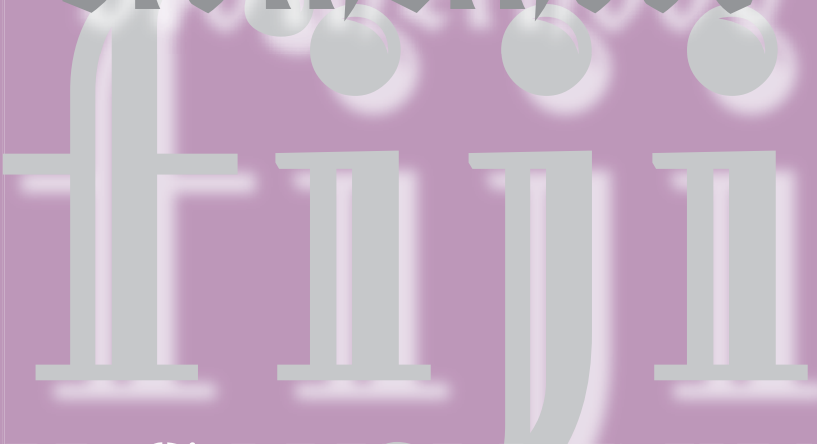


# PL Notebook

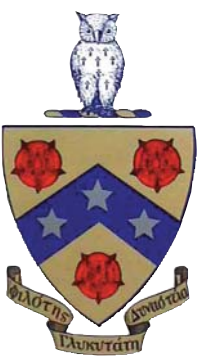
brotherhood



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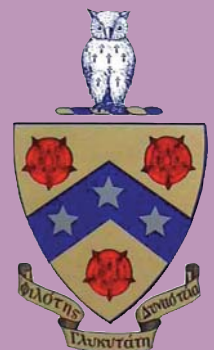
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# PURPLE LEGIONNAIRE NOTEBOOK

- I. Guidelines For Success
- II. Purple Legionnaire Reports
- III. PL Self Evaluation
- IV. Calendar/Checklist
- V. PL Position

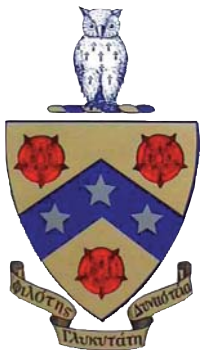
## TABLE OF CONTENTS



GUIDELINES FOR SUCCESS

ASA

# PURPLE LEGIONNAIRE



brotherhood



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## **GUIDELINES FOR SUCCESS AS A PURPLE LEGIONNAIRE**

### **Purpose**

The Purple Legionnaire is the day-to-day, on-line advisor to the undergraduate chapter, providing the continuity and experience which inherently is lacking in an undergraduate chapter.

### **Guidelines**

1. Develop a close working and fraternal relationship with the undergraduate chapter by having substantive contact at least once each week, including:
  - a. Attending at least one chapter meeting per month
  - b. Attending at least one cabinet meeting per month
  - c. Attending Ritual ceremonies (pledging, initiation, officer installation)
  - d. Attending pledge meetings occasionally
  - e. Attending special events, such as Pig Dinner, Homecoming, scholarship dinners, Founders Day, etc.
2. Monitor and support the chapter and the chapter officers in meeting objectives and carrying out plans.
3. See that the members, as well as the individual brothers considering chapter office, understand the responsibilities of each office and the commitment and talents necessary for successfully administering each office.
4. See that a thorough chapter officer transition is completed.
5. See that the chapter conducts an annual self-assessment, goal setting and planning.
6. Develop and maintain a familiarity with chapter operations; fraternity laws, policies, practices, and procedures; and the issues facing the Fraternity and college students by:
  - a. Reviewing the information sent from the International Headquarters and the Educational Foundation
  - b. Utilizing PL support materials
  - c. Attending and participating the Fiji Leadership Academy

**Phi Gamma Delta**  
**PL – Guidelines for Success**  
**p.2**

7. Work with the BCA and facilitate its direct involvement to meet the chapter's advisory needs. Whenever possible, delegate to BCA members the responsibility for advising on specific operations areas (finances, recruitment, scholarship, etc.).
8. Work with the house corporation by:
  - a. Communicating to the house corporation the housing-related needs of the chapter
  - b. Seeing that the chapter does the things necessary for a stable house corporation (filling the beds, financial management, recruitment, housekeeping)
9. Communicate regularly with the Section Chief, including filing necessary reports.
10. Communicate with the college/university administrators who oversee the fraternities.
11. Communicate with parents and the community.
12. Assure that the chapter has full representation at the Fiji Academy and Ekklesia.
13. Serve as a link between the undergraduate chapter and the graduate chapter, if there is one nearby.
14. Provide feedback to the Archons and Staff, from time to time, about planning priorities for the entire Fraternity.
15. Meet with the Field Secretary when he visits the chapter and help him to focus on the chapter's areas of special need where he can have the greatest impact.
16. See that the chapter follows all applicable laws, regulations, and policies, including the Fraternity's Risk Management Policy and the prohibition against hazing.

**PURPLE LEGIONNAIRE  
REPORTS**

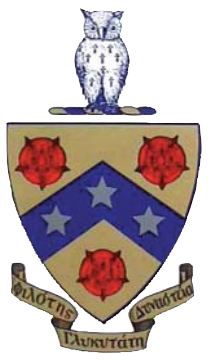
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**THE FRATERNITY OF PHI GAMMA DELTA  
REPORT OF PURPLE LEGIONNAIRE**

Name of Purple Legionnaire: \_\_\_\_\_

Chapter at: \_\_\_\_\_ Date: \_\_\_\_\_

The Report of Purple Legionnaire is divided into four sections:

- a. An evaluation of chapter performances
- b. A description of the chapter's performance in achieving stated goals
- c. A statement of your priorities and goals in the coming months
- d. Your feedback to the Archons, Section chief and Headquarters' Staff

**A. EVALUATION OF CHAPTER PERFORMANCE**

As Purple Legionnaire, you are uniquely qualified to evaluate the operations of the undergraduate chapter you serve. You are likely to be more objective than the chapter officers, and you have closer and more regular contact with the chapter than the BCA members, the Section Chief or the Field Secretary.

The following evaluation is organized around Phi Gamma Delta's Standards of Excellence. It gives you an organized method for evaluating the chapter and will also inform the Section Chief and Headquarters Staff of the condition of the chapter which we are all working to support.

Each possible answer to each question has a point value, with maximum possible points for any one answer being five (5). Space is provided at the end of each section for comments/explanations of very high or very low ratings. Each of the seven sections has a maximum possible score, and there is a total possible score for the entire evaluation. Please calculate your chapter's score for each section and the total score.

**I. We understand and strive to exemplify the ideals and values of Phi Gamma Delta.**

1. How often are formal (Ritual) meetings held?

Weekly (5)\_\_\_\_\_ 2/month (4)\_\_\_\_\_ monthly (3)\_\_\_\_\_ other (0)\_\_\_\_\_

2. Are Ritual ceremonies conducted without omission or alteration?

Yes (5)\_\_\_\_\_ No (0)\_\_\_\_\_

3. What percentage of the chapter membership can recite the Creed?

Over 90% (5)\_\_\_\_\_ 70-90% (4)\_\_\_\_\_ 50-70% (3)\_\_\_\_\_ 25-50% (1)\_\_\_\_\_

4. How many hours of Post Initiation Education do each of the new initiates receive?

5+ (5)\_\_\_\_\_ 3-4 (3)\_\_\_\_\_ 1-2 (1)\_\_\_\_\_ no program (0)\_\_\_\_\_

5. Within the past 12 months, has the chapter held a retreat to discuss topics such as the Rituals mission and values of the Fraternity, the chapter’s standards and expectations, etc?

Yes (5)\_\_\_\_\_ No (0)\_\_\_\_\_

**Possible Score: 25**

**Chapter score:\_\_\_\_\_**

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**II. We select, pledge, and initiate men who are qualified to be our brothers in Phi Gamma Delta.**

1. What percentage of the chapters’ membership was pledged during the past 12 months?

35%+ (5)\_\_\_\_\_ 31-34% (4)\_\_\_\_\_ 26-30% (3)\_\_\_\_\_ 21-25% (2)\_\_\_\_\_ up to 20% (1)\_\_\_\_\_

2. What consideration is given to scholarship and academic ability when evaluating each recruit?

High – Poor to average academic performance or attitude disqualify him (5)\_\_\_\_\_  
Moderate – It is given equal consideration with other factors. (3)\_\_\_\_\_  
Low – It is not used consistently as a criterion in evaluating recruits. (1)\_\_\_\_\_

3. Rate the chapter’s program of academic support for pledges.

Extensive – It is considered the most important part of the pledge program. (5)\_\_\_\_\_  
Supportive – It is given equal emphasis with other portions of the pledge program. (4)\_\_\_\_\_  
Basic – Study tables but not much more. (2)\_\_\_\_\_  
Poor – They are on their own. (0)\_\_\_\_\_

4. Rate the planning and organization of the pledge education program.

Well organized – A good week-by-week plan is given to all pledges. (5)\_\_\_\_\_  
Average – The pledge educator has a good written plan. (3)\_\_\_\_\_  
Poor – The pledge educator is flying by the seat of his pants. (1)\_\_\_\_\_



5. Does the chapter follow the *Handbook for Pledge Educators* provided by the Fraternity?

Completely (5)\_\_\_\_\_ mostly (4)\_\_\_\_\_ moderately(2)\_\_\_\_\_ little (1)\_\_\_\_\_ never (0)\_\_\_\_\_

6. What percentage of the men pledged in the past 12 months have been initiated?

95-100% (5)\_\_\_\_\_ 85-95% (4)\_\_\_\_\_ 80-85% (3)\_\_\_\_\_ 70-79%\_\_\_\_\_ <70% (0)\_\_\_\_\_

**Possible score: 30**

**Chapter score:\_\_\_\_\_**

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**III. We encourage and aid each brother in maintaining the highest scholarship of which he is capable.**

1. How many hours of academic support programming (study skills, etc.) do pledges or brothers receive?

5+ (5)\_\_\_\_\_ 4 (4)\_\_\_\_\_ 3 (3)\_\_\_\_\_ 2 (2)\_\_\_\_\_ 1 (1)\_\_\_\_\_ 0 (0)\_\_\_\_\_

2. Does the chapter have a faculty advisor who is utilized?

Yes (5)\_\_\_\_\_ No (0)\_\_\_\_\_

3. Does the chapter have a program (restrictions or requirements or both) for brothers on academic probation?

Yes (5)\_\_\_\_\_ No (0)\_\_\_\_\_

4. For the most recent term, was the chapter above the all-fraternity average?

Yes (5)\_\_\_\_\_ No (0)\_\_\_\_\_

5. For the most recent term, was the chapter above the all-men's average?

Yes (5)\_\_\_\_\_ No (0)\_\_\_\_\_

**Possible score: 25**

**Chapter score:\_\_\_\_\_**

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**IV. We stimulate the mental, moral, physical and social growth of brothers throughout their undergraduate years.**

1. How many speakers have addressed the chapter during the past 12 months?

8+ (5)\_\_\_\_\_ 5-7 (4)\_\_\_\_\_ 3-4 (3)\_\_\_\_\_ 1-2 (1)\_\_\_\_\_ 0 (0)\_\_\_\_\_

2. Which of the following programs has the chapter sponsored or attended (at least 60% of brothers) during the past 12 months?

Sexual abuse/date rape (2)\_\_\_\_\_

Alcohol education (2)\_\_\_\_\_

Risk Management/Safety (2)\_\_\_\_\_

Racial sensitivity (2)\_\_\_\_\_

Etiquette/social skills (2)\_\_\_\_\_

3. Does the chapter follow the Fraternity's Risk Management Policy?

Yes (5)\_\_\_\_\_ No (0)\_\_\_\_\_

4. Does the chapter have a plan, which is followed, for managing parties, including the use of alcohol?

Yes (5)\_\_\_\_\_ No (0)\_\_\_\_\_

5. Does the chapter hold brothers accountable for the obligations of membership, the Laws of the Fraternity and chapter bylaws?

Consistently – Obligations, expectations and laws are enforced (5)\_\_\_\_\_

Usually – Intentions are good, but follow-through isn't always there (3)\_\_\_\_\_

Irregularly – For the most part, only extreme behavior is addressed. (1)\_\_\_\_\_

**Possible score: 30**

**Chapter score: \_\_\_\_\_**

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**V. We provide the opportunity for brothers to develop their organizational and leadership abilities in the Fraternity, campus and community environments.**

1. How many brothers from the chapter attended the most recent Academy/Ekklesia (whichever occurred most recently)?

4+ (5)\_\_\_\_\_ 3 (3)\_\_\_\_\_ 2 (2)\_\_\_\_\_ 1 (1)\_\_\_\_\_ 0 (0)\_\_\_\_\_

2. How many brothers attended the most recent Leadership Academy or Section Convention?

8+ (5)\_\_\_\_\_ 5-7 (4)\_\_\_\_\_ 3-4 (3)\_\_\_\_\_ 1-2 (1)\_\_\_\_\_ 0 (0)\_\_\_\_\_

3. What percentage of the chapter is serving either as a chapter officer or on a committee?

100% (5)\_\_\_ 80-99% (4)\_\_\_ 60-79% (3)\_\_\_ 40-59% (2)\_\_\_ 20-39% (1)\_\_\_ <20% (0)\_\_\_

4. Does the chapter encourage involvement in campus activities?

Regularly – Involvement is expected and assistance is provided. (5)\_\_\_

Usually – Those who express an interest are encouraged to get involved. (3)\_\_\_

Not really – it is not recognized as valuable for individual brothers or the chapter. (1)\_\_\_

5. What percentage of the brothers participate in community service activities on a monthly basis?

>50% (5)\_\_\_ 40-50% (4)\_\_\_ 30-39% (3)\_\_\_ 20-20% (2)\_\_\_ 10-19% (1)\_\_\_ <10% (0)\_\_\_

**Possible score: 25**

**Chapter score: \_\_\_\_\_**

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**VI. We provide opportunities for graduate brothers to become actively involved in the Fraternity, thereby enhancing their continuing experience in Phi Gamma Delta.**

1. How many newsletters has the chapter produced and mailed to graduates in the past 12 months?

3+ (5)\_\_\_ 2 (3)\_\_\_ 1 (2)\_\_\_ 0 (0)\_\_\_

2. What was the graduate attendance at the last Pig Dinner?

*Actual numbers:*

50+ (5)\_\_\_ 40-49 (4)\_\_\_ 30-39 (3)\_\_\_ 20-29 (2)\_\_\_ 10-19 (1)\_\_\_ <10 (0)\_\_\_

*OR for younger chapters, as percentage of chapter's total graduates:*

50%+ (5)\_\_\_ 40-49% (4)\_\_\_ 30-39% (3)\_\_\_ <30% (1)\_\_\_

3. Does the chapter send the newsletter and Pig Dinner invitation to graduates from other chapters living in the area?

Yes (5)\_\_\_

No (0)\_\_\_

4. Including the Pig Dinner, how many events per year does the chapter sponsor for all graduate brothers?

3+ (5)\_\_\_ 2 (4)\_\_\_ 1 (2)\_\_\_

5. What percentage of the chapter newsletter is about graduate brothers?

70%+ (5)\_\_\_\_ 50-69% (4)\_\_\_\_ 30-49% (2)\_\_\_\_ 20-29% (1)\_\_\_\_ <20% (0)\_\_\_\_

**Possible score: 25**

**Chapter score: \_\_\_\_\_**

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**VII. We strive for efficiency and continuity in chapter operations.**

1. Were the financial records for the most recently completed fiscal year subjected to an Audit or a review by a qualified person?

Yes (5)\_\_\_\_ No (0)\_\_\_\_

2. Does the chapter have a budget for the current fiscal year which is useful and thorough?

Yes (5)\_\_\_\_ No (0)\_\_\_\_

3. Was an Annual Financial Report prepared for the most recently completed fiscal year?

Yes (5)\_\_\_\_ No (0)\_\_\_\_

4. Are Monthly Financial Reports prepared?

Yes (5)\_\_\_\_ No (0)\_\_\_\_

5. What percentage of committee chairmen keep useful records (reports, etc.) which are passed to their successors and which provide for continuity in committee work?

90%+ (5)\_\_\_\_ 75-90% (4)\_\_\_\_ 50-74% (3)\_\_\_\_ 25-49% (2)\_\_\_\_ <25% (0)\_\_\_\_

6. Does the chapter have a written collection procedure which is followed?

Yes (5)\_\_\_\_ No (0)\_\_\_\_

7. Are minutes of chapter meetings typed and preserved?

Yes (5)\_\_\_\_ No (0)\_\_\_\_

8. What type of transition process did the current chapter officers have?

Thorough – included self-assessment, goal setting and planning for the year. (5)\_\_\_\_

Adequate – Some goal setting and planning, but could have been more thorough. (3)\_\_\_\_

Inadequate – Have some ideas about what they want to do but nothing on paper. (1)\_\_\_\_

None – They are just taking things day by day. (0)\_\_\_\_

**Possible score: 40**

**Chapter score: \_\_\_\_\_**

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**TOTAL POSSIBLE SCORE: 200**

**CHAPTER TOTAL SCORE: \_\_\_\_\_**

**B. CHAPTER'S PERFORMANCE AGAINST GOALS**

Each chapter is expected each year to complete a planning process which includes self-assessment, goal setting and planning to achieve the goals. An important step beyond that initial planning process is evaluation of progress in achieving the goals. Please describe below the chapter's progress to date in the major goal areas.

**Goal area:** \_\_\_\_\_ **Date set:** \_\_\_\_\_

**Results:** \_\_\_\_\_

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

**Goal area:** \_\_\_\_\_ **Date set:** \_\_\_\_\_

**Results:** \_\_\_\_\_

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

**Goal area:** \_\_\_\_\_ **Date set:** \_\_\_\_\_

**Results:** \_\_\_\_\_

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

**Goal area:** \_\_\_\_\_ **Date set:** \_\_\_\_\_

**Results:** \_\_\_\_\_

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

**Goal area:** \_\_\_\_\_ **Date set:** \_\_\_\_\_

**Results:** \_\_\_\_\_

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

**Goal area:** \_\_\_\_\_ **Date set:** \_\_\_\_\_

**Results:** \_\_\_\_\_

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

### **C. PURPLE LEGIONNAIRE PRIORITIES AND GOALS**

Given your assessment of the condition and progress of the chapter in Sections A and B, what are your priorities and/or goals for the coming months?

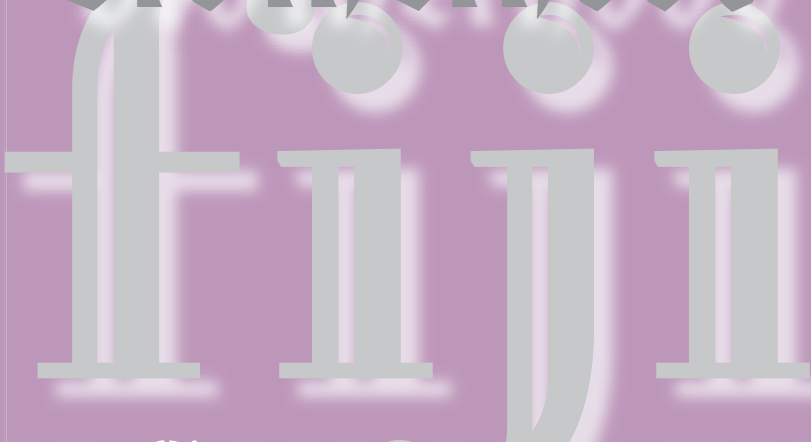
### **D. FEEDBACK FOR ARCHONS, SECTION CHIEF AND STAFF**

What recommendations do you have for the Archons regarding planning and strategic issues for the Fraternity?

What special needs do you or the Chapter have to which the Section Chief or the Headquarters staff need to respond?

# PL SELF EVALUATION

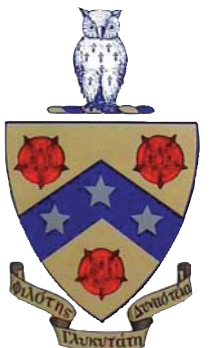
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**The Fraternity of Phi Gamma Delta**  
**PURPLE LEGIONNAIRE SELF-EVALUATION**  
**Academic Year 2\_\_\_\_ - 2\_\_\_\_**

Purple Legionnaire at: \_\_\_\_\_ Chapter at \_\_\_\_\_

Name: \_\_\_\_\_ School/Year \_\_\_\_\_

Purple Legionnaire since: \_\_\_\_\_

**DIRECTIONS:** *The Purple Legionnaire is the front line manager in providing support and guidance to the Fraternity's overall success. As such, it is important that this graduate volunteer be provided the information and tools to ensure that he is fulfilling this position at every Chapter and Colony.*

*These following codes are the judgments of the performance of the job...not judgments about the Purple Legionnaire. Check (X) the appropriate blank in the areas of performance using one of the following codes.*

- “3” – Purple Legionnaire achieves highly satisfactory results in the duties, responsibilities and objectives of this area.*
- “2” – Purple Legionnaire achieves adequate and satisfactory results in the duties, responsibilities and objectives of this area.*
- “1” – Purple Legionnaire has not achieved satisfactory results in the duties, responsibilities and objectives of this area.*
- “0” – Not able to rate in this area.*

**Note:** *Evaluations of “1” and “0” should be commented on the appropriate spaces in order to identify specific areas where additional training or support is necessary.*

I. AREAS OF EXPECTATION	3	2	1	0
A. Develops a close working and fraternal relationship with the Chapter/Colony through attendance at meetings, social events, ensuring attendance at Fraternity-wide leadership/educational events.	—	—	—	—

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

3                      2                      1                      0

B. Monitors and supports the Chapter/Colony and the Chapter/Colony officers in meeting objectives and carrying out plans.

—                      —                      —                      —

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

C. Sees that those Brothers considering/seeking Chapter/Colony office understand the responsibilities of the office.

—                      —                      —                      —

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

D. See that a thorough Chapter/Colony officer transition is done.

—                      —                      —                      —

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

E. Sees that the Chapter/Colony does an annual self-assessment, goal setting and planning session.

—                      —                      —                      —

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

F. Develops and maintains a familiarity with Chapter/Colony operations; fraternity laws, policies, practices and procedures; and the issues facing the Fraternity and college students.

—                      —                      —                      —

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

G. Works with the BCA and requests their direct involvement to meet the Chapter's/Colony's guidance/advisory needs.

—                      —                      —                      —

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3                      2                      1                      0

H. Works with the House Corporation by communicating house-related needs and sees that the Chapter/Colony follows directions/requirements to maintain a stable House Corporation.    —                      —                      —                      —

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I. Communicates with the Section Chief, Headquarters, etc. including filing reports as called for.                      —                      —                      —                      —

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

J. Communicates with college/university administrators who oversee the fraternities.                      —                      —                      —                      —

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

K. Communicates with parents and the community.                      —                      —                      —                      —

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

L. Serves as a link between the Chapter/Colony and the graduate chapter, if applicable.                      —                      —                      —                      —

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

M. Provides feedback to the Archons and Staff, as requested.                      —                      —                      —                      —

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3                      2                      1                      0

N. Meets with the Field Secretary and provides him information/focus on the Chapters/Colony's area of special needs or where he can have the greatest impact.

—                      —                      —                      —

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

O. Sees that the Chapter adheres to all applicable laws, regulations and policies, including Risk Management and the prohibition against hazing.

—                      —                      —                      —

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## II. OVERALL EVALUATION

Check (X) overall present evaluation and comment as necessary:

Exceeds expectations

Meets expectations

Does not meet expectations (enter recommended action in Comments section)

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Completed by:

\_\_\_\_\_, Purple Legionnaire and discussed with

\_\_\_\_\_, Chief of Section \_\_\_\_\_

on \_\_\_/\_\_\_/\_\_\_

# CALENDAR/CHECKLIST

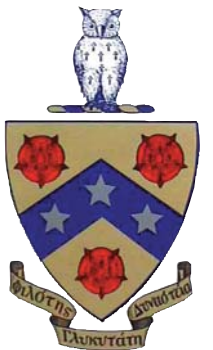
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## PURPLE LEGIONNAIRE CALENDAR & CHECKLIST

### AUGUST

#### *Action to be taken*

1. Attend, if possible, the Ekklesia (in the alternative, recruit a local graduate replacement. Attend graduate events at Ekklesia. **Date completed:** \_\_\_\_\_
2. Thank notes are sent to all local graduates who attended the Ekklesia.  
**Date completed:** \_\_\_\_\_
3. Work with chapter president to identify in writing fall goals for the chapter officers.  
**Date completed:** \_\_\_\_\_
4. Work with chapter president/officers to create a fall calendar. **Date completed:** \_\_\_\_\_
5. Work with chapter president to insure fall recruitment is entirely planned.  
**Date completed:** \_\_\_\_\_
6. Make annual fall courtesy call to university/college Greek advisor. **Date completed:** \_\_\_\_\_

### SEPTEMBER

#### *Actions to be taken*

1. Attend a recruitment event. **Date completed:** \_\_\_\_\_
2. Attend a chapter meeting. **Date completed:** \_\_\_\_\_
3. Fall chapter roster created (recording secretary) – the roster should include names, class year, address, phone number, parents names and addresses in case of emergency and current major. **Date completed:** \_\_\_\_\_
4. Attend a pledge meeting. **Date completed:** \_\_\_\_\_
  - a. Deliver “not for college days alone” speech on organizational structure of the Fraternity and role of the PL. **Date completed:** \_\_\_\_\_
  - b. All pledge forms are completed and mailed or submitted via brother portal at [www.phigam.org](http://www.phigam.org).  
**Date completed:** \_\_\_\_\_
  - c. Pledge roster is developed and merged with the chapter’s roster.  
**Date completed:** \_\_\_\_\_

**SEPTEMBER**

5. Itinerary established for fall Field Secretary's visit. Refer to previous FS reports to check chapter follow-up. **Date completed:** \_\_\_\_\_
6. Follow-up with any VIPs, speakers, etc. who stopped by the chapter. Were thank you/acknowledgement notes sent? **Date completed:** \_\_\_\_\_
7. Is IHQ being "copied" on appropriate business letters? Insure that corresponding secretary and other interested brothers are taught business letter styles, grammar, etc.  
**Date completed:** \_\_\_\_\_
8. Are officers keeping up with their calendars? **Date completed:** \_\_\_\_\_
9. Monitor pace of chapter meetings. Are agendas in order? **Date completed:** \_\_\_\_\_
10. Documentation is being maintained. These items may be of use as exhibits next spring when developing this academic year's awards packet. **Date completed:** \_\_\_\_\_
11. Is the chapter president getting important time with campus administration officials, including academic advisors? This is important to his future – for example, he may develop a reference for his resume. **Date completed:** \_\_\_\_\_
12. Is fall parents' event is getting appropriate attention? **Date completed:** \_\_\_\_\_
13. In-house list of graduate brothers is being updated to make sure names are correctly spelled and that addresses are current. **Date completed:** \_\_\_\_\_
14. Encourage chapter to se up for holiday/Christmas cards to be mailed to graduate brothers that announces the date for next spring's Pig Dinner. **Date completed:** \_\_\_\_\_
15. Chapter treasurer is trained and organized. Perhaps a local CPA can be recruited to serve as a BCA advisor for the chapter treasurer. The CPA advisor can assist the PL in insuring that all finance-related IHQ forms are completed and sent. **Date completed:** \_\_\_\_\_
16. Historian is maintaining a fall semester history, a scrapbook and that the ritual is being maintained with dignity. **Date completed:** \_\_\_\_\_
17. Insure that post initiation education for last spring semester's pledges, now this semester's new brothers, is worthwhile. If in doubt, ask Field Secretary for his evaluation of your PIE.  
**Date completed:** \_\_\_\_\_
18. Make sure that all IHQ forms due are completed and sent or submitted.  
**Date completed:** \_\_\_\_\_
19. Re-evaluate chapter calendar and adjust as necessary. **Date completed:** \_\_\_\_\_

**OCTOBER**

*Action to be taken*

1. All IHQ forms due are completed and sent (audit due by 31<sup>st</sup>). **Date completed:** \_\_\_\_\_
2. IHQ is advised of Pig Dinner date, speaker, etc. **Date completed:** \_\_\_\_\_
3. Attend a chapter meeting. **Date completed:** \_\_\_\_\_
4. Facilitate (or insure graduate involvement in) fall chapter retreat.  
**Date completed:** \_\_\_\_\_
5. Plans for officers' election started well in advance of elections. **Date completed:** \_\_\_\_\_
6. Begin officers' leadership/transition retreat – location, travel, materials, speakers, etc.  
**Date completed:** \_\_\_\_\_
7. Determine status of homecoming events. **Date completed:** \_\_\_\_\_
8. Determine individual academic status of each pledge. **Date completed:** \_\_\_\_\_
9. Determine status of over-all academic performance. **Date completed:** \_\_\_\_\_
10. Monitor status of big brother/little brother program. **Date completed:** \_\_\_\_\_
11. Determine status of all public relations efforts. Insure that news clippings are being compiled and safely kept. **Date completed:** \_\_\_\_\_
12. Determine status of fall newsletter. **Date completed:** \_\_\_\_\_
13. Determine status of community service program, generally. **Date completed:** \_\_\_\_\_
14. Keep BCA and House Corporation informed. **Date completed:** \_\_\_\_\_
15. Re-evaluate chapter calendar, adjust as necessary. **Date completed:** \_\_\_\_\_

**NOVEMBER**

*Actions to be taken*

1. All IHQ forms due are completed and sent or submitted. **Date completed:** \_\_\_\_\_



**NOVEMBER**

2. Follow-up with the status of each project listed earlier. **Date completed:** \_\_\_\_\_
3. Conduct Officers Leadership & Transition Retreat. Set goals for each officer.  
**Date completed:** \_\_\_\_\_
4. Spring semester recruitment is being developed. Make sure that fall semester chairman is advising spring semester chairman (trying to insure that the wheel is not re-invented).  
**Date completed:** \_\_\_\_\_
5. Are holiday/Christmas cards to graduate brothers, parents, administration officials and sororities being sent? Pig Dinner dates should be announced in the cards to graduate brothers.  
**Date completed:** \_\_\_\_\_
6. Keep BCA and House Corporation informed. **Date completed:** \_\_\_\_\_
7. Re-evaluate chapter calendar, adjust as necessary. **Date completed:** \_\_\_\_\_
8. Make sure house will be fully rented next (spring) term. **Date completed:** \_\_\_\_\_
9. Promote the Fiji Leadership Academy that is held in January. **Date completed:** \_\_\_\_\_

**DECEMBER**

*Actions to be taken*

1. All IHQ forms due are completed and sent or submitted. **Date completed:** \_\_\_\_\_
2. Follow-up with all items listed earlier. **Date completed:** \_\_\_\_\_
3. Attend a chapter meeting. **Date completed:** \_\_\_\_\_
4. Keep BCA and House Corporation informed. **Date completed:** \_\_\_\_\_
5. Evaluate how well the chapter officers kept their calendars during this past semester. Get ready to try the same drill with a new set of officers. **Date completed:** \_\_\_\_\_

**JANUARY**

*Actions to be taken*

1. All IHQ forms due are completed and mailed or submitted. **Date completed:** \_\_\_\_\_
2. Pledge and initiation forms and fees timely filed. **Date completed:** \_\_\_\_\_
3. Review the chapter's spring recruitment plan. **Date completed:** \_\_\_\_\_
4. Attend a chapter meeting. **Date completed:** \_\_\_\_\_
5. Review the officer's new spring goals (previously decided at their officer transition retreat) and their time lines to accomplish those goals. **Date completed:** \_\_\_\_\_
6. Itinerary is established for spring Field Secretary's visit. Refer to previous FS report to check chapter follow-up. **Date completed:** \_\_\_\_\_
7. Create spring chapter/officers calendar. **Date completed:** \_\_\_\_\_
8. Keep BCA and House Corporation informed. **Date completed:** \_\_\_\_\_
9. Post initiation education for new brothers is worthwhile. If in doubt, ask Field Secretary for his evaluation of your PIE. **Date completed:** \_\_\_\_\_

**FEBRUARY**

*Actions to be taken*

1. IHQ forms due are completed and sent or submitted. **Date completed:** \_\_\_\_\_
2. Spring newsletter is being drafted. **Date completed:** \_\_\_\_\_
3. Make spring courtesy cal to university/college Greek advisor. **Date completed:** \_\_\_\_\_
4. Spring semester chapter roster is prepared. **Date completed:** \_\_\_\_\_
5. Attend a chapter meeting. **Date completed:** \_\_\_\_\_
6. Attend a pledge meeting. **Date completed:** \_\_\_\_\_
7. All pledge forms are completed and mailed or submitted. **Date completed:** \_\_\_\_\_

**FEBRUARY**

8. Pledge roster is developed and merged with the chapter's roster. **Date completed:** \_\_\_\_\_
9. Itinerary is established for spring Field Secretary's visit. **Date completed:** \_\_\_\_\_
10. Conduct a resumé writing seminar. **Date completed:** \_\_\_\_\_
11. Re-evaluate chapter calendar, adjust as necessary. **Date completed:** \_\_\_\_\_
12. Is IHQ begin copied on appropriate business letters? **Y/N:** \_\_\_\_\_
13. Are officers keeping up with their calendars? **Date completed:** \_\_\_\_\_
14. Monitor pace of chapter meetings. **Date completed:** \_\_\_\_\_
15. Documentation is being maintained. **Date completed:** \_\_\_\_\_
16. Is the chapter president getting time with campus administration officials, including Greek and academic advisors? **Y/N:** \_\_\_\_\_
17. In-house list of graduate brothers is being updated to make sure names are correctly spelled and that addresses are current. **Date completed:** \_\_\_\_\_
18. Chapter Treasurer books and forms are in order. **Date completed:** \_\_\_\_\_
19. Historian is maintain a spring semester history, a scrapbook and the Ritual is being maintained with dignity. **Date completed:** \_\_\_\_\_
20. Determine individual academic status of each pledge. **Date completed:** \_\_\_\_\_
21. Monitor status of big brother/little brother program. **Date completed:** \_\_\_\_\_
22. Keep BCA and House Corporation informed. **Date completed:** \_\_\_\_\_

**MARCH**

*Actions to be taken*

1. IHQ forms due are completed and sent or submitted. **Date completed:** \_\_\_\_\_
2. Attend a chapter meeting. **Date completed:** \_\_\_\_\_
3. Begin lobbying local graduate brothers for their participation in Pig Dinner. **Date completed:** \_\_\_\_\_  
\_\_\_\_\_

**MARCH**

4. Awards committee is composing and organizing packet for submission. **Date completed:** \_\_\_\_\_
5. House contracts are signed to fill house for next fall term. **Date completed:** \_\_\_\_\_
6. Re-evaluate chapter calendar, adjust as necessary. **Date completed:** \_\_\_\_\_
7. Have chapter president contact you with status of each committee's spring goals. **Date completed:** \_\_\_\_\_
8. Determine status of spring newsletter. **Date completed:** \_\_\_\_\_
9. Determine status of community service program, generally. **Date completed:** \_\_\_\_\_
10. Select chapter's Wilkinson Award nominee. **Date completed:** \_\_\_\_\_
11. Keep BCA and House Corporation informed. **Date completed:** \_\_\_\_\_
12. Finalize awards packet. Maintain photocopy in chapter house. **Date completed:** \_\_\_\_\_

**APRIL**

*Actions to be taken*

1. IHQ forms due are completed and mailed or submitted electronically. **Date completed:** \_\_\_\_\_  
—
2. Attend a chapter meeting. **Date completed:** \_\_\_\_\_
3. All traditional protocol is followed for Pig Dinner VIPs (local graduate brothers, parents, if applicable, speaker). **Date completed:** \_\_\_\_\_
4. Historian maintains appropriate Pig Dinner memorabilia/photographs. **Date completed:** \_\_\_\_\_  
—
5. Proper Pig Dinner follow-up: bills paid, thank you notes sent, notebook maintained for next year's chairman. **Date completed:** \_\_\_\_\_
6. All local university/college spring applications are timely completed and submitted, including applications for individual honors. **Date completed:** \_\_\_\_\_
7. Plans are developing for this coming summer's and next fall's recruitment. **Date completed:** \_\_\_\_\_  
\_\_\_\_\_

**APRIL**

8. Start preparing for closing the chapter house for summer. **Date completed:** \_\_\_\_\_
9. Review chapter finances/check book. Reconcile. **Date completed:** \_\_\_\_\_
10. Summer roster is being assembled for distribution. **Date completed:** \_\_\_\_\_
11. Keep BCA and House Corporation informed. **Date completed:** \_\_\_\_\_
12. Determine status of public relations efforts. **Date completed:** \_\_\_\_\_
13. Re-evaluate chapter calendar, adjust if necessary. **Date completed:** \_\_\_\_\_

**MAY**

*Actions to be taken*

1. Conduct a review of each brother's account. **Date completed:** \_\_\_\_\_
2. IHQ forms due are sent. **Date completed:** \_\_\_\_\_
3. Attend a chapter meeting. **Date completed:** \_\_\_\_\_
4. Make courtesy call to university/college Greek advisor. **Date completed:** \_\_\_\_\_
5. Finalize details fro summer chapter house situation. **Date completed:** \_\_\_\_\_
6. Evaluate how well the chapter officers kept their calendars during the past semester. **Date completed:** \_\_\_\_\_

**JUNE**

*Actions to be taken*

1. IHQ forms due are completed and mailed or submitted electronically. **Date completed:** \_\_\_\_\_  
—
2. Attend summer recruitment event, if applicable. **Date completed:** \_\_\_\_\_

**JULY**

*Actions to be taken*

1. Contact chapter president and ensure that Ekklesia delegates are attending. **Date completed:** \_\_\_\_\_  
\_\_\_\_\_

# PURPLE LEGIONNAIRE POSITION

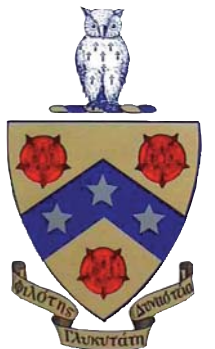
brotherhood



**PHI GAMMA DELTA**

*Not for college days alone*

Friendship the Sweetest Influence





## The Purple Legionnaire Position

*By Former Executive Director/Editor Emeritus Bill Zerman (Michigan 1949)*

Having been a Purple Legionnaire for four years myself, I am not unaware of the tremendous amount of time and devotion involved for busy men to be Purple Legionnaires.

However, the largest and most efficient staff in the world cannot take the place of the day-to-day activities of the Purple Legionnaire. You must translate everything within the Fraternity and apply bits and pieces to the administrative structure of the undergraduate chapter or colony.

As we see it, there are a number of administrative areas which need particular attention. These are: (1) recruitment, (2) pledge education, (3) chapter administration, (4) chapter finances, (5) public relations, (6) graduate relations, (7) scholarship, (8) ritual, and (9) fraternity law. I have listed these areas in no particular order of importance. They are all important!

Over the years, it has been our experience that the Chapter President who does everything himself is leading the chapter down the primrose path for the year following his presidency. On the other hand, the Chapter President who involves each member of the chapter on a committee and as a committee chairman is laying the groundwork for good chapter administration for a number of years after he graduates.

If I were a Purple Legionnaire today, I would consider doing the following things:

1. Get to know the officers of the chapter well, their assts and their liabilities; have good rapport with them.
2. I would get to know each member of the chapter, and as soon as the new men are pledged, I would have a man-to-man talk with each pledge, laying out his responsibilities as a member of Phi Gamma Delta.
3. I would certainly ensure that I had a member of the Board of Chapter Advisors working with the Chapter Treasurer...contact all the time, but man-to-man communication at least once every two weeks.
4. I would see to it that we had a Board of Chapter Advisors, each of whom would be responsible for one of the above areas of internal organization.
5. With no question, there should be a good hard working House Corporation, whose officers would meet monthly. I would suggest that the total House Corporation include at least 15-20 brothers, most of whom live away from the locality of the chapter house. The reason for this is that it prevents provincialism, brings in new ideas and new skills, I would suggest that the entire House Corporation meet only once a year, probably on a football weekend or at Pig Dinner.
6. I would get to know the Student Personnel Dean at the college or university who is in charge of fraternities, and make certain that I at least talked with him/her on the telephone once every three weeks. I would suggest that it might be well to get to know him personally during the first few weeks of the opening term of the college or university.
7. I would give leadership to the establishment of a Mary McCarty Club, i.e. a mothers' organization which can give the chapter a tremendous amount of continuity.
8. I would make certain that a member of the Board of Chapter Advisors and a member of the House Corporation serve on the annual Pig Dinner Committee as consultant to the undergraduate committee in charge of this affair. There is a great need for graduate support and activity in this area.

9. I would make certain that the House Corporation budget includes funds for the mailing of at least three chapter publications per year to the graduate brothers of the Fraternity, with copies to be sent to the International Headquarters.

These are just some areas which we consider important. However, there are others which concern the International Headquarters. It is most important that pledge forms and initiation forms be properly signed and submitted immediately after pledging to the International Headquarters. We have been very much concerned that some monies paid to the Chapter Treasurers (such as initiation fees) have not been used for the purpose intended, but have been mismanaged and used for other expenditures.

One of the most important responsibilities of that brother of the Board of Chapter Advisors who will work with the Chapter Treasurer is to see that there is a realistic budget for the year, and that after the Treasurer has completed his work, an audit be made of the books before the new Treasurer takes over. There are too many young men having to take over the problems of a previous Treasurer without an immediate audit.

A Purple Legionnaire can spend too much time at the chapter house. A Purple Legionnaire can spend too little time at the chapter house. A Purple Legionnaire who knows the laws of the Fraternity, i.e. the Bylaws and the Constitution, the Rituals, the Chapter Bylaws, and the college or university rules and regulations will have a much smoother experience than those Purple Legionnaires who have to do their homework. The Purple Legionnaires should meet at least once a month with the members of the Board of Chapter Advisors. The Purple Legionnaire who has a Board of Chapter Advisors to work with will have contributed much in the areas of Fraternity continuity.

The Purple Legionnaire should not try to affect the chapter election. The Purple Legionnaire who directs the Housemother's complaints to the cabinet, rather than to himself is a wise man. The Purple Legionnaire who has lunch with the cabinet, perhaps once every five to seven days, away from the fraternity house – and who listens to the cabinet as they discuss their opportunities for improvement – will be a successful Purple Legionnaire.

The Purple Legionnaire who attends a chapter meeting once a month and who insists on a formal meeting twice a month will find that the axiom that the Fraternity is built on "the formal meeting with the full use of the Ritual" is sound, and he is the kind of leader our Fraternity deserves.

These are just some thoughts at random – some of you would delete some and, on the other hand, some of you experienced Purple Legionnaires would add more to the list.

Being a Purple Legionnaire is a tremendous responsibility. No greater a responsibility than in days past, but we must recognize today that often the rules and regulations involving our fraternity house are "our rules" and not the rules of the community – the college or the university – because increasingly, the rules are being eliminated.

Why? I don't know. If I had an answer, I would say that the problems stem from the demoralization and the breakdown in the American family unit. This is a three-hour lecture. You can take it from there.

The Purple Legionnaire is a very valuable link in the chain of Phi Gamma Delta. We appreciate what you are doing. We respect you for what you are doing, and we know that if you will do a good job based upon all you know, being a Purple Legionnaire will be for you a rewarding and very worthwhile experience.

*Pergé!*