Understanding Pulse Point Action Items

YEAR-END SIZE: Meet regional director assigned year-end chapter size

Required creation of complete recruitment plan one (1) academic term in advance
Use the Recruitment Plan to pre-plan recruitment. For spring terms this should be uploaded by November 1, for fall terms it should be completed by April 1. The purpose of this action item is to get the framework of your recruitment together well in advance, encouraging you to not only plan your recruitment but consider who you are trying to recruit, and allowing time for smaller details to be taken care of.

Creation of a membership development plan based on results of the member needs assessment
Use the Member Needs Assessment to determine the needs of your chapter members. Use this information to build programming and events that meet their specific needs. This may result in new events needing to be put together and/or reoccurring chapter events to be modified to better suit the chapter's needs. The purpose of this action item is to fight member apathy by creating programming that directly addresses their needs and wants.

CHAPTER SUCCESS PLAN: Chapter must submit their Chapter Success Plan for regional director approval

Complete Chapter Success Plan along with a RMT member’s sign-off before official submission for regional director approval
Utilizing your RMT will ensure that any issues are addressed ahead of submission, including incomplete answers, answers that don't directly relate to the question(s) being asked, and providing you an outsider's perspective on things to consider. The purpose of this action item is to submit a Chapter Success Plan that has been well thought out and will be a better base for the chapter to work off of during the upcoming year.
Submit Chapter Success Plan a week before the deadline
The Chapter Success Plan must be submitted by May 7. The purpose of this action items is to ensure the official deadline is met and encourage the chapter to start working on the plan earlier to meet the advanced deadline.

Over 50% of core seven officers must complete SWOT analysis
At least four core seven officers must complete the SWOT analysis when the link is sent out in January. The purpose of this action item is to give the officers more feedback to discuss when completing the Chapter Success Plan, and the ability to directly address current issues in the chapter as well as build on current strengths.

100% of core seven officers complete SWOT analysis as well as Chapter Advisor (if applicable)
All seven core officers must complete the SWOT analysis when the link is sent out in January. If the chapter has a chapter advisor, they must also complete the SWOT analysis. The purpose of this action item is to give the officers more feedback to discuss when completing the Chapter Success Plan, and the ability to directly address current issues in the chapter as well as build on current strengths.

CURRENT ACCOUNTING: Have a current balance on June 30; Additionally, the chapter’s balance on December 31 must not be more than 60-days past due

Stay under 60-days past due
All invoices from the Heritage Center must be paid in full within 60 days from the date of the invoice. The purpose of this action item is to encourage financial responsibility, mitigate excessive finance charges, and encourage the chapter get creative in how the spend, save, and earn their money.
Custom payment plan with the Heritage Center
Contact Deana Gausepohl (deana@akpsi.org, 317-872-1553) to discuss the chapter’s current financial situation, and set up a payment plan. The purpose of this action item is to reduce the chapter’s debt in a realistic manner and provide coaching.

Required review of budget by RMT member and/or a specialized alumnus
Find a member of the RMT or an alumnus who specializes in finance or accounting to review the chapter’s budget. Any specialized alumnus must be approved by your RMT check-in appointee. The purpose of this action item is to ensure that all funds are being utilized properly and in a realistic way to ensure the chapter’s financial health.

Required external audit by Heritage Center approved volunteer or alumnus
Find a member of the RMT or an alumnus who specializes in finance or accounting to audit the chapter’s budget. The individual you find must be approved by the chapter’s CERC. The purpose of this action item is to ensure that all funds are being utilized properly and proper spending procedures are in place to ensure the chapter’s financial health.

PLEDGE EDUCATION: The chapter must adhere to the official pledge education program approved by the Board of Directors
Submit post-event evaluation within one (1) week of any pledge interaction outside of meetings or rituals
Write a brief synopsis, a minimum of two paragraphs, about how the event was planned and executed, where the event succeeded and/or fell short, and include feedback from at least one pledge for the following elective credits:

- Brotherhood Event(s)
- Chapter Event(s)
- Community Service
- Fundraising for Charity
- Networking Groups
• Pledge Retreat
Evaluations should be uploaded to the ‘Pledge Documents/ Bridge Documents’ folder for the current academic year in HQDocs. The purpose of this action item is to ensure that events planned for the pledges are fulfilling their intended outcomes.

Elective point events must be fully planned and be pre-approved by the chapter’s CERC
Fill in a copy of the Holmes Murphy Event Planning Guide for any of the following elective credits:
• Brotherhood Event(s)
• Chapter Event(s)
• Community Service
• Fundraising for Charity
• Networking Groups
• Pledge Retreat
You can also download the HM Event Planner app (available for both iPhone and Android devices) and complete the guide. The completed planning guide should be sent directly to your CERC for review. If accepted, you will be notified, and it will uploaded to HQDocs. If revisions are needed you will receive communication about what must be changed. These should be completed no less than two weeks before each event for the duration of one academic term. The purpose of this action item is to guarantee that all events facilitated with the pledges are being done so thoughtfully and properly within fraternity guidelines.

Completion of Bridge to Brotherhood with a reduced number of elective credits for one term
The chapter must complete Bridge to Brotherhood utilizing the follow number of maximum credits based on program duration for one academic term:
• 5 weeks – 3 credits
• 6 weeks – 4 credits
• 7 weeks – 6 credits
• 8 weeks – 7 credits
• 9 weeks – 9 credits
The purpose of this action item is to allow the chapter to fully grasp the program itself and to facilitate it properly.

**Completion of Bridge to Brotherhood without elective credits for one term**
The chapter must complete Bridge to Brotherhood utilize 0 credits regardless of the length of their program duration for one academic term. The purpose of this action item is to allow the chapter to fully grasp the program itself and to facilitate it properly.

**FRATERNITY EVENTS: At least four officers must attend Officer Training held in conjunction with PBLI; At least one delegate and alternate delegate must attend Convention (in Convention years only)**

**Updated calendar set up a semester in advance including fraternity, chapter, and pledge events**
The chapter must create a calendar to include all chapter meetings and events, pledge meetings and events, and fraternity events uploaded to HQDocs by November 1 for spring terms, and April 1 for fall terms. The purpose of this action item is to ensure the chapter is accounting for holidays, chapter members know in advance what their attendance is required at, and can set up any necessary fundraising well in advance of when funds for specific events may be needed.

**Specific fundraising event(s) for fraternity events one (1) academic term in advance**
View and edit this document in Word on your computer, tablet, or phone. You can edit text; easily insert content such as pictures, shapes, or tables; and seamlessly save the document to the cloud from Word on your Windows, Mac, Android, or iOS device.
Two (2) required Early Bird registrations for PBLI and two (2) required Early Bird registrations for Convention (in Convention years only)
The chapter must register a minimum of two (2) individuals the Early Bird rate for PBLI and two (2) individuals at the Early Bird rate for Convention (in Convention years only). The purpose of this action item is to ensure the chapter is planning in advance who will be representing them at Fraternity events in addition to guaranteeing they purchase registration at the lowest rate to save the chapter money.

Four (4) required Early Bird registrations for PBLI and two (2) required Early Bird registrations for Convention (in Convention years only)
The chapter must register a minimum of four (4) individuals the Early Bird rate for PBLI and two (2) individuals at the Early Bird rate for Convention (in Convention years only). The purpose of this action item is to ensure the chapter is planning in advance who will be representing them at Fraternity events in addition to guaranteeing they purchase registration at the lowest rate to save the chapter money.

INITIATION: Each college chapter shall hold at least two (2) initiations during each academic year

Must consult with a member of the fraternity ritual team (FRT) or a regional manager of rituals one (1) week prior to each ritual and within 48 hours post ritual to recap
Must speak with a member of the FRT or a regional manager of rituals to discuss how the MOR plans to facilitate the ritual to ensure everything is planned correctly. Within 48 hours they must send a recap e-mail to the individual they consulted. The purpose of this action item is to ensure that the ritual is being facilitated in accordance with fraternity policies and procedures.
Must have a member of the fraternity ritual team (FRT) or a regional manager of rituals present for at least one (1) ritual of the volunteer’s choosing.

Must have a member of the FRT or a regional manager of rituals present (or another volunteer approved by the chapter’s CERC) attend at least one ritual. The purpose of this action item is to ensure that the ritual is being facilitated in accordance with fraternity policies and procedures.