

SIGMA ALPHA EPSILON PLEDGE RUSH RECOMMENDATIONS

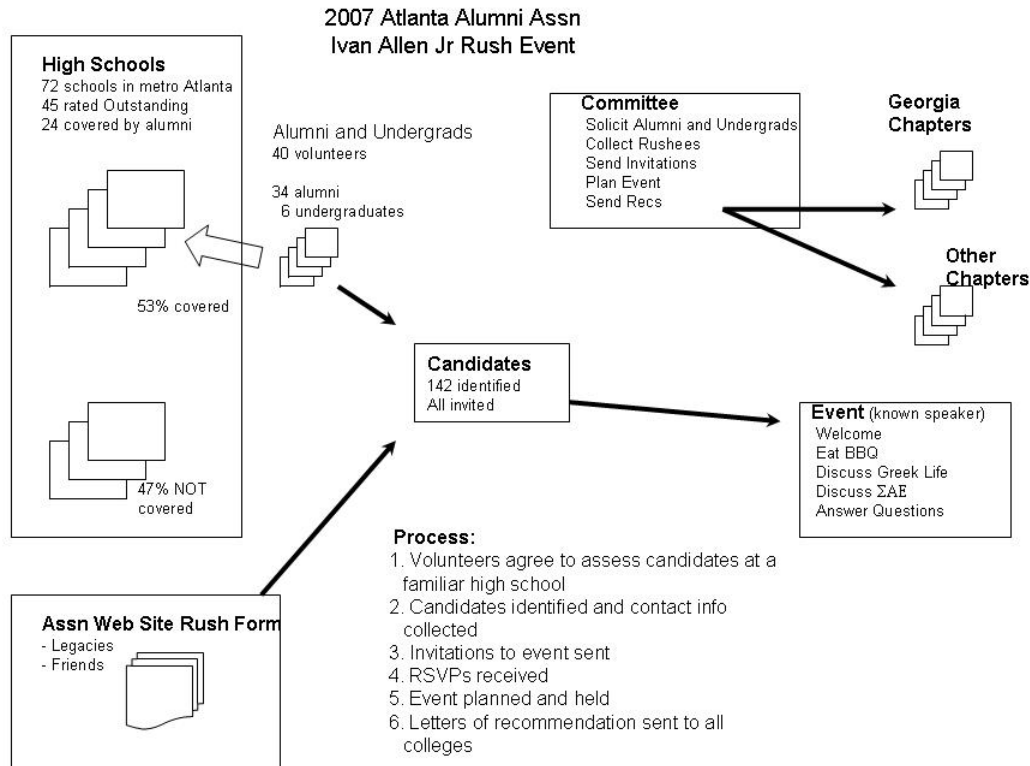
DRAFT v4.0

Summary

Sigma Alpha Epsilon has an opportunity to create a new initiative that will have a major impact on the growth of the Fraternity for the foreseeable future. **The initiative, “Committed to Σ AE Growth,” requires rush recommendations from every Σ AE pledge throughout the Realm.**

Potential rushees identified through this initiative will be introduced to the Greek system and Σ AE with a standard letter sent via email from the Fraternity Service Center. Additionally, the potential rushee’s contact information will be forwarded to the Σ AE chapter and alumni association at the institution they plan to attend following their high school graduation. The requirement for every Σ AE pledge to fill out rush recommendations in 2008-09, will capitalize on and help fulfill ESA Todd Buchanan’s mandate to “Be the One - *Committed to Σ AE Growth*”.

The initiative is based on the long-term project sponsored by the Atlanta Alumni Association. Begun 68 years ago by Brother Bob Cousins, the Ivan Allen Rush Party has had a profound impact on the growth of Σ AE in Georgia, the Southeast and other areas that men from Atlanta go. The proposed process, based on the one the Atlanta Association used in 2007 and has enhanced in 2008, is shown below.



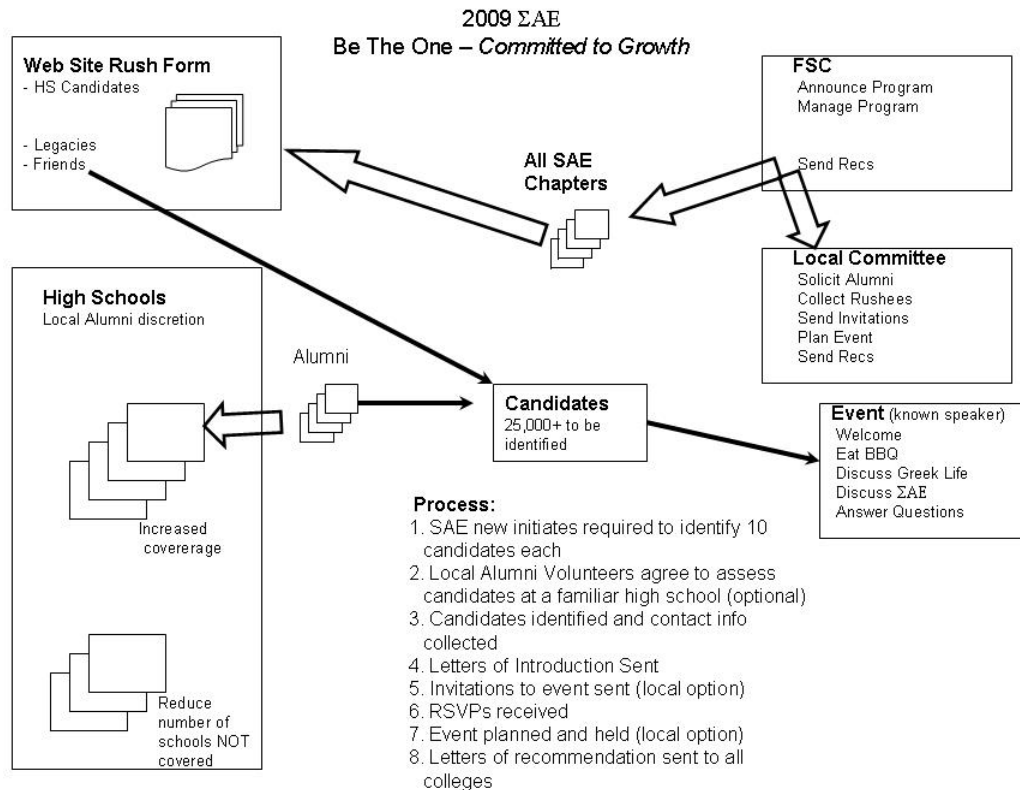
The proposed initiative capitalizes on the successful work done to date and, with the maturing of web based technology, expands these benefits to every chapter in the Realm. The initiative, potential benefits, and a pilot project for spring 2008 are described below.

Background

- Sigma Alpha Epsilon, prior to the current year, has had a relatively flat headcount for the past several years.
- Rush recommendations are generated informally and infrequently by alumni across the Realm.
 - Recommendations can be made electronically on Σ AE's web site with a form filled out by alumni, (e.g. fathers, uncles, and friends). The number of these recommendations, usually made for legacies, in 2007 was approximately 30.
 - While there is no restriction, the electronic recommendation form process is never (I will verify with Erik) used by a chapter collegiate brothers.
- Pledges represent a contemporary and active source of rush recommendations which can augment efforts by chapters and alumni.
- Pledges fill out documentation and pay pledge fees. Chapters fill out and compile documentation, gather and send pledge fees, and receive *The Phoenix* and pledge pins. The additional pledge requirement to supply rush candidates contact information is consistent and compatible with the teachings of the *Phoenix*.

Proposal

The proposal is to formalize a process for gathering rush recommendations from pledges who have developed relationships in high school and to integrate them into the rush process. The elements of the proposal are shown here:



1. Pledge Rush Recommendations

- As a part of the pledge program, ΣAE would require each pledge to provide the name and contact information for five or more rush recommendations from his high school or community. These recommendations would be for men a year behind him and now graduating seniors bound for college.
 - This information could be entered online by pledges and compiled directly into a fraternity database.
 - The data would contain, at a minimum, the name, address, email and phone number plus comments about the candidate's qualifications (e.g. academic, leadership, extra-curricular, etc.), and the name of the school(s) to which the rushee has applied or been accepted. Additionally, the name and contact information of the pledge making the recommendation would be entered.
 - Chapters would be required by the FSC web database system to keep their Forum membership list up-to-date with the current Recruitment Chairman as a mandatory designated officer.

- **Completing this on-line rush activity would be a condition of pledgeship. Failure to comply would result in an incomplete pledgeship and prevent the pledge from being initiated.** Accountability will be important to assembling pledges' rush recommendations over time.

2. Introduction to the Greek System and ΣAE

- The Fraternity Service Center would coordinate communications.
 - The FSC will designate a Recruitment Coordinator who will own and facilitate the process.
 - **The FSC would send an automated letter via email to each rushee introducing him to the Greek system, introducing him to ΣAE, encouraging him to seek out ΣAE during rush, and identifying whether there is a chapter at the institution he plans to attend (if known).** The email would also indicate who made the recommendation. This procedure will standardize the message. Even if a chapter or area alumni association fails to follow-up, a communication will have been made.
 - Since most high school rushees identified will not have selected their colleges until after the fall pledgeship, the FSC will notify the pledge (now a member of SAE) and the Chapter EA in the early spring. They will be asked to talk to the high school men whom they recommended and find out which offer of admission they have accepted. The institution chosen would be added to the rushee's record.

3. Chapter and Alumni Association Notification

- Although the recommended rushees might not be attending the same college or university as the pledge, **the rush recommendations would be sorted by the FSC and forwarded to the appropriate chapter (if the college or university to be attended is known) and/or chapter/area alumni association near their high school for follow-up.**
- **Chapters and alumni associations can follow-up with potential rushees as appropriate.**
 - Chapter alumni can sponsor, help organize, and attend rush events.
 - Alumni may be asked to speak about ΣAE's history, values, and opportunities for rushees that go beyond the chapter (e.g., Leadership School, Convention, scholarships, etc.).
 - If multiple chapters in an area or province have strong rush programs and alumni involvement, then a rush event may be organized at an area or province level.
 - This strategy can increase the exposure of ΣAE, increase the number of rushees, and improve the yield among those rushees on a given campus.

Benefits

A number of quantifiable benefits will be derived by implementing the proposed “Committed to SAE Growth” initiative.

- The initiative could produce over 26,000¹ qualified rushee candidates our chapters in fall 2008.
- The initiative would deliver substantial assistance to every local Chapter and Area Alumni Association. Today the “barrier to entry” for alumni associations to identify high quality potential rushees is extremely high.²

The barrier is lowered to the point that every alumni association or small group of alumni can support their local chapters with this initiative. Further the quality and coverage of candidates is significantly improved. Alumni will still be asked to supply candidates and to cover “uncovered” high schools. Those chapters with more diverse sourcing of pledges will increase the coverage of high schools.

- Like many processes that are developed end-to-end, they are more efficient and they relieve the good but very difficult work of invention and implementation repeated at many, many alumni locations.

The initiative is a logical and physical extension of the work that the Atlanta Alumni Association has been doing with its Ivan Allen Jr. Rush Party and the processes will be piloted in spring 2008.

- This process can be designed to take place entirely on-line, by email and automated so that staff support is only required to set-up the pledges’ rush recommendation forms and to maintain the database.

Infrastructure and Systems Requirements

Like many technology-based and supported processes, this initiative will require systems to support it. Today almost all Recruitment activities are manual and there will always be a manual and “hands-on” component. The systems support starts with the data entered by the new initiates, the database that stores the rushees’ contact information, and then is completed with the applications that generate custom personal letters to rushees and aggregates lists of rushees to the chapter Recruitment Chairman and local alumni associations.

- Data entry – data screens can be used to capture the rushee information.
- Data base – a database is required with standard data sorting and extraction capabilities.

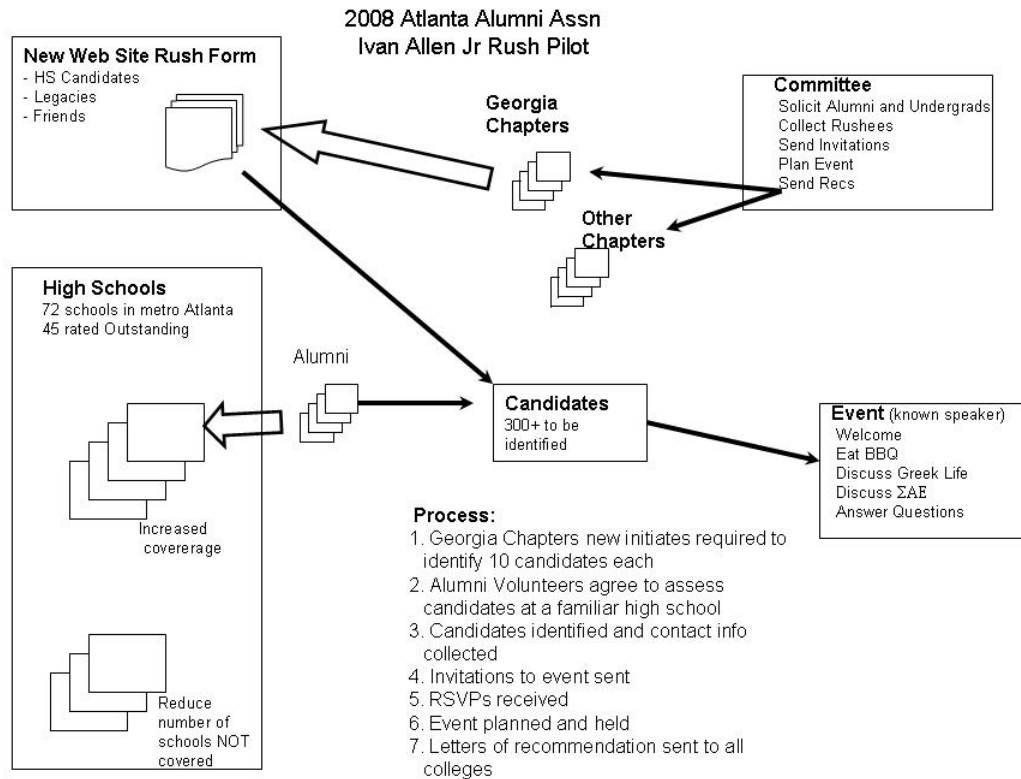
¹ Based on a projected 5,300 new pledges fall 2008 with each of them identifying 5 rushees.. Note that this assumption is taken from an assessment that stipulated 4,122 pledges in 2004, 3,788 in 2005, 4,396 in 2006, and 4,835 in 2007. Data was prepared for the Nat’l Convention dues increase debate.

² The Atlanta Alumni Association has identified 72 top high schools in the Metro Atlanta Area. In 2007 only about 24 were covered, that is had an alumnus who was qualified and committed to screening the candidates.

- Letter and email generation – using data merge and standard text. The cost of postage can be avoided by sending all communications via email.
- Administration – Probably a part-time job at 0.25 FTEs for one of the FSC staff members

Pilot

The Atlanta Alumni Association Ivan Allen Jr. Rush process is being enhanced in the spring 2008 to incorporate some of the concepts of the proposed initiative. A graphic of the enhancements are shown here:



Planned enhancements include:

- New in 2008, the Atlanta Alumni Association has formally required (through the Province Council) the chapters³ in Province Epsilon-Alpha to identify their Recruitment Chairman and to identify, with contact information, each new initiate from the Metro Atlanta Area and the high school they attended.
- High school coverage will be improved and increased by requiring each of the new Atlanta-based initiates in a spreadsheet provided to identify the top 10 candidates from their high school regardless of the college they plan to attend.⁴

³ The chapters and colonies in the Province represent 9 (4.1%) of the 222 total chapters in ΣΑΕ.

⁴ There are an estimated 131 pledges in the Province in the fall 2007 - 2008 class; approximately 20 are from the Atlanta area. The yield in fall 2008 should be 200 new rush candidates identified. Were the initiative implemented the yield would be 1,310 new potential rushees.

- As soon as a college is selected by the rush candidate, written notification of the candidate's contact information will be given to the chapter's Recruitment Chairman. In prior years, the notification was sent immediately after the Rush event in July.

As a result of this initiative, several additional enhancements to the Atlanta Alumni Association Ivan Allen Jr. Rush process are being planned for 2008.

- All new initiates, regardless of their home town will be asked to identify rush candidates from their high school.⁵ This will be done after the Atlanta based data is collected and will, as a result, have a higher percentage of rushees that know what college they will attend.

The ideal time to get the final information on rushees is in the April / May timeframe when college decisions have been made.

- The web site will be enhanced to facilitate the data entry. A prototype of the data entry is at <http://www.saeatlanta.com/IAEPRushform.html>

The Excel Spreadsheet currently used by the initiates will be abandoned in favor of the on-line form. The data will be collected centrally and held offline in an Excel spread sheet. Emails to the rushees will be used to gather the yet undecided college information when it is available.

- Letters of invitation using standard MS Word "Mail Merge" capability will be used to customize the letters to the rushees. The use of email will also be used when addresses are incomplete.
- A standard, but customized, letter will be created and sent to all non Atlanta-based rush candidates informing them of the Greek system and ΣAE and encouraging them, to seek out ΣAE when they get to school.
- Once the college information is received by the recommending initiate or rushee, a letter of recommendation for each rushee will be sent to the chapter at his chosen institution.

Based on the lessons learned from this Pilot in the spring of 2008, feedback can be provided to the planned national roll-out for fall 2008-09.

⁵ The yield will be approximately 1,310 new potential rushees.