaul			
ACTION	WHO	WHEN	OUTCOME
Spec necessary enhancements & review with board	LAE Sec/CRC	21-FEB 2006	KYLE MADE AN UPDATE IN AP2007
Update website to spec	CHAPTER TECHNICAL EXPERT	16-MAR 2006	
Switch to GoDaddy.com or something else away from WebGIO		FALL 2007	

OBJECTIVE Plan fall 06 alumni weekend			
ACTION	WHO	WHEN	OUTCOME
Plan & book dinner location	LAE BOARD (JT LEAD)	SEP 2006	DONE
Advertise via newsletter, e-mail for 150 th	LAE BOARD (JT LEAD)	MAY 2006	DONE
Schedule soccer & other activities	LAE BOARD (JT LEAD)	SEP 2006	DONE
Maintain the RSVP's and payments and dinner selections, name tags,			DONE
T-shirts: Sell of last year's chapter Tshirts, left over phonathon trinkets as door prize, 50-50 raffle			NOT DONE
Advertise to National Officers interested in attendance			

OBJECTIVE			
Elect new LAE Board Members for 4 year terms			
ACTION	WHO	WHEN	OUTCOME
Determine who is on board now and when their terms are up <ul style="list-style-type: none"> • Chairman - Keith Cormier 2004 (term up 2007) • Vice Chair - Jared Ray 2004 (term up 2010) • Secretary - Jonathan "Jerry" Witter 1982 (term up 2009) • Treasurer - James "Surf" Owens 1968 • Kurt Spiegel 2004 (term up 2007) • Matt Jeffers 1996 (term up 2008) • Maura Spiegel 2004 (term up 2008) • John Bogdan 1986 (term up 2009) • Nick Mandelenakis 2001 (term up 2010) • Chapter Advisor - John Thomas 2003 • Eminent Archon - Dave Roberge 2008 • Eminent Treasurer -Anthony Guidarelli 2009 • Alumni Relations - Jim Croke - 2010 • House Manager - Steve Knapp -2009 	LAE BOARD	AUG 2006	DONE FIGURED WHO WAS UP WHEN
Recruit new candidates and put into the Sept newsletter to meet ballot deadline for the corporation (Swarthout, JRay, Cieplinski?, Blodgett, Nick M, D'Amore, Witter, Kirk Filbey, JT)	LAE BOARD	SEPT 1, 2006	NICK AND JRAY

MEDIUM TERM ITEMS 2006-07

OBJECTIVE Vote & train replacement treasurer			
ACTION	WHO	WHEN	OUTCOME
Advertise vacancy for fall alumni weekend to assess interested parties	LAE BOARD (LEAD NEEDED)	OCT 2006	SURF REITERATE NOT READY YET
Interview & vote on potential candidates	LAE BOARD	OCT 2007?	
Train and transition to treasurer elect	SURF	OCT 2008	

OBJECTIVE Wallpaper and painting for house			
ACTION	WHO	WHEN	OUTCOME
Redo wallpaper in stairwell,(blank space shows dirt and wall deformities)			
Windows and Shutters			
Fix air porch pillars, ceiling and paint			

OBJECTIVE Use of cash flow from wiring mortgage expiry (~3yrs)			
ACTION	WHO	WHEN	OUTCOME
Develop investment strategy for big replacement and/or increased spending on maintenance	LAE BOARD (LEAD NEEDED)	OCT 2006	

LONG TERM ITEMS 2006-07

OBJECTIVE			
Gather info to make fix/buy decision on current house			
ACTION	WHO	WHEN	OUTCOME
Research current zoning regulations & what we're allowed to do	LAE BOARD (KURT)	OCT 2007	
Obtain architect opinion on viable enhancement options	LAE BOARD (LEAD NEEDED)	OCT 2007	
Research available house/properties available for purchase	LAE BOARD (LEAD NEEDED)	OCT 2007	
Review the Congressional Law on Fraternity Housing to see if changes donation and funding status of LAE			

OBJECTIVE			
Plan large projects for major enhancements			
ACTION	WHO	WHEN	OUTCOME
Research requirements & costs for sprinkler system addition, if needed	LAE BOARD (LEAD NEEDED)	OCT 2007	
Research requirements & costs for heating system enhancement	LAE BOARD (LEAD NEEDED)	OCT 2007	

SHORT TERM ITEMS 2007-08

Financial Plan for Post Rewiring Mortgage payments

Action	Who	When	Outcome
Develop investment strategy for big replacement and/or increased spending on maintenance			
Talk to Dave Haviland for Ideas for work, planning, and donation development			

Update Relations of Undergraduate Chapter and Alumni LAE Members

Action	Who	When	Outcome
Review last year frustrations and successes – don't dwell but focus on future opportunities and avoid mistakes		July 2007	
Explicitly state expectations for each – wish lists from both sides		July 2007	
Set the short term items for the coming year for house work and Chapter/LAE operations		July 2007	
LAE spend time with broader group of actives		August 2007	
Define Living In issues (parents, costs, conditions, brochure, etc.) so can address strategically			

Develop LAE Alumni Board Members

Action	Who	When	Outcome
Determine who is on board now and when their terms are up <ul style="list-style-type: none"> • Chair - Keith Cormier 2004 (term up 2007) • Vice Chair - Jared Ray 2004 (term up 2010) • Secretary - Jonathan "Jerry" Witter 1982 (term up 2009) • Treasurer - James "Surf" Owens 1968 • Kurt Spiegel 2004 (term up 2007) • Matt Jeffers 1996 (term up 2008) • Maura Spiegel 2004 (term up 2008) • John Bogdan 1986 (term up 2009) • Nick Mandelenakis 2001 (term up 2010) • Chapter Advisor - John Thomas 2003 • Eminent Archon - Dave Roberge 2008 • Eminent Treasurer -Anthony Guidarelli 2009 • Alumni Relations - Jim Croke - 2010 • House Manager - Steve Knapp -2009 		July 2007	
Recruit new candidates and put into the Sept newsletter to meet ballot deadline for the corporation (possibilities: Swarthout, Cieplinski, Blodgett, D'Amore, Kirk Filbey)	LAE	Aug 2007	

Plan Fall 2007 Alumni Weekend – Oct 19-21 (RPI Homecoming)

Action	Who	When	Outcome
Address Alcohol and Risk Management to aid Chapter in meeting neighbor and RPI policies (newsletter, stance that weekend, and scheduling activities)		Aug 2007	
Plan & book dinner at the house?	LAE/CRC	Sept 2007	
Advertise via newsletter, web, and e-mail	LAE/CRC	Aug 2007	
Schedule soccer & other activities	CRC/D'Amore	Aug 2007	
Maintain the RSVP's	CRC	Oct 2007	
T-shirts: Sell of past year's chapter Tshirts, left over phonathon trinkets as door prize, 50-50 raffle	CRC	Oct 2007	
Invite to National Officers interested in attendance	CRC	Aug 2007	
Reserve some hotel rooms?	LAE/CRC	Aug 2007	

Plan Spring 2007 Alumni Weekend (Freakout or when?? (softball, vball, Farkouh)

Action	Who	When	Outcome
Get Hockey Tickets for Freakout	CRC/D'Amore	Oct 2007	
Advertise via newsletter, web, and e-mail	LAE/CRC	Nov 2007	
Schedule other activities	CRC		

Bathroom Renovation and Structural Repairs

Action	Who	When	Outcome
Repair wall above 1 st floor bay window (estimates needed)			
Remove & replace 3 rd floor showers (\$6445)			
Toilet & tile in Jane (estimates needed)			
Stabilize/replace main stair railings (estimates needed)			
Patch driveway potholes (known cost here) –			
Replace/fix heater unit in Dining Room and fix air ducting to it to improve first floor heat			
Replace window well windows to seal up basement to reduce cold drafts.			
Replace broken windows and doors to basement and kitchen			
Get contract to checkout the boiler, flush system, and to start it off in the fall to protect the investment and longevity of the boiler.	Crisafulli?		
Redo wallpaper in stairwell,(large painted wall space shows dirt and wall deformities)	Contract		
Paint Windows and Shutters	Contract		
Fix air porch pillars, ceiling and paint			
Seal Driveway		Aug 2007	
Grass Seed		June 2007	
Motion Lights		Aug 2007	
Security Locks on Doors		Aug 2007	

Garage and Servants Stairs Sand and Poly		Aug 2007	
Second and Third Floor sand and poly		Aug 2007	
Basement Floor paint		July 2007	
Steve Knapp HM punch list	LAE/HM		

Phonathon 2008

Action	Who	When	Outcome
Follow up letters to delinquent donors of 2007	Surf/Jerry	July 2007	
Advertise results of last year's phonathon in newsletter and website	Jerry/CRC	Aug 2007 and Jan 2008	
Advertise phonathon via website, e-mail and postcard		Jan-Mar 2008	
Book physical location for undergrad to make calls – along with OT coverage if needed at RPI HC		Jan 2008	
Establish "Alumni chair" for each class year to facilitate contact (update phonathon db)	Jerry/CRC	Fall 2007	
Train undergrads & provide calling tips		Mar 2008	
Track & execute follow-up calls/e-mails monthly with pledged but not collected donators		July 2007	
Revisit ideas from Todd Cieplinski's offer to help,		Oct 2007	
Set donation award tiers based on calls level		Oct 2007	
Use past donation awards trinkets and lithos		Oct 2007	
Spec necessary enhancements & review with board			
Update website to spec			
Switch to GoDaddy.com or something else away from WebGIO			

Update Website and Electronic Communications for better Alumni Relations

Action	Who	When	Outcome
Switch to GoDaddy.com or something else away from WebGIO			
Specify further enhancements to the update of Spring 2007 & review with board			
Update website to specification			
Utilize the current Yahoo group list or create a new one at Google or new host			
Make use of the Yahoo Calendar and Evites for events			
Chapter Update current news on monthly basis (sports, chapter rush, retreats, dinners, pledging, etc.)			
Define use and availability of the LAE database			

MEDIUM TERM ITEMS 2007-08

Address Water Leakage and Damage Issues

Action	Who	When	Outcome
Mitigate Water Damage from downspout next to the Dining Room corner			
Mitigate Water Damage from above the first floor stairwell landing			
Address Airporch Roofing/drains to prevent further damage			
Investigate Front wall drift and tying it up	LAE Downey/Auren Harris/Haviland		

Recruit, Elect, Train new LAE Treasurer

Action	Who	When	Outcome
Work with "Surf" for timing and job functions			
Advertise future vacancy for fall alumni weekend to assess interested parties			
Interview & vote on potential candidates			
Train and transition to treasurer elect			

Plan Fall 2011 NYEP 60th Alumni Weekend – Oct (RPI Homecoming)

Action	Who	When	Outcome
Plan & book dinner banquet, house reception	LAE/CRC	May 2011	
Advertise via newsletter, web, and e-mail	LAE/CRC	May 2011	
Schedule soccer & other activities	CRC/D'Amore	Aug 2011	
Maintain the RSVP's, dinner selections, payments	CRC	Aug 2011	
T-shirts: Sell of past year's chapter Tshirts, left over phonathon trinkets as door prize, 50-50 raffle	CRC	Oct 2011	
Invite to National Officers	CRC	Aug 2011	
Reserve block of hotel rooms	LAE/CRC	Aug 2011	
Reserve the Heffner Alumni House?	LAE/CRC	May 2011	

LONG TERM ITEMS 2007-08

Decide to Fix current house, Build or buy new

Action	Who	When	Outcome
Research current zoning regulations & what we're allowed to do	LAE (Kurt)	Oct 2007	
Obtain architect opinion on viable enhancement options	LAE (?)	Oct 2007	
Research available house/properties available for purchase (<i>TKE gone to AGD in lease – who contracting with?</i>)	LAE (?)	Oct 2007	
Review the Congressional Law on Fraternity Housing to see if changes donation and funding status of LAE	LAE (?)	Oct 2008	
Investigate costs of plans for other chapters (TN, KY, IA, etc.)			

Plan large projects for enhancements

Action	Who	When	Outcome
Research requirements & costs for sprinkler system addition, if needed	LAE	Oct	
Research requirements & costs for heating system enhancement	LAE		