



Alpha Phi Omega

National Service Fraternity

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 (2011-12)	Goals Current Year (2012-13)
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-whomever 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) _____	_____	_____

Appendix H

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)

CHAPTER LEADERSHIP PROGRAM

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

CHAPTER OPERATIONS

	Results Past Year (2011-12)	Goals Current Year (2012-13)
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 (2011-12)	Goals Current Year (2012-13)
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	_____	_____

Appendix H

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)

CHAPTER MEMBERSHIP RETENTION PROGRAM

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

SERVICE

	Results Past Year (2011-12)	Goals Current Year (2012-13)
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		

Appendix H

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.

Accomplished 2011-2012	Planned 2012-2013
CAMPUS	CAMPUS
COMMUNIUTY	COMMUNITY
SCOUTING	SCOUTING
NATION	NATION
FRATERNITY	FRATERNITY

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Appendix H

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.*

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:

Chapter President

Date

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. 42ND 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)

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: