

2009-2010

CHAPTER EFFICIENCY INDEX

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What is the Chapter Efficiency Index (CEI)?

The Chapter Efficiency Index (CEI) is a planning document designed to help chapters operate at their highest potential. The index contains a collection of the various administrative and programming activities that our chapters should be implementing in order to provide their members with the experiences that will give them “their business advantage for life”. Using the CEI guide will help preserve chapter focus throughout the year and provide a foundation for new chapter officers and members to use in the future.

It is important to understand that the CEI should not be solely the responsibility of the chapter officers; all chapter members should actively participate in CEI reporting activities. Aside from the experience of physically doing the planning and work, members can use the reports to build a portfolio of professional writing samples that can benefit them in their career search.

Additionally, participation in the CEI also forms the basis for national recognition and eligibility for the PSE NEF National Awards Program. This recognition is gained through the accumulation of CEI points. Each CEI category carries a point value, and by earning these points, chapters can plan to meet various levels of achievement and special designations:

Bronze:	12,000 points
Amethyst:	16,000 points
Silver:	21,000 points
Gold:	30,000 points

Why should chapters actively use the CEI?

- The CEI facilitates the creation and implementation of chapter goals.
- The CEI acts as a practical guide for implementing different levels of chapter operations.
- The CEI provides practical experience with writing business reporting.
- The CEI offers specific experience in the business planning and plan implementation processes.
- CEI achievement qualifies the PSE Chapter for national awards and recognition.

How should reports be submitted?

Reports should be uploaded to PSE HQ by the due dates¹ shown in each category. Some reports may require written narratives, while other reports may be forms, worksheets, or online templates. Samples or artifacts from projects that the chapter wishes to share with PSE HQ may be mailed at the time a report is submitted, but are not required. Each report MUST be accompanied by a CEI cover page (Appendix A of this document) and needs to be uploaded at <http://www.pse.org/pseonline-cei-upload.asp>

¹ All due dates are calendar days unless otherwise specified. Extensions may be granted in special circumstances.

WHAT'S NEW IN THE CEI FOR 2009-2010

PSE Headquarters has identified a collection of CEI activities that are critical for continued chapter stability and growth. To ensure that our chapters are taking these steps to further their development, the completion of the following CEI categories will now be considered mandatory for our chapters to remain in good standing with National Headquarters for the following year. "Good standing" will be determined in two parts (see breakdown below):

1. Chapters must at all times remain financially and administratively "current" with National Headquarters. Failure to do so will result in *immediate* loss of "good standing" status.
2. Chapters must also complete the list of annually mandatory reports **on time** (see below) to maintain their good standing entering the next CEI year.

Please also note that *only chapters in good standing with National Headquarters* will be eligible for participation in the PSE NEF National Awards Program^{II}.

1. Chapters must at all times remain financially and administratively "current" with National Headquarters. Failure to do this will result in *immediate* loss of "good standing" status. To remain financially and administratively current, chapters must complete the following CEI categories on time:

- _____ Chapter Membership Roster Review & Forecast – Fall (A4)
- _____ Chapter Membership Roster Review & Forecast – Spring (A4)
- _____ Chapter New Member Processing – Fall (A6)
- _____ Chapter New Member Processing – Spring (A6)
- _____ Payment of Annual National Dues (A7)
- _____ Annual Officer Report (A11)

Chapters failing to complete these steps will not be eligible for the 2009-2010 National Awards Program.

2. Chapters must also complete the list of annually mandatory reports on time to maintain their good standing entering the next CEI year. These reports include:

- _____ Chapter Annual Plan (A1)
- _____ Chapter Annual Report (A3)
- _____ Chapter 12-Month Operating Statement (A8)
- _____ Submission of Three General Business Meeting Minutes (A10)
- _____ Submission of Three Management Team Meeting Minutes (A10)
- _____ Officer Training (A12)
- _____ Chapter Bylaws (A13)
- _____ Completion of One Sales or Marketing Project (P1)
- _____ Completion of One Service Project (P2)
- _____ Completion of One Professional Networking / Development Activity (P4)

Chapters failing to complete these steps will not be eligible for the 2010-2011 National Awards Program.

These mandatory categories will also be marked with a in their descriptions.

^{II} For eligibility for the 2009-2010 National Awards Program, all chapters will be considered "in good standing" provided that they remain financially and administratively current with National Headquarters (section 1) throughout the 2009-2010 CEI Year.

CEI CATEGORIES

Chapter Administration

- A-1 Chapter Annual Plan
- A-2 Chapter Annual Plan Mid-Year Review
- A-3 Chapter Annual Report
- A-4 Chapter Membership Roster Review and Forecast (Spring & Fall)
- A-5 Chapter New Member Processing (Spring & Fall)
- A-6 New Member Training (Spring & Fall)
- A-7 Payment of Annual National Dues
- A-8 Chapter 12-month operating statement
- A-9 Proof of dual signature card for chapter banking account
- A-10 Meeting Minutes
- A-11 Officer Report
- A-12 Officer Training
- A-13 Chapter Bylaws
- A-14 Chapter Administrative Review

Chapter Programming

- P-1 Profitable or Non-profitable Sales, Marketing, and Marketing Research Projects
- P-2 Community Service Projects
- P-3 Individual Member Volunteerism / Community Service Projects
- P-4 Chapter sponsored Professional Development, Recognition or Networking Activities (Alumni, Professional, Interchapter, etc.)
- P-5 Chapter Extra Curricular Activities
- P-6 Chapter Public Relations
- P-7 Chapter Corporate Sponsorship Packages
- P-8 Hosting or Co-hosting a PSE National Event

CHAPTER ADMINISTRATION

A-1 CHAPTER ANNUAL PLAN

Mandatory Category: Chapters must submit an Annual Plan.

Annual planning assists in providing chapter direction. In specific, the plan addresses three major parts, needs assessment, goal setting/implementation, and evaluation. Chapter annual planning is a group activity and requires participation from the entire chapter. For assistance with annual planning or for contacting a potential facilitator, contact PSE HQ.

Due Date February 15, 2009

Required Report Information:

- I. Chapter situational analysis (past, present, and future situation of the chapter) and chapter mission statement.
- II. Competitive analysis (names of other student organizations that you compete with, dues analysis, size of membership)
- III. Recruitment planning worksheet
 - a. Current Membership Analysis
 - Total number of active (paid) members
 - Anticipated number of graduates by semester (spring and fall)
 - Anticipated loss of inactive members by semester (spring and fall)
 - b. Target Market Determination Analysis^{III}
 - c. Chapter Recruitment Strategy
 - Recruiting Goals – chapters should utilize their membership analysis to help them plan the size of their recruiting class^{IV}.
 - Creative Strategy/Theme
 - Recruitment Activity Plan (info nights, classroom visits, organization fairs)
- IV. SWOT Analysis (What are your chapter's internal strengths and weaknesses; external opportunities and threats?)
- V. Chapter Goals - Goals should address the weaknesses and opportunities identified in the SWOT analysis, and must be "SMART" - Specific, Measurable, Attainable, Reasonable and Timely. This section should also include the goal-completion strategies (how you plan on accomplishing each goal^V).
- VI. Previous year's operating statement (sample available at pse.org)
- VII. Current year's budget (sample available at pse.org)
- VIII. Date of annual planning meeting and date of annual plan ratification.

^{III} Your target markets are those students whom you will aim to recruit into your chapter. More information about this can be found on pse.org under the recruitment training section of Chapter Management.

^{IV} Ex: A chapter finished last year with 50 members, and they feel that having 65 members let them grow. 5 Seniors will be graduating this spring, and on average 10 underclassmen decide not to come back in the fall (unplanned turnover). If they take the 50 members they have and factor out the graduates and those underclassmen, they can expect to have 35 members at the start of the fall. If they want to get to 65, their recruitment goal should be 30 people. ($50 - 5 - 10 = 35$; $65 - 35 = 30$)

^V Ex: **Goal** – Increase the number of chapter marketing projects from 2 to 4. **Strategies** – 1. Improve relationship with Greek system to gain projects marketing their events. 2. Research NFP marketing possibilities with local charities.

Point Value: 2000 points (one annual submission)

A-2 CHAPTER ANNUAL PLAN MID-YEAR REVIEW

During the Mid-Year review, chapters should go back to their Annual Plan and make any revisions that are needed due to chapter progress.

Due Date September 15, 2009

Report Information:

- I. Initial outcome analysis (how are you coming along with your goals? How many have been completed? What do you have left to do?)
- II. Revised goals (if necessary) and why goals were revised
- III. Date of revision session.

Point Value: 1000 points (one annual submission)

A-3 CHAPTER ANNUAL REPORT

Mandatory Category: Chapters must submit an Annual Report.

The Annual Report is a synopsis of the chapter's activities over the past year. This report should summarize the accomplishments of the chapter and can be used as a promotional piece for the Chapter. Retain a copy for future chapters to review.

Due Date January 31, 2010

Report information:

- I. Executive Summary (Annual summary of overall chapter performance)
- II. Goals and Strategies (List goals and strategies projected, revised and accomplished)
- III. Programming
 - Provide a short narrative of each chapter sales, marketing, marketing research, and community service projects – highlight important points such as a description, number of total chapter participants, beneficiaries, total sales revenue, total chapter profit
- IV. Professional Development
 - Provide a narrative discussing number of guest speakers, professional programs, extra-curricular activities, affiliate relationships (SME, Chambers, etc.)
- V. Membership
- VI. Recruiting (Goals versus actual – broken down by classification and major)
- VII. Achievement (Number of leadership positions, awards, honorary organizations, academic achievement, MKT, internships, etc. earned by chapter members)
- VIII. Financial Position (Include financial statement of all chapter operations_
- IX. Conclusion
 - Include the overall impression of the performance of the chapter. Be specific as possible. Make recommendations for work still to be done, goals to be accomplished. Provide a discussion of what challenges lie ahead for the chapter and its leadership to develop. Make projections for the future of the chapter.

Point Value: 2000 points (one annual submission)

500 bonus points will be awarded to chapters who submit their annual plan, annual plan mid-year review and annual report on time. These will automatically be awarded by the PSE HQ office.

A-4 CHAPTER MEMBERSHIP ROSTER REVIEW & FORECAST

Mandatory Category: Chapters must submit two Roster Reviews – Spring and Fall

Due Date May 1, 2009 (Spring);
December 15, 2009 (Fall)

Keeping membership records up-to-date is essential. Two weeks prior to the due date of the roster review, the chapter president and VP of Human Resources will receive an email from HQ with a list of names of the current membership on file in the PSE HQ database. The list must be verified for accuracy, including proper spelling of members' names, e-mail addresses, mailing addresses, graduation date, and year in school. Indicate any changes in yellow, and be sure to note graduating seniors. If a member has gone inactive, do not delete their information; rather, indicate them in red.

Chapters must also submit their retention rates for each semester. The equation to calculate this is as follows:

$$\frac{\text{\# of paid active members}}{(\text{\# of members on last roster review}) - (\text{\# of new graduates})}$$

For example, if a chapter had 55 members in the spring, graduated 5 seniors that semester, then had 40 of those members pay dues in the fall, their retention rate would be 80%:

$$\frac{40 \text{ members paying dues in Fall}}{55 \text{ members in the Spring} - 5 \text{ Spring graduates}}$$

Point Value: 500 points each (two annual submissions; one Spring, one Fall)

A-5 CHAPTER NEW MEMBER PROCESSING

Mandatory Category: Chapters must process new members twice yearly – Spring and Fall

Due Date Three weeks prior to each initiation ceremony, or, at the latest, May 1, 2009 (Spring); December 1, 2009 (Fall)

New member processing is how a chapter's new initiates become formally recognized by National Headquarters. Upon receiving full payment of each new member's fees and a **FULLY COMPLETED** new member processing form, the chapter will receive membership certificates, pins, and a new member kit, including their membership handbook. The chapter will NOT receive any new member materials unless ALL members are registered online and ALL of their information is entered. Be sure you carefully check the accuracy of your information on the processing sheet to ensure timely turnaround time for your materials.

Report information:

- Find New member processing paperwork at <http://www.pse.org/Forms/NewMemberProcess.xls>

Point Value: 50 points per senior, 75 points per junior, 100 points per sophomore and freshman. 200 points per Life Member (two annual submissions; one Spring and one Fall)

A-6 NEW MEMBER TRAINING

A thorough introduction to PSE and the chapter is a vital part of welcoming new members. This is also a time when active members can interact and get to know new members. Training will include PSE history, Chapter history, and an introduction to chapter programming. Well-trained new members add energy and bring new ideas to the chapter help it operate at higher levels.

Due Date May 30, 2009 (Spring);
December 30, 2009 (Fall)

Report Submission Steps:

- Download the new member training curriculum at [pse.org](http://www.pse.org) and have the New Member Trainer customize it to the chapter. <http://www.pse.org/pseonline-training-newmem.asp>
- Train your new members on the materials and submit your new member meeting minutes as a group, in addition to your new member training plan to earn your points. (New member training should last approximately four weeks, or four 45-minute classes)

Point Value: 500 each (two annual submissions; one Spring and one Fall)

A-7 PAYMENT OF ANNUAL NATIONAL DUES

Mandatory Category: Chapters must pay Annual Dues

Due Date October 15, 2009 (semester schools);
November 15, 2009 (quarterly schools)

National dues need to be remitted annually from chapter members wishing to retain their membership. Note that this category only includes returning members, not new initiates during the year.

Failure to remit dues on time will result in penalties to your chapter, including loss of all national benefits, the chapter's "good standing" status, and the chapter's eligibility in this year's National Awards Program.

Report Submission Steps:

- Have all members verify their information in the PSE database online by logging in with their user name and password
- Download and completely fill out the membership renewal paperwork located on pse.org under the chapter resources link <http://www.pse.org/Forms/RenewalMemberProcess.xls>
- Remit renewal paperwork to PSE HQ with a check for membership dues. Members may also pay their renewal dues online, if they prefer.

Members opting to pay for Life Membership may do so at any time, but any annual dues already paid will not count as a credit towards their life membership payment. This means that if a member joins as a freshman, but decides sophomore year to become a Life Member, he or she will not be able to apply the previous year's dues towards the Life Member Fee.

To become a Life Member, interested individuals will need to fill out and submit the Life Membership Application found under the Chapter Resources link at pse.org

Point Value: 1000 points

A-8 CHAPTER 12-MONTH OPERATING STATEMENT

Mandatory Category: Chapters must submit their 12-month Operating Statement

Keeping accurate financial records is vital to chapter stability and accurate chapter financial reporting. The operating statement reflects the actual dollars collected and spent by the chapter. This document will also be used in the chapter's annual report and the *following* year's annual plan.

Due Date July 15, 2009

Report Information:

- Because PSE HQ operates on a fiscal year different from the CEI calendar, it is important that your operating statement match the PSE fiscal year as HQ uses your chapter operating statements to report to the IRS for tax purposes.
- The 12-month operating statement will reflect the fiscal term of July 1, 2008- June 30, 2009.
- The report **MUST** include a beginning and ending balance on the Operating Statement. A sample Operating Statement is available at pse.org
- 100 bonus points will be awarded if the chapter submits the operating statement before July 1, 2009.

Point Value: 500 points (one annual submission)

A-9 PROOF OF DUAL SIGNATURE CARD FOR CHAPTER BANKING ACCOUNT

Dual signatures for financial transactions provide the chapter with a layer of security over Chapter finances. By requiring two signatures for all deposits and withdrawals, at least two people will be aware of all financial transactions. HQ recommends three signers on your account; the Faculty Advisor, the President and VP of Finance.

Due Date 60 days after officer election

Report information:

- A copy of the card, length of time the card is good for, and the name of the financial institution.
 - Checking and/or savings accounts should be clearly named Pi Sigma Epsilon, the Chapter Name (ex. Pi Sigma Epsilon, Eta Omega Chapter) to avoid confusion as the financial institution may serve many student organizations from the campus.

Point Value: 200 points (one annual submission)

A-10 GENERAL BUSINESS OR MANAGEMENT TEAM MEETING MINUTES

- Mandatory Category: Chapters must submit minutes for at least three (3) general business meetings and for three (3) management team meetings.*

Meeting minutes are the official record of the proceedings of a meeting and should be kept to record the history and progress made. Well-kept minutes should contain enough information so that members unable to attend a meeting in person can still gain the information needed to actively participate in chapter activities. Minutes should be recorded for all general business and all management team meetings.

Due Date 30 days after end of month (For example: All October meeting minutes need to be submitted in one report by November 30)

Report information:

1. Date and time called to order and adjourned
2. First and last names of people who presented at meeting
3. Detailed report of topics discussed including relevant information given about each
4. Include type of minutes (General Business Meeting or Management Team.)
5. List total number of active members in attendance

Point Value: 50 points per meeting, maximum of 200 points/month per meeting type

A-11 ANNUAL OFFICER REPORT

- Mandatory Category: Chapters must submit an Annual Officer Report*

The officer report is a complete and accurate list of all officers and their contact numbers.

Due Date 30 days after officer elections or December 15, 2009, whichever is earliest.

Required Report Information:

- Electronic Officer Report Form located at <http://www.pse.org/pseonline-officer.asp>

Notes:

- To maintain optimum chapter momentum and success, PSE HQ recommends that you elect officers once a year in late October or early November. This will allow plenty of time for you to train in your new officers and allow them to transition to become the chapter leaders in February with the new CEI year.
- Ensure that your chapter has a valid physical address for proper handling of chapter mailings. **We cannot ship to P.O. Boxes.**

Point Value: 500 points (one annual submission) Points will be awarded once the chapter president emails his/her chapter consultant indicating that the form has been completed. Only forms completely filled out will receive points.

A-12 OFFICER TRAINING PROGRAM

Mandatory Category: Chapters must submit an Officer Training Program

Due Date May 15, 2009 (chapters electing in the Spring);
January 15, 2010 (chapters electing in the Fall)

Chapters may develop their own officer training programs, but it is highly recommended that chapters utilize PSE HQ training materials. They can be located on pse.org.

Required Report Information:

- Names of outgoing and incoming officers
- A brief explanation of officer responsibilities
- Officer goals for the upcoming year
- Date the training took place

Notes:

- Proper and thorough officer training is one of the keys to chapter success. PSE HQ recommends that training of new officer begins soon after elections and the new officers have at least a month where they shadow current officers and learn the chapter management structure.

Point Value: 1000 points (one annual submission)

A-13 CHAPTER BYLAWS

- ☑ *Mandatory Category: Chapters must submit an updated and ratified copy of their Chapter Bylaws*

Chapter Bylaws act as the governing document for the Chapter. Topics include officer qualifications and responsibilities, membership requirements, operational procedures, and disciplinary procedures. Bylaws cannot conflict with the National Constitution. Bylaws which are updated annually provide the chapter with a comprehensive guide. A sample of Model Chapter Bylaws is available at pse.org.

Due Date: March 1, 2009.

Report Information:

- Chapter Name
- Membership eligibility and classification
- Terminology (refer to National Constitution Article XII Section 10)
- Chapter officer positions and job descriptions
- Officer elections and terms of office
- Impeachment procedures
- Minimum chapter requirements
- No hazing policy
- Initiation
- Chapter finance structure including chapter fiscal year
- Drug, alcohol and sexual harassment policies and disciplinary measures
- Amendment procedures
- Chapter dissolution procedure

Point Value: 1000 points (one annual submission)

A-14 CHAPTER ADMINISTRATIVE REVIEW

The Chapter Administrative Review (CAR) is a service provided to the Chapter during which a qualified consultant visits the chapter in person or via teleconference to offer information and guidance in all areas of chapter operations based upon each chapter's needs. During such visits, the consultations will include an assessment of chapter operation and an analysis of areas to improve. Upon completion of the visit, a report will be provided to Chapter leaders in order to review the evaluation. Members will also have the opportunity to complete a Chapter Administrative Review evaluation based on the Chapter Consultant's performance.

Notes:

- To request a consultation, contact PSE HQ to establish a CAR date.

Point Value: 200 points (one annual submission – automatically awarded by PSE HQ)

CHAPTER PROGRAMMING

P-1 PROFITABLE /UNPROFITABLE SALES, MARKETING, OR MARKETING RESEARCH PROJECTS

Mandatory Category: Chapters must complete at least 1 Sales or Marketing Project

Projects are the core element of the PSE experience, particularly as it applies to Chapter member's skill development and the foundation of their "business advantage for life". Successful implementation of any project requires planning, implementation, recording, and evaluation for future repeated implementation.

Due Date 30 days after completion of the project (date of last sale, close of books, etc.)

Point Value:

- | | |
|----------------------------------|-------------------------------|
| • < \$ 500 Net Profit | Point Value: 500 per project |
| • \$501- \$1,499.99 Net Profit | Point Value: 1000 per project |
| • \$1,500- \$2,999.99 Net Profit | Point Value: 1500 per project |
| • \$3,000-\$4,999.99 Net Profit | Point Value: 2500 per project |
| • > \$5,000 Net Profit | Point Value: 4000 per project |

BONUS: 100 points will be added to each project in which a minimum of \$150.00 is donated to the PSE National Educational Foundation in support of the NEF Scholarship Fund. Visit pse.org for more information on the PSE NEF.

SALES or MARKETING PROJECTS

Report Information:

- I. Introduction
 - a. Title and type of project (sales, marketing, or marketing research project).
 - b. Beginning and ending dates
 - c. Name of chairperson, telephone number and email address
 - d. Overview: A brief description of the project (one paragraph)
- II. Project Planning
 - a. Project Goals – What goals were set prior to beginning the project?
 - b. Market Research – What market research was conducted to evaluate the feasibility of the project if any?
 - c. Project Organization Management – Who managed the project? Committees?
- III. Project Implementation
 - a. Project Implementation – What steps or phases occurred in the implementation of the project. Describe all activities associated with the project, day of, etc.
- IV. Project Evaluation
 - a. Project Analysis - Comparison of expected and actual results (Did you reach all intended project goals: profit/loss, membership participation levels planned, versus outcomes), outcome measures, project evaluation (include specific percentages of goal completion.)
- V. Project Financials
 - a. Budget - Expected incomes and expenses (See Budget sample at pse.org)
 - b. Financial statement – Project actual incomes and expenses (See Financial Statement at pse.org)
- VI. Supporting Documentation / Artifacts (optional)

Notes:

- Projects that are assigned as part of class projects are not admissible.
- Chapters hosting or sponsoring career fairs are to be considered as profitable / unprofitable sales or marketing projects.

MARKETING RESEARCH PROJECTS

Report Information:

- I. Introduction
 - a. Identify the client
 - b. States the purpose/ research objectives of the study
 - c. Identify the proposed research sample
- II. Background Research
 - a. Identify the scope of the study
 - b. Review of literature such as industry reports or similar studies related to the scope of the study
- III. Research Instrument Design & Methodology
 - a. Description and development of the research instrument (attach questionnaire/focus group agenda, etc)
 - b. Description of the research design: telephone, written, on-line or in-person
 - c. Surveys/ focus groups/ interviews; random sample, population sample, and how data was obtained; the number of contacts made during the research study by PSE students
- IV. Research Analysis
 - a. Quantitative summaries of your findings, i.e., statistical analysis of survey results as shown in tables, charts, and graphs
 - b. Implications and recommendations determined from the results of the research
 - c. Qualitative interpretation of your findings, i.e., discuss the results in relationship to the scope of the study
- V. Project Evaluation
 - a. Project Analysis - Comparison of expected and actual results (Did you reach all intended project goals: profit/loss, membership participation levels planned, versus outcomes), outcome measures, project evaluation (include specific percentages of goal completion.)
- VI. Project Financials
 - a. Budget - Expected incomes and expenses (See Budget sample at pse.org)
 - b. Financial statement – Project actual incomes and expenses (See Financial Statement at pse.org)
- VII. Supporting Documentation / Artifacts (optional)

Notes:

- Projects that are assigned as part of class projects are not admissible.

P-2 COMMUNITY SERVICE PROJECT (Charitable Non-Profit Projects)

Mandatory Category: Chapters must complete at least 1 Community Service Project

Community service projects not only develop good public relations and give back to the community; they are a good way to bring unity to the chapter by fostering brotherhood and a sense of pride.

Due Date 30 days after completion of the project (date of last sale, close of books, etc.)

Point Value:

- < \$ 500 Net Value of Donation Point Value: 500 per project
- \$501- \$1,499.99 Net Value of Donation Point Value: 1000 per project
- \$1,500-\$2,999.99 Net Value of Donation Point Value: 1500 per project
- \$3,000-\$4,999.99 Net Value of Donation Point Value: 2500 per project
- > \$5,000 Net Value of Donation Point Value: 4000 per project

Point requests will be based on the amount of money earned or value of goods donated to your cause. If your project was not designed to donate money or other tangible goods, please ask for 500 points for your project.

Report information:

- I. Introduction
 - a. Title of project
 - b. Beginning and ending dates
 - c. Name of chairperson, telephone number and email address
 - d. Overview: A brief description of the project (one paragraph)
 - e. Organization benefited by the project and the relationship of the organization to the chapter
- II. Project Planning
 - a. Project Goals – What goals were set prior to beginning the project?
 - b. Market Research – What market research was conducted to evaluate the feasibility of the project if any?
 - c. Project Organization Management – Who managed the project? Committees?
- III. Project Implementation
 - a. What steps or phases occurred in the implementation of the project. Describe all activities associated with the project...day of, etc.
- IV. Project Evaluation
 - a. Project Analysis - Comparison of expected and actual results (Did you reach all intended project goals: profit/loss, membership participation levels planned, versus outcomes), outcome measures, project evaluation (include specific percentages of goal completion.)
- V. Project Financials
 - a. Budget - Expected incomes and expenses (See Budget sample at pse.org)
 - b. Financial statement – Project actual incomes and expenses (See Financial Statement at pse.org)
- VI. Supporting Documentation / Artifacts (optional)

Notes:

- Only chapter-planned and chapter-hosted events apply. Events participated in *on behalf of* Pi Sigma Epsilon do not count towards this category (please see section P-3 for these activities).

**P-3 INDIVIDUAL MEMBER VOLUNTEERISM / COMMUNITY SERVICE PROJECT
(Charitable Non-Profit Projects)**

Member community service includes all community service done by *individual* members as representatives of PSE. These projects are not planned or implemented under the leadership of the chapter. This includes any activity where time and/or money is donated.

Due Date: 30 days after the event date

Report information:

- Name of organization volunteering for
- Dates of volunteer effort
- Name of chairperson coordinating volunteer effort
- Name, telephone numbers and email addresses of attendees
- Brief description of the project - an overview

Point Value: 25 points per member volunteering. Maximum points available per year: 375.

P-4 CHAPTER-SPONSORED PROFESSIONAL DEVELOPMENT, NETWORKING, or RECOGNITION ACTIVITIES (ALUMNI, PROFESSIONAL, INTERCHAPTER, ETC.)

Mandatory Category: Chapters must complete at least 1 Professional Networking/Development Activity

Professional development activities sponsored by the chapter offers numerous member benefits that support overall personal and professional development. Professional development activities include, guest speakers, workshops, seminars, networking events, lectures, company tours, etc. This also includes chapter recognition events such as award banquets, chapter retreats, interchapter events, alumni and professional events and PSE Founder's Day.

Due Date: 30 days after the event date.

Report information:

- Title and type of event
- Name of chairperson, telephone number and email address
- Brief overview of speech, event, etc. (Include speaker's names, titles, whether they are alumni, sponsors, etc.)
- Brief overview of chapter's responsibilities in putting the event on
- Names of chapter members in attendance

Point Value: 200 points per event.

P-5 EXTRACURRICULAR ACTIVITIES

Extracurricular activities encourage chapter unity and motivation. Consider bowling nights, scavenger hunts, spaghetti dinners, road rallies, chapter Olympics, intramural sports, chapter retreats, picnics, etc.

Due Date: 30 days after the event date.

Report information:

- A description of the event
- Names of chapter members in attendance

Notes:

- 50% of all chapter members (as defined by the Roster Review) must be in attendance

Point Value: 50 points per event. Maximum points available per year: 500

P-6 CHAPTER PUBLIC RELATIONS

Chapter Public Relations activities are critical to the success and longevity of the chapter. Such information distributed to appropriate targeted publics, both internal and external, serves as a method of maintaining positive communication and inspires participation in chapter activities. Public Relations tools include: Chapter Newsletters, E-zines, Websites, and publicity materials such as press releases, public service announcements, and video news releases.

Due Date: 30 days after the Public Relations exposure has occurred or was distributed.

Report Submission Steps:

- Submit a copy of the release, along with a brief overview of the audience and where it was broadcast, published, uploaded, etc. URL link required for website updates.

Note:

- Website updates must be considered substantial changes or more than 50 word edits.
- If the release was audio/video-based (radio, TV, etc.), a copy does not need to be mailed to HQ.

Point Value: 100 points each publication, update, etc.

P-7 CHAPTER CORPORATE SPONSORSHIP PACKAGES

Networking with area business is critical in helping chapter members achieve a business advantage for life. Not only do area business want to work and have their name known on campus, but they appreciate the talent that your chapter can bring to them to complete projects.

Due Date: 30 days after the creation of materials

Report information:

- Date package was completed
- A copy of your corporate sponsorship package

(If you'd like to see other chapters' packages, visit the Chapter CEI Resources link on pse.org under the Chapter Management link)

Notes:

- Remember that your chapter cannot sell corporate sponsorships to any of PSE's national sponsors. For a complete list of PSE's national partners, visit <http://www.pse.org/sponsors.asp>

Point Value: 200 points per package. Maximum of 1000 points.

Bonus points will be awarded for successful selling of your corporate sponsorship package. 100 points per sale. These will be awarded after submitting the signed contract between your chapter and your corporate partner(s) to PSE HQ. There is no maximum on bonus points.

P-8 HOSTING OR CO-HOSTING A PSE REGIONAL CONFERENCE OR NATIONAL CONVENTION

Event planning is a demanding skill set. Chapters choosing to undertake the hosting of PSE national events have a lot of details to coordinate and the responsibility to know answers to questions and ensure attendees have a great experience. All responsibilities outlined in PSE HQ's Regional Conference or National Convention planning documents must be fulfilled to earn full points, including maintaining the prescribed communication schedule.

Point Value: 1250 points per event hosted. Points will automatically be awarded by the PSE HQ office.

CEI COVER PAGE

Chapter Efficiency Index
Point Submittal Form

This cover page must be submitted with every report

To: CEI Administrator
Pi Sigma Epsilon
3747 S. Howell Ave.
Milwaukee, Wisconsin 53207

From: Chapter:
School:
Event Date:

CEI Category:

Project Title:

Total Points Requested:

EXAMPLE

CEI Category: P-1

Project Title: Send Out Cards

Total Points Requested: 1000

Report Written by (person who actually wrote the report):

Phone:

Email:

Report Submitted by (person who sent the report in):

Phone:

Email:

OFFICE USE ONLY

Received on:

Graded on:

Points Requested:

Points Granted:

Graded by:

CEI Deductions

No Cover Page with CEI Report:	50%
CEI report is late:	50%
Incorrect written format:	25%
Incorrect CEI category indicated:	25%

****If dues and new member processing sheets are late, NO points will be awarded****

Appendices A-D

For Appendices A-D (Chapter Budget, Chapter Operating Statement, Project Budget, Project Operating Statement), please go [pse.org](http://www.pse.org). The links can be found below. These forms are now in Excel format, and have the calculations built in.

Appendix A: <http://www.pse.org/Forms/cei/AppendixA.xls>

Appendix B: <http://www.pse.org/Forms/cei/AppendixB.xls>

Appendix C: <http://www.pse.org/Forms/cei/AppendixC.xls>

Appendix D: <http://www.pse.org/Forms/cei/AppendixD.xls>