



SAE Financial and  
Housing  
Corporation

## House Director's Manual

**Version 1.3 – August 2015**



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## **Introduction and Purpose**

### **1 Introduction and Role of the House Director**

This manual is the “play book” for Greek Housing Management, LLC (GHM) operations and the House Director.

In this manual are descriptions of the key House Director duties and methods of operation.

Each House Director is encouraged to create his own unique “play book appendix” for his chapter house with unique content that can be added to this manual.

Version 1.0 – Dated July 1, 2012 this version is the first.

Version 1.1 – Dated October 2012, this version includes the House Director performance and appraisal process as well as the implementation of RealPage.

Version 1.2 – Dated July 27, 2015, this version edits out RealPage and enters Aspire CPAs’ services and Facilities Management; it also updates language to incorporate the True Gentlemen Experience (TGE).

Version 1.3 – Dated August 2015, this version includes information about the 7/1/2015 F&H organization that implements the Chapter Operation Consultant and the new issue management process.

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### **1.1 What is a House Director?**

#### **1.1.1 House Director Minimum Performance Requirements**

(also see Appendix 1):

- Reside in the Fraternity Chapter House (the “Premises”) at all times. Be available on weekends and evenings in case of emergency and to notify the tenant/employer and Greek Housing Management, LLC (“Manager”), the Facilities Manager for the Premises and tenant/employer, if this is not possible. This position requires a 12 month/52 week commitment with all absences or vacations coordinated and approved by the Facilities Manager in consultation with the tenant/employer.
- Prepare reports for the Facilities Manager (submitted to Facilities Manager) on the physical condition of the Premises. Complete and return all reports by their designated timeline, including:
  - Monthly report
  - Semester report
  - Yearend report
  - Other reports as requested
- Be present during scheduled non-ritual functions Sigma Alpha Epsilon Fraternity (“Fraternity”), such as:
  - Homecoming
  - Parent’s Weekend
  - Recruitment Events
  - Other events as requested
- Report any major physical or structural problems of the Premises immediately to the Facilities Manager.
- Become informed of and to enforce the Health & Safety policies, rules and regulations of the Fraternity and this Lease, including but not limited to the no alcohol policy in common areas, pets, smoking, etc. These rules apply to the House Director as well as the tenant’s members.
- Report any issues or incidents involving the tenant’s members and guests, observed or experienced, to the Manager and to other persons designated by the Manager.
- Close and secure the Premises after residents leave for university designated breaks.
- Maintain an open line of communication with the undergraduate chapter by attending weekly chapter executive board meeting.
- Work to build a mentor-type relationship with the members of the undergraduate chapter with whom you are working. You should achieve true and lasting engagement with the members fostering an environment of trust and personal accountability.
- Participate in any hiring, management, or termination process of meal preparation staff of the tenant chapter.
- Review all expenditures related to meal preparation ensuring they are in-line with the budget allotted by the tenant/employer.
- Supervise cleaning staff and work with the tenant’s House Manager to ensure the cleanliness of the Premises and keep the Premises clean and orderly while maintaining a hospitable environment.
- Review and record all invoices for purchases House Manager has made and has been authorized to make, and to turn them over to Manager or payment. Fax invoices and related documents to Manager upon request.
- Keep a record for Manager of any and all charges incurred by the tenant chapter that appear on the landlord’s invoices or by special purchase so Manager can bill the tenant chapter under the terms of the lease.
- Perform resident check-in/check-out procedure at the commencement/conclusion of each semester or as individual tenants may check-in/check-out during the semester, including managing room keys and performing the duties prescribed under the “Room Inventory Form/Membership Deposit Refund” document approved by landlord (which must be completed immediately upon resident check-in/check-out). Visually inspect the resident’s room during check-in/check-out for any damage and note the same on the Room Inventory Form/Membership deposit Refund” document approved by landlord.

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- Provide a list of Premises residents including name, room number, and cell phone number to the Manager by the second week of classes each academic period.
- Schedule, supervise, and review the work of any outside contractors. Recommendations on summer work/repairs must be presented to Manager by February 1st of the same calendar year.
- Forward all mail to the appropriate parties when school is not in session.
- Report any security infractions to employer, Manager, and to the university department of public safety or local security guard, if applicable.
- Upon your departure from the position, turn over all maintenance records to the appropriate Manager representative.

House Director's duties shall also include the application of the employee's skills and knowledge to ensure a safe, well-run operation, between both the House Director and the employer/tenant. Manager, in consultation with the employer, reserves the right to change the nature and scope of the House Director's duties. House Director shall carry out, to the best of his or her ability, any and all duties assigned to the employee.

### **1.1.2 The House Director is an Employee of the Chapter**

SAE Financial and Housing Corporation (F&H) is the provider of landlord and property management services. Chapters that lease an F&H owned house are required to use the services of Greek Housing Management (GHM). GHM requires that the chapter engage a House Director. The House Director is deemed an employee of the chapter, but is hired by GHM and takes direction for the Facilities Manager (FM).

The House Director is responsible for managing the chapter's property management relationship with the Facilities Manager and fulfilling all of the terms of the GHM agreement. F&H, a member of the Association of Fraternal Leadership & Values, finds their views on several aspect of the House Director important, as follows:

A House Director is an important and influential position on the college campus. Few other people in the college community have so many opportunities to influence the lives of young people in various direct ways. The attitudes, habits, values, and standards the House Director encourages have an impact that often lasts long after graduation. Often, people think that the life of the House Director, much like the house mother of the

50's, is spent playing bridge and attending parties and college events. Nothing is further from the truth. Although these activities are a part of the House Director's life, he/she is responsible for sharing professional, mature judgment seven days a week for nine or ten months of the year as House Manager and role model. The House Director also oversees the [some of the] finances, operation, and atmosphere or ambiance of the house.<sup>1</sup>

Many SAE fraternity chapters with housing on college campuses have a House Directors. These student organizations range in size from 25 to 100 or more live-in members. A chapter house may be owned and operated by private, non-profit house corporation, or it may be owned by the university. In the cases described in this guide, the house is owned by either SAE Financial and Housing Corp. or a chapter house corporation. In either case, the property is managed under the terms of a GHM agreement.

In all cases, a landlord owns a property and provides room and, in some cases, board services for the residents, usually comprised of members of the chapter. Typically, the house has sleeping spaces, public areas, study facilities, dining facilities, a kitchen, a laundry room, and an apartment for the House Director.

The property owner is responsible, as landlord, for operating a residence for the students who are members of the chapter. F&H contracts the property to the chapter. The chapter then contracts specific rooms with each individuals living in the house.

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<sup>1</sup> *AFLV House Director's Manual* Association of Fraternal Leadership & Values, PO Box 1576, Fort Collins, CO 80522-1576.



## Introduction and Purpose

House Directors are paid by the SAE chapter. The GHM, with input from the fraternity Chapter Advisor and Chapter President, will recruit applicants and oversee the training process. The House Director takes day-to-day direction from the Facilities Manager.

The student members that comprise the Chapter are a self-governing organization. The Chapter is governed by elected officers and advised by adult advisors, usually alumni of the organization and/or the chapter. There is also usually a campus fraternity advisor who works with the chapter primarily through an umbrella governing council. In some cases, the campus fraternity advisor may work with Chapter Advisors on a monthly or term basis. In addition, the campus fraternity advisor also usually makes a point to meet with and communicate with the House Directors on a regular basis. The House Director must know each of these entities and, more importantly, work within the boundaries of each of their elected or assumed responsibilities.

The Association of Fraternal Leadership & Values *House Director's Manual* describes the House Director's duties:

House Directors are best described as resident advisors. Generally, they have specific responsibilities hiring and firing kitchen and janitorial employees or services. However, at least half of the House Director's duties are "intangible." He/she is sometimes called upon to advise individual members, officers, or committees regarding personal matters as well as chapter activities. In this respect, House Directors must be people who enjoy working with young people, have an ability to listen, and know that although college students generally like to "do their own thing" without excessive adult supervision, they also enjoy the opportunity to have someone around to use as a sounding board in order to maintain communication in the chapter and to assist in the planning of chapter activities, a weekly meeting between key officers and the House Director is recommended. This also helps provide continuity from year to year.

House Directors are provided furnished quarters. These private, but small; apartments are not able to accommodate children or pets. The House Director is also provided meals in the chapter house when school is in session and the kitchen is open. House Directors receive regular school holidays as vacation time as well as other weekends that are arranged in advance with the chapter officers and/or advisor.<sup>2</sup>

The GHM guidelines for the House Director, described herein, render the duties more "tangible" than the above description.

The Facilities Manager is, by definition, remote from the property and relies 100% on the House Director for the execution of the chapter's obligations under the Account Management Agreement. The successful House Director performs all of the duties required to satisfy the Facilities Manager while maintaining an open positive relationship with the chapter leaders and the members.

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<sup>2</sup> *AFLV House Director's Manual* Association of Fraternal Leadership & Values, PO Box 1576, Fort Collins, CO 80522-1576.

## Introduction and Purpose

### **1.2 How Does a House Director Stay Organized?**

- Encourage chapter to schedule all chapter events and activities as far in advance as possible.
  - Meet with the key chapter officers at least once a week. Always ask about future events.
  - Keep a calendar as a model for the next year as many activities are traditional and occur annually.
- Schedule blocks of time each day to accomplish the items on a "to do" list.
- Specifying certain times when you are available for drop-in visitors.
- Use forms and checklists for as many jobs as possible (e.g. staff schedules, meal sign-up, food and household inventories, etc.).
- Tackle high priority agenda items first.
- Divide major projects into smaller parts. Involve House Manager in appropriate tasks.
- A voice message system is necessary.
- The GHM will provide a computer and printer for HD use only; use it to organize a multitude of tasks, manage the budget(s), etc.
- Use email regularly (membership with social networking sites, such as Twitter and Facebook, may also be helpful ways to communicate with the chapter members).
- Have contingency plans prepared for various possible scenarios (e.g. the cook calls in sick, the housekeeper can't come to work, a mixer or social event is scheduled 12 hours in advance, etc.).
- The House Director should establish office hours and post a schedule of appointments. It is important to maintain some privacy, but to expect interruptions. Post a sign that tells members when you will be out and what time you expect to return. Utilize email, texting, and other methods to facilitate communication and a quick response time.
- The House Director should attend any scheduled meetings with the campus fraternity advisor (i.e. the House Director training workshops or monthly meetings).

### **1.3 What Can the House Director Expect from the Chapter?**

The students in the fraternity chapter have an obligation to keep the House Director well informed regarding the members and chapter activities. They should give him/her customary courtesies, for example: they should use good manners, speak courteously, and respect the House Director's privacy.

- Each fall, the officers must give the House Director (HD) a list of all members with their home addresses, phone numbers or extensions, and e-mail addresses, as well as all parents' names, addresses, and phone numbers. This can also be provided by and/or shared with the Coordinator of Leasing and Membership.
- When available, the HD should receive a university and/or student activities calendar.
- The Social Chair should provide the HD with a weekly or monthly social calendar and should always check with the HD in advance of all chapter events and all occasions when guests are invited or residents will miss a meal.
  - The HD should be invited to all meetings concerning house matters and special events.
- Committees planning activities requiring food or special materials to be ordered should discuss their plans well in advance with the HD. The cook will need the authorization and chapter funds to order food since these activities are not part of the budgeted meal plan.
- The Chapter's Steward should notify the Cook and HD of members who will have classes during meals and are requesting a late plate (HD might need to open kitchen for late plate retrieval).
- The HD should be notified immediately if a member is ill.
- Following chapter elections, the HD should be informed of the results.
- As long as hours are established for the members to stop in, the HD can expect his/her right to privacy.

## F&H and SAE Basics

### **2 SAE Fraternity and SAE F&H Basics**

#### **2.1 Overview**

The SAE Fraternity has three main entities: SAE Fraternity, SAE Housing and Financial (F&H) Corp., and the SAE Foundation. Each entity has its own governing body and unique US IRS governance.

The entity responsible for chartering chapters and for chapter governance is the SAE Fraternity.

The entity responsible for housing is SAE Financial & Housing Corporation (F&H)`. The organization that provides property management services in GHM, LLC a wholly owned subsidiary of F&H.

#### **2.2 SAE Fraternity and the SAE Chapter**

The collegiate chapter operates under a charter granted by the SAE Fraternity.

The Fraternity employs a Regional Director (RD) who has responsibility for the several chapters in an assigned geographic region usually made up of several contiguous states. The region is further divided into Provinces, each headed by an alumnus volunteer Province Archon (PA). The RD and PA work together to assist the chapter's officers and to encourage that their operations are maintained within the chapter's charter and SAE National Fraternity Law.

The fraternity has many resources designed to assist the chapter. The web based True Gentleman Initiative site has best practices for the key chapter operations. The Minerva's Shield (hard copy and on-line) documents all required Health & Safety practices, including a zero tolerance for hazing,<sup>3</sup> prohibition of under-aged consumption of alcohol<sup>4</sup> and protocols for social events.

Chapter officers are elected to perform specific roles according to the Chapter By-law. Each officer is expected to perform his elected duties. Officers that do not comply are subject to discipline or replacement by the Chapter's Executive Board or the chapter members.

#### **2.3 SAE Financial & Housing Corp. (F&H)**

F&H operates under a 501(c)(7) regulations. These regulations, developed for social and recreational clubs were originally granted exemption in the Revenue Act of 1916.

F&H provides Chapters and House Corporations a growing number of product and services offerings. Originally offering financing to chapter house corporations, F&H has more recently acquired several houses and now has a portfolio of chapter houses. Each house acquired by F&H is owned by an individual [Chapter Name] Housing, LLC.

In all cases, when F&H acquires the house, the prior landlord, the local Chapter House Corporation, transfers ownership and landlord responsibilities to the [Chapter Name] Housing, LLC.

In the process of providing landlord support to houses F&H created the Greek Housing Management, LLC (GHM) to provide property management services to the chapter. Under the terms of GHM Account Management Agreement (AMA) the chapter is required to employ a House Director.

##### **2.3.1 F&H – [Chapter Name] Housing, LLC**

Whether purchased by or donated to F&H, there is uniform structure and support offered for these houses. Each house acquired by F&H is transferred from its owner, typically a [Chapter Name] House Corporation, to a LLC that is wholly owned by F&H.

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<sup>3</sup> Also a felony in many states.

<sup>4</sup> Banned by most state and local laws.

## F&H and SAE Basics

Through repairs, renovation or reconstruction or even ground up construction, the objective is to return the chapter to a house through the [Chapter Name] Housing, LLC. The [Chapter Name] Housing, LLC (landlord) leases the house to the chapter (tenant) under the terms of a Master Lease.

One of the several conditions of the Master Lease is that the chapter becomes a user of Greek Housing Management, LLC (GHM) property management services.

### 2.3.2 Chapter House Corporation properties

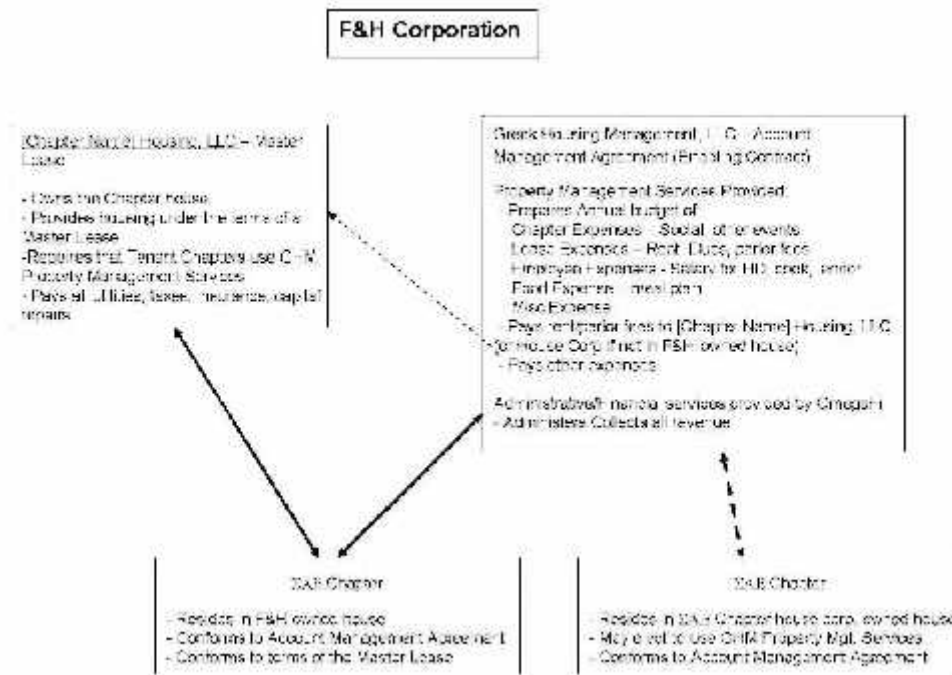
Chapter Houses owned by a Chapter's House Corporation have the option of engaging F&H services through a property management agreement. Under this agreement, the house corporation agrees to the property management services of GHM.

## 2.4 F&H Corp. - Greek Housing Management, LLC

The Greek Housing Management LLC (GHM) is a wholly owned subsidiary of SAE Financial and Housing Corporation. It is the property management services arm of SAE Financial and Housing Corporation.

GHM manages F&H owned as well as house corporation properties. All chapters residing in houses owned and operated by [Chapter Name] Housing, LLC are required, by the terms of its use of the house, to engage, by contract, the property management services of GHM.

The chart below shows the organizational entities and how they operate relative to the SAE Chapter.



Lastly, the GHM property management services agreement with the chapter provides for the use of a financial services firm, currently Aspire CPAs and the hiring of a Housing Director. Additionally, the GHM services are administered by a GHM Facilities Manager.



## F&H and SAE Basics

### **2.5 F&H / Chapter Master Lease Process**

#### **2.5.1 Master Lease**

Once F&H Corp. has acquired a house from a Chapter House Corporation, and the [Chapter Name] Housing, LLC has been formed, the Master Lease and Account Management Agreement (AMA) is completed with the chapter. The next order of business is to either:

- Make repairs and perform maintenance so that the house is ready for occupants. Ideally, the mature, well-functioning SAE Chapter currently in the house will be the tenant and a long profitable relationship for both will ensue.

OR

- Completely renovate the house or in some cases demolish the house and re-build it.

Alternatively, a Chapter House Corporation may decide that they prefer the property management services of GHM and want to retain ownership of the house. The Chapter House Corporation will complete the GHM Property Management Agreement, agree to use the Master Lease agreement and obligate the chapter to GHM with the Account Management Agreement.

Under all scenarios, the chapter must have the support of its alumni, have an advisor, and meet all of its contractual obligations under the Master Lease and the GHM Account Management Agreement.

#### **Summary of Landlord ([Chapter Name] Housing, LLC) and Chapter Relationship**

The Master Lease obligates the chapter to pay a set amount of rent to the Landlord regardless of the number of members living in the house. The Landlord is the Housing, LLC subsidiary of SAE F&H Corp. The chapter then subleases individual rooms to members of the chapter using the form Sublease found as an exhibit in the Master Lease (See Appendix 2: Master Lease).

The Master Lease also obligates the chapter to enter into a management agreement with Greek Housing Management (GHM).

#### **How rent is determined**

GHM uses a Rent Comparison Spreadsheet to compare market rents for off campus housing, dorms and parking rates. Based on these comparable rents, a rate is set for room and board for each tenant living in the Chapter House.

Generally, the Chapter House room rate will be set to be competitive with dorm rates. In a situation where accessible off-campus facilities are available at a significantly lower rate, further adjustments, approved by the board, may be warranted.

#### **How rent is calculated**

For Chapter and [Chapter Name] Housing, LLC budgeting, each chapter house has a maximum occupancy based on the house's room configuration. The room configuration and occupancy number are agreed to prior to the Master Lease being presented. The minimum occupancy rate is 92% of the maximum occupancy. Based on this 92% occupancy rate, the minimum number of tenants is calculated and the semester's total rent amount determined.

#### **How the budgets are determined**

There are two budgets - the chapter's budget and the [Chapter Name] Housing, LLC's budget - which are interlocked by necessity and design.

Generally, most chapters budgets would start by defining all revenues (from rents, dues, parlor and other fees, meal plan, philanthropy, etc.) and expenses rent payments to the House Corp. (dues, fees, cook and janitor salaries,

## F&H and SAE Basics

supplies, food, IFC, social, etc.). A positive net would usually go into a contingency fund or larger social spending. A negative net would result in a reduced social spending or reduced other variable obligation.

With F&H Corp. housing, most Chapter and [Chapter Name] Housing, LLC funds are collected under the terms of GHM, which require that all rent, culinary expenses, parlor fees, membership deposits, national dues, and social dues be collected using the financial services of Aspire CPAs. Greek Housing Management, LLC assists the chapter with setting up billing through the F&H Financial Manager. Aspire sends out the invoices which are collected and put into the appropriate account at Aspire. Greek Housing Management, LLC then pays all expenses on behalf of the chapter including rent to [Chapter Name] Housing, LLC. Once the rent is paid to [Chapter Name] Housing, LLC, the chapter has nothing to do with [Chapter Name] Housing, LLC budget or expenses.

The money flows into the [Chapter Name] Housing, LLC budget as revenue and is transferred to the Chapter's budget where it is recorded as Chapter Revenue. This is a complex methodology that fulfills the [Chapter Name] Housing, LLC's need for profitability and the chapter's need for autonomy and independence, enabling it to meet its contractual obligations to F&H.

The chapter's rent is calculated using the market rent rate and the 92% occupancy rate.

The chapter's budget includes the revenue line items that account for the individuals not living in the house, such as: meal plan fees, parlor fees, membership deposits, fraternity dues and social fees.

It also contains the expense line items that satisfy all requirements in the Master Lease and all chapter obligations such as lease related expenses like parlor fees, janitorial services and GHM fees. The budget has Fraternity expenses (National Dues, and Health & Safety Fees) and has food and employee expenses including all aspects of the culinary budget (food, cook's salary, licensing, etc), the House Director's salary, and payroll taxes. Then there are GHM Fees, Aspire fees, supplies, etc.. Lastly, social expenses and other chapter related expense line item are included in the budget.

The net (revenue – expenses) is the amount that by definition is obligated to [Chapter Name] Housing, LLC for rent (the use of the house).

Note that several iterations and adjustments in variables are made in order for the rent paid to the [Chapter Name] Housing, LLC to be about a 10% ROI.

The [Chapter Name] Housing, LLC budget, in contrast, includes the revenue line items made up of the rent (the net amount in the chapter's budget), parlor fees and any SAE Foundation CEF/CAF Grants. It also includes the expenses related to home ownership including, property tax, insurance, repairs and maintenance and utilities, including water and sewer, electric, gas/fuel oil, fire alarm, telephone, internet, cable, trash, and lawn services.

The net is the profit for the [Chapter Name] Housing, LLC.

## **2.6 Chapter Room Sublease Process**

The chapter subleases the individual rooms to chapter members rather than the Landlord leasing to the individual members.

The chapter is responsible for the lump sum rent required in the Master Lease so it is important that the chapter subleases the entire chapter house out to the members. Greek Housing Management will work with the chapter and the House Director **starting in September of the prior year** to ensure that leases are signed for the following academic school year.

The Sublease is for the full academic year and can only be cut short if the member is graduating early, studying abroad or is removed from the chapter. This does not relieve the chapter of paying for the rent and the **chapter must find a replacement** tenant.

## **F&H and SAE Basics**

The Sublease requires three signatures. The first is on the Sublease itself. The second signature is on the Membership Agreement which verifies the tenant has been given a copy of the Master Lease and has read the Master Lease. Finally, the Parent/Guardian Guarantee must be signed by a guardian.

### **2.6.1 Parent/Guardian Guarantee**

The Parent/Guardian Guarantee form is for a parent or guardian of the undergraduate resident of the chapter. It guarantees the rent on behalf of the tenant, holding the guardian responsible for any outstanding debt related to the lease if the undergraduate member does not pay their outstanding bills to F&H.

This form is to be given to the undergraduate member's parents who fill out the form with their contact information and signature. It guarantees the rent on behalf of the tenant. The Parent/Guardian Guarantee requirement can be waived if the tenant agrees to purchase a renter's insurance policy with at least \$100,000 in general liability coverage and pays an additional Membership Deposit (\$250 as of 2015).

### **2.6.2 Membership Agreement (MA), Signed by All Members**

The Membership Agreement is to be signed by all undergraduate members of the chapter who live in the house. By signing this document, the signer confirms that they have received a copy of the Master Lease between the chapter and F&H, they have read the Master Lease, they understand all of the terms of the lease and agree to abide by those terms.

### **2.6.3 Membership Deposits (for all members)**

Each member in the chapter is charged a Membership Deposit. This charge is refunded to the member upon graduation in good standing, minus any damages to the premises or unpaid bills. Damages include any damage to the tenant's room (if applicable) as well any damage done to common areas of the chapter house. For any damages to common areas of the house, the repair amount will be divided amongst all members' Membership Deposits unless the damage can be attributed to a single person/group of people.

## **2.7 Move in / Move Out and Room Inventory Checklist**

Before a tenant is given a key and allowed to occupy a room, they must complete and sign the Room Inventory Checklist. The condition of the room is checked at year-end or when member vacates the room (which might be at semester's end). The Membership Deposit refund will NOT be refunded to anyone who does not complete this or does not return a room key.

## **2.8 Chapter Lease Administration**

All efforts shall be made to collect individual Subleases before the completion of the first academic period (semester or quarter).

Chapter leaders and the HD should be aware of their minimum capacity requirements when distributing subleases and be knowledgeable about chapter specific policies/by-laws regarding who is required to sign a sublease (many chapters base this on badge numbers. Example: The chapter is short of minimum capacity by three subleases so they will require the three highest badge numbers, who have not already signed, to sign a sublease).

## **2.9 Chapter/Tenant Satisfaction**

GHM will administer a survey of all of their chapters, one for in-house members and one for out-of-house members, to gauge how satisfied they are with F&H owned housing. As an incentive to increase participation, everyone who fills out a housing satisfaction survey is entered into a drawing to win a prize.

The surveys are sent out by the Coordinator of Leasing and Membership at the close of each academic school year. The internal goal is 50% participation but GHM informs the chapters of a desire for 80% participation. Once



## **F&H and SAE Basics**

completed, staff summarizes results and sends to board for review at the Spring Board meeting. The board and staff use the results to make changes to the housing program and gets bids for improvements in order for the board to vote on changes at the Spring Board meeting.

### **2.10 Communication with GHM/F&H**

Proper communication between undergraduate chapters and Facilities Manager & F&H Staff is crucial to the success of the chapters and to GHM as a property management company.

For copies of reports see Appendix7: Reports.

#### **2.10.1 Reports**

Reports are used as a means of structured communication between House Directors who live and work on site at the chapter house and the Facilities Manager (FM). These reports allow the FM to track the needs of each facility and also provide a record of the condition of the premises from month to month and year to year. All House Directors use the same standardized forms that are submitted to the PM via mail, email, or fax each month and semester.

##### **2.10.1.1 Monthly**

House Directors are required to submit a monthly report to the PM detailing the current status of various aspects of the chapter. Topics included in these reports are: food service, cleanliness of the house, general maintenance, landscaping, snow removal, behavioral issues of the chapter, and any additional information the House Director deems necessary to report. These reports allow F&H to chart the status of the chapter house from month to month.

##### **2.10.1.2 Semester/Year End**

House Director fills out premises condition forms and sends them to FM by due date.

House Directors are required to submit an inspection report at the beginning and conclusion of each semester. This report gives detailed information regarding the current condition of the physical structure of the house. Inspection points include: the exterior of the premises, the parking lot [if applicable], the kitchen and its fixtures, common areas such as the dining room, living room, bathrooms, chapter room and their contents. This report also details any heating/cooling, electrical, plumbing, or life safety [fire alarm/suppression systems] issues that may exist. These reports allow F&H to chart the status of the physical structure of the house from semester to semester.

#### **2.10.2 Phone/Email**

It is important for GHM to communicate directly with each of the House Directors each month outside of the reports. The Facilities Manager should make contact with each House Director at least once a week via phone or email to be kept up to date on the facility and the actions of the chapter members, whether they are positive or negative.

#### **2.10.3 House Director Conference Call**

A conference call is scheduled by Facilities Manager once a month. All House Directors, the Facilities Manager, and AED are on the call to discuss current/upcoming issues. These monthly calls allow F&H to get an insight of the status of the chapters and also allow House Directors to talk with each other and discuss issues and how they deal with said issues.

#### **2.10.4 Situational Updates via phone/email**

House Directors contact PM via phone or email with any issues they need to discuss outside the monthly call.

## Chapter House Operations

### 3 The House Director – Managing Relationships

#### 3.1 Managing Relationships

##### 3.1.1 Starting Off Strong

Success depends on good communication and clear expectations. During the first week of each term, the president, House Manager, and the House Director should meet and establish clear expectations.

This is an opportunity for the House Director to ask questions and express his/her own view of the job. The president should convey what the chapter expects, not just his personal opinion.

Please incorporate F&H guidelines into the discussion.

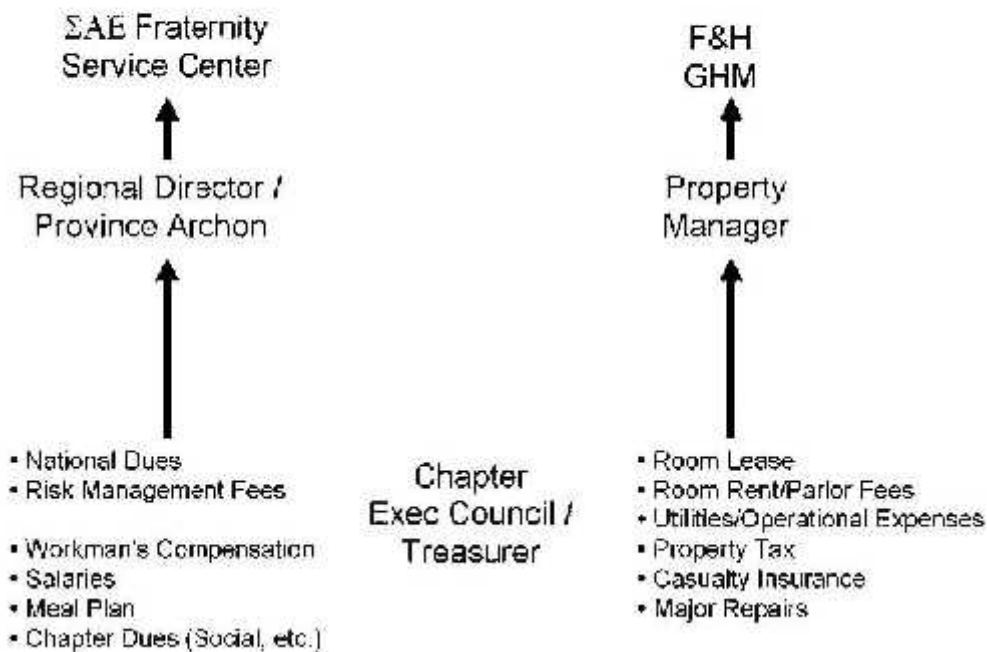
Below is a list of items which may be provided at this first meeting if not sooner:

- Composite picture of the chapter (to help put names with faces). Facebook and other social networking sites may also help the House Director get to know the members.
- Chapter publications (recruitment materials, alum newsletter, website, etc.).
- National fraternity magazines and national website.
- Names and contact information for members and advisors.
- Names and addresses of parents (the House Director may wish to write notes to the parents of the new members),
- A campus directory and student handbook.
- A copy of the house rules and bylaws (a copy of the Phoenix or new member manual will also be helpful in learning chapter history and traditions).
- Download and print a copy of **Minerva's Shield**, the SAE Fraternity Guide for Health & Safety. <http://www.saerecord.net/files/docs/MinervasShield.pdf>
- Calendars (university academic calendar, chapter social calendar, and fraternity activities calendar).
- Telephone numbers, both emergency numbers (campus and city police, ambulance service, department, and campus health service) and general numbers (university fraternity advisor, other House Directors, and maintenance personnel such as pest control, fire alarm, yard work, kitchen hoods, carpenters, plumbers, electricians, carpet cleaners, and painters).
- Recipes and menu files, cookbooks, computer with internet access, furnishings, and equipment inventories.

Additionally, there should be a discussion between the chapter leadership and the House Director related to each entity's roles and responsibilities. Generally, the Chapter leadership is responsible for the enforcement of all terms of the Fraternity Law and the chapter's By-law as well as the terms of the lease. The House Director in contrast is responsible for representing F&H's interest in the property and the chapter house. .

The chapter members and the chapter leaders may sometime be confused about their financial relationship with the SAE Fraternity and GHM. Generally, financial issues (e.g. dues and fees) related to the Fraternity are negotiated and escalated with the Province Archon, the Asst. Exec Regional Director or directly with the Fraternity Service Center personnel. In contrast, issues related to the lease, rents and repairs are negotiated with GHM through the Facilities Manager.

## Chapter Escalation



### Chapter Escalation of Financial Issues

#### 3.1.2 Responsibilities of the Chapter under Terms of their By-Law

Several chapter officers are critical to the successful execution of the functions of the House Director. The minimum duties assigned are described in the SAE Fraternity National By-Law. The chapter by-law, created for their unique needs by each chapter provides the governance for the chapter.

The officer roles are described in detail later:

- Chapter President – Called the Eminent Archon, he usually elected for a year term.
- Chapter Treasurer – Called the Eminent Treasurer, he is usually elected for a year term and is responsible for the chapter budget. He collects rents, parlor fees and all chapter dues. He ensures on-time lease payments and is the primary interface to Aspire and the F&H Financial Manager. The Treasurer is the focal point for all financial issues related to the house and the lease and he is likewise responsible for all financial issues related to the Fraternity including National Dues, Health & Safety Fees and Chapter dues.
- House Manager – is responsible for daily repairs based on wear and tear. He is the primary interface for communicating housing related issues to the Chapter and is liaison between the Chapter and F&H.
- Social Chairman – coordinates and arranges for all social events. The chapter's social budget is the source of funds.
- Health & Safety Officer – responsible for the orderly conduct of members and guests at all social functions. His plan for securing the house during social events and ensuring 3<sup>rd</sup> party security is essential to controlling the event.
- Chapter Executive Board –is composed of various elected officers and meets weekly.
- Chapter Advisor(s) – Usually an alumnus or multiple alumni, these volunteers work with the chapter of goals and direction to ensure alumni support of the chapter programs.

The House Director is an employee of the chapter and needs to understand the roles and responsibilities of all key officers. Establishing a good working relationship with each is essential.

## Chapter House Operations

The House Director must not assume or perform the duty of an officer who fails to perform his elected or appointed duties. The House Director's responsibility is to inform the chapter's leaders of the impact on operations and encourage them to resolve the issue.

### **3.1.3 Responsibilities of the Chapter under the Terms of the Lease**

The F&H landlord requires that the chapter engage and use the property management services of GHM, LLC.

The landlord requires that the chapter employ a House Director. Many of the Chapter's obligations spelled out in the lease and the GHM Management Agreement are performed by the House Director. Additionally, the chapter assigns the daily management of the House Director to the Facilities Manager.

Key terms of the lease:

- Possession (Who has the right to access)
  - Chapter and alumni have the right to occupy the Premises so long as rents are paid.
  - Chapter will occupy the house solely for boarding house purposes and for activity reasonably related to fraternity operations
- Who pays what – sometimes this needs to be reviewed, but only if there are questions.
  - Landlord pays
    - Expenses for maintenance of all landscaping and the exterior portions of the Premises including lawn care and snow removal, but excluding such expenses resulting from Tenant's misuse or neglect of the Premises;
    - All utility and operational expenses including, for example, electricity, gas, water and sewer, cable television, telephone services, computer fiber-optic network access, trash removal, fire alarm monitoring service (including a dedicated phone line for the alarm system), etc, but excluding such expenses resulting from tenant's misuse or neglect of the Premises, Tenant's excessive or unreasonable consumption of such utilities, or any utility or operational expenses not expressly authorized by Landlord;
    - All real property taxes, assessments, and related municipal taxes and fees imposed on Landlord by virtue of its ownership of the Premises;
    - Commercial property and casualty insurance insuring the full replacement cost of the Premises and Landlord's Property with an insurance provider selected by Landlord.
    - Expenses for maintaining in good working order the existing fire alarm system (and all components thereof) and all other existing fire protection and fire prevention equipment and system in the Premises, including but not limited to all annual renewal of fire extinguishers and re-charging of fire extinguishers, annual inspection of the fire sprinkler system, etc.; and
  - Chapter responsibilities
    - Rent on time, according to the agreed to contract and schedule
    - Pays expenses for maintenance resulting from Chapter's misuse or neglect of the Premises;
    - Chapter and the members are responsible for insuring its own personal property in the Premises at its own cost and expense;
    - Commercial general liability insurance written on an occurrence basis and insuring the Chapter and Landlord against any and all liability for injury to or death of a person or persons and for damage to property occasioned by or arising out of the condition, use or occupancy of the Premises, or in any way occasioned by or arising out of the activities of Tenant, its agents, contractors, employees, occupants, members, guests, invitees, or licensees.

The limits of the policy for both damage to property and personal injury will be in amounts not less than \$1,000,000.00 for each occurrence. In addition, the insurance shall extend to any liability of Chapter arising out of any indemnities provided for in this lease.

In the event that Tenant is more than thirty (30) days late in making policy payments, Landlord, in its sole discretion, may (i) pay such overdue premiums and invoice Tenant for the amount so

## Chapter House Operations

paid, and/or (ii) assess Tenant a late fee (in addition to any late charges assessed by the insurance provider) equal to ten percent (10%) of the outstanding amount due;

- Workmen's compensation insurance (applicable for all Chapter employees, such as House Director, janitor, cook, etc.). Upon request, Chapter shall provide Landlord, at Chapter's cost, with evidence that such policies are in full force and effect and all policy payments are current.

In the event that Chapter is more than thirty (30) days late in making policy payments, Landlord, in its sole discretion, may (i) pay such overdue premiums and invoice Chapter for the amount so paid, and/or (ii) assess Chapter a late fee (in addition to any late charges assessed by the insurance provider) equal to ten percent (10%) of the outstanding amount due;

- Expenses for keeping the Premises and Landlord's Property continuously clean and in good order, including expenses of a janitor or janitorial service;
- Salary and Expenses of the House Director;
- Expenses of the Housing, LLC Manager;
- Expenses associated with operating the kitchen and providing food service, including all expenses associated with hiring a cook and related personnel and related service providers, and obtaining and maintaining kitchen equipment and supplies, for so long as Chapter elects to provide food service (including specifically semi-annual cleaning all kitchen and cook-top ventilation equipment and monthly cleaning of any grease traps);
- Expenses for maintenance and repairs to the Premises and Landlord's Property arising from Chapter's, its members, occupants, guests, invitees, and licensees, misuse of the Premises and for maintenance expenses not attributable to "normal wear and tear," including specifically, but not limited to, any vandalism damages caused by any party whomsoever; and
- Keys – Chapter is responsible for all keys to the Premises, including the cost of replacing any missing keys, repairing any broken locks, and re-keying any or all locks in the event that an excessive number of keys remain unaccounted for and as may be required by Landlord in its sole discretion.

No locks shall be added, removed or modified without Landlord's advance written consent. Tenant acknowledges that it has received from Landlord at least two keys for each dormitory room and one key for all other locks on the Premises.

Additionally, and subject to Landlord's approval, Tenant shall establish and administer a formal key control system so that all keys to Premises (exterior and interior doors) are accounted for at the beginning and end of each collegiate semester, all missing keys are promptly replaced pursuant to this Paragraph (or locks are re-keyed as appropriate), and any and all broken locks are timely repaired. Chapter acknowledges that the keys for the Premises may only be duplicated by the manufacturer of the locks; accordingly, Tenant shall coordinate with Landlord on the replacement of any missing keys.

- Damage or Theft of Personal Property. - All personal property brought into the Premises by Chapter, or Chapter's members, occupants, employees, agents, guests, licensees, or invitees shall be at the risk of Chapter only, and unless due to Landlord's gross negligence or willful misconduct, Landlord shall not be liable for theft thereof or any damage or loss of any kind whatsoever.
- Fire Marshal Inspection – Chapter will arrange for an inspection of the premises by the local fire Marshall within ninety (90) days of the lease commencement date (and within 90 days of each annual anniversary of the commencement date), and to provide landlord with written evidence of said inspection and any deficiencies found or noted by the fire Marshall within five (5) days of the inspection.
- Property Use - Chapter must not allow the Premises to be used for any unlawful activity
- Chapter acknowledges that no extension cords may be used anywhere on the Premises. Chapter acknowledges that grounded surge protectors may be used in place of extension cords.

## Chapter House Operations

- Chapter will allow no person (other than authorized maintenance personnel) to gain access or remain on any roof of the Premises. Chapter will actively monitor and enforce the at all times during the Lease term.
- Chapter agrees and understands that only pictures and award plaques may be mounted on any wall of the Premises (including individual dorm rooms) with only the use of common picture hangers obtained from local hardware stores (i.e., no nails, no screws, no tape or other adhesive, etc.), and that no other item whatsoever shall be affixed to the interior and exterior walls without Landlord's advance written consent.

Tenant agrees and understands that, except as may be approved by Landlord in writing, no area of the Premises (including any dorm room) may be painted or re-painted, in whole or in part, except in the original paint colors approved by Landlord and as presently used throughout the Premises.

- Except for legally permitted service animals, no animal or pet of any kind may be kept on any portion of the Premises at any time. Chapter acknowledges that Landlord's insurance policies do not cover animals or pets on the Premises.
- Consumption of alcohol by underage members is unlawful by the state, the school and the fraternity.
- Consumption of alcoholic beverages in the house and at social events in the house by anyone is prohibited under the terms of the contract. Each semester the chapter can petition the Facilities Manager for a waiver that grants alcohol consumption under specific conditions. The waiver is granted based on the chapter's prior semester Health & Safety record.
- Except for non-alcoholic rush functions, Alumni Association functions and other events expressly approved in writing by Landlord, no food except individually wrapped snacks (such as candy bars and crackers) may be served or consumed in the Study Room. Chapter shall maintain and frequently empty appropriately sized trash cans throughout all common areas of the Premises and shall ensure that the Study Room remains clean and free of debris at all times.
- Chapter reasonably shall cooperate with Landlord to preserve the ability of its affiliated foundation to make contributions towards the expenses of the Premises, which contributions shall be for the benefit of Landlord only.

Accordingly, except for non-alcoholic rush functions, Alumni Association functions and other events expressly approved in writing by Landlord, the Study Room shall be used exclusively for qualified academic activities, including study halls, new member education meetings, membership training and workshops, etc. Except as provided in this Paragraph, the aforementioned areas of the Premises may not be used for any kind of social or recreational function, including parties, card and board games, television viewing, etc.

In connection with any Alumni Association function which relates to any host university sporting event, the Alumni Association may have one or more televisions in the Study Room and other academically-restricted areas, provided that all such televisions promptly are removed at the conclusion of the function.

- Chapter shall take reasonable steps to insure that: (i) no one tampers with the life safety systems of the Premises; (ii) no flammables, bicycles and motorcycles are stored within the Premises; (iii) no firearms or weapons are brought onto or stored within any portion of the Premises; (iv) no fireworks are stored or used on any portion of the Premises; (v) the HVAC system remains operational at all times of the year, including during any holiday breaks (minimum 60 degrees Fahrenheit and a maximum of 78 degrees Fahrenheit); and (vi) the Premises remains secured and locked at all times to prevent uninvited guests and trespassers from gaining entry into the Premises. Chapter acknowledges and agrees that should any break-in occur over a holiday break or period, then upon Landlord's request, Chapter thereafter shall be obligated to hire someone (or member volunteer) to watch over and reside in the Premises during all future breaks and holidays.

## Chapter House Operations

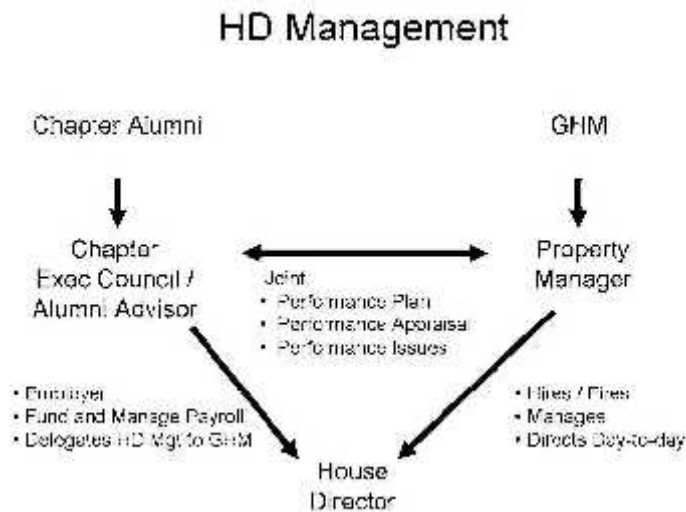
- Meal Plan - Except with the approval of the House Director or cook, as applicable, and then subject to such requirements as may be imposed by the House Director or cook, including the right to revoke said approval at any time, Tenant, its members and guests shall no access whatsoever to the Premises' kitchen.
- All interior portions of the Premises are NON-SMOKING and TOBACCO FREE. Chapter shall take reasonable steps to insure that no person smokes or uses any tobacco products or other similar products in the interior of the Premises. Chapter may designate certain outside areas of the Premises for smoking and tobacco product use.
- Chapter shall not have nor permit candles, incense or any type of cooking equipment in the dorm rooms, including but not limited to toasters, toaster ovens, hot water heaters, hot plates, microwaves, etc. Chapter acknowledges and agrees that Landlord's insurance policies prohibit the same in dorm rooms.
- Chapter shall require its undergraduate chapter to modify their chapter bylaws to include a provision requiring all members to live in the Premises unless a member is studying abroad or working at an internship.
- Chapter shall require its undergraduate chapter to modify their chapter bylaws to include a provision for an empty bed fee.
- Chapter shall be responsible for the above cleaning of the Premises after every social function; it shall not be the responsibility of any third party janitor or janitorial service to service the Premises after Chapter social functions unless paid by Tenant.

Failure to comply with the terms of the lease may result in the chapter being evicted or fined by the Landlord.

### **3.1.4 Responsibilities of the House Director Re: Greek Housing Management Corp. (GHM)**

The House Director is employed by and responsible to the Chapter, its members, officers, alumni and parents. The chapter is responsible for all compensation and compensation related issues.

Equally important, the House Director is functionally directed and managed each day by the Facilities Manager. This includes the timely and appropriate performance of lease and property management operations, processes and issues. Key to this arrangement is the assignment of authority by the chapter to the GHM for the direct management including hiring and firing.



New in 2012 is the House Director Performance Plan and Appraisal system.

## Chapter House Operations

### 3.1.5 Chapter Relations

The House Director should maintain a close relationship with the president and the officers, discussing with them both major and minor situations which he/she feels need to be addressed. However, the House Director should have nothing to do with discipline directly. If certain things need correction, they should be discussed with the president or chapter executives.

After chapter meetings the president and/or the House Manager should report to the House Director anything that might affect the operations of the house or the activities of its members.

The Chapter Advisor should also chat often with the House Director, getting his/her reaction about the house attitude and perhaps recommendations for improvement in the chapter. The advisor should also acquaint the House Director with any suggestions from the alumni.

The House Director must NOT have favorites. This is extremely important in order to maintain the equality of brotherhood and unity within the chapter. The successful House Director has the ability to create a close, genuine, and warm family feeling among all the members of the chapter. This will create an attitude and atmosphere within the chapter which provides a strong base for the overall success of the chapter. It is essential that this aura be immediately evident to guests when they enter the chapter house, as it also directly affects the chapter's ability to recruit and accomplish other important goals and objectives.

Following is a general list of duties and responsibilities in this area:

- Students may seek advice and counsel from the House Director. Use a degree of caution and listen carefully to the student. While it is fine to offer your advice or opinion, there may be students who need a professional counselor. In situations where the student may have serious concerns and need professional assistance, the House Director should know how he/she is expected to respond. Maintain confidentiality regarding details of the conversation.
- Strive to set a high standard of social behavior and tone for the chapter without being judgmental. Encourage worthwhile extracurricular activities, mental and physical health, and participation in outside activities.
- Become acquainted with key alumni members of the chapter.
- Become familiar with the history and traditions of the chapter and the national fraternity. The new member manual and the national website are excellent resources.
- Coordinate with the university fraternity advisor with respect to the chapter's compliance with housing standards, life safety codes, and other regulations.
- Support the chapter's legitimate goals and objectives, and demonstrate loyalty to the chapter and its members (this does not mean covering up or ignoring wrongdoing or condoning unacceptable behavior).
- Read chapter and campus publications to become well-informed about campus and fraternity life in general.
- Become familiar with all campus and community resource services in order to be able to refer members for appropriate professional help or guidance.
- Be aware of individual members with apparent health problems, referring those who are ill to proper treatment facilities.

### 3.1.6 President

The president, formally called Eminent Archon, and the House Director together are accountable in some degree to the university, the F&H Housing, LLC Manager, the Facilities Manager, the parents, and alumni for many things. They should confer often so that both are familiar with the rules, responsibilities, and general condition of the chapter. The president should feel free to come to the House Director for advice if disturbing incidents arise, knowing that he/she will be impartial and the discussion confidential.

The president should inform the House Director well ahead of time of any expected guests and he should also arrange an escort to activities such as lectures, concerts, or sporting events. While the House Director should consciously work toward gaining the respect of members in the chapter, the president, both by instruction and example, should influence members to respect the House Director. The president should remind the chapter that the House



## Chapter House Operations

Director is a member of the household, and as such, it should be both their desire and privilege to show him/her the attentions that mean so much.

### **3.1.7 Treasurer**

The treasurer, formally called Eminent Treasurer, and the House Director are accountable for the delivery of the budgeted financial performance of the chapter as it relates to all items associated with the property and the lease.

### **3.1.8 House Manager**

While the responsibilities of this officer may vary from chapter to chapter, the House Director and the House Manager have many similar duties. It is important to clarify who does what early in the school year to avoid misunderstandings and duplication of efforts. In terms of responsibilities, generally the House Manager:

- makes small repairs
- coordinates room assignments and creates room chart
- distributes key/door codes
- assigns parking spaces
- organizes house duties
- assigns phone and door duty
- designs the master calendar in conjunction with the House Director
- communicates regularly with the House Director
- reports at house meetings
- creates master phone list and assigns mail boxes
- maintains files
- is responsible for household inventory
- coordinates fire drills and inspections with the House Director and the chapter members
- checks house security
- supervises room inspections with the House Director
- directs special house cleaning efforts (e.g. before and after recruitment)
- distributes and collects housing contracts with the House Director
- revises and distributes house rules when necessary
- leads workshop for new members on house policies
- helps with planning the budget

Regularly scheduled (weekly) meetings between the House Director and House Manager are an excellent way to insure the house is managed well. Some House Managers are great and some are not so great. The House Director is wise to establish and/or revise expectations of the House Manager each year, taking into consideration the skills of the person in the position at the time. Maintain the same standards, but be prepared to be flexible with expectations of performance.

### **3.1.9 Alumni Chapter Advisor**

The House Director is expected to know and develop a professional relationship with the Chapter Advisor.

### **3.1.10 Meetings**

House Director is required to attend executive board meetings, and if the chapter deems it necessary, the chapter meetings. This allows the House Director to give advice to chapter leadership and also keeps the House Director informed on the chapter activities.

## Chapter House Operations

### **3.1.11 Events**

The House Director should, at a minimum, be present at the following events to answer any questions alumni, potential members, or parents have about the house:

- Homecoming
- Parents' Weekend
- Recruitment

### **3.1.12 Health & Safety**

Please refer to Minerva's Shield for the most up-to-date Health & Safety information at <http://www.saerecord.net/files/docs/MinervasShield.pdf>.

Health & Safety is a critical success factor for SAE and for each chapter. Not only are young college people "at risk" because of their young age and their new environment, some away from home for the first time. Physically they are adult; emotionally and socially most are not. Their ability to differentiate between "cause" and "effect" does not mature until they are generally older.

SAE takes the management of risk seriously and instructs individuals and the chapters on how to manage it in the Minerva's Shield. Issues with the chapter's Health & Safety implementation must be managed by the Chapter's Executive Board, the Chapter's alumni advisor, the Province Archon and the Regional Director.

The House Director should be aware of the Health & Safety plans and be particularly alert to issues that affect or impact the property.

#### **3.1.12.1 Prevention**

House Director shall provide a sense of a watchful eye over the chapter to mitigate and potentially reduce Health & Safety violations.

The chapter bylaws require the election of a Health & Safety Officer who is responsible for all aspects of the chapter's plan. Key to the chapter's success is the level of planning between the Health & Safety Officer and the Social Chairman for ALL social events. Their mutually agreed to plan should include sober monitors and a clear line of authority for dealing with bad behavior during the event. Generally a third party vendor will supply and manage the distribution of alcohol and the managing of security. The chapter's EA is responsible for filing incident reports with the fraternity. The EA is also the single and only person who should talk to non-SAE authorities in the event of an incident.

The House Director should be aware of all of these entities and NOT attempt to manage any of them except when the property or safety of members is compromised. Reports by the House Director to the Facilities Manager are expected and required when the incident involves damage or risk to the property or residents of the property. Additionally, all issues related to the safety of the property or anyone on the premises should be managed by the House Director.

#### **3.1.12.2 Reporting of H&S Incidents/Violations**

House Director should be aware of all Health & Safety violations and facilitate to proper reporting of an incident to the proper SAE authority. See "Financial & Housing Staff Contact" appendix

### **3.1.13 New Member**

The House Director has a special obligation to serve as mature role model for the new members. First-year students are young and immature and will respond well to encouragement. The director should encourage them to maintain a balance between getting involved in activities, studies, work, and chapter responsibilities. The first term is usually the most stressful and new members are urged by older members into activities beyond their strength and ability.

## Chapter House Operations

The House Director should visit with new members about their responsibilities around the house, helping to instill pride in the care of the house, its traditions, its reputation on campus, and scholarship achievement.

In a few years, the new members will be the leaders. The director should impress upon them the importance of good conduct and regular attendance in classes. Some will not be prepared to meet the more difficult university work. They should be encouraged to be themselves and to maintain their values. The House Director should know the values of the fraternity and feel free to encourage conversations and behaviors that support those values.

The House Director may want to consider implementing the following ideas:

- Create a way to recognize new members (even if they do not yet live in the house) on their birthday.
- Be sure to have the new members complete an emergency card that includes parents' names and cell phone numbers, allergies, special diets or medications, etc.
- Coordinate with GHM sending a letter to parents that introduces the House Director and gives a phone number to parents who may have special concerns or may just need reassurance.
- Coordinate Steward with the new member for their favorite recipes from home so that their favorite meals can become part of the chapter's menus.

### **3.1.14 Alumni Relations**

An organized alumni group can be of invaluable help to the chapter and to the House Director by visiting with him/her and the officers and showing concern for - and interest in - chapter scholarship, financial conditions, and overall management, Alumni who know the members are usually the most helpful.

One of the best methods to gain graduate or alumni interest is to encourage the chapter officers to invite them to dinner and chapter meetings: the chapter should invite the Chapter Advisor or other local alumni to attend its social functions, community service activities, and appropriate fraternity campus events. Alumni and their families are always welcome to visit the chapter house and it is the job of the House Director to receive them graciously.

### **3.1.15 Parent Relations**

The House Director should meet parents whenever they come to the house. After greeting them graciously and chatting a few moments, he/she should leave them to have their family visit. Since parents get few opportunities to see their son, they appreciate as much time as possible for personal conversation. It is impolite for a talkative House Director to keep the parents from the object of their visit.

The House Director should urge parents to come to campus often and should assure them of the genuineness his/her concern for the members of the chapter. Parents can be assured that good food is provided and that the house is a safe environment. The parents should be encouraged to maintain good communication directly with their son.

It is NOT the House Director's role to provide the parents with information about the activities, grades, or location of their son. The residents of the house and members of the chapter are (mostly) legally adults and their privacy should be protected. The House Director should develop a clear understanding about expectations in this regard.

Parents' Day, football weekends, and Founder's Weekends are ideal times for close contact with parents, alumni, and their families. Parents sometimes need to be reminded that they have sent young men to college who are anxious to prove their ability to be independent and make their own decisions.

### **3.1.16 University Relations**

The university fraternity advisor is oftentimes a good source of information on fraternity operations as well as House Director responsibilities, and he/she can make the House Director's job easier. Therefore, the House Director should feel free to consult the university fraternity advisor at any time, particularly if he/she senses that a problem is developing.

## **Chapter House Operations**

The House Director should encourage the chapter to develop more than a casual acquaintance with deans, advisors, and other college officials. Invitations to dinner and informal chats and a genuine encouragement to stop in at any time make the exchange of ideas and opinions easy when relations are smooth and make for better understanding when trouble arises.

The House Director should also encourage members to develop a positive relationship with the campus and community police. Most campus police respond to friendly consideration and welcome a dinner invitation. They are glad to explain their duties and responsibilities. They can also help the students understand the laws and important safety measures that should be incorporated into daily practice. A good relationship can come in handy if there are any problems.

It is also a good idea to have a good relationship with fire and health department officials.

### **3.1.17 Landlord F&H Relations**

As long as the chapter members occupy the house under a lease, the Chapter is the tenant and the [Chapter Name] Housing, LLC is the landlord.

Complimenting this relationship is the requirement for the chapter to have a property management agreement in place with Greek Housing Management, LLC., which is a subsidiary of SAE Financial & Housing Corporation.

The House Director is the key to successful chapter operation in many areas, including the relationship with the landlord and the Facilities Manager.

#### **3.1.17.1 Facilities Manager**

A House Director reports to the Facilities Manager (FM). The FM will schedule monthly calls to discuss the Monthly Checklist Report (see Appendix 7: Reports) and any other topics necessary. Any reports and the Move-in/Move-out Checklists are submitted to the FM.

The Facilities Manager is responsible for oversight of the Property and Building itself, including approval of any alteration, maintenance, and care. Alterations to the building or property of any kind need to be approved in writing by the Facilities Manager.

#### **3.1.17.2 Finance Manager**

The Finance Manager sends a monthly report about the Chapter's financial health including budget updates and collections status. A House Director should refer the Cook to the Finance Manager if he/she has any questions or concerns about the food budget.

#### **3.1.17.3 Coordinator of Leasing and Membership**

The Coordinator of Leasing and Membership (CLM) distributes and collects chapter paperwork, mostly via DocuSign electronic signature service. A House Director may request from and/or share with the CLM emergency contact information for members and their guardians.

The HD should refer any leasing questions to the CLM and may request contact information for chapter executives, F&H staff, etc. from him/her.

#### **3.1.17.4 Chapter Operations Consultant (Independent Consultant hired by GHM)**

The Chapter Operations Consultant (COC) is an independent consultant who is hired by Greek Housing Management, LLC.. For F&H Owned Properties, he/she schedules an onsite, chapter meeting to inform members of policies and procedures and to discuss all that it means to live in an F&H owned property. The meetings occur once a semester.

## Chapter House Operations

The COC is available for hire to come to an F&H Managed Property as well. Please contact Facilities Manager to arrange hiring and scheduling.

### 3.2 Social Responsibilities

The House Director has much to do with setting the social standards of the house. Cordial hospitality to all guests, faculty members, alumni, parents, and students serves as an example to be followed by members of the house. This can result in valuable social skills education.

**Work with the chapter officers at the beginning of the school year to establish the expectations for behavior in public areas of the house.** Determine expectations about who will greet guests, answer the phone, insure the public areas are neat and tidy, etc. **The House Director should support (and post) the chapter's house rules and communicate to the House Manager and/or president when problems occur.**

Many students may be interested in learning etiquette, especially table manners and business etiquette. The seniors may be the most interested, but it is good **to establish expectations about dinner manners and social courtesies from the beginning of the school year.** The practice of good social skills all year for four years will make the seniors very confident that they know how to behave in a professional setting.

Social expectations lessons might include the following topics:

- Meeting guests at the door
- Proper cell phone and texting courtesy
- Introductions (this may require instructions and practice)
- Reception etiquette
- Escorting a guest to dinner and seating him/ her (guests should always be placed with someone who will act as the host/hostess during the dinner)
- Proper handling of foods and table service
- The art of hand written thank you notes
- House guest etiquette
- Conversation skills
- Professional dress
- Respecting quiet hours, study spaces, and privacy (including using the HD's established hours of availability)

A current book on accepted social behavior should be used by the House Director as a reference. Additionally, the university fraternity advisor's office will usually have videos and handouts available. It may be advisable to invite a guest speaker to provide instruction to the members about etiquette and social skills.

Generally, the dinner hour should be a leisurely time with members engaging in interesting conversation. The ability to converse well at the table is a coveted social grace and is certainly part of a college education. This is an excellent time to discuss traditions and history of the fraternity and the university, current events, and campus happenings. Singing fraternity songs between courses is a great way for the new members to learn them.

**The chapter officers may want to determine whether or not to allow cell phones at the dinner table.** If so, include these in your House Rules.

Occasionally, parents or alumni send a gift or provide some service to the chapter. In addition to the appropriate officer sending a note of acknowledgement, the House Director might also want to write a personal thank-you note.

During the year, there are numerous traditional social events, such as open houses after football games, Parents' Day, Homecoming, Founder's Day, and holiday dinners. **All of these events require extra planning and table decorations. These may or may not be the House Director's responsibility.**

## Chapter House Operations

### **3.3 The Fraternity Campus Greek Advisor**

At nearly every campus with a fraternity community, the university hires a fraternity advisor to advise, educate, and direct the activities and programming of the fraternities. Although the job description varies, the fraternity Greek advisor (and his or her staff) generally has the following responsibilities:

- advises the Inter-fraternity, and other governing bodies, their officers, and all related committees
- Advises fraternity related organizations (e.g. GAMMA—Greeks Advocating Mature Management of Alcohol, Up 'til Dawn, Adopt-a-School, etc.)
- attends all meetings of the councils, executive boards, and committees
- Counsels individual chapter officers and members on legal issues, finances, chapter standards, date rape, suicide attempts, philanthropy projects, House Director concerns, etc.
- coordinates fraternity recruitment activities
- meets with chapter consultants from headquarters and national/regional officers
- meets periodically with Chapter Advisors, financial advisors, recruitment advisors, and house corporation/alumni association officers
- serves as a university department head in the student life area
- meets with prospective students and their parents during summer orientation and throughout the year
- conducts programs and retreats for councils and chapters
- Maintains the fraternity statistics (e.g. scholarship, membership, finances, pledging, initiation, chapter officer and advisor directories, etc.)
- Prepares briefings for university administrators prior to their speeches at fraternity functions.

Many fraternity advisors have additional job responsibilities in other areas (e.g. student government, student activities, etc.). ALL fraternity advisors recognize the valuable role that House Directors play, and although they may not have time to meet frequently, they do know that House Directors make the fraternity advisors jobs easier!

## Chapter House Operations

### 3.4 Being Politically Correct

#### FRATERNITY TERMINOLOGY

##### Correct Term

##### Incorrect Term

Fraternity	Greek-letter Organization
Recruitment	Rush
Recruitment Events	Rush Parties
New Member	Pledge
New Member Educator	Pledge Trainor
Semester/Winter Break	Christmas Break
Men	Boys
Fraternity	Frat
Residence Hall	Dorm
Potential Member	Rushee
Initiated Member	Active
Greek Community	Greek System
Headquarters or National	Nationals
House Director	House Mom or Dad

## Chapter House Operations

### 3.5 House Director's Expectations of New Members

The House Director should review and revise these guidelines with your Chapter President, Chapter Advisor, and house corporation president before using it. This is an outline for House Directors to use and adapt according to their own chapter's policies.

Welcome everyone and let them know how happy you are to be part of the group. Introduce yourself—tell the members who you are in terms of background, experiences, special skills, and interests (no more than 3 minutes).

Review your responsibilities (e.g. menu planning, supervising kitchen operations, serving as social hostess and etiquette educator, etc.).

List what YOU expect from the MEMBERS:

- Respect for the organization
- Respect for the physical facility (reiterate that this is their home, so they should help keep the public areas ready for visitors and alumni)
- Respect for each other and the staff (cook, housekeeper, handy person)—members should use courtesy and treat others as they want to be treated
- Honesty—members need to follow the house rules and not abuse the system (i.e. theft of food items or kitchen utensils)
- Communication—members should let the House Director or other officers know of problems; be sure to specify how the members can communicate with you and how you will communicate with them

List the specific house rules pertaining to your areas of responsibility (e.g. meal times, closed kitchen, breakfast options, etc.). Ask the House Manager to speak to the other house rules.

Explain the procedures for reporting repair requests (e.g. plumbing problems).

Discuss the emergency procedures (or make sure one of the officers does).

Talk about house keys and chapter security in general (or ask the Health & Safety officer to do so).

If there are committees such as menu planning, post a sign-up sheet.

Schedule a one-on-one get-acquainted time with each member. During that meeting, have them emergency contact information.

### 3.6 Stress Periods for Students

- **September**
  - Homesickness often arises, especially for freshmen.
  - Values crises occur—students are confronted with questions of conscience over value-conflict areas of race, drugs, and alcohol experimentation, morality, religion, and social expectations.
  - Feelings of inadequacy and inferiority develop because of the discrepancy between high school status and grades and initial college performance.
  - "In Loco Parentis Blues"—students feel depressed because of real or perceived restrictive policies and regulations of the college and/or the chapter.
  - International students may feel contusion, vulnerability; and powerlessness as well as a lack of any advocate in power positions.
- **October**
  - New students begin to realize life at college is not as perfect as they were led to believe by parents, teachers, and counselors. Old problems seem to continue and new ones are added. An external reality in which they had put their hopes often fails them.
  - Grief develops because of inadequate skills for finding a group or not being selected by one.
  - Mid-term workload pressures are followed by feelings of failure and loss of self-esteem



## Chapter House Operations

- Sexual conflicts and confusion result when confronting, often for the first time, different sexual orientations and conformity to different standards of sexual behavior.
- Non-dating students sense a loss of esteem because so much value is placed on dates.
- Job panic may arise for mid-year graduates.
- **November**
  - Academic pressure is beginning to mount because of procrastination, difficulty of work, and lack of ability.
  - Depression and anxiety increase because of feelings that one should have adjusted to college by now.
  - Homecoming blues develop because of dates and/ or lack of ability to participate in activities. Increased alcohol consumption may also cloud judgment.
  - Economic anxiety may occur as funds from family and summer earnings begin to run out and loans become due.
  - Some students have ceased to expand their network of friends beyond the first few people with whom they came into close contact
- **December**
  - Extra-curricular time strain occurs; seasonal parties, concerns, social service projects, and religious activities drain student energies.
  - Anxiety, fear, and guilt increase as final examinations approach and holiday papers are due.
  - Pre-holiday depression develops, especially for those who have concerns for family, those who have no home to visit, and for those who prefer not to go home because of family conflicts.
  - Pressure increases to perform socially because of the approaching vacation and extended separation time.
- **January**
  - Post-holiday depression may arise once members are away from the secure and positive environment of home.
  - Significant time spent socializing occurs because of the perception that academics haven't really begun until the second or third week of classes.
- **February**
  - Many students experience optimism because second semester is perceived as going "downhill."
  - Vocational/career/major choices cause anxiety and/or depression.
  - Couples begin to establish stronger ties or experience weakening of their relationship.
  - Depression increases for those students who have failed to establish a social relationship or achieve a moderate amount of recognition.
- **March**
  - Drug and alcohol use increase significantly before, during, and after spring break.
  - Academic pressure increases. Extra-curricular crisis for juniors develops (Will I get an internship?) as well as for seniors (Will get a job? Have I really learned anything? Was my major a mistake?).
  - Diets and body image concerns for both men and women become "critical" this time of year.
  - Pressure increases to perform socially because of the approaching vacation and extended separation time.
- **April**
  - Academic pressures continue and midterm results are received.
  - Frustration and confusion develop because of decisions necessary for fall pre-enrollment.
  - Summer job pressures develop.
  - Major often has to be declared and pressure mounts.
  - Papers and exams are beginning to pile up, but motivation to study decreases as the weather changes to spring.
- **May, June, July and August**
  - Usually, the summer months are when many Greek campus activities are suspended until fall.
  - In the case of F&H, the house financial structure and the property management services are based on a twelve month cycle

## Chapter House Operations

### 4 Chapter House Operations

#### 4.1 Bits and Pieces of Advice for House Directors

- You cannot be a good mentor to anyone without building a solid relationship first.
- Give students ownership of the project and/or process.
- Listen to both sides of the story.
- Give students the freedom to fail, no matter how hard it is to watch.
- Don't neglect your personal life.
- Advise, guide, but never decide.
- Hold students accountable for their words and actions.
- You cannot change patterns of behavior overnight.
- Remember that students are in the process of growing and learning.
- Students will go the extra mile if you do.
- Learn every member's name and use it often.
- **Lead by example; follow all rules yourself.**
- Do what is right/ethical and those actions will most likely address liability concerns.
- The dynamics of the house change every time one new person moves in or someone moves out.
- The dynamics of the leadership of the chapter change each time a new officer is elected.

#### 4.1.1 Opening the Chapter House

- Check that all lights are working, both inside and out.
- Review the HVAC system operation procedures, and ensure that qualified personnel have inspected all equipment
- **Prepare a list of vendors, F&H Staff, and repair company phone numbers.**
- Have emergency numbers posted including F&H contact and HD cell phone.
- Inspect kitchen and public areas to ensure that they are properly cleaned.
- Post safety rules and procedures in appropriate places.
- Have a key check-out list ready, and have all keys ready to distribute (in some cases, this may be the House Manager's responsibility).
- Make sure health and kitchen inspections have been completed and licenses have been posted.
- Arrange for lawn maintenance, trash, collection, phone service, exterminator service, etc.
- **Finalize the budget with F&H.**
- **Over see Cook's purchase necessary food and housekeeping supplies.**

#### 4.1.2 Closing the Chapter House

- **Instruct residents to remove all personal items by date/time. Post consequences before Move-out.**
- Dispose of all perishable food and supplies.
- Ensure that the entire house is cleaned.
- Inform city and/or University police and the Fraternity Life Office of the name, address, email, and cell phone number of the person responsible for the house, as well as the contact information for emergency situations. Be sure to inform them of special situations (e.g. construction, summer rentals, meetings, etc.).
- Turn furnace to 55 degrees if you schedule a vacation with the Facilities Manager.
- Leave all utilities on.
- Disconnect refrigerators, freezers, ice machines, soda machines, and personal refrigerators.
- Unplug TVs, radios, computers, stereos, etc.
- Notify campus security when the house is closed
- Empty all indoor garbage containers.
- Tightly secure all outdoor garbage containers and arrange for a final pickup.
- Store or secure valuable articles such as silver, artwork, and televisions,
- Store outdoor furniture and other portable items.
- Turn on timers for outside lights.
- Set alarms where applicable; replace batteries as appropriate.
- Collect all keys from residents, cooks, and others.
- Arrange for mail holding and/or pickup.
- Set answering machine for house phones if applicable.
- Leave blinds, curtains, and drapes open/closed.
- Stop newspaper delivery.
- Lock all windows (and doors if you will not be in the house. **Note the HDs are expected to live in the house, even when members are not there).**

## Chapter House Operations

### 4.2 Safety Concerns

The House Director should work closely with the Facilities Manager to ensure the following safety issues are completed.

- Schedule inspections every three months with the House Director, Chapter President, House Manager, and an Alumni Representative. Use a written checklist to ensure consistency.
- Regular inspection of fire escapes and fire exits to make sure they are clear of obstacles and securing fire escapes to prevent unauthorized entry.
- Schedule and know how to do fire safety inspection and work with the city fire department and House Manager to schedule regular, assisted fire drills.
- Connect the fire alarm system directly to the fire department.
- Schedule regular cleaning, service, and inspections of all kitchen equipment, especially stoves, deep fryers, exhaust hood filters, fire extinguishers, and grease traps.
- Schedule and know how to do the biannual health inspections.
- Restrict access to dangerous areas such as roofs, furnace rooms, and fuse boxes.
- Keep the house locked at all times; the only exception should be during social events when door monitors are greeting guests.
- Lock all ground access windows.
- Install floodlights in front and security lights in back and parking lot (if applicable).
- Designate Alumni or F&H Staff as key holder to check-in during House Director's vacations.
- Keep a photo inventory of valuable items.
- Have heating and air conditioning equipment inspected and serviced annually.
- Develop a written maintenance program for changing furnace filters, light bulbs, exit lights, etc.
- Check the credentials of salespersons, vendors, repairmen, and delivery people prior to admittance into the house.
- Do background checks on kitchen and cleaning staff.
- Do not allow the use of extension cords and portable heaters.

### 4.3 Tools of the Trade

#### 4.3.1 Suggestions

Have a ransom box—any items left in public areas are placed in the box, and members must pay one dollar to get them back,

When checking out tools, require a driver's license as a deposit to ensure the items are returned.

Give the tool box to the House Manager.

Tool boxes are just ways to make life easier. Create your own based on the needs of your house and the chapter. Ensure the chapter leaders agree and are willing to pay. Keep the boxes in secure places and use for emergencies or when time is of essence. It is not the House Director's job to provide these items for the members' personal use.

#### 4.3.2 General Tool Box

- Flashlight
- Masking tape/Duct Tape
- Plunger
- Super glue & Elmer's glue
- Fire extinguisher
- Small saw
- Wood glue
- Hammer/nails
- Screwdriver set
- picture-hanging hooks
- electrical tape

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- construction paper
- yardstick/tape measure
- jumper cables
- batteries (extra batteries)
- safety-edge, razor blade/xacto knife
- paint brush/ roller
- grounded surge protectors
- gas meter wrench
- soap or candle wax (for tight drawers)
- pliers (regular and needle nose)
- scissors
- putty (for holes in walls)
- WD-40

### **4.3.3 Laundry Room Tool Box**

- Scissors
- Flashlight (extra batteries)
- Fire extinguisher
- Sewing repair kit (thread, needles, safety pins, straight pins, etc.)
- Sign to remind member to Clean Dryer Lint.
- Trash Can
- Message board over washers and claim clothes in the machine
- Lost & Found/Donation Box
- Change machine
- phone number for repairman

### **4.3.4 Kitchen Tool Box**

- flashlight (extra batteries)
- Scissors
- fire extinguisher(s) and baking soda
- aloe for burns
- hand sanitizer
- utility tool
- recycling guide
- conversion tables
- emergency substitutes
- rubber and disposable gloves
- **emergency info related to food allergies**
- phone numbers for food delivery places
- jar opener
- ice packs

### **4.3.5 First Aid Tool Box**

**(Suggestions. You should check for any standard regulations re: First Aid)**

- flashlight (extra batteries)
- fire extinguisher
- emergency phone numbers – fire police
- poison control center - rape crisis center
- emergency contact and medical

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- information on all members
- first aid instruction book
- tweezers
- kit for working with body fluids
- burn treatment
- thermometer
- feminine hygiene products 0 heating pad
- mouth protector for CPR
- first aid kit with band aids, ace bandage, eyewash,
- Tylenol, Pepto Bismol, etc. (students should help themselves; House Directors should NOT dispense medicine)

### **4.4 House Directors Can Save Their Chapters Money**

The House Director should work with the cook to accomplish the following

#### **4.4.1 Food Budget**

- Build a strong relationship with the food vendor sales representatives.
- Use sale items and in-season produce.
- Check orders carefully including prices.
- Allow chapter members to make sample menus to help ensure that they'll like the menu.
- Have cook do a food survey each term.
- Supervise the amount of food the cook is preparing to eliminate waste.
- Have the cook watch the food that is being thrown out to determine unpopular choices.
- Learn about food purchasing options by going to trade shows and comparing prices.
- Buy bread products at the day-old bakery.
- Schedule fewer deliveries.
- Get bids for food products.
- Make good use of leftovers.
- Check out prices at Sam's Club and other volume vendors and challenge vendors to meet those prices.
- Purchase in bulk quantities (if you have adequate storage).
- Alternate meat entrees with vegetarian entrees (1-2/week).
- Keep accurate daily/weekly records of money spent.
- Keep track of numbers of people attending meals at special events. It will help estimate the number to expect from year to year

#### **4.4.2 Overall Kitchen Operation**

- Have a congenial staff who are willing to help keep costs down-give them ownership in decisions by allowing them to have input.
- Review kitchen operation rules and enforce them consistently.
- Meet weekly with the cook to monitor the purchases and the budget limitations.
- Make sure that food is not taken for personal use.
- Buy cleaning and paper products on sale.
- Turn off kitchen exhaust fans when not cooking.
- Lock the kitchen.

#### **4.4.3 Appliances**

- Clean appliances thoroughly after each use.
- Unplug equipment during vacations.
- Unplug computers during vacation periods.
- Keep instructions for appliances accessible.

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### **4.4.4 House Maintenance**

- Ask other House Directors for references on companies.
- Schedule frequent meetings with House Manager.
- Don't defer maintenance—it's more cost-effective to repair a small problem before it escalates into a larger one.
- Change filters on a regular basis. Keep records of the dates, sizes, and locations.
- Implement penalties for false fire alarms.
- Have drains cleaned in the shower stalls on a bi-weekly basis.
- Recycle!
- Work with Facilities Manager to schedule services (exterminator, yard work, deliveries, etc.)
- Negotiate payback on vending machines.
- Change smoke alarm batteries on a regular schedule

### **4.4.5 Housekeeping**

- Ask the housekeepers to report maintenance needs (e.g. dripping faucets, malfunctioning doors or windows, etc.).
- Ask the residents to fill out a "Work Request Order" form when they recognize maintenance needs. Do not wait till the end of the semester/school year

### **4.4.6 Vacation Periods**

- Have the trash dumpster removed during the summer months.
- Turn off-phones, cable TV, Internet connections, etc. during the summer (unless it costs more to have them re-connected).
- Close the house during the summer months for maintenance and repairs (see 4.1.2).
- Adjust the thermostats for an empty house (55° in winter and 80° in the summer).
- Close draperies to insulate windows.
- Unplug non-essential electrical items.
- Make sure all trash is emptied.
- Secure all doors and windows.
- Use night lights/timers for lighting

## Chapter House Operations Frequently Asked Questions

### **5 Maintenance & Repairs**

The below procedures are designed to track and manage all maintenance and repairs for F&H owned properties.

Routine maintenance (such as janitorial services) is not covered by this procedure. Moreover, this procedure does not address capital improvements to the Chapter House (such as remodeling common area) or major capital repair items that do not constitute an emergency (such as replacement of equipment that is nearing the end of its anticipated useful life).

The goal of the below process is to:

- ensure the timely completion of any required maintenance and repairs,
- obtain any necessary approvals prior to such work being performed,
- facilitate proper accounting of the expenses incurred as between the House Corporation and the Chapter (or others) under the terms of the Lease,
- timely communicate to the Chapter the progress being made to complete approved repairs, and
- provide the Chapter an opportunity to communicate with Greek Housing Management about any questions or concerns it may have regarding repairs to the Chapter House.

#### **5.1 Repair and Maintenance Guidelines**

A. Except for Emergency Repairs (see below), work may not commence on a repair item unless and until a Repair Request Form has been submitted to and approved by the Facilities Manager.

B. All repair items must be communicated to the Facilities Manager on a Repair Request Form, which shall be submitted by the House Director to the Facilities Manager by e-mail, with copy to the AED and House Manager.

C. The House Director is the only person authorized to submit a Repair Request Form directly to the Facilities Manager for a repair item. However, the House Director shall work with the House Manager on a weekly basis to screen all complaints and/or suggested repairs submitted by the Chapter's members and, as appropriate, submit a Repair Request Form for repair items identified by the House Manager. The House Manager shall contact the Facilities Manager in the event he believes the House Director is not timely addressing repair items.

D. Within three (3) business days of its submittal, the Facilities Manager shall review a Repair Request Form. As needed, the Facilities Manager shall work with the House Director to complete any missing information on the Repair Request Form and to identify additional information pertinent to the repair request.

E. Within five (5) business days of submittal, the Facilities Manager shall notify the House Director and House Manager by e-mail, with copy to the AED, of one of the following:

- The repair item is "Approved for Immediate Repair", or
- The repair item is "Approved for Future Repair", or
- The repair item is "Subject to AED/F&H Board Approval", or
- The repair item is "Subject to Additional Investigation", or
- The repair item is "Denied".

F. For a repair item classified as "Approved for Immediate Repair", the House Director shall cause the repair item to be timely repaired by an Approved Vendor. In the event of any delay in the vendor making the repair (for example only, certain parts must be ordered, scheduling conflict, etc.), the House Director shall immediately report any such delay to the Facilities Manager who, in turn, shall update his repair log making a note of the reason for the delay. For the purposes of this paragraph, "timely repaired" shall mean that the House Director has ordered the repair within three (3) business days of the Facilities Manager's approval, and the Approved Vendor has agreed to make the subject repair within seven (7) business days of the Facilities Manager's approval.

## Chapter House Operations Frequently Asked Questions

G. For a repair item classified as “Approved for Future Repair”, the Facilities Manager shall denote on his response both an anticipated repair date for said repair item and the reason why the repair item is being delayed. There are many reasons why a repair item may be classified as “Approved for Future Repair”. For example, the Facilities Manager may wish to defer certain repair items to a later date so that multiple repair items can be completed at the same time by the same Approved Vendor for a lower overall cost. Additionally, in some instances, it may be preferred to handle certain repair items at a later date when the residents are on break to avoid inconvenience, loud noises, offensive smells, and so forth.

H. A repair item classified as “Subject to AED/F&H Board Approval” means that the Facilities Manager does not have the authority to approve the repair item without additional approvals. The following is a brief summary of spending authority and required approvals:

- The F&H Board must approve any increase to the maintenance and repair line item budget for a House Corporation in the event one or more repair items reasonably will cause the line item budget to be exceeded for that fiscal year. repair items which are to be charged back to the Chapter or certain Chapter member(s) do not impact the line item budget of a House Corporation.
- Upon the recommendation of the AED, the President and Executive Director of F&H must approve any repair item that reasonably will cost in excess of \$5,000 to repair, regardless of who ultimately is responsible to cover the cost of repair.
- Upon the recommendation of the Facilities Manager, the AED must approve any repair item that reasonably will cost in excess of \$300 to repair, regardless of who ultimately is responsible to cover the cost of repair.
- The Facilities Manager may approve any repair item that reasonably will cost less than \$300 to repair, regardless of who ultimately is responsible to cover the cost of repair.
- The House Director may approve any Emergency Repair (see below).
- No person shall purposefully divide or segregate related repair items or classify a repair as an Emergency Repair in order to avoid the spending authority limits described above.
- As applicable, the Facilities Manager with the assistance of the AED shall timely pursue all required approvals as may be needed to authorize the repair item. Upon obtaining the appropriate approvals, the Facilities Manager shall update the Repair Request Form and notify the House Director and House Manager, with copy to the AED, of the updated status of the repair item.

I. A repair item classified as “Subject to Additional Investigation” means that the Facilities Manager has insufficient information to approve the repair item. For example, the Facilities Manager may request that the House Director obtain one or more quotes from qualified vendors to perform the work Or, for example, a vendor or other expert may need to be consulted to determine the underlying cause of the damage or maintenance need. Whenever a repair item has been classified as “Subject to Additional Investigation”, the Facilities Manager shall denote on his response the reason needed for additional investigation, a detailed plan to obtain such additional investigation on a timely basis, and an anticipated date by which such additional investigation shall be completed. As applicable, the Facilities Manager with the assistance of the House Director shall timely pursue all required additional investigations as may be needed to authorize the repair item. Upon obtaining the appropriate approvals, the Facilities Manager shall update the Repair Request Form and notify the House Director and House Manager, with copy to the AED, of the updated status of the repair item (for example, “Approved for Immediate Repair”, “Approved for Future Repair”, etc.).

J. A repair item may be “Denied” for any number of reasons. For example, the repair item may have been misclassified and is really an improvement or a routine maintenance matter. The Facilities Manager shall provide a brief description of why any repair item was denied.

K. For each Chapter House, the Facilities Manager, in coordination with the House Director, shall keep a log of all Repair Request Forms, including a description of the repair item, the date submitted, the dates of all relevant decisions/approvals, the name of the vendor hired to make the repair, the actual cost of the repair, and the date the repair was completed. Unless otherwise posted online, the Facilities Manager shall distribute monthly to the House Director, House Manager and AED, the log of all open and unresolved Repair Request Forms for the Chapter House. It is the responsibility of the House Director and House Manager to keep the Chapter informed of the progress of all repair items.



## Chapter House Operations Frequently Asked Questions

### **5.2 EMERGENCY REPAIRS.**

The House Director is authorized to immediately contact an Approved Vendor to make any Emergency Repair and without the need of obtaining the advance approval of the Facilities Manager. An Emergency Repair shall be limited to that level of repair as needed to protect the Chapter House from additional damage and to make the Chapter House safe and inhabitable. In many instances, additional repairs may be required after the Emergency Repair is made, all of which additional repairs shall comply with the Repair Request Form process described above. Concurrent with any Emergency Repair situation, the House Director shall make all reasonable attempts to contact the Facilities Manager by telephone and e-mail prior to incurring expenses for the Emergency Repair. In the event the Facilities Manager cannot be reached on a timely basis, the House Director shall make all reasonable attempts to contact the AED and, failing that, the Executive Director of F&H. The House Director shall remain available at all times to take phone calls from the House Manager regarding Emergency Repairs, even when not on the Chapter House property. Within 24 hours of making an Emergency Repair, the House Director and Facilities Manager shall document the Emergency Repair using a Repair Request Form or such similar document approved by the AED.

M. Only Approved Vendors may be used to satisfy repair items. In the event an Approved Vendor has not been pre-selected for the repair item or the Approved Vendor is otherwise unavailable to satisfy the repair item, the House Director shall timely cooperate with the Facilities Manager and AED to identify an alternative vendor to make the repair. An alternative vendor used for one repair item shall not automatically designate such vendor as an "Approved Vendor". Only the Facilities Manager with the approval of the AED may add a vendor to the Approved Vendor list for the Chapter House. The House Director shall maintain an accurate Approved Vendor list.

N. As a general proposition and pursuant to the terms of the Lease, the House Corporation is responsible only for "normal wear and tear" repairs and routine maintenance and repairs to all utility systems. The House Corporation is not responsible for repair items resulting from the Chapter's (and its tenants', guests', and visitors') misuse or neglect of the Chapter House. Conversely, the Chapter and its members are responsible for the cost of all maintenance and repairs to the Chapter House arising from the Chapter's, its members, occupants, guests, invitees, and licensees, misuse of the Chapter House and for all maintenance expenses not attributable to "normal wear and tear," including specifically, but not limited to, any vandalism damages caused by any party whomsoever. The Chapter also is responsible for all repair items related to the kitchen equipment and kitchen supplies (including for example, the grease trap) and for all other expenses not specifically attributed to the House Corporation under the terms of the Lease (for example, replacement of light bulbs). For the purpose of this document, "normal wear and tear" means deterioration by the ordinary and reasonable use of the item in question.

O. All Repair Request Forms require the Facilities Manager, with the assistance of the House Director and in conformance with the terms of the Lease, to assign responsibility for the cause and cost of the repair item to (i) the House Corporation, (ii) the Chapter, (iii) one or more members of the Chapter, and/or (iv) some other third party. In accordance with the terms of the Lease, the Chapter is ultimately responsible to pay for repair items caused by one or more of its members or by some other third party unless and until such persons pay for the repair item. As applicable, the Facilities Manager shall denote the party responsible for the repair item on the Repair Request Form and notify the House Director and House Manager by e-mail of the same. Furthermore, and provided e-mail contact information is available for the responsible person(s), the Facilities Manager shall notify the responsible person(s) of their obligation to pay for the repair item as soon as reasonably possible. Once a repair item is fully satisfied or the amount of the repair item is known, the Facilities Manager shall promptly send an invoice to all responsible parties for the cost of the repair item, which invoice shall be due and payable upon demand. The Facilities Manager may withdraw funds from any tenant membership deposit(s) or the Chapter's social accounts (if applicable) as may be needed to pay for the Repair Item.

P. The House Director should use the Repair Request Form to report any repair items required by the local municipality including, for example only, the results of any routine code enforcement inspection or the inspection of the Chapter House by the Fire Marshall or any similar life safety inspector. The Facilities Manager and House Director shall cooperate with each other to perform any such repair items on an expedited basis.

Q. The House Director shall notify the Facilities Manager by e-mail upon the completion of any repair item, with copy to the House Manager. The House Director's notification shall include relevant notes relating to the repair item,

## **Chapter House Operations Frequently Asked Questions**

any new information discovered during the repair and feedback on the performance of the vendor performing the work. The House Director shall timely cooperate with the Facilities Manager to obtain and submit any vendor invoices for payment. In turn, the Facilities Manager shall promptly update its log of Repair Request Forms to show the subject repair item as having been completed.

R. Within three (3) days of the House Director's notice of completion, the House Manager shall notify the House Director and Facilities Manager by e-mail if he reasonably believes any such repair item remains unsatisfied or has been unsatisfactorily repaired, or in the event the House Manager disagrees with the House Director's assessment of the vendor performing the work. The Facilities Manager shall investigate any such complaint prior to closing the repair log on the subject repair item and notify the House Manager of his findings by e-mail, with copy to the House Director and AED.

S. Once a repair item has been closed on the Facilities Manager's repair log, a new Repair Request Form shall be required for the same or similar repair item in the future.

### **5.3 Approval Process**

House Director submits repair requests to the Facilities Manager using standard form. In case of emergency repair, House Director has authority to schedule repair.

### **5.4 Capital Improvements**

House Director submits "wish list" of capital improvements with semester report to Facilities Manager.

### **5.5 Lawn Care/Snow Removal**

House Director supervises lawn care and snow removal to make sure exterior of the house is presentable/safe for tenants.

### **5.6 Inspections**

With permission of Facilities Manager, House Directors schedule required inspections of the premises.

### **5.7 Securing premises during breaks**

During periods when house is un-inhabited, House Director secures the property and makes sure there are no potential risks to the premises.

## Janitorial and Kitchen Operations

### 6 Janitorial and Kitchen Operations

#### 6.1 General Hiring Processes and Procedures

##### 6.1.1 New Hire Checklist

- Payroll is handled thru Aspire using a 3<sup>rd</sup> party payroll provider called Paychex
- Time clock hours are rectified between HD and GHM.
- Payroll is paperless but employees can access information online related to each pay period.
- **Submit New Hire Paperwork and refer questions to Finance Manager**

#### 6.2 Hiring Other Employees

The Master Lease requires the chapter to hire a cook if culinary services are offered in section 8(f), and to hire a janitorial service or employee in section 11 See Appendix 2: Master Lease.

The Account Management Agreement (AMA) States in section (j) that, “Pursuant to the terms of the Lease [Master Lease], Manager shall assist the Chapter in hiring various employees for the Project, including but not limited to the “House Director” (as such is defined in the Lease), cook and janitor.” See Appendix 3. The same operating procedures will be followed as the House Directors with Greek Housing Management (GHM) making the offer on behalf of the chapter.

It is important to note that SAE Financial & Housing Corporation must approve all employees of the chapter and no employees can be unilaterally terminated without the consent of SAE Financial & Housing Corporation.

##### 6.2.1 Hiring a Cook

###### 6.2.1.1 Cook Minimum Performance Requirements (Also See Appendix 1)

- The Cook reports directly to the House Director.
- Responsible for checking in with the House Director subject to his/her instructions when arriving to work, when on lunch breaks, and also before leaving at the end of the day so that he/she can be paid properly.
- Responsible for working at the chapter house during the hours scheduled by the House Director. Any change in this schedule (days off, early departure time) must be approved by the House Director and/or the chapter of Sigma Alpha Epsilon in advance. The Cook is responsible for calling the House Director before his/her start time on the day that he/she is going to miss if calling in sick or for an unexpected absence.
- Responsible for preparing a variety of nutritious, wholesome meals according to the chapter schedule which will be given to him/her by the House Director. As much as possible, meals are to be prepared “from scratch”. Prepackaged or frozen meals served on a regular basis are not acceptable. It may be appropriate to prepare, leave in crock pot or casserole; salad, or sandwiches (prepare tray of cold cuts or chicken salad, tuna salad, or egg salad) and leave in the refrigerator. Desserts, cookies, bars at the discretion of the Cook, but must be approved by the House Director. When the house does not have a House Director, the approval will be given from the house steward.
- Responsible for maintaining a clean and sanitary kitchen area. This includes the kitchen, pantry, and storeroom. Responsible for cleaning all accessible areas of the stove, grill, and oven (including vent hood filters) as needed; and cleaning and defrosting the refrigerator and freezer on a regular schedule (refrigerator, bi-weekly, and freezer, monthly). Daily cleaning should include: wiping of all counters, work areas, and milk machine with a disinfecting solution, sweeping kitchen area, wiping all spills in any related area, washing and drying tea towels and hot pads, as needed at the Chapter of Sigma Alpha Epsilon’s expense.
- Responsible for maintaining a neat, sanitary, and work appropriate personal appearance. Personal hygiene and adequate hand washing are mandatory. A professional attitude toward sales personnel, chapter members, alumnae, and the House Director should be maintained at all times.
- Responsible for preparing meals taking into consideration nutrition, food availability, and budget requirements. Consult with House Director and House Steward on menu planning. Efforts should be made to use leftovers, to minimize waste and discard due to spoilage, and to use food in an appropriate length of

## Janitorial and Kitchen Operations

time. Leftovers will be stored in the refrigerator or freezer in plastic containers and labeled as to date and contents.

- Responsible for ordering or purchasing all food supplies for breakfast, lunch, and dinner in consultation with the House Director on purchases of food and supplies. Budget guidelines will be followed.
- Responsible for cleaning the kitchen area of all dishes or pots and pans used in food preparation before his/her shift ends. Bussers, if utilized, will clean remaining dishes, pots, and pans.
- In consultation with the House Director, responsible for the kitchen and dining room supervision of the Busser staff.
- Responsible for preparation of an occasional meal or dessert as necessary for special events. Cook shall be given one week's advance notice if possible by the House Director or Chapter President. Must keep track of any expenses related to the special event and turn this information in to the House Director.
- The chapter members may request your cooking for their own events, for which they would arrange payment. This must be submitted to the House Director and approved by Greek Housing Management, LLC. Must keep track of any expenses related to the special event and turn this information in to the House Director.
- Responsible for contacting the House Director when repairs of kitchen items or equipment are needed. Cook or House Director will oversee repairmen when they are in the kitchen.

### • **ADDITIONAL RESPONSIBILITIES**

- The following three items should be discussed with the House Director each fall and spring as the duties are shared by the House Director and Cook.
- While the Kitchen Assistants are hired by the House Director, they should be supervised while in the kitchen and dining room areas by the Cook. The House Director will supervise them if the Cook is not present. The House Director will verify the hours and days worked by each of the Kitchen Assistants and forward that information to the Chapter of Sigma Alpha Epsilon on a bi-weekly basis.
- Ordering of paper products and cleaning supplies can be decided by either the House Director or Cook.
- It is the duty of both the House Director and Cook to maintain costs within the allotted budget. The Greek Housing Management, LLC will periodically consult with the House Director and Cook regarding the budget.

### **6.2.1.2 Hiring Considerations for Cook**

Issues that need to be addressed include proper equipment and servicing of the equipment, ordering food for each week, proper storage of food (i.e., temperature control), proper preparation of food, cost control and portion control, etc.. For all these reasons, it is important that a cook who is experienced in running a full time commercial kitchen be hired. Ideal candidates include cooks who have worked in the restaurant industry, other collegiate organizations, or summer camps.

The cook reports directly to the House Director (HD), however the cook will use the time clock at the Chapter House and the HD will approve them. Any request for vacation or sick days for the cook need to be coordinated between the Chapter, the HD and GHM.

Greek Housing Management works with the cook and House Steward to ensure that the chapter is staying within the allotted budget. Issues that will need to be addressed include payments of food vendors, towel service, and purchase of supplies such as dishwasher detergent, utensils, plates, etc. A monthly update shall be provided to the cook and chapter from the Finance Manager showing where they are actual-to-budget on the meal plan. If action needs to be taken (i.e., over-budget on food purchases), GHM and HD will work with the house steward and the cook to see how to lower food cost without compromising quantity and quality of food being served.

**The chapter, House Director, and cook need to plan for the possibility of the cook calling in sick.** It is recommended that the cook always have one day worth of frozen meals prepared that the House Director could simply heat up and serve the chapter.

In cases where the House Director is not also the cook, the House Director supervises the quality of the food, the cleanliness of the kitchen, the food budget, and hours worked by the cook.

## Janitorial and Kitchen Operations

### 6.2.2 Hiring Janitorial / Cleaning Services

#### 6.2.2.1 Janitorial Minimum Performance Requirements

(See Appendix 1)

The following janitorial services shall be performed not less than two (2) times per week:

- Sweep and mop all tile floors and vacuum all carpet floors throughout the common areas of the Premises, including bathrooms, kitchen, dining room, hallways, stairs, entry foyer and Study Room.
- Sweep front and rear porch.
- Pick-up and dispose of trash and debris around entire Premises (interior and exterior).
- Empty trash cans to dumpster and replace trash bag liners.
- Clean bathrooms, including sinks, toilets and shower stalls with appropriate cleaning agents.
- Clean kitchen and dining areas, including countertops, dining tables, serving tables, appliances, etc. with appropriate cleaning agents.
- Re-stock paper products in bathrooms and kitchen.
- Replace light bulbs.
- Dust furniture, window blinds, pictures, award plaques, etc. throughout Premises, including Study Room.
- Assist House Director with keeping inventory of janitorial supplies and ordering additional supplies as needed.
- Assist House Director by reporting any damage to the Premises.
- Additionally:
  - Once a month, clean windows (interior and exterior) of Study Room and entry door side lights, and dining/recreation room.
  - As needed, spot treat stains in carpet with appropriate cleaning agents tested for colorfastness.
  - As needed, spot treat stains in furniture fabrics with appropriate cleaning agents tested for colorfastness.
  - As needed, clean and buff tile floor in dining/recreation room.

**Tenant shall be responsible for the above cleaning of the Premises after every social function; it shall not be the responsibility of any third party janitor or janitorial service to service the Premises after Tenant social functions unless paid by Tenant.**

#### 6.2.2.2 Hiring Considerations for Janitorial Service

By maintaining the property, the undergraduates respect it more and the alumni are proud to call these properties their own when they come back to campus. Therefore, the Master Lease requires the chapter to employ a janitor/maid or hire a 3<sup>rd</sup> party cleaning service (See Appendix 2: Master Lease). Greek Housing Management (GHM) will work the House Director and chapter to find the most economical solution that gives the maximum result.

**If the cleaning service is unavailable for any reason (i.e.: sick, snow day, etc.) the chapter should be prepared to assign cleaning duties to ensure the property is cleaned for that day.**

**It is the responsibility of the chapter to ensure the property is cleaned up after all parties immediately after the event has ended.** In addition, each individual member is responsible for cleaning and removing refuse from his own room. Room trash is to be brought to a trash receptacle, not set in the hall for the service to pick up.

### 6.3 Termination of Employees

Although all employees can be terminated at any time for any reason, no employee can be terminated without the consent of SAE Financial & Housing Corporation and such termination shall be communicated by the Facilities Manager (GHM).

In most situations, a suitable replacement for any terminated employee shall be in place before the employee is let go. Prior notice shall be given to Greek Housing Management for the need to replace the employee so that all proper

## Janitorial and Kitchen Operations

protocol can be taken on their part, such as providing a termination letter, informing payroll, changing door codes and authority to purchase product on behalf of the chapter, etc.

### **6.4 Kitchen Management and Menu Planning**

#### **6.4.1 Starting the Kitchen Operation**

The Chapter will offer a meal plan for all members if there is a functioning kitchen.

If the kitchen has not been used recently, there must be a professional assessment of all equipment. Kitchens with older equipment should also be professionally assessed periodically, to ensure that fans, emergency equipment, gas lines and all other components are functioning normally.

- **Financial** – The meal plan will have a per member cost associated with it. The total amount must be budgeted in such a way that the costs of meals do not consume the budgeted amount prior to the end of the plan period; that is, it must last the entire period (e.g. semester).  
Generally, the meal plan and the chapter budgets should be kept separate. If the cook lacks cost control experience, each of the menus will need to be costed out, so that the per-meal cost can be managed. Additionally, the meal plan budget must be able to accommodate broken or lost implements. Capital items such as a freezer will be replaced out of the capital budget, but items that need replacing because of neglect or wear-and-tear will be replaced from the meal plan budget.
- **Safety and Cleanliness** – The kitchen must be kept clean and free of sickening or deadly bacteria. Proper washing and drying procedure must be practiced.  
Ideally the kitchen should be closed to all except the cook. To facilitate a kitchenette for snacks with a refrigerator outside the locked kitchen should be maintained.
- **Quality** – the food must be appealing and desirable to the men. If it is not, they will find ways to not support the meal plan and therefore reduce the ability for the kitchen to operate

## **Professional Development and Performance Planning**

### **7 Professional Development and Performance Planning**

#### **7.1 Key Employment Relationships**

The Master Lease between the SAE Chapter and [Chapter Name] Housing, LLC requires that a House Director be employed.

There are many entities involved in a well run chapter including the chapter officers, the alumni, the alumni advisor, university officials and parents. All of them are important and need to be engaged with the House Director.

The most important, however, are the chapter officers and the GHM Facilities Manager and the Chapter Operations Consultant.

#### **7.2 Management Structure**

The House Director will be hired by and will report to a management team composed of representatives of the SAE Chapter, with representatives of GHM, LLC consenting.

The management team will be composed of the following:

Chapter  
President  
Treasurer  
Chapter Advisor

GHM, LLC  
Facilities Manager  
F&H AED

The management team will be responsible for performance planning and performance evaluation.

#### **7.3 Minimum Performance Requirements for House Director**

Please see section 1.1 of this document or Appendix 1.

#### **7.4 Performance Evaluations**

The House Director will be given a specific performance plan when hired. The plan will include many of the items described above as well as performance item unique to the house. Generally, the performance of the annual plan will be evaluated at the end of the first six months for new House Directors and then annually.

##### Performance Appraisal:

- Outstanding - met and exceeded ALL Objectives
- Exceeded - met ALL Objectives and Exceeded in some
- Met ALL of the requirements of the job
- Met SOME of the requirements of the job, Needs Improvement in specific areas
- Met a FEW of the requirements of the job, Needs marked Improvement

##### Managing Poor Performance:

- Those appraised a 4 or “5”
  - Are not performing satisfactorily and
  - need either to improve or be replaced
- Poor performers will be put on an “improvement plan” by Manager.

## **Professional Development and Performance Planning**

- Told that lack of improvement will be grounds for dismissal
- Manager documents specific items that need to be improved (new appraisal)
- Given specific time frame (6 – 8 weeks) to show improvement
- Periodic, additional assessments by Manager (attitude, capacity, experience, etc)
- If, no improvement

### **7.5 Communicating Issues**

The House Director, as a condition of employment, agrees to communicate employment issues exclusively with the Facilities Manager.

### **7.6 House Director Employment Agreement**

The House Director is deemed an employee of the chapter. The House Director is hired and fired by the GHM Facilities Manager and is always an “at-will” employee. Greek Housing Management (GHM) will engage the chapter in the hiring process and the offer letter will come from GHM on behalf of the chapter.

### **7.7 Payroll**

Payroll is facilitated by the Facilities Manager through the use of a payroll service. All House Directors have a set salary they are paid. Payroll is processed bi-weekly and paychecks are paid via direct deposit into the employees account.

Some employees, such as the cook and janitorial service, may be paid hourly. In this case, it is the House Director’s responsibility as the supervisor to submit time sheets to the Facilities Manager by the deadline for each pay period.

### **7.8 Vacation**

Due to the nature of working in a school environment, breaks during Christmas and the summer allow the House Director time off while members are not residing in the chapter house. Time off when school is in session is at the discretion of the Facilities Manager. All time off must first be approved by the Facilities Manager, whether it be during school or over a break. This allows the Facilities Manager to enable policies for procedures of action while the House Director is away from the premises.

### **7.9 Room and Board**

Room and board is included as part of the House Director’s compensation. Each House Director will be given their own suite to reside in. They are also allowed to eat on the chapter’s meal plan which serves lunch and dinner daily, while school is in session and the chapter’s kitchen is in operation. The House Director is responsible for meals outside these time periods.



## Chapter Operation

### 8 Chapter Operations

#### 8.1 Introduction

The standards for chapter operations are described in the True Gentleman Initiative (TGI) of the Fraternity web site. These operations are described as 12 core areas and are presented along with best practices and templates developed by chapters that excel in each area. See <http://www.truegentlemaninitiative.net/ChapterResources.aspx> for details

There are several core areas that when implemented correctly are key to the success of a chapter that uses the services of GHM. Chiefly among them is Financial Management.

#### 8.2 Chapter Financial and Budget

The Financial Management core area is designed to assist the chapter treasurer to deal with a number of difficult chapter financial issues. One of the deliverable begins:

Someone once said, “Brotherhood begins when the bills are paid.” Well, we know most our our collegiate members aren’t fond of the business aspect of the Fraternity. But it’s a fact of fraternity life just as much as real life once you’re finished with college. Chapter finances can be a tricky area, especially if you are unfamiliar with all of the different forms and payments associated with membership in Sigma Alpha Epsilon. But we’ll make your job a lot easier. By reading through this guide and becoming familiar with the biggest areas of financial obligations, you will understand what is expected of your chapter, which will keep you on solid ground.

The Supreme Council of Sigma Alpha Epsilon continues to address the ongoing problems of ghost brothers, membership reporting and chapter closures that are major financial issues that continue to impact the Fraternity. In order for our members to be properly educated on how to prevent financial distress, we have included information that answers your biggest questions.

There are additional issues that relate specifically to the treasurer’s dealing with chapter housing and the issues of housing.

#### 8.3 Payment plans

Infrequently, a chapter member, especially those who are working, on scholarships, etc. has an issue with their own personal cash flow and cannot meet their monthly financial obligations. In cases approved by the chapter’s leadership, including the Eminent Treasurer, a payment plan can be negotiated with the member.

If a member wants to go on a payment plan, they must first submit a request to their chapter. Once approved by the Eminent Treasurer of the chapter, it must then be sent to F&H Facilities Manager for approval.

Once approved by the chapter and F&H Facilities Manager, late fees are turned off on their account and the F&H Facilities Manager keeps track of payments against the payment plan. If payments are not made and the plan is broken, late fees are re-accessed. A sample of the Payment Plan Contract is in the Appendix.

#### 8.4 Aspire CPAs

One of the third party suppliers of financial services to chapters is Aspire CPAs. Aspire provides chapter and alumni management tools enable chapters to more effectively bill and collect dues and rent, manage rosters and records, pay bills and employees and file tax returns. Information-rich, business process and data analysis applications for chapters and headquarters allow you to monitor and gauge your financials and improve overall records reporting and management. Aspire also brings expertise to annual and major gift fundraising with high pledge-to-contribution conversion rates at both the local and national levels, strategically positioning your community to raise capital and enjoy greater campaign oversight and all-around prosperity. Supported by a nimble and integrated communications platform, chapter leadership can now more regularly connect with and engage your members, their parents and

## Chapter Operation

friends creating and sending newsletters, building and maintaining websites, thanking donors and planning and hosting productive meetings.

### **8.4.1 General Explanation of Fees and Charges**

#### **For Potential members and Parents**

The following general information about chapter fees and related costs for the 2015-16 school year and is designed to be copied into an information sheet and given to potential members and parents.

Room Rent: Fee charged for use of the room and building. This fee includes all utilities, internet, parking if available, and use of the laundry services.

Food Service Fee: Breakfast, lunch and dinner is provided Monday through Friday. A cold breakfast Monday through Friday includes cereal, toast, bagels, fruit, etc.. Lunch and dinner are prepared by the cook Monday through Friday. A brunch is available on Saturday and dinner on Sunday. Snacks are available 24 hours a day. Food service begins on the first day of classes. This plan is required for any member living in the chapter house.

Out of House Meal Plan: – Members not living in the chapter house are required to purchase a half meal plan when not living in the dorms or chapter house. This provides either lunch or dinner each week day, a hot brunch Saturdays and dinner Sunday. This also covers snacks at the house while visiting.

Social Dues: These dues are used to finance chapter and campus related activities, social events, Parent's weekend, IFC dues, Province dues and to help offset the cost of Recruitment fees.

National Dues: This is a once a year payment charged in the Spring that covers their membership in Sigma Alpha Epsilon and helps pay for their subscription for the national magazine of SAE (The Record).

Health & Safety Fee: \*\* A once a year payment charged in the Fall that covers liability insurance for the national headquarters, chapter officers, volunteers and chapter members associated with the Chapter. Personal items of the members are not covered under this fee. We encourage parents to obtain rental insurance coverage or check with their home owners insurance on covering personal contents. In addition, members who park their car in the parking lot at the chapter house do so at their own risk.

Membership deposit: – A refundable deposit that can be used to pay for any charges related to membership including but not limited to damages to the house, national dues, health and safety fees, social dues, etc.

Parlor Fee: – Is applied to help cover the utilities used by all members of the fraternity such as the electricity and maintenance for meetings spaces etc., at the chapter house. This fee is only charged to out-of-house members as the members living in the house pay rent for these utilities.

Vacancy Fee: – \*\*\*A vacancy fee is charged when the chapter as a whole fails to meet the minimum required number of members living in the house to cover their Master Lease. When this happens, the shortfall in rent is divided amongst every member in the chapter. It is every members responsibility to work together to fill the chapter house.

Late Fees: Late fees equaling 5% of any outstanding balance will be accessed ten days after the due date. Late fees can be avoided for any member who is on an approved payment plan.

**\*The chapter, at its discretion, may charge other fees for social events, new member fees, initiation fees, badge fees, party favors, T-shirts, etc.** These charges are determined by the chapter and collected within the chapter. Greek Housing Management, LLC does not generally have knowledge of these charges nor does it collect for these items, except in special circumstances and at the request of the chapter's executive board.

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\*\*The Health and Safety charge noted on the Summary of Charges is estimated as the exact amount is not yet finalized and available to us at this time.

\*\*\*As a reminder, it is your son's responsibility as a chapter member to live in the house for four semesters (or six quarters) or until the house is full. All initiates and new members of a college chapter maintaining a house shall be **required to live in the house to capacity**. The Room Contracts for the 2015-2016 academic year have been distributed to your son and he is required to sign the Sublease if the house is not full or if he has not fulfilled the minimum requirement. The contracts will be accepted in the order received. **Your son should not make alternate living arrangements until the house is filled to capacity**. Please keep this in mind when making arrangements for each year he will be in school before signing up for alternative housing.

## Chapter Operation

### **8.5 Chapter Governance**

#### **8.5.1 Background**

The popularity and relevance of Fraternity life on college campuses has evolved ever since they were founded in the mid to late 1800s. Certainly they were founded on high moral and academic ideals often as an adjunct to the university literary societies of the mid 1800s. More recently their popularity was at a peak in the mid to late 1960s but was at an all-time low just a decade later as a result of the anti-Viet Nam campus movements and the dynamic social changes that occurred during that period.

Now in the early 21<sup>st</sup> century fraternity popularity is rivaling that of the mid 1960's again. Individually, young men, aged 17 to 22 years old, still experience the "rites of passage." Today, young men want to "belong," they aspire to the ideals expressed in fraternity core values, and they know that social development is as important as their academic development. But not much else is the same as before. Issues associated with under-aged drinking, the availability and use of drugs, and hazing and bad behavior in a society that is less tolerant and prone to law suits, contribute to the vulnerability of fraternities and, left unchecked, threaten, in the extreme, their very existence. Everyone has seen the movie "Animal House." Today, that is the model perceived to be reality by many non-Greek parents.

Exacerbating the plight of fraternity life is the attitude of the administration on some campuses. Many see the Greek system as an advantage and are organized in such a way to promote Greek membership. Other campus administration view the Greek system as a threat and either has bared it or have created stifling rules that make their existence difficult. Across them all is the certainty that when a fraternity "breaks the rules" the chapter will be put on probation or worse "kicked off campus."

#### **8.5.2 SAE Chapter Development**

It is worth noting that SAE has a very robust chapter development model with web enabled "best practice" templates available through its "True Gentleman Initiative (TGI). The thirteen core capabilities are designed to provide the fundamental operations for a sound, well run chapter.

Chapters are, by fraternity law, required to have an alumni advisor who is available for counsel and advice. Those chapters that have on campus housing will have a House Corporation that owns and manages the property. A strong chapter will have an organized, supportive alumni association.

#### **8.5.3 F&H Corp process**

F&H Corporation housing ownership is predicated on a sound financial investment along with all components of the chapter, including the alumni, being functional and responsive. The F&H processes require a House Director and the involvement of a House Manager to ensure timely and relevant support.

The recent (7/1/2015) deployment of the Chapter Operations Consultant adds additional resource to the challenge of compliance, standards and improved efficiency for all F&H managed properties.

Additionally, the financial and collection resources provided by Aspire add discipline, support and reporting capability to the chapter.

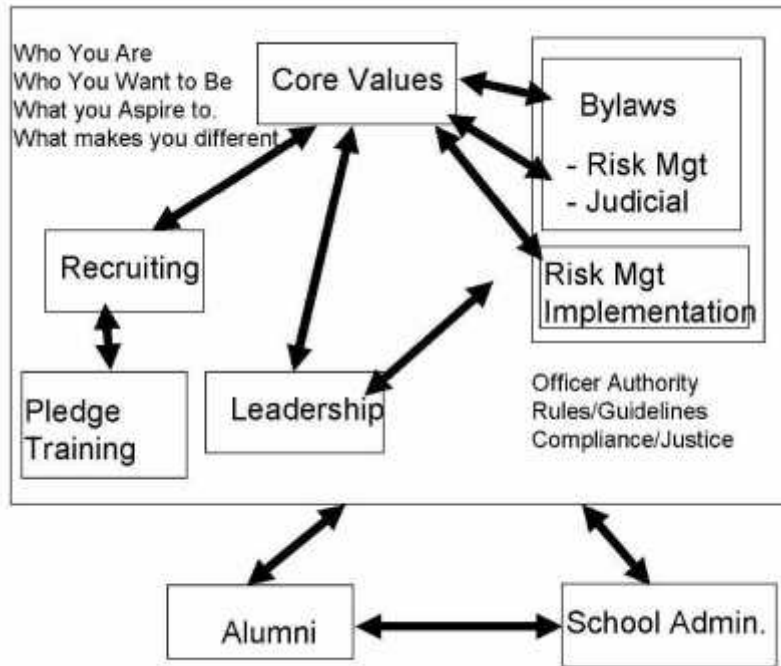
#### **8.5.4 Chapter Management**

The business processes enabled by F&H are robust and sound but they are all dependent on capable, responsible, and responsive chapter leadership. The chapter's leadership, by definition, must be enabled and capable of delivering all that is expected of them. The chapter's leadership is contractually obligated to F&H. The chapter's leadership is morally and ethically obligated to the Fraternity, to their alumni and to their parents.

All entities, parents, alumni, school, and F&H, depend on the chapter and the chapter's leadership to fulfill their commitment, and yet the chapter and the chapter's leadership potentially represent the weakest link. Even a strong chapter that is working well one year, may lose its way the next because of the leadership turnover.

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Several of the SAE TGI development areas are critical to the chapter's overall ability to govern itself and to be viable in the long run. They have to do with the chapter's governance and the ability of the chapter to manage itself in good times and in bad. Health & Safety, for instance, is critical for a chapter to implement seriously and well because of the potential for bad things to occur during social events. Recruiting is also critical because of the annual need to replenish the chapter with men who aspire to the ideals of the fraternity. The graph below shows all of the key development areas and the way they relate.



## **Chapter Governance**

Core Values - Critical to the overall long-term success of the chapter. The True Gentleman provides ample content for a chapter's commitment.

Recruiting –the process used and the results achieved is the most important of all activities. Done well, the chapter will have a solid complement of young men to carry on the chapter's good works.

New Member Training – Equally important, how the New Members are treated, educated, and introduced to the fraternity and the chapter will have long-felt consequences. The chapter must have a zero tolerance to hazing,

Shared Accountability – While not on the above chart the term describes the overarching leadership and management system of the chapter. It starts with the Fraternity Law and the chapter's By-Law. Each officer's duties need to be clearly defined. The role of Health & Safety and the duty of the Health & Safety Officer as well as the "Standards of Behavior" must be defined. The By-Law must state and chapter members must agree and understand that there is a zero-tolerance for hazing, under-age drinking and substance abuse. A Judicial process will allow the chapter to deal with those who violate the fraternity or chapter law.

Overall, men elected to office who do not fulfill the obligations of their office must be encouraged to resign and a replacement elected. The chapter is dependent on each officer and committee chairman performing their elected or appointed duty. It is the By-Law and the chapter's leadership, with the help of the alumni advisor, which provides the enablers.

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Critical is the support of and the relationship of the chapter with the school and the chapter's alumni advisor and House Corporation.

### **8.5.5 SAE Governance**

The fraternity's Assistant Executive Director (AED), has Regional Directors, employees of the fraternity, to manage the chapters compliance with fraternity laws and processes.

### **8.5.6 F&H Governance**

The F&H's Assistant Executive Director (AED), has the Facilities Manager and the Chapter Operations Consultant to manage the chapter's compliance with the Master Lease, property management guidelines and processes.

### **8.5.7 SAE Fraternity and F&H Issue Management**

The fraternity and F&H leadership have agreed to a issue management process, whereby all issues at a chapter are identified and logged. Issues related to chapter operations will be managed and resolved by the Fraternity AED.

Conversely, Issues related to property and house operations will be managed and resolved by the F&H AED, through the Facilities Manager.

**Issue Identification** - The Fraternity encourages each chapter to manage its development and operations around 12 Core Areas.

Alumni Relations	Recruitment
Chapter Management	Risk Management
Continuing Education	Ritual
Financial Management	Scholarship
Housing	Service & Philanthropy
New Member Education	University Relations

Direction, guidance and issue resolution related to the Core Areas is exclusively managed by the Fraternity and its personnel.

Direction, guidance and issue resolution associated with how the chapter implements or manages problems with these areas is exclusively managed by the fraternity through the SAE Regional Executive, and alumni volunteer: Province Archon and Chapter's Alumni Advisory Board. With the exception of Housing, neither the Chapter Consultant nor the House Director will engage the chapter leaders about issues related to the core area.

However, issues related to Housing can arise based on how the chapter implements or operates any of the Core Areas. When Housing issues arise, it is important that the focus remain on the effect that the issue has on Housing or the property, not on the core area itself.

Examples of how Core Areas may involve Housing follow:

Social - Focus on how the chapter house is to be used for social events if allowed.

- Library off limits,
- Rules related to alcohol per Town rules, university rules, or limitations of the lease.
- Locking up kitchen and cleanup.

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- Lease states cleaning people are not responsible for cleaning up after parties, and if forced to, we will charge membership deposits.

Recruitment - A discussion about how recruitment affects their ability to comply with the lease terms and avoiding vacancy fees. As it relates to occupancy, the chapter should set a minimum limit for recruitment and if they don't reach their minimum, they need a second or third recruitment period or consider non-SAE's live-in..

- Report on numbers of members
- Report on retention
- Report on new Member involvement

Scholarship / GPA - Discuss mandatory library hours, utilizing the video cameras to confirm they are studying and showing up.

- All men's GPA vs Chapter GPA
- Study Tables
- Other

Housing Physical Plant (Fix something)

- Walk building with HM and report needs to FM

University Relations

- Probation of any kind? If the chapter is on probation, the chapter operations consultant will work with the PA and Regional Director to outline the terms of the probation. If they involve AFH, we can discuss that.
- Hospital visits? HD's that take members and even ladies to the hospital should report the event to the Facilities Manager. F&H actions will be taken on a case by case basis.
- Police - Campus or City or both. The Chapter Operations Consultant can work with the HD's to host a dinner and invite the police and fire department to the chapter house. .

All issues, regardless of who is assigned to resolve it, will be identified and documented by the House Director and the Chapter Consultant. The Chapter Consultant will keep a log of the issue, the date it was identified, by whom and a short description of the issue. The Facilities Manager will keep a consolidated log of ALL issues.

**Issue Management** –The Chapter Consultant will communicate the issue log contents to the Facilities Manager immediately after a new issue is identified. Issues will be categorized either:

1. Property or housing
- Or
2. Chapter operations

1. Property or housing - For issues related to the property or housing, the Facilities Manager, with the concurrence of the F&H AED, will identify who will have the responsibility for resolving the issue. The issue will be communicated by the Facilities Manager, the urgency, and the potential resolution to whomever is assigned, along with a due date.

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The Facilities Manager will ensure that those assigned to resolve housing or property issues understands and accepts the assignment as well as the due date. The Facilities Manager will communicate and announce the resolution to all concerned.

2. Chapter operations - For issues related to chapter operations, the F&H AED, will immediately communicate the issue and related information to the Fraternity Associate Executive Director, Jeff Hall. The resolution, if any, is wholly and exclusively the responsibility of the Fraternity Associate Executive Director, Chapter Development.



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#### 9.1 Acronyms, Issues, and Resources

##### **Approved Vendor:**

A vendor pre-approved to perform certain types of maintenance or to make certain kinds of repairs to the Chapter House, which vendor list is included on Exhibit “Landlord Approved Service Providers” of the Lease, as may be modified from time to time by the Facilities Manager with the approval of the AED.

##### **Associate Executive Director (AED):**

The AED of F&H is whom the Facilities Manager reports and who is responsible for advising the F&H Board on matters requiring their approval.

##### **Association of Fraternity/Sorority Advisors (AFA):**

Founded in 1976, it has provided individuals concerned with the fraternity movement an avenue for professional growth and development. Since that time, the AFA has grown into a multifaceted international organization providing resources, recognition, and support for campus fraternity advising professionals. <http://www.fraternityadvisors.org/>

##### **Association of Fraternal Leadership & Values (AFLV):**

The Association exists to stimulate the growth and development of fraternity council and chapter leaders by promoting leadership, educational, and values based experiences and resources for student leaders, their advisors, and the larger fraternal market. AFLV is a membership based, non-profit organization with a 501(C3) IRS tax status. In addition to other programs and support services, the foundational programs include the AFLV Central Fraternal Leadership Conference, the National Black Greek Leadership Conference, the AFLV West Fraternal Leadership Conference, the National Cultural Greek Leadership Conference, and the National House Director Conference. AFLV also publishes a quarterly magazine, Connections. <http://www.afiv.org/>

##### **Alumnus:**

An initiated fraternity man who is married, graduated, or has withdrawn from school.

##### **Alumni:**

Plural of alumnus.

##### **Bid:**

A formal written invitation to join a fraternity.

##### **Chapter:**

The name applied to the local group of members of a national fraternity. It could mean the fraternity chapter which is a tenant of the House Corporation and occupies the Chapter House.

##### **Chapter House:**

The improvements on the property owned by the House Corporation and leased by the Chapter pursuant to the Lease.

##### **Continuous Open Recruitment:**

Chapters that have not reached their membership goals continue to recruit new members throughout the academic year in an informal manner.

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### **Deferred Recruitment:**

The term "deferred" is most commonly used to describe a situation where students must have completed at least one semester before they are eligible to join a fraternity the term "delayed" may be used to describe a campus policy of postponing the concentrated recruitment period until later in September or mid-October,

Most fraternities still recommend an early fall recruitment period, and most international organizations prefer fall as the optimum time for new members to join the organization. Many campus administrators, however, are pushing for recruitment to be deferred or delayed to allow new students a chance to adjust to campus and to develop sound study habits. The most commonly cited factor for mandating dry recruitment (without alcohol) is poor academic performance on the part of new members.

**Date Rape Drugs:** See Sexual Assault

### **Eating Disorders:**

Eating disorders are characterized by severe disturbances in eating behavior. The practice of an eating disorder can be viewed as a survival mechanism. Just as an alcoholic uses alcohol to cope, a person with an eating disorder can use eating, purging or restricting to deal with their problems. Some of the underlying issues that are associated with an eating disorder include low self-esteem, depression, feelings of loss of control, feelings of worthlessness, identity concerns, family communication problems and an inability to cope with emotions. The practice of an eating disorder like Anorexia, Bulimia or Compulsive Overeating may be an expression of something that the eating disordered individual has found no other way of expressing. Eating disorders are usually divided into three categories: Anorexia Nervosa, Bulimia Nervosa and Compulsive Overeating.

E. Emergency Repair means a repair item that reasonably cannot wait to be processed through the normal Repair Request Form process and the delay of making such a repair will cause additional damage to the Chapter House or otherwise make the Chapter House unsafe and uninhabitable. An Emergency Repair shall be limited to that level of repair as needed to protect the Chapter House from additional damage and to make the Chapter House safe and inhabitable.

### **Facilities Manager:**

The person who has been designated by GHM and who is responsible for overseeing all duties assigned to GHM by both the House Corporation and the Chapter.

### **Financial & Housing Corporation (F&H):**

The parent entity of the House Corporation and Greek Housing Management (GHM).

### **Financial & Housing Board (F&H Board):**

The Board of Directors of Financial & Housing Corporation who, from time to time, must approve certain expenditures related to the repair and maintenance of the Chapter House.

### **Fraternity Executives Association (FEA):**

The FEA is organized and operated exclusively to further the common business interests of the members by promoting, supporting, and encouraging the free discussion and exchange of ideas relating to college fraternal organizations. The membership of FEA is composed of employees of the administrative offices of fraternal member organizations.

### **Fraternity Insurance Purchasing Group (FIPG):**

The original concept behind the FIPG was simple: first, adopt a Health & Safety plan that would help reduce exposure to risk, and second, use the group buying power of many national organizations as leverage to obtain more

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extensive coverage at lower prices. Today, though the title has remained the same, the organization is actually a risk management group. Men's and women's fraternities join FIPG, adopt its risk management policy, and make every effort to reduce their exposure to claims, but are not required to purchase insurance from the same carrier.

<http://www.fipg.org>

### **Formal Membership Recruitment:**

Formal recruitment is planned by the governing council. It is usually a few days in the fall in most cases before classes begin. Some schools have recruitment during the first week or so of the fall or spring term. There are established times for recruitment events councils encourage potential new members to "sign up" and then guide them to each of the chapters in an organized systematic way. It is a mutual selection process with the chapters inviting potential members back to the chapter events and the potential new members accepting/regretting the invitations,

### **Fraternity:**

Formally, it is the name applied to all Greek-letter organizations. Informally, it is applied to men's groups.

### **Gamma Sigma Alpha National Academic Greek Honor Society (GSA):**

GSA is the premier organization committed to the academic success of our members and alignment with the academic missions of our host institutions. Students are eligible for membership based on grade point average and membership in a Greek fraternity. The Society strives to uphold the high ideals of scholastic achievement and therefore, only students with a cumulative grade point average of 3.5 or above (on a 4.0 scale) at the start of their junior year or a grade point average of 3.5 or higher in any semester during their junior or senior year are eligible. GSA is headquartered in Indianapolis, with over 200 chapters across the country and in Canada.

### **Greek:**

The name applied to all fraternity members. The trend is to drop Greek and replace it with fraternity because the public confuses the name with the country of Greece).

### **Greek Affairs or Greek Life or Fraternity and Sorority Life:**

The name of the university department responsible for advising fraternities and sororities as well as the associated governing councils on campus. Fraternities may also be advised out of a campus activities office.

### **Greek Housing Management, LLC (GHM, Facilities Manager, or GHM Facilities Manager):**

A wholly owned subsidiary of SAE F&H and a third party manager hired by both the House Corporation and Chapter to assist with various aspects of property and financial management (also known as Facilities Manager (PM)). The SAE entity responsible for housing is SAE F&H; the organization that provides property management services is GHM, LLC and it is the property management services arm of F&H.

### **Hazing:**

Hazing is any action taken or situation created intentionally that causes embarrassment, harassment or ridicule, that risks emotional and/or physical harm, to members of an organization or team whether new or not, regardless of the person's willingness to participate

Still confused? Ask yourself these questions:

- Would I feel comfortable participating in this activity if my parents were watching?
- Would we get in trouble if the Dean of Students walked by?
- Am I being asked to keep these activities a secret?
- Am I doing anything illegal?

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- Does participation violate my values or those of my organization?
- Is it causing emotional distress or stress of any kind to me or others?

MPG definition of hazing: Hazing activities are defined as: "Any action taken or situation created, intentionally, whether on or off fraternity premises, to produce mental or physical discomfort, embarrassment, harassment, or ridicule. Such activities may include but are not limited to the following: use of alcohol, paddling in any form, creation of excessive fatigue, physical and psychological shocks, quests, treasure hunts, scavenger hunts, road trips or any other such activities carried on outside or inside of the confines of the chapter house; wearing of public apparel which is conspicuous and not normally in good taste, engaging in public stunts and buffoonery, morally degrading or humiliating games and activities, and any other activities which are not consistent with academic achievement, fraternal law, ritual or policy or the regulations and policies of the educational institution or applicable state law"

### **House:**

The word refers to the bricks and mortar only, but it is frequently used by the members to describe the chapter. The chapter is the people.

### **House Corporation:**

The limited liability company that owns a Chapter House, which is a subsidiary of F&H.

### **House Director:**

The paid, adult, employee of the chapter, hired to manage the property (house) and oversee the kitchen operation and other similar duties. (See Section 6.3)

### **House Manager:**

The member of the Chapter who has been elected or assigned to serve as the primary liaison between the Chapter, the House Corporation, GHM and the House Director on all matter involving the Chapter House (See Minimum Performance Requirements for House Manager).

### **Initiated member:**

An initiated member is an unmarried, undergraduate member who has been initiated into a fraternity chapter and is currently enrolled in classes at the institution. Initiated member is an interchangeable term.

### **Inter Fraternity Council (IFC):**

IFC is the campus governing body for all fraternities. The Council plans recruitment, community service events, and provides educational programs for the community.

### **Initiate:**

An initiate is a member who has recently been initiated into the fraternity chapter following initiation ceremonies or ritual.

### **Initiation**

Initiation is the formal ceremony in which potential members become full members of the organization.

### **Lease (or Master Lease):**

The certain leasing agreement between the House Corporation and the Chapter for the rental of the Chapter House.

### **Legacy:**

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A man whose father, brother, grandfather, or half-brother is an alumnus or initiated member of a fraternity.

### **Membership Development:**

The basic philosophy is that the new member period (six weeks on average) is an orientation period, while education continues throughout the member's years in college and beyond.

### **Mental Health:**

Mental health is clearly linked to retention and academic performance (Backels & Wheeler, 2001). Academic advisors find that mental health issues interfere with student success more than ever before. Yung (2004) brought these issues to light in The Chronicle of Higher Education article, "Prozac Campus."

Today several excellent resources are available to advisors who want to be informed and capable to assist the students who struggle with these problems. Today, faculty and staff members note that complex and even clinical issues are more prevalent among the students they teach and advise. Kadison & DiGeronimo (2004), in the recent book *College of the*

*Overwhelmed: The Campus Mental Health Crisis and What to Do About it*, confirm that a rising number of students are coping with depression, anxiety, and other major mental health challenges.

College counseling centers across the country report increased frequency and severity of students' mental health concerns. Two major studies document these observations. At Kansas State University, counseling center staff conducted a retrospective analysis of client problems over 13 years (Benton, Robertson, Tseng, Newton, & Benton, 2003). Corroborating their suspicions, the K-State researchers found a significant: increase in student psychopathology in 14 out of 19 areas, e. g. depression, suicidal thoughts, sexual assaults, personality disorders, and the like. Kitzrow (2003) published a literature review related to the mental health needs of today's college students. Citing a survey of directors of college counseling centers, Kitzrow reported that from 1996 - 2001, 85% saw more severe psychological problems. In addition, respondents described more cases of learning disabilities, self-injury incidents, eating disorders, alcohol and drug use, warnings to third parties, and stalking.

Why are students so anxious and depressed? Today's students deal with cross-cultural issues, family dysfunction, poor frustration tolerance, experimentation with drugs and alcohol, and weak interpersonal attachments (Kitzrow, 2003). Greg Kneser, Dean of Students at St. Olaf College in Northfield, MN, notes that many students lead "hyper-enriched lives", with their cell phones, computers, classes, jobs, sports, travel, volunteer work, and more (Kneser, 2004); all this is too much to handle for some students.

### **National House Director Conference:**

The Association of Fraternal Leadership & Values is proud to support House Directors that play such a vital role in the chapter house management of our undergraduate fraternity chapters across the country AFLV hosts the national conference for House Directors each summer in a different geographical location. This conference is intended to provide an opportunity for fraternity House Directors to gain valuable skills and keep up with the issues that impact them in today's ever changing market. The professional House Directors Conference is the premier opportunity for fraternity House Directors to gain valuable skills and keep up with the issues that impact them in today's ever changing campus environment.

### **New Member:**

Man who has accepted the bid of SAE fraternity and has been taken into full membership.

### **New Member Mom/Dad or Big Sister/Brother:**

An initiated member who sponsors, advises, and guides a new member through the initial stages of membership.

### **Open Recruitment:**

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An informal period during which fraternities recruit new members.

### **Order of Omega:**

Order of Omega is an honor society for members of Greek organizations. The organization recognizes juniors and seniors who have exemplified high standards in the areas of scholarship, leadership, involvement within their respective organization and within the Greek, campus and local community. Members are selected from the top 3% of Greeks at each institution. Order of Omega now has over 500 chapters in the United States and Canada, and over 200,000 members!

### **Panhellenic Council :**

The campus governing body for NPC sororities. Each sorority on campus has at least one delegate. Each sorority has an NPC Advisor from her own national organization. The NPC provides an Area Advisor who is available to assist and advise the Panhellenic Council on NPC matters including recruitment, extension and programming.

### **Philanthropy or Community Service:**

A fraternal value, community service is the donation of an individual's personal time and service (not money) to the community.

### **Prospective or Potential Member:**

A student who is registered with the IFC to participate in the recruitment process on campus (formerly known as a rushee).

### **Province Archon (PA):**

An SAE region is divided into Provinces, each headed by an alumnus volunteer (PA). The RD and PA work together to assist the chapter's officers and to encourage that their operations are maintained within the chapter's charter and SAE National Fraternity Law.

### **Recommendation:**

A letter or statement written by an alumnus of a national organization to the chapter, recommending a potential new member for membership in the chapter

### **Recruitment Event:**

A time block during Recruitment Week used to entertain and get acquainted with prospective members (formerly known as a rush party).

### **Recruitment Week:**

The major, formal period (formerly known as rush) set aside by the university Greek community for recruiting prospective members. During the week, those men interested in fraternity membership are given the opportunity to become acquainted with the members of each fraternity.

### **Regional Director (RD):**

Has responsibility for the several chapters in an assigned geographic region usually made up of several contiguous states. The RD and PA work together to assist the chapter's officers and to encourage that their operations are maintained within the chapter's charter and SAE National Fraternity Law.

### **Repair item:**

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A portion of the Chapter House that requires maintenance or repair and which was not reasonably anticipated at the beginning of the Lease term. In many instances, such repair items will result from the misuse or abuse of a portion of the Chapter House. In other instances, such Repairs Items will result from Acts of God or other unforeseen circumstances not directly attributable to the conduct of an individual, such as a storm or power surge.

### **Repair Request Form:**

The form promulgated by GHM to report and track repair items for each Chapter House. Initially, the Repair Request Form is a writable PDF document which is to be sent to the Facilities Manager; however, in the future, the Repair Request Form may become a web-based document reporting system.

### **Health & Safety:**

Most fraternities pay particular attention to managing risks in a variety of areas. The SAE Minerva's Shield is the chapter guide.

### **Sexual Assault:**

Sexual Assault can include child sexual abuse, rape, attempted rape, incest, exhibitionism, voyeurism, obscene phone calls, fondling, and sexual harassment. There is a range of nonconsensual sexual acts that create a continuum in which each form of sexual assault is linked to the others by their root causes, as well as by the effects they have on individuals and can ramify. While sexual assault can take many forms, it is important to remember that the loss of power and control that a victim of sexual assault experiences is a common thread.

Rape is any sexual intercourse with a person without his or her consent. It is an act of violence that uses sex as a weapon. There are many different types of rape that are important to distinguish as well.

Stranger rape happens when the victim does not know his or her offender. The reality of stranger rape is that it happens during the day and at night, to people from all different walks of life, and in lots of different places.

Acquaintance rape describes a rape in which the victim and the perpetrator are known to each other. The perpetrator might be a partner, coworker, best friend or neighbor. This is the most common type of rape. 84 percent of rapes happen among people who know one another.

Date rape is a specific kind of acquaintance rape, referring to a rape that occurs between two people who are dating partners. Often times the victim is emotionally manipulated or coerced into having sex with his or her partner.

Marital rape, one of the least talked about forms of sexual assault, is rape between husband and wife. Because of personal and societal barriers to reporting marital rape, its prevalence is probably higher than we are aware.

Sexual harassment is any unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature. Sexual harassment often manifests itself in subtle ways, such as sexually suggestive comments, unwanted touching, risqué jokes, or blatant demand for sexual contact. In most cases, these actions take place within work or educational settings where both the offender and the victim are required to be in close contact.

### **Sexually Transmitted Disease (STD) or Sexually Transmitted Diseases (STD):**

A STD, also known as STI or Venereal Disease (VD), is an illness that has a significant probability of transmission between humans or animals by means of sexual behavior, including vaginal intercourse, oral sex, and anal sex. While in the past, these illnesses have mostly been referred to as STDs or VD, in recent years the term STI has been preferred, as it has a broader range of meaning; a person may be infected, and may potentially infect others without showing signs of disease. Some STDs can also be transmitted via the use of IV drug needles after use by an infected person, and through childbirth and breastfeeding.

**HIV/AIDS:** Acquired Immune Deficiency Syndrome or Acquired Immunodeficiency Syndrome (AIDS) is a disease of the human immune system caused by the Human Immunodeficiency Virus (HIV). This condition

## Glossary

progressively reduces the effectiveness of the immune system and leaves individuals susceptible to opportunistic infection and tumors. HIV is transmitted through direct contact of a mucous membrane or the bloodstream with a bodily fluid containing it, such as blood, semen, vaginal fluid, seminal fluid, and breast milk.

### **Stalking:**

The difficulties associated with precisely defining this term (or defining it at all) are well documented. It seems to have been first applied to the harassment (in a general sense) of celebrities by strangers who were described as being obsessed. Stalking can be defined as the willful and repeated following, watching, and I or harassing of another person. Most of the time, the purpose of stalking is to attempt to force a relationship with someone who is unwilling or otherwise unavailable. Unlike other crimes, which usually involve one act, stalking is a series of actions that occur over a period of time. Although stalking is illegal, the actions that contribute to stalking are usually legal, such as gathering information, calling someone on the phone, sending gifts, emailing or instant messaging. Such actions by themselves are not usually abusive, but can become abusive when frequently repeated over time.

### **Substance-free Housing:**

The substance-free housing initiative is one of the most controversial issues affecting the Greek movement. Women's fraternities and sororities (through NPC) have always mandated substance free housing, as has the FarmHouse fraternity. In the past several years, several inter/national men's fraternities mandated that their chapters have substance free housing by the year 2000. The basic requirements are that no alcohol or other substances will be permitted in the chapter house or on other kinds of chapter property and that the chapter must hold social functions involving alcohol at out-of-house locations using third-party vendors. Another development is the passing of resolutions by several NPC member organizations which prohibit collegiate chapters from participating in (or co-sponsoring) social events with alcohol on fraternity chapter property

### **Sorority:**

A group of women joined together in friendship, common interest and for educational purposes, whose interests include living the fraternal values of the organization which usually include academic excellence, service and friendship.

### **Umbrella Governing Organizations:**

- NALFO (National Association of Latino Fraternal Organizations) is an umbrella council for Latino Greek Letter organizations. The purpose of NAVA-) is to promote and foster positive inter-fraternal relations, communication, and development of all Latino Fraternal organizations through mutual respect, leadership, honesty, professionalism and education. Established in 1998, NALFO) has .20 member organizations from across the United States.

<http://www.nalkiorg/>

- NAPA.—National Asian. Pacific American Panhellenic Association—developed in 2004 and continuing to evolve to this day the Association forms the base from which a strong and united Asian Greek community will be developed.

[www.napa-online.org](http://www.napa-online.org).

- NIC - Since 1909, the North American Interfraternity Conference has been serving the men's college fraternity community in Canada and the United States. Through 73 member fraternities, the NIC represents almost 4.5 million alumni and 400,000 college students in over 5,500 chapters on more than 800 college campuses. The NIC advocates the needs of fraternities through the enrichment of the Greek experience, advancement and growth of the fraternities, and enhancement of the educational mission of the host institutions, <http://www.nicindy.org/>

- NMGC The National Multicultural Greek Council (NMGC) is an umbrella council for a coalition of Multicultural Greek-letter organizations (MGLOs) established in 1998. The purpose of NMGC is to provide a forum that allows for the free exchange of ideas, programs, and services between its constituent fraternities and sororities; to promote the



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awareness of multicultural diversity within collegiate institutions, their surrounding communities, and the greater community-at-large, and to support and promote the works of its member organizations. <http://nationalmgc.org/about/>

- NPC - The National Panhellenic Conference, founded in 1902, is an umbrella organization for 26 inter/ national women's fraternities and sororities. Each member group is autonomous as a social, Greek-letter society of college women and alumnae. Members are represented on over 620 college and university campuses in the United States and Canada and in over 5,300 alumnae associations, making up a population of over three million sorority women in the world. "The mission of the National Panhellenic Conference is to support and promote women's fraternities as a positive element of the higher education experience."
- NPHC - The National Pan-Hellenic Council is the national coordinating body for the nine historically African American fraternities and sororities. The NPHC is currently composed of over 900,000 affiliated members in undergraduate and alumni councils in all regions of the United States and abroad. The NPHC stresses and provides action strategies on matters of mutual concern and serves as the conduit through which these action plans are put into effect. NPHC organizations are unique with respect to other Greek letter organizations in that they have profound commitment to providing community service and to uplifting/promoting the general public welfare.

### **Welcome Week:**

Many campuses plan events and activities primarily for new students. These events are an orientation to campus as well as an opportunity to meet faculty and upperclassmen who usually assist in the implementation of the events. Fraternities and sororities usually play a big part in this event.

### **Work Week:**

Members return to campus the week before formal recruitment begins. They use the week to prepare for formal recruitment.

- Chapter President – Called the Eminent Archon, the president is usually elected for a year term.
- Chapter Treasurer – Called the Eminent Treasurer, he is usually elected for a year term and is responsible for the chapter budget as well as the meal plan.
- The treasurer collects rents, parlor fees and all chapter dues. He ensures on-time lease payments and is the primary interface to Aspire.
- The Treasurer is the focal point for all financial issues related to the house and the lease and he is likewise responsible for all financial issues related to the Fraternity including National Dues, Health & Safety Fees and Chapter dues.
- House Manager – The House Manager is responsible for daily repairs based on wear and tear. The House Manager is the primary interface for communicating housing related issues to the chapter.
- Social Chair – Coordinates and arranges for all social events. The chapter's social budget is the source of funds.
- Health & Safety Officer –Responsible for the orderly conduct of members and guests at all social functions. His plan for securing the house during social events and ensuring 3<sup>rd</sup> party security is key to controlling the event.
- Chapter Executive Board – The board is composed of various elected officers and meeting weekly, deal with chapter issues.
- Chapter Advisor(s) – Usually an alumnus or multiple alumni, these volunteers work with the chapter of goals and direction to ensure alumni support of the chapter programs.

## Appendix 1: Minimum Performance Requirements

### 10 Appendix 1: Minimum Performance

#### 10.1 Minimum Performance Requirements for House Director



## GREEK HOUSING MANAGEMENT, LLC

### Minimum Performance Requirements for House Director

1. Reside in the Fraternity Chapter House (the “Premises”) at all times. Be available on weekends and evenings in case of emergency and to notify the tenant/employer and Greek Housing Management, LLC (“Manager”), the Facilities Manager for the Premises and tenant/employer, if this is not possible. This position requires is a 12 month/52 week commitment with all absences or vacations coordinated and approved by the Facilities Manager in consultation with the tenant/employer.
2. Prepare reports for the Manager on the physical condition of the Premises. Complete and return all reports by their designated timeline, including:
  - a. Monthly report
  - b. Semester report
  - c. Yearend report
  - d. Other reports as requested
3. Be present during scheduled non-ritual functions Sigma Alpha Epsilon Fraternity (“Fraternity”), such as:
  - a. Homecoming
  - b. Parent’s Weekend
  - c. Recruitment Events
  - e. Other events as requested
4. Report any major physical or structural problems of the Premises immediately to the Facilities Manager.
5. Become informed of and to enforce the Health & Safety policies, rules and regulations of the Fraternity and this Lease, including but not limited to the no alcohol policy in common areas, pets, smoking, etc. These rules apply to the House Director as well as the tenant’s members.
6. Report any issues or incidents involving the tenant’s members and guests, observed or experienced, to the Manager and to other persons designated by the Manager.
7. Close and secure the Premises after residents leave for university designated breaks.
8. Maintain an open line of communication with the undergraduate chapter by attending weekly chapter executive board meeting.
9. Work to build a mentor-type relationship with the members of the undergraduate chapter with whom you are working. You should achieve true and lasting engagement with the members fostering an environment of trust and personal accountability.
10. Participate in any hiring, management, or termination process of meal preparation staff of the tenant chapter.
11. Review all expenditures related to meal preparation ensuring they are in-line with the budget allotted by the tenant/employer.
12. Supervise cleaning staff and work with the tenant’s House Manager to ensure the cleanliness of the Premises and keep the Premises clean and orderly while maintaining a hospitable environment.
13. Review and record all invoices for purchases House Manager has made and has been authorized to make,

## **Appendix 1: Minimum Performance Requirements**

and to turn them over to Manager or payment. Fax invoices and related documents to Manager upon request.

14. Keep a record for Manager of any and all charges incurred by the tenant chapter that appear on the landlord's invoices or by special purchase so Manager can bill the tenant chapter under the terms of the lease.

15. Perform resident check-in/check-out procedure at the commencement/conclusion of each semester or as individual tenants may check-in/check-out during the semester, including managing room keys and performing the duties prescribed under the "Room Inventory Form/Security Deposit Refund" document approved by landlord (which must be completed immediately upon resident check-in/check-out). Visually inspect the resident's room during check-in/check-out for any damage and note the same on the Room Inventory Form/Security Deposit Refund" document approved by landlord.

16. Provide a list of Premises residents including name, room number, and cell phone number to the Manager by the second week of classes each academic period.

17. Schedule, supervise, and review the work of any outside contractors. Recommendations on summer work/repairs must be presented to Manager by February 1st of the same calendar year.

18. Forward all mail to the appropriate parties when school is not in session.

19. Report any security infractions to employer, Manager, and to the university department of public safety or local security guard, if applicable.

20. Upon your departure from the position, turn over all maintenance records to the appropriate Manager Representative.

House Director's duties shall also include the application of the employee's skills and knowledge to ensure a safe, well-run operation, between both the House Director and the employer/tenant. Manager, in consultation with the employer, reserves the right to change the nature and scope of the House Director's duties. House Director shall carry out, to the best of his or her ability, any and all duties assigned to the employee.

## Appendix 1: Minimum Performance Requirements

### 10.2 Minimum Performance Requirements for Cook



#### Minimum Performance Requirements for Cook

1. The Cook reports directly to the House Director.
2. Responsible for checking in with the House Director subject to his/her instructions when arriving to work, when on lunch breaks, and also before leaving at the end of the day so that he/she can be paid properly.
3. Responsible for working at the chapter house during the hours scheduled by the House Director. Any change in this schedule (days off, early departure time) must be approved by the House Director and/or the chapter of Sigma Alpha Epsilon in advance. The Cook is responsible for calling the House Director before his/her start time on the day that he/she is going to miss if calling in sick or for an unexpected absence.
4. Responsible for preparing a variety of nutritious, wholesome meals according to the chapter schedule which will be given to him/her by the House Director. As much as possible, meals are to be prepared "from scratch". Prepackaged or frozen meals served on a regular basis are not acceptable. It may be appropriate to prepare, leave in crock pot or casserole; salad, or sandwiches (prepare tray of cold cuts or chicken salad, tuna salad, or egg salad) and leave in the refrigerator. Desserts, cookies, bars at the discretion of the Cook, but must be approved by the House Director. When the house does not have a House Director, the approval will be given from the house steward.
5. Responsible for maintaining a clean and sanitary kitchen area. This includes the kitchen, pantry, and storeroom. Responsible for cleaning all accessible areas of the stove, grill, and oven (including vent hood filters) as needed; and cleaning and defrosting the refrigerator and freezer on a regular schedule (refrigerator, bi-weekly, and freezer, monthly). Daily cleaning should include: wiping of all counters, work areas, and milk machine with a disinfecting solution, sweeping kitchen area, wiping all spills in any related area, washing and drying tea towels and hot pads, as needed at the Chapter of Sigma Alpha Epsilon's expense.
6. Responsible for maintaining a neat, sanitary, and work appropriate personal appearance. Personal hygiene and adequate hand washing are mandatory. A professional attitude toward sales personnel, chapter members, alumnae, and the House Director should be maintained at all times.
7. Responsible for preparing meals taking into consideration nutrition, food availability, and budget requirements. Consult with House Director and House Steward on menu planning. Efforts should be made to use leftovers, to minimize waste and discard due to spoilage, and to use food in an appropriate length of time. Leftovers will be stored in the refrigerator or freezer in plastic containers and labeled as to date and contents.
8. Responsible for ordering or purchasing all food supplies for breakfast, lunch, and dinner in consultation with the House Director on purchases of food and supplies. Budget guidelines will be followed.
9. Responsible for cleaning the kitchen area of all dishes or pots and pans used in food preparation before his/her shift ends. Bussers, if utilized, will clean remaining dishes, pots, and pans.
10. In consultation with the House Director, responsible for the kitchen and dining room supervision of the Busser staff.

### **Appendix 1: Minimum Performance Requirements**

11. Responsible for preparation of an occasional meal or dessert as necessary for special events. Cook shall be given one week's advance notice if possible by the House Director or Chapter President. Must keep track of any expenses related to the special event and turn this information in to the House Director.
12. The chapter members may request your cooking for their own events, for which they would arrange payment. This must be submitted to the House Director and approved by Greek Housing Management, LLC. Must keep track of any expenses related to the special event and turn this information in to the House Director.
13. Responsible for contacting the House Director when repairs of kitchen items or equipment are needed. Cook or House Director will oversee repairmen when they are in the kitchen.

### **ADDITIONAL RESPONSIBILITIES**

The following three items should be discussed with the House Director each fall and spring as the duties are shared by the House Director and Cook.

1. While the Kitchen Assistants are hired by the House Director, they should be supervised while in the kitchen and dining room areas by the Cook. The House Director will supervise them if the Cook is not present. The House Director will verify the hours and days worked by each of the Kitchen Assistants and forward that information to the Chapter of Sigma Alpha Epsilon on a bi-weekly basis.
2. Ordering of paper products and cleaning supplies can be decided by either the House Director or Cook.
3. It is the duty of both the House Director and Cook to maintain costs within the allotted budget. The Greek Housing Management, LLC will periodically consult with the House Director and Cook regarding the budget.

## Appendix 1: Minimum Performance Requirements

### 10.3 Minimum Performance Requirements for Janitorial Services



#### Minimum Performance Requirements for Janitorial Services

The following janitorial services shall be performed not less than two (2) times per week:

1. Sweep and mop all tile floors and vacuum all carpet floors throughout the common areas of the Premises, including bathrooms, kitchen, dining room, hallways, stairs, entry foyer and Study Room.
2. Sweep front and rear porch.
3. Pick-up and dispose of trash and debris around entire Premises (interior and exterior).
4. Empty trash cans to dumpster and replace trash bag liners.
5. Clean bathrooms, including sinks, toilets and shower stalls with appropriate cleaning agents.
6. Clean kitchen and dining areas, including countertops, dining tables, serving tables, appliances, etc. with appropriate cleaning agents.
7. Re-stock paper products in bathrooms and kitchen.
8. Replace light bulbs.
9. Dust furniture, window blinds, pictures, award plaques, etc. throughout Premises, including Study Room.
10. Assist House Director with keeping inventory of janitorial supplies and ordering additional supplies as needed.
11. Assist House Director by reporting any damage to the Premises.

Additionally:

12. Once a month, clean windows (interior and exterior) of Study Room and entry door side lights, and dining/recreation room.
13. As needed, spot treat stains in carpet with appropriate cleaning agents tested for colorfastness.
14. As needed, spot treat stains in furniture fabrics with appropriate cleaning agents tested for colorfastness.
15. As needed, clean and buff tile floor in dining/recreation room.

**Tenant shall be responsible for the above cleaning of the Premises after every social function; it shall not be the responsibility of any third party janitor or janitorial service to service the Premises after Tenant social functions unless paid by Tenant.**

## Appendix 1: Minimum Performance Requirements

### **10.4 Minimum Performance Requirements for House Manager**



While the responsibilities of this officer may vary from chapter to chapter, the House Director and the House Manager have many similar duties. It is important to clarify who does what early in the school year to avoid misunderstandings and duplication of efforts. In terms of responsibilities, generally the House Manager:

1. Makes small repairs
2. Coordinates room assignments and creates room chart
3. Distributes keys/door codes
4. Assigns parking spaces
5. Organizes house duties
6. Assigns phone and door duty
7. Designs the master calendar in conjunction with the House Director
8. Communicates regularly with the House Director
9. Reports at house meetings
10. Creates master phone list and assigns mail boxes (if applicable)
11. Maintains files
12. Is responsible for household inventory
13. Coordinates fire drills and inspections with the House Director and chapter members
14. Checks house security
15. Supervises room inspections with the House Director
16. Directs special house cleaning efforts (e.g. before and after recruitment)
17. Distributes and collects housing contracts in coordination with the House Director
18. Devises and distributes house rules when necessary
19. Leads workshop for new members on house policies
20. Helps with planning the budget

Regularly scheduled (weekly) meetings between the House Director and House Manager are an excellent way to insure the house is managed well. The House Director is wise to establish and/or revise expectations of the House Manager each year, taking into consideration the skills of the person in the position at the time.

## Appendix 2: Master Lease

### 11 Appendix 2: Leases

#### 11.1 Master Lease

Note: The content of the following lease is for information purposes. This Lease is a F&H Template, and is NOT the actual Lease document that the chapter signed with F&H.

[Chapter Name] Housing, LLC

*a subsidiary of SAE Financial & Housing Corporation*

1856 Sheridan Road  
Evanston, IL 60201  
800-233-1856 (Main)  
847-475-2250 (Fax)

LEASE AGREEMENT

by and between

[CHAPTER NAME] HOUSING, LLC

("Landlord")

and

[CHAPTER NAME] CHAPTER OF  
SIGMA ALPHA EPSILON FRATERNITY

("Tenant")

dated as of

[Date]



**Appendix 2: Master Lease**

LEASE AGREEMENT

**THIS LEASE AGREEMENT** (“Lease”) is made and entered into as of the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_, by and between Landlord and Tenant.

**W I T N E S S E T H:**

**Certain Definitions.** The following terms are defined for purposes of this Lease:

**Landlord:** [Chapter Name] Housing, LLC, an Illinois limited liability company. The term “Landlord” shall include Landlord and its successors, assigns, and successors-in-title.

**Landlord’s Address:**

c/o SAE Financial and Housing Corporation

1856 Sheridan Road

Evanston, IL 60201

Attn: Executive Director

**Tenant:** [Chapter Name] Chapter of Sigma Alpha Epsilon Fraternity [Check Corporate Status], a \_\_\_\_\_ nonprofit corporation]. The term “Tenant” shall include Tenant and its heirs, legal representatives and successors, and also shall include Tenant’s approved assignees and sublessees, as applicable.

**Tenant’s Address:**

\_\_\_\_\_

\_\_\_\_\_

Attn: Eminent Archon & House Manager

**Premises:** The real property, improvements, and certain personal property located at [Full Address], and which historically has been known as the “Sigma Alpha Epsilon Fraternity House.”

**Lease Term:** Thirty Six (36) months.

**Commencement Date:** 12 midnight on \_\_\_\_\_, 20\_\_\_\_.

**Termination Date:** 12 midnight on \_\_\_\_\_, 20\_\_\_\_.

## **Appendix 2: Master Lease**

Rent: For each Rental Period set forth on Exhibit "A", an amount equal to: (a) "Rent" for the applicable Rental Period as all such rental amounts and due dates are set forth on the same Exhibit "A"; and (b) the "Parlor Fee" for each non-resident member of the Tenant as all such parlor fee amounts and due dates are set forth on the same Exhibit "A".

**Lease of Premises.** Landlord, in consideration of the covenants and agreements to be performed by Tenant, and upon the terms and conditions of this Lease, leases to Tenant, and Tenant leases from Landlord, the Premises, which primarily consists of a dormitory style building. The Premises also includes all land, buildings, parking facilities, walkways, common areas, landscaping, and any other improvements on the property, as well as a license to use Landlord's personal property associated with and remaining on the Premises for Tenant's use ("Landlord's Property"). Tenant accepts the Premises "AS IS, WHERE IS, WITH ALL FAULTS."

**Term.** Subject to the other terms of this Lease, the Lease Term commences on the Commencement Date and shall end on the Termination Date.

**Possession.** For so long as Tenant timely pays the Rent and complies with and performs all obligations and covenants required by it under this Lease, Tenant shall have the right to hold and occupy the Premises for the Lease Term. Tenant agrees that it will occupy the Premises solely for boarding house purposes and for activities reasonably related to Tenant's fraternity operations. Landlord and Tenant agree that at all times Landlord and Landlord's representatives, agents, assignees, and designees shall retain the right to access the Premises for any purpose whatsoever, including maintenance, making improvements, and inspection. [ADD IF APPLICABLE: Additionally, Landlord and Tenant agree that the [Chapter Name] Alumni Association, Inc. ("Alumni Association"), may use the Premises, including the [Name Common Areas], kitchen, and all exterior portions of the Premises, for special events and alumni meetings at such reasonable times as Landlord may determine in its sole discretion with reasonable advance notice to Tenant; accordingly, Tenant's possession of the Premises is subject to the aforementioned reservation of rights and license to use the Premises and Landlord's Property by the designated third parties.]

### **Rental Payments.**

Beginning before the Commencement Date and continuing throughout the Lease Term, Tenant agrees to pay the Rent due and payable under this Lease. The Rent shall be due and payable on those due dates and in the installment amounts as shown on the attached Exhibit "A" and as set forth in Paragraph 1(i).

Tenant may make rental payments in excess of the amount due at any installment date, and such advance payment shall be credited towards the next installment amount due.

Rent installment payments which are more than ten (10) days past due shall incur a late fee of five percent (5%) of the total installment amount then outstanding, provided, however, that Landlord agrees to accept any such past due amounts.

(d) Payments made by Tenant to Landlord pursuant to this Lease, shall be applied as follows and in the following order and notwithstanding any Tenant correspondence or notation regarding the same: (i) towards any attorneys fees and collection costs incurred by Landlord to compel Tenant's compliance with the terms of this Lease; (ii) towards any fines levied by Landlord pursuant to Paragraph 24(c) below; (iii) towards costs incurred by Landlord to repair any damages to the Premises caused by Tenant pursuant to Paragraph 8(g) below or to pay for any other cost expressly assigned to Tenant pursuant to the terms of this Lease; (iv) towards any late fees payable to Landlord pursuant to subsection (c) above; and, (v) towards the payment of Rent.

(e) For the purposes of Paragraphs 7(e) and 7(f) of this Lease (i.e., property taxes and property insurance), Landlord and Tenant have determined the Rent on the assumption that each such expense may increase by no more than 3% in each successive period that the tax or expense is regularly assessed. In

## **Appendix 2: Master Lease**

the event the applicable expense increases by more than 3% in each successive period, Tenant (and not Landlord) shall be responsible for the additional charges incurred by Landlord on account of said expenses, and Tenant agrees to pay all such amounts to Landlord within thirty (30) days of written notice by Landlord, which notice shall include supporting evidence of the expense in question.

**Tenant's Financial Covenants.** As a material consideration for Landlord executing this Lease with Tenant and to ensure Tenant's compliance with the Lease terms, including but not limited to all financial obligations arising under this Lease, Tenant agrees to the following terms and conditions:

Tenant agrees to pledge and, as needed, pay over to Landlord, all monies maintained by Tenant in any bank account whatsoever held in Tenant's name and/or as managed on Tenant's behalf by Manager, including but not limited to its Membership Deposits (as defined below) and any security deposits collected by Tenant pursuant to its Subleases (defined below), as well as all of Tenant's other assets whatsoever, including but not limited to personal property and intangible rights, whether or not located on the Premises. Upon request of Landlord, Tenant agrees to execute such additional security instruments as may be reasonably requested by Landlord and necessary to evidence the foregoing terms.

Tenant shall require each and every one of its members and neophytes (i.e., persons who have completed the tenant's pledge program but who have not yet been initiated into the fraternity), to maintain with Tenant at all times and on account of their financial obligations to Tenant, a "Membership Deposit" which amount per member and neophyte shall be no less than \$450.00 per person. The Membership Deposit program shall be administered by Manager on behalf of Tenant and upon such terms and conditions reasonably approved by Landlord. Tenant agrees that at all times it shall remain responsible and liable to any member, neophyte or pledge member for the Membership Deposit paid by such person in accordance with the terms of the Membership Agreement (defined below).

Tenant shall require each and every one of its members, neophytes and, as applicable, pledge members (i.e., persons who have been accepted into tenant's pledge program but who have not yet completed the same) to sublease rooms in the Premises as required to fully occupy the Premises and for so long as they remain enrolled in the host university; provided, however, the foregoing occupancy requirement shall not apply to a person (i) who is studying abroad under a university-recognized academic program, (ii) who is working full-time at an internship as part of a university sponsored "co-op" program (by whatever name), (iii) who is prohibited by the host university from living in the Premises, (iv) who is otherwise unable to occupy a room due to a documented medical disability that would make such occupancy unreasonable under the circumstances and for which Landlord is unable or unwilling to make an accommodation (for example only, no wheel chair access to the applicable dorm rooms), or (v) upon request of Tenant, who Landlord has agreed in its sole discretion may be exempt from this occupancy requirement.

At a minimum, Tenant shall require each and every one of its members, neophytes and pledge members to participate in Tenant's meal program, as follows: (i) members, neophytes and pledge members who reside in the Premise's dorm rooms shall be required to pay and participate in the Tenant's "full meal plan", which provides breakfast, lunch and dinner at least five (5) days per week; and, (ii) members, neophytes and pledge members who do not reside in the Premise's dorm rooms shall be required to pay and participate in either Tenant's "full meal plan" (described above) or its "half meal plan", which provides an option of either lunch or dinner at least five (5) days per week. However, the foregoing meal plan obligation shall not apply to a person (i) who is studying abroad under a university-recognized academic program, (ii) who is working full-time at an internship as part of a university sponsored "co-op" program (by whatever name), (iii) who is required by the host university to pay and participate in a similar "full meal plan" offered by the host university, (iv) who has food allergies or a medical disability that would make such meal plan participation unreasonable under the circumstances and for which Tenant is unable or unwilling to make an accommodation, or (v) upon request of Tenant, who Landlord has agreed in its sole discretion may be exempt from this meal plan requirement. Additionally, pledge

## Appendix 2: Master Lease

members shall not be required to participate in the Tenant's meal program in the same academic quarter or semester (as applicable) during which they pledge Tenant's fraternity chapter, provided that they do not reside in the Premises.

Immediately upon execution of this Lease and, thereafter, as new members, neophytes and pledge members are obtained, Tenant shall require that each and every one of its members, neophytes and pledge members execute and maintain on file with Manager a "Membership Agreement" in the form promulgated by Manager from time to time, and as reasonably approved by Landlord. Pursuant to the terms of the Membership Agreement, Tenant's members, neophytes and pledge members shall covenant and agree with Tenant as follows: (i) acknowledgment and receipt of this Lease, the Account Management Agreement and all such related documents and their agreement to comply with the same; (ii) to pay and maintain the Membership Deposit with Tenant; (iii) to sublease dorm rooms from Tenant as needed to fully occupy the Premises; (iv) to pay and participate in Tenant's meal program, as applicable; (v) to abide by the Rules as defined in this Lease; (vi) agree that their Membership Deposit may be applied by Tenant, in its sole discretion, to remedy any default or other violation or requirement of this Lease and that said Membership Deposit has been pledged by the Tenant to Landlord on account of its obligations under this Lease; (vii) that Landlord and Manager shall be deemed third party beneficiaries of the covenants set forth in the Membership Agreement; and, (viii) such other terms, conditions and agreements requested or provided by Tenant and Manager and reasonably approved by Landlord.

**Landlord Expenses.** Landlord shall be responsible solely for and shall pay when due the following expenses associated with the Premises:

All principal and interest payments on any mortgage encumbering or loan secured by the Premises;

Expenses for routine maintenance and repairs (but not cleaning) necessary to keep the Premises and Landlord's Property in good repair, including expenses for "normal wear and tear" repairs and routine maintenance and repairs to all utility systems, but excluding maintenance and repair expenses resulting from Tenant's misuse or neglect of the Premises;

Expenses for maintenance of all landscaping and the exterior portions of the Premises including lawn care and snow removal, but excluding such expenses resulting from Tenant's misuse or neglect of the Premises;

All utility and operational expenses including, for example, electricity, gas, water and sewer, cable television, telephone services, computer fiber optic network access, trash removal, fire alarm monitoring service (including a dedicated phone line for the alarm system), etc., but excluding such expenses resulting from Tenant's misuse or neglect of the Premises, Tenant's excessive or unreasonable consumption of such utilities, or any utility or operational expenses not expressly authorized by Landlord;

All real property taxes, assessments, and related municipal taxes and fees imposed on Landlord by virtue of its ownership of the Premises;

Commercial property and casualty insurance insuring the full replacement cost of the Premises and Landlord's Property with an insurance provider selected by Landlord. Such insurance also shall include a loss of rents or business interruption policy. Landlord shall be named as sole insured under all such insurance policies. Tenant shall be responsible for insuring its own personal property in the Premises at its own cost and expense;

Expenses for maintaining in good working order the existing fire alarm system (and all components thereof) and all other existing fire protection and fire prevention equipment and system in the Premises, including but not limited to all annual renewal of fire extinguishers and re-charging of fire extinguishers, annual inspection of the fire sprinkler system, etc.; and

## Appendix 2: Master Lease

Expenses and repairs caused by Landlord's gross negligence or intentional acts or omissions, and the gross negligence or intentional acts or omissions of its directors, officers, employees, agents, invitees, and licensees.

**Tenant Expenses.** Tenant shall be solely responsible for and shall pay when due the following:

Commercial general liability insurance written on an occurrence basis and insuring Tenant and Landlord against any and all liability for injury to or death of a person or persons and for damage to property occasioned by or arising out of the condition, use or occupancy of the Premises, or in any way occasioned by or arising out of the activities of Tenant, its agents, contractors, employees, occupants, members, guests, invitees, or licensees. The limits of such policy or policies shall be in combined single limits for both damage to property and personal injury and in amounts not less than \$1,000,000.00 for each occurrence. In addition, such insurance shall extend to any liability of Tenant arising out of any indemnities provided for in this Lease. All insurance policies procured and maintained by Tenant pursuant to this provision shall name Landlord, Tenant and any additional parties designated by Landlord as additional insured. Upon request, Tenant shall provide Landlord, at Tenant's cost, with evidence that such policies are in full force and effect and all policy payments are current. In the event that Tenant is more than thirty (30) days late in making policy payments, Landlord, in its sole discretion, may (i) pay such overdue premiums and invoice Tenant for the amount so paid, and/or (ii) assess Tenant a late fee (in addition to any late charges assessed by the insurance provider) equal to ten percent (10%) of the outstanding amount due;

Workmen's compensation insurance (applicable if Tenant has any employees, such as House Director, janitor, cook, etc.). Upon request, Tenant shall provide Landlord, at Tenant's cost, with evidence that such policies are in full force and effect and all policy payments are current. In the event that Tenant is more than thirty (30) days late in making policy payments, Landlord, in its sole discretion, may (i) pay such overdue premiums and invoice Tenant for the amount so paid, and/or (ii) assess Tenant a late fee (in addition to any late charges assessed by the insurance provider) equal to ten percent (10%) of the outstanding amount due;

Expenses for keeping the Premises and Landlord's Property continuously clean and in good order, including expenses of a janitor or janitorial service as described and required by this Lease;

Expenses of the House Director as described and required by this Lease;

Expenses of the Manager as described and required by this Lease;

Expenses associated with operating the kitchen and providing food service, including all expenses associated with hiring a cook and related personnel and related service providers, and obtaining and maintaining kitchen equipment and supplies, for so long as Tenant elects to provide food service (including specifically semi-annual cleaning all kitchen and cooktop ventilation equipment and monthly cleaning of any grease traps);

Expenses for maintenance and repairs to the Premises and Landlord's Property arising from Tenant's, its members, occupants, guests, invitees, and licensees, misuse of the Premises and for maintenance expenses not attributable to "normal wear and tear," including specifically, but not limited to, any vandalism damages caused by any party whomsoever; and

All other expenses not specifically attributed to Landlord under the terms of this Lease.

**Rules.** The Premises shall be used in accordance with, and Tenant, its members, occupants, agents, guests, invitees, and licensees, shall comply with all applicable laws, ordinances and rules and regulations (as may be amended from time to time) of the following ("Rules"): (i) the United States of America, the county, city and state in which the Premises is located, and other applicable governmental authorities; (ii)

## **Appendix 2: Master Lease**

the host university in which Tenant's members are enrolled; (iii) the Sigma Alpha Epsilon Fraternity ("Fraternity") of which Tenant is a chapter or colony (including all risk management policies of the Fraternity); (iv) the Tenant's Bylaws which are attached as Exhibit "F" and the rules for members established by Tenant pursuant to said Bylaws; (v) any insurance carrier insuring Landlord or Tenant under any applicable insurance policy; and (vi) the Special Stipulations attached as Exhibit "B".

**Alterations.** Tenant shall not make, suffer or permit to be made any alterations, additions or improvements to or of the Premises or any part thereof of any nature whatsoever (including but not limited to moving or removing Landlord's Property), or attach or add any additional fixtures, furniture or equipment thereto, without first obtaining Landlord's written consent. Landlord may condition its consent on certain terms to be complied with by Tenant at Tenant's sole expense in conjunction with such alteration, addition, or improvement. All such alterations, additions and improvements shall become Landlord's property at the expiration or earlier termination of the Lease Term and shall remain on the Premises without compensation to Tenant; provided, however, Landlord may elect by notice to Tenant at the time of Landlord's consent to have Tenant remove such improvements at the end of the Lease Term. In the event that Tenant may and does remove such improvements, Tenant shall promptly restore, at its sole cost and expense, the Premises to its condition prior to the installation of such alterations, additions and improvements. Landlord reserves the right from time to time to make various alterations and improvements to the Premises in its sole discretion. [ADD IF APPLICABLE: From time to time, the Alumni Association may loan personal property to the Chapter or otherwise have such personal property displayed within the Premises; in such event, Tenant agrees to maintain and protect all such personal property as if such property was part of Landlord's Property.]

**Janitorial Services.** Tenant agrees to employ, at Tenant's cost and expense in the amount actually incurred, and with the approval of Landlord, a janitor or comparable janitorial service to assist Tenant in maintaining the cleanliness, good order, and good repair of the Premises and Landlord's Property. The minimum performance requirements for the janitor or comparable janitorial service, including days of service per week, are attached as Exhibit "C"; however, Tenant shall be responsible for all cleaning of the Premises and Landlord's Property not performed by the janitor or janitorial service as reasonably necessary to maintain the cleanliness and good order of the Premises and Landlord's Property (including but not limited to the prompt washing of dishes and silverware in connection with any use of the kitchen and cleaning the Premises immediately after any social event). Tenant shall ensure that the janitor or janitorial service performs the minimum performance requirements set forth on Exhibit "C". If, in Landlord's sole opinion, the frequency of cleaning prescribed by Exhibit "C" is insufficient to maintain the cleanliness, good order and good repair of the Premises based on actual use by Tenant, then Landlord may require Tenant to increase such frequency of cleaning and/or the scope of such work at Tenant's expense. Additionally, at any time and for any reason, Landlord may withdraw its consent of the janitor or janitorial service employed by Tenant pursuant to this Paragraph and require Tenant to employ an alternate janitor or janitorial service acceptable to Landlord.

**House Director.** Tenant agrees to cause and reasonable cooperate with Manager (defined below) to employ, as Tenant's employee and at Tenant's cost and expense, an on-site, live-in House Director, which individual shall be hired and employed in accordance with the Manager's Account Management Agreement, attached as Exhibit "E" and approved by Landlord. The House Director shall reside on the Premises in the room or suite designated by Landlord for such purposes; provided, however, no Rent shall be due and payable to Landlord (or to Tenant) on account of the House Director's occupancy in the Premises.

**Management Assistance.** As a material consideration for Landlord executing this Lease with Tenant and to ensure Tenant's compliance with the Lease terms (including but not limited to all financial obligations arising under this Lease), Tenant has agreed to employ Greek Housing Management, LLC, an Illinois

## **Appendix 2: Master Lease**

limited liability company (“Manager”) to assist Tenant with the financial and all other management responsibilities described in this Lease, including but not limited to the requirements outlined in Paragraph 8 above. Accordingly, and as a mandatory requirement of this Lease, Tenant agrees to employ, at its sole cost and expense, the Manager at all times during the Lease Term, and Tenant agrees to execute simultaneously upon execution of this Lease the Manager’s Account Management Agreement, attached as Exhibit “E” and approved by Landlord (as the same may be amended from time to time with Landlord’s consent). In the event Manager ceases to do business or otherwise ceases to provide such management services to Tenant, Tenant agrees to employ a comparable management company providing identical management services as approved in advance and in writing by Landlord.

**Service Contracts and Vendors.** Landlord agrees to work with the Manager to maintain, at Landlord’s expense, an annual maintenance and service contract with (a) an HVAC contractor for the purpose of maintaining the good working order of all HVAC equipment, including regular inspection and filter service, and (b) a fire alarm and fire sprinkler contractor (as applicable) for the purpose of maintaining the good working order of all fire safety systems (including fire alarms, fire extinguishers, and fire sprinkler systems), including annual inspection of the same. Without Landlord’s written consent, all work to be performed by Tenant pursuant to this Lease shall be performed only by Landlord-approved service contractors and vendors, a list of which is maintained by Manager, as such approved vendor list may be amended from time to time by Landlord in its sole discretion and upon written notice to Tenant and Manager.

### **Surrender of Premises.**

Upon the expiration or other termination of this Lease, Tenant shall quit and surrender to Landlord the Premises and every part thereof (including Landlord’s Property) and all alterations, additions and improvements thereto, as approved by Landlord, broom clean and in good condition and state of repair, reasonable wear and tear only excepted. Moreover, Tenant shall remove all personal property, equipment, and all alterations, additions and improvements not accepted by Landlord, which it has placed upon the Premises, and Tenant shall repair any damage resulting therefrom. If Tenant fails to repair any damage to the Premises or fails to surrender the Premises broom clean and in good condition and state of repair (less reasonable wear and tear), then Landlord, in addition to any other remedy set forth in this Lease, may cause such damages to be repaired and the Premises to be so cleaned and, upon demand, Tenant immediately shall reimburse Landlord for all costs and expenses incurred by Landlord to remedy the same.

If Tenant remains in possession after expiration or termination of the Lease Term with or without Landlord’s written consent, then Tenant shall become a tenant at sufferance, and there shall be no renewal of this Lease by operation of law. During the period of any such holding over, all provisions of this Lease shall be and remain in effect. The monthly rent for any holdover period shall be the Rent due for the prior 12 month period plus 50%, divided by 12 months; and, the monthly rent due during any holdover period shall be fully earned and due on the first day of each month encompassing the holdover period and shall not be prorated for any partial month of occupancy.

The terms of this Paragraph expressly shall survive the termination of this Lease and the expiration of the Lease Term.

**Keys.** Tenant shall be responsible for all keys (which term shall include, as applicable, key cards and other means of entry) to the Premises, including the cost of replacing any missing keys, repairing any broken locks, and re-keying any or all locks in the event that an excessive number of keys remain unaccounted for and as may be required by Landlord in its sole discretion. No locks shall be added, removed or modified without Landlord’s advance written consent. Additionally, and subject to Landlord’s approval, Tenant shall establish and administer in coordination with the Manager a formal key

## **Appendix 2: Master Lease**

control system so that all keys to Premises (exterior and interior doors) are accounted for at the beginning and end of each collegiate semester, all missing keys are promptly replaced pursuant to this Paragraph (or locks are re-keyed as appropriate), and any and all broken locks are timely repaired. Tenant acknowledges that the keys for the Premises may only be duplicated by the manufacturer of the locks; accordingly, Tenant shall coordinate with Landlord on the replacement of any missing keys.

### **Destruction.**

If the Premises are damaged by fire or other casualty, the same shall be repaired or rebuilt as speedily as practical under the circumstances under the supervision of Landlord, unless this Lease is terminated as provided in this Article. Except as may be otherwise provided, Landlord is not required to rebuild the Premises.

If the Premises are (i) destroyed as a result of a risk which is not insured under the insurance policies required hereunder, or (ii) destroyed during the last three (3) months of the Lease Term, or (iii) damaged in whole or in part to such an extent that the Premises cannot, in Landlord's reasonable judgment, be operated economically as an integral unit, then and in any such event, Landlord may at its option terminate this Lease by notice in writing to Tenant within thirty (30) days after the day of such occurrence and Landlord shall retain all proceeds payable under all insurance policies for which Landlord is a named insured or beneficiary and which concern the Premises and Landlord's Property, such payments being the property of Landlord without any participation by Tenant.

If Landlord should elect pursuant to this Article to repair or rebuild because of any damage or destruction, Landlord's obligation to repair or rebuild shall be limited to the original condition of the Premises and shall not include any alterations or improvements made by Tenant. Landlord shall retain all proceeds payable under all insurance policies for which Landlord is a named insured or beneficiary and which concern the Premises and Landlord's Property, such payments being the property of Landlord without any participation by Tenant.

In no event shall Landlord be liable to Tenant or any other party for any consequential damages (i.e., damages, losses or injuries which are a result of an act but are not direct and immediate) arising under or in connection with this Lease or the use and occupancy of the Premises. In no event shall Landlord be liable to Tenant, its members, occupants, guest, invitees, and licensees for any property damage resulting from fire or other casualty to the Premises. The terms of this subsection expressly shall survive termination of this Lease.

In the event Tenant is dispossessed from the Premises, and if Landlord does not exercise any right it may have to terminate the Lease, then Landlord shall, with all due diligence, repair and rebuild the damage done to the Premises to the condition which existed prior to the casualty. In the event that Tenant may occupy or re-occupy a portion of the Premises during the described repair and re-construction period, and in the event that any loss of rents or business interruption insurance benefits are accordingly reduced thereby, Tenant shall be liable for the difference of the Rent and all such insurance proceeds. At all times, Tenant shall be responsible and liable for the Rent due hereunder.

The terms of this Paragraph shall survive any termination of this Lease.

### **Eminent Domain.**

If all or part of the Premises shall be taken for any public or quasi-public use by virtue of the exercise of the power of eminent domain or by private purchase in lieu thereof, and if title to so much of the Premises is taken that a reasonable amount of reconstruction thereof will not in Landlord's reasonable discretion result in the Premises being suitable for use for the purpose for which it is designed, then this Lease shall terminate on the date that the condemning authority actually takes possession of the part so condemned or purchased.



## **Appendix 2: Master Lease**

If this Lease is terminated under the provisions of this Article, Rent shall be apportioned and adjusted as of the date of termination.

If there is a partial taking of the Premises and this Lease is not thereupon terminated under the provisions of this Article, then this Lease shall remain in full force and effect, and Landlord shall, within a reasonable time thereafter, repair or reconstruct the remaining portion of the Premises to the extent necessary to make the same a complete architectural unit.

All compensation awarded or paid to Landlord upon a total or partial taking of the Premises shall belong to and be the property of Landlord without any participation by Tenant.

The terms of this Paragraph shall survive any termination of this Lease.

**Damage or Theft of Personal Property.** All personal property brought into the Premises or improvements and alterations made by Tenant (whether or not approved by Landlord), and by Tenant's members, occupants, employees, agents, guests, licensees, or invitees, shall be at the risk of Tenant only, and unless due to Landlord's gross negligence or willful misconduct, Landlord shall not be liable for theft thereof or any damage or loss of any kind whatsoever. Unless due to Landlord's gross negligence, Landlord shall not at any time be liable for damage to any property in or upon the Premises, which results from fire, gas, smoke, water, rain, ice, snow, wind, or leaks from any part of the Premises or from the pipes or plumbing work, or from any other place whatsoever. In the event of any insurance claim that can be made against one or more of the insurance policies of Landlord, Tenant, and Tenant's members and occupants, the insurance policies of Tenant and Tenant's members and occupants shall be primary with respect to any sickness, accident, injury or death, or for loss or damage to any property, or for any other legal liabilities which might be imposed for damage to persons or property. The terms of this Paragraph shall survive any termination of this Lease.

### **Liability of Tenant and Landlord.**

Tenant shall indemnify, defend and hold harmless Landlord (including Landlord's members, directors, officers, employees, agents and invitees) from any and against any and all liability, claims, suits, actions, losses, damages, penalties, costs and expenses (including, without limitation, reasonable attorneys' fees and court costs) for any damage or injury to any person (including death resulting therefrom) or property occurring in, on, or about the Premises arising from or caused by any person whomsoever except to the extent caused by the gross negligence or willful misconduct of Landlord and its members, directors, officers, employees, agents, and invitees, and Tenant hereby releases Landlord from any and all liability for the same.

Landlord shall indemnify, defend and hold harmless Tenant from any and against any and all liability, claims, suits, actions, losses, damages, penalties, costs and expenses (including, without limitation, reasonable attorneys' fees and court costs) for any damage or injury to any person (including death resulting therefrom) or to the Premises to the extent caused by the gross negligence or willful misconduct of Landlord or of any member, director, officer, employee, agent or invitee under the direction or control of Landlord.

Notwithstanding anything to the contrary contained in this Lease, Landlord and Tenant shall not be liable and hereby release one another with respect to and waive all rights to consequential damages arising in connection with or pursuant to this Lease and the use, management and occupancy of the Premises.

The provisions of this Paragraph shall survive any termination of this Lease.

**Tenant's Estoppel and Subordination.** Tenant shall, from time to time, upon not less than ten (10) days prior written request by Landlord, execute, acknowledge and deliver to Landlord a written statement certifying (to the extent true and correct) that this Lease is unmodified and in full force and effect (or, if

## **Appendix 2: Master Lease**

there have been modifications, that the same is in full force and effect as modified and stating the modifications), the dates to which the Rent and other charges have been paid, that Tenant is not in default hereunder and has no off sets or defenses against Landlord under this Lease, and whether or not, to the best of Tenant's knowledge, Landlord is in default hereunder (and, if so, specifying the nature of the default). The parties intend that any such statement delivered pursuant to this Paragraph may be relied upon by a prospective purchaser of Landlord's interest or by a mortgagee of Landlord's interest or assignee of any security deed upon Landlord's interest in the Premises. Failure to timely provide the above described tenant estoppel certificate shall be deemed a default.

**Mortgagee Rights.** This Lease is and shall be automatically subject and subordinate to any mortgage encumbering the Premises and to any and all advances to be made thereunder and to all renewals, modifications and extensions thereof. It is the intention of Landlord and Tenant that the foregoing subordination shall be self-operating without any further agreement of Tenant. In the event any mortgagee exercises the power of sale or accepts a deed in lieu of foreclosure under any mortgage, Tenant agrees, in consideration for the subordination of this Lease set forth above, to attorn to and recognize the purchaser, at such sale, as landlord under this Lease. In the event the mortgagee requires confirmation of the agreements contemplated in this Paragraph, Tenant agrees, on or before seven (7) days after request, to execute and deliver to Landlord such instrument as the mortgagee may reasonably require. In the event Tenant fails to do so, Landlord is hereby irrevocably vested with full power and authority to confirm the subordination of Tenant's interest under this Lease to the mortgagee.

### **Subleasing.**

This Lease may not be assigned nor the Premises sublet in whole by Tenant without the prior written consent of Landlord. However, Tenant shall be entitled to sublease dormitory rooms of the Premises to any of its undergraduate fraternity chapter members, neophytes and pledge members or other host university undergraduate students, provided that such sublessee shall assume and agree to accept, by written instrument, in a form reasonably satisfactory to Landlord, the performance of all of Tenant's obligations under this Lease, and provided that Landlord approves each sublessee and sublease. The form of sublease approved by Landlord for the foregoing purposes is attached as Exhibit "D" (the "Sublease"), which may not be modified without Landlord's consent. A copy of all such executed Subleases shall be provided to Landlord at least thirty (30) days prior to the effective date of such subletting for Landlord's review and approval. Except for the House Director and sublessees approved by Landlord, no other person or party may occupy any portion of the Premises. In its sole discretion, Landlord reserves the right to require future amendments to the form Sublease used in connection with this Lease.

Tenant agrees that should Landlord's interest in the Premises cease to exist for any reason during the Lease Term, then notwithstanding the happening of such event, this Lease and all approved Subleases nevertheless shall remain in full force and effect.

### **Default.**

The following events shall be deemed to be events of default by Tenant under this Lease: (i) Tenant shall fail to pay any installment of Rent or any other charge or assessment against Tenant pursuant to the terms hereof which remains uncured for a period of seven (7) days after written notice from Landlord; or (ii) Tenant shall fail to comply with any material term, provision, covenant or warranty made under this Lease by Tenant, including compliance with the Rules, which remains uncured for a period of seven (7) days after written demand by the Landlord specifying the nature of the breach (or such longer period as reasonably may be required if such breach cannot be cured within seven (7) days, so long as Tenant commences such cure within the initial seven (7) day period and does thereafter diligently prosecute such cure to completion); or, (iii) in Landlord's reasonable opinion, Tenant shall be disciplined by the Fraternity or host university in such a manner so as to substantially impair Tenant's ability to fully

## Appendix 2: Master Lease

perform under the terms of this Lease, including but not limited to suspension or loss of its Fraternity charter.

Upon the occurrence of any of the above events of default, Landlord shall have the option to pursue any remedy which may be available to Landlord by law or under this Lease, including but not limited to termination of the Lease and eviction of Tenant.

In addition to or in lieu of any other remedy available to Landlord under this Lease or by law, and without regard to any notice and cure period, Landlord may fine Tenant \$250.00 for each violation of the Rules and such fines shall be deemed part of the Rent. Each occurrence of a Rules violation and/or multiple Rules violations that occur as part of the same incident may be fined separately by Landlord and shall not be deemed a single violation for the purposes of this Lease.

No waiver of any breach of the covenants, warranties, agreements, provisions, or conditions contained in this Lease shall be construed as a waiver of said covenant, warranty, provision, agreement or condition or of any subsequent breach thereof. If any breach shall occur and afterwards be compromised, settled or adjusted, this Lease shall continue in full force and effect as if no breach had occurred.

If Landlord uses the services of attorneys in order to secure compliance with any provision of this Lease, to recover damages for any breach or default of any provision of this Lease, or to terminate this Lease, Landlord shall be reimbursed by Tenant upon demand for any and all reasonable attorneys' fees and expenses so incurred by Landlord. Tenant waives all homestead rights and exemptions which it may have under any law as against any obligation owing under this Lease, and assigns to Landlord its homestead and exemptions to the extent necessary to secure payment and performance of its covenants and agreements hereunder.

**Arbitration.** The parties agree to negotiate between themselves any controversy or claim arising out of or relating to this Lease, or the breach thereof, for a period of fourteen (14) days after the dispute is first documented in writing by one party to the other and written demand for negotiation is first made. Thereafter, if not resolved by negotiation, the parties agree that any such controversy or claim arising out of or relating to this Lease, or the breach thereof, shall be settled by arbitration by a single arbitrator mutually selected by the parties in accordance with the American Arbitration Association's Commercial Arbitration Rules (including the Optional Rules for Emergency Measures of Protection), and judgment on the award may be entered in any court having jurisdiction thereof; provided, however, it is not the intent of the parties to arbitrate with the American Arbitration Association unless mutually agreed by the parties. The scheduled hearing shall be held at a location in Evanston, Illinois designated by the arbitrator (or, if the parties mutually agree, in the state in which the Premises is located). The arbitrator shall be a qualified, impartial person, who is a licensed attorney, and said arbitrator shall have had at least ten (10) years of experience immediately prior to the date of the demand with active involvement or experience in fraternity or sorority housing and/or student housing. The arbitrator shall render his/her decision and award within sixty (60) days of referral. Such decision and award shall be final, binding and conclusive on the parties and counterpart copies of the same shall be delivered to each of the parties. In rendering such a decision and award, the arbitrator shall not add to, subtract from or otherwise modify the provisions of this Lease. Any arbitration conducted pursuant to this Lease may include by consolidation or joinder and upon demand of the Landlord and Tenant, any person or entity not a party to this Lease, if such person or entity is involved in a common question of law or fact or the presence of such person is required in order for complete relief to be accorded in the arbitration, and such party or entity otherwise agrees or has previously agreed to such arbitration. Because of the expedited arbitration process agreed to by the parties, there shall be no discovery except for the following: seven (7) days prior to the scheduled hearing, the parties shall exchange all documents which the parties intend to use at the scheduled hearing. Each party shall pay its own fees and expenses related to arbitration, including their own attorneys, experts and witnesses; provided, however, if requested by either party in their pleadings, the arbitrator in

## **Appendix 2: Master Lease**

its sole discretion may award the prevailing party attorney fees and other litigation expenses in such amount as the arbitrator deems reasonable or commensurate with the award provided, if any. Each party also shall pay one-half (1/2) of the fees and expenses of the arbitrator. After all of the evidence has been presented, and the hearing concluded, the arbitrator shall issue an award within fifteen (15) days. The arbitrator shall have no authority to award punitive damages or exemplary damages. Each party acknowledges that, by entering into these provisions, it has agreed to arbitrate any disputes or controversy described in this Paragraph, and that such agreement necessarily entails a waiver of numerous rights that the party might have were such disputes to be determined other than pursuant to arbitration. Nonetheless, each party knowingly and voluntarily waives all rights that it might otherwise have, including without limitation: the right to litigate such disputes in a state court forum or federal court forum having jurisdiction over this matter; the right to conduct discovery in accordance with the rules of the court in which the litigation concerning the dispute might otherwise be filed; the right to trial in such court, including without limitation the right to trial by jury; the right to obtain certain damages and remedies that might not be awardable by the arbitrator pursuant to this Paragraph; and the right to an appeal of the arbitrator's award. The foregoing enumeration of the rights waived by the party are not intended to be exclusive, and the fact that any right is not specifically listed here shall have no effect on the fact that such right is waived by virtue of the agreement to arbitrate disputes as provided herein.

**Authority.** To the best of their knowledge and belief, each person executing this Agreement below represents and warrants to the other the following: (i) the party and the persons signing below have the full power and authority to enter into this Agreement; (ii) the party is solvent and has not filed for bankruptcy or is contemplating filing for bankruptcy; and (iii) neither the execution of this Agreement nor the finalization of the transactions contemplated hereby will result in or constitute a breach or default under any contract, other commitment or restriction to which it is a party or by which it is bound, or requires any consent, vote or approval which has not been taken, or at the time of the transaction involved will not have been given or taken.

**Notices.** All notices required or permitted to be given hereunder shall be in writing and shall be deemed to have been fully given, whether actually received or rejected if (i) sent postage prepaid, in the United States Mail, certified, return receipt requested, (ii) sent by Federal Express or by a similar overnight delivery service which obtains a signature from the recipient (or receipt is expressly rejected), or (iii) hand delivered, to Landlord or Tenant at their respective address as set forth above or at such other address as either party shall give to the other by notice.

**Miscellaneous.** The laws of the State in which the Premises is located shall govern the validity, performance and enforcement of this Lease. Time is of the essence of this Lease and whenever a certain day is stated for payment or performance of any obligation of Tenant or Landlord, the same enters into and becomes a part of the consideration. This Lease contains the entire agreement of the parties and no representations, inducements, promises or agreements, oral or otherwise, between the parties not embodied herein shall be of any force or effect. If any clause or provision of the Lease is illegal, invalid or unenforceable under present or future laws, the remainder of this Lease shall not be affected thereby, and in lieu of each clause or provision of this Lease which is illegal, invalid or unenforceable, there shall be added as a part of this Lease a clause or provision as nearly identical to the said clause or provision as may be legal, valid and enforceable. No failure of Landlord or Tenant to exercise any power given Landlord or Tenant, as the case may be hereunder, or to insist upon strict compliance by the other party with any obligation of such other party hereunder, and no custom or practice of the parties at variance with the terms hereof, shall constitute a waiver of Landlord's or Tenant's right to demand exact compliance with the terms hereof. This Lease may not be altered, waived, amended or extended except by an instrument in writing signed by Landlord and Tenant. The parties agree that they and their agents have fully and jointly participated in the preparation and negotiation of this Lease, and that no court, administrative body, or other entity interpreting or construing this Lease shall presume that its terms shall

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be more strictly construed against one party over another by virtue of who may have drafted any portion of this Lease. Furthermore, the parties acknowledge and agree that certain terms of this Lease regarding Tenant's financial covenants, possession by Tenant, Rules, remedies of Landlord upon default by Tenant, subleasing to Tenant's members, and such similar and related Lease terms may vary from and/or modify applicable law as the same may be enacted now or in the future, and all such modifications are expressly intended by each party to supersede federal, state and/or local law, as applicable, but only to the extent permitted by law. Furthermore, each party acknowledges and agrees that they have had an opportunity to consult with an attorney prior to executing this Lease and have done so, or they have otherwise voluntarily waived the opportunity for such legal consultation. All rights, powers and privileges conferred hereunder upon the parties shall be cumulative to, but not restrictive of or in lieu of, those conferred by law. The use of headings herein is solely for the convenience of indexing the various paragraphs hereof and shall in no event be considered in construing or interpreting any provision of this Lease. This Lease may be signed in one or more counterparts with the same force and effect as if all signatures were contained in a single original instrument.

**Special Stipulations and Exhibits.** By this reference, all Exhibits attached hereto and referenced within this Lease, including but not limited to the Special Stipulations, expressly are incorporated into the terms of this Lease. For the purposes of this Lease, the terms of all attached Exhibits may not be amended without the express written consent of Landlord.

### List of Exhibits:

Exhibit "A" – Rent Schedule

Exhibit "B" – Special Stipulations

Exhibit "C" – Minimum Performance Requirements for Janitorial Services

Exhibit "D" – Form of Approved Sublease

Exhibit "E" – Account Management Agreement Form

Exhibit "F" – Tenant's Bylaws

[SIGNATURE PAGE FOLLOWS]

**Appendix 2: Master Lease**

[SIGNATURE PAGE TO LEASE AGREEMENT]

**IN WITNESS WHEREOF**, the parties have hereunto set their hands and seals as of the day, month and year first above written.

**“LANDLORD”:**

[Chapter] Housing, LLC, an Illinois limited liability company

By: SAE Financial and Housing Corporation, an Ohio corporation, its sole member

By: \_\_\_\_\_

Name:

Title:

[SEAL]

**“TENANT”**

[Complete Full Chapter Name and Entity]

By: \_\_\_\_\_

Name:

Its: President

Attest: \_\_\_\_\_

Name:

Its: Secretary

[SEAL]

**Exhibit "A"****Rent Schedule**

Rental Periods	Rent Installment Due Dates	Rent	Parlor Fee for Each Non-Resident Tenant Member
8/24/09 – 12/31/09	9/15/09		
	10/15/09		
	11/15/09		
1/01/10 – 5/23/10	1/15/10		
	2/15/10		
	3/15/10		
5/24/10 – 8/23/10	5/25/10		
8/24/10 – 12/31/10	9/15/10		
	10/15/10		
	11/15/10		
1/01/11 – 5/23/11	1/15/11		
	2/15/11		
	3/15/11		
5/24/11 – 8/23/11	5/25/11		

**Appendix 2: Master Lease**

8/24/11 –	9/15/11
12/31/11	10/15/11
	11/15/11
1/01/12 – 5/23/12	1/15/12
	2/15/12
	3/15/12
5/24/12 – 8/23/12	5/25/12



## Appendix 2: Master Lease

### Exhibit "B"

#### **Special Stipulations**

Fire Marshal Inspection. Tenant agrees to arrange for an inspection of the Premises by the local fire marshal within ninety (90) days of the Commencement Date (and within 90 days of each annual anniversary of the Commencement Date), and to provide Landlord with written evidence of said inspection and any deficiencies found or noted by the fire marshal within five (5) days of the inspection.

Preservation of Educational Areas. Tenant reasonably shall cooperate with Landlord to preserve the ability of its affiliated foundation to make contributions towards the expenses of the Premises, which contributions shall be for the benefit of Landlord only. Accordingly, except for non-alcoholic rush functions, Alumni Association functions and other events expressly approved in writing by Landlord, the Study Room [**DESCRIBE OTHER AREAS**] shall be used exclusively for qualified academic activities, including study halls, pledge education meetings, membership training and workshops, etc. Except as provided in this Paragraph, the aforementioned areas of the Premises may not be used for any kind of social or recreational function, including parties, card and board games, etc. In connection with any Alumni Association function which relates to any host university sporting event, the Alumni Association may have one or more televisions in the Study Room and other academically-restricted areas, provided that all such televisions promptly are removed at the conclusion of the function.

#### Affixing Items to Premises.

Greek letters, Fraternity related signage or murals, lawn ornaments (such as lion statues), and similar items must be approved by Landlord pursuant to Paragraph 10 of the Lease before being affixed to or displayed from the Premises.

Tenant agrees and understands that only pictures and award plaques may be mounted on any wall of the Premises (including individual dorm rooms) with only the use of common picture hangers obtained from local hardware stores (i.e., no nails, no screws, no tape or other adhesive, etc.), and that no other item whatsoever shall be affixed to the interior and exterior walls without Landlord's advance written consent. Additionally, Tenant agrees and understands that, except as may be approved by Landlord in writing, no area of the Premises (including any dorm room) may be painted or re-painted, in whole or in part, except in the original paint colors approved by Landlord and as presently used throughout the Premises and then only with Landlord's advance written consent.

**Use of Premises.** Tenant shall take reasonable steps to insure that:

no one tampers with the life safety systems of the Premises;

no flammables, bicycles and motorcycles are stored within the Premises;

no candles, incense or any type of cooking equipment is used in the dorm rooms, including but not limited to toasters, toaster ovens, hot water heaters, hot plates, microwaves, etc.;

no person whomsoever smokes or uses any tobacco products or other similar products in the interior of the Premises. All interior portions of the Premises are **NON-SMOKING** and **TOBACCO FREE**;

## Appendix 2: Master Lease

however, Tenant may designate certain outside areas of the Premises for smoking and tobacco product use;

no firearms or weapons are brought onto or stored within any portion of the Premises;

no fireworks are stored or used on any portion of the Premises;

no extension cords are used anywhere on the Premises, provided that UL rated ground surge protectors may be used in place of extension cords;

no person (other than authorized maintenance personnel) gains access or remains on any roof of the Premises; except for the Tenant's cook, House Director, food suppliers and other persons authorized by the Tenant in accordance with reasonable rules approved by the Manager,

no person shall use or access whatsoever the Premises' kitchen; Except for legally permitted service animals,

no animal or pet of any kind is brought onto or kept upon any portion of the Premises at any time;

the HVAC system remains operational at all times of the year, including during any holiday breaks (minimum 60 degrees Fahrenheit and a maximum of 78 degrees Fahrenheit);

and the Premises remains secured and locked at all times to prevent uninvited guests and trespassers from gaining entry into the Premises.

Tenant acknowledges and agrees that should any break-in occur over a holiday break or any other period, then upon Landlord's request, Tenant thereafter shall be obligated to hire someone (or member volunteer) to watch over and reside in the Premises during all future breaks and holidays.

### Restrictions on Alcohol Use.

**TENANT AGREES THAT THE PREMISES SHALL REMAIN "ALCOHOL FREE" FOR THE ENTIRE TERM OF THIS LEASE.** For the purposes of this Paragraph, the term "alcohol free" shall mean absolutely no possession or consumption of alcoholic beverages on any portion of the Premises by any person whomsoever. Notwithstanding the foregoing, Landlord may, in its sole discretion, allow Tenant and its residents, members and guests of legal drinking age, to possess and consume alcohol on the Premises on a semester-by-semester basis (i.e., academic semesters of the host university or, if applicable, by quarter system), subject to such additional rules and regulations promulgated by Landlord from time to time. Factors which may influence Landlord to allow the possession and consumption of alcohol on the Premises include, but is not limited to the following: (i) Tenant's good standing with the host university, the Fraternity and such other bodies which oversee Tenant's operations (including, for example only, being placed on any form of suspension or probation); (ii) Tenant's and its members' strict compliance with the Rules set forth in Paragraph 9 of the Lease and all other terms of this Lease (including, for example only, the timely payment of Rent and the ongoing maintenance and upkeep of the Premises); (iii) the nature and number of any complaints filed by neighbors with Landlord and/or reports from the local police department of any adverse nature regarding Tenant's and its members' occupancy of the Premises or its behavior in general (including, for example only, complaints of noise, littering and

## Appendix 2: Master Lease

public intoxication); and, (iv) Tenant's relative good standing within the fraternity community of the host university (including, for example only, its grade point average ranking as compared to all other fraternities and the general student population). Prior to each semester, Tenant may request in writing from Landlord a written exemption to the alcohol free restriction set forth in this Paragraph; and, unless and until Landlord provides Tenant with a written notice allowing Tenant and its residents, members and guests of legal drinking age to possess and consume alcohol on the Premises, the entire Premises (without exception) shall remain alcohol free.

Except for non-alcoholic rush functions, Alumni Association functions and other events expressly approved in writing by Landlord, and provided that alcoholic beverages are permitted on the Premises pursuant to this Paragraph, no alcoholic beverages may be served or consumed [DESCRIBE RESTRICTED COMMON AREAS]. Except for non-alcoholic rush functions, Alumni Association functions and other events expressly approved in writing by Landlord, no food except individually wrapped snacks (such as candy bars and crackers) may be served or consumed in the Study Room [DESCRIBE ANY OTHER AREAS]. Tenant shall maintain and frequently empty appropriately sized trash cans throughout all common areas of the Premises and shall ensure that the Study Room [DESCRIBE OTHER AREAS] remains clean and free of debris at all times.

[Customize per Chapter] Notwithstanding any term and condition set forth above in Paragraph 6(b) to the contrary, Landlord and Tenant agree that (i) the Membership Deposit shall not become due and payable until after August 15, 2012; (ii) the Membership Deposit may be "phased in" to its members and neophytes as follows: (x) persons who become members or neophytes from and after the date of this Lease or who otherwise do not qualify pursuant to subsections (y) and (z) below, shall be required to pay a Membership deposit of no less than \$450.00; (ii) persons who have acquired (as of August 15, 2012) at least 25% of the academic credits necessary to graduate from the host university in good standing shall be required to pay a Membership deposit of no less than \$350.00; and (iii) persons who have acquired (as of August 15, 2012) at least 75% of the academic credits necessary to graduate from the host university in good standing shall be required to pay a Membership deposit of no less than \$250.00; and, (iii) the Membership Deposit may be paid by the applicable persons in up to six (6) equal installments on the same Rent Installment Due Dates described in Exhibit "A" of this Lease from and after the date said person becomes obligated to make such deposit.

[Customize per Chapter] Notwithstanding any term and condition set forth above in Paragraph 6(d) to the contrary, Landlord and Tenant agree that Tenant's existing members and neophytes (but excluding any existing pledge members) shall be exempt from the meal plan requirement described in the Lease, provided that they do not reside in the Premise's dorm rooms. Otherwise, persons who become members or neophytes from and after the date of this Lease shall be required to pay for and participate in Tenant's meal plan as described in Paragraph 6(d) above.

## Appendix 2: Master Lease

### Exhibit “C”

#### **Minimum Performance Requirements for Janitorial Service**

The following janitorial services shall be performed not less than two (2) times per week:

Sweep and mop all tile floors and vacuum all carpet floors throughout the common areas of the Premises, including bathrooms, kitchen, dining room, hallways, stairs, entry foyer and Study Room.

Sweep front and rear porch.

Pick-up and dispose of trash and debris around entire Premises (interior and exterior).

Empty trash cans to dumpster and replace trash bag liners.

Clean bathrooms, including sinks, toilets and shower stalls with appropriate cleaning agents.

Clean kitchen and dining areas, including countertops, dining tables, serving tables, appliances, etc. with appropriate cleaning agents.

Re-stock paper products in bathrooms and kitchen.

Replace light bulbs.

Dust furniture, window blinds, pictures, award plaques, etc. throughout Premises, including Study Room.

Assist House Director with keeping inventory of janitorial supplies and ordering additional supplies as needed.

Assist House Director by reporting any damage to the Premises.

Additionally:

Once a month, clean windows (interior and exterior) of Study Room and entry door side lights, and dining/recreation room.

As needed, spot treat stains in carpet with appropriate cleaning agents tested for colorfastness.

As needed, spot treat stains in furniture fabrics with appropriate cleaning agents tested for colorfastness.

As needed, clean and buff tile floor in dining/recreation room.

**Tenant shall be responsible for the above cleaning of the Premises after every social function; it shall not be the responsibility of any third party janitor or janitorial service to service the Premises after Tenant social functions unless paid by Tenant.**

**Appendix 2: Master Lease**

**EXHIBIT “D”**

**Form of Sublease**

**(attached)**



**Appendix 2: Master Lease**

THE TERMS OF THIS SUBLEASE, OCCUPANT SHALL STRICTLY COMPLY WITH ALL TERMS OF THE MASTER LEASE, AND SHALL PERMIT NO DEFAULT OR BREACH THEREUNDER. THIS SUBLEASE AND OCCUPANT’S POSSESSION OF THE ROOM IS MADE SUBJECT TO THE CHAPTER’S COMPLIANCE WITH ALL TERMS OF THE MASTER LEASE AND THE MASTER LEASE REMAINING IN EFFECT.

**3. Term.** UNLESS EARLIER TERMINATED IN ACCORDANCE WITH THIS SUBLEASE OR THE MASTER LEASE, the Sublease Term commences on the commencement date and shall end on the termination date as provided in Paragraph 1 above.

**4. Possession.** For so long as Occupant timely pays the Room Rent and complies with and performs all obligations and covenants required by it under this Sublease, the Master Lease, and the Rules (as such term is defined in the Master Lease), Occupant shall have the right to hold and occupy the Room for the Sublease Term. Chapter and Occupant acknowledge and agree that at all times Chapter, Landlord, and their respective representatives, agents, assignees, and designees, shall retain the right to access the Room at any time, and for any purpose whatsoever, including maintenance and inspection. During the Term, and pursuant to the terms of the Master Lease, certain utilities will be provided to the Room and common areas of the Premises as part of the Room Rent. Occupant acknowledges that he has inspected the Room, common areas of the Premises and utilities being provided to the Room and finds the same acceptable. All personal property brought onto the Premises by Occupant shall be at the risk of Occupant only. Occupant acknowledges that he has been advised to obtain “renter’s insurance” to cover any loss to his personal property while stored within the Premises. Furthermore, this Sublease does not assign nor guarantee a parking space to Occupant. All parking privileges on the Premises shall be governed by the Chapter under separate rules and policies governing the same.

**5. Rental Payments.** Beginning before the Commencement Date and continuing throughout the Sublease Term, Occupant agrees to pay the Room Rent due and payable under this Sublease. Room Rent includes the following items: Room occupancy for the Sublease Term; all utilities presently provided to the Room and Premises; and, [a full meal plan]. Except for an alternative payment plan approved in writing by the Chapter, the Room Rent shall be due and payable in the following amounts on the following dates:

**Fall Installment Schedule**

DUE DATE: \_\_\_\_\_, 20\_\_                      AMOUNT: \$ \_\_\_\_\_

DUE DATE: \_\_\_\_\_, 20\_\_                      AMOUNT: \$ \_\_\_\_\_

DUE DATE: \_\_\_\_\_, 20\_\_                      AMOUNT: \$ \_\_\_\_\_

**Spring Installment Schedule**

DUE DATE: \_\_\_\_\_, 20\_\_                      AMOUNT: \$ \_\_\_\_\_

DUE DATE: \_\_\_\_\_, 20\_\_                      AMOUNT: \$ \_\_\_\_\_

DUE DATE: \_\_\_\_\_, 20\_\_                      AMOUNT: \$ \_\_\_\_\_

**Summer**

DUE DATE: \_\_\_\_\_, 20\_\_                      AMOUNT: \$ \_\_\_\_\_

Occupant may make rental payments in excess of the amount due on any installment due date, and such advance payment shall be credited towards the next installment amount due under this Sublease. Room Rent installment payments which are more than ten (10) days past due shall incur a late fee of five percent (5%) of the total installment amount then outstanding. Room Rent installment payments which are more than thirty (30) days past due shall incur an additional late fee of ten percent (10%) of the total installment

## Appendix 2: Master Lease

amount then outstanding, which late fee shall be reassessed for each thirty (30) day period thereafter until paid in full.

**6. Condition of Room.** Occupant accepts the Room in its existing condition, without representation or warranty, express or implied, and no representation has been made by Chapter (or Landlord under the Master Lease) as to its condition. Occupant agrees not to make any alterations, additions, removals (such as furniture) or improvements to or of the Room and Landlord's Property without the prior written consent of Chapter (whose consent shall be subject to the consent of Landlord under the Master Lease). Any approved alteration, modification, or improvement shall be removed by Occupant at the end of the Sublease Term. Occupant shall be responsible for general maintenance and regular cleaning of the Room throughout the Term of this Sublease. Upon the expiration or other termination of this Sublease, Occupant shall surrender to Chapter the Room broom clean and in good condition and state of repair, reasonable wear and tear only excepted. Occupant shall remove all personal possessions which it has placed upon the Room or the Premises, and Occupant shall repair any damage which has resulted from its occupancy of the Room or Premises. In coordination with the administration of this Sublease, Occupant agrees to participate in the check-in and check-out process prescribed by the Chapter and the Manager.

**7. Deposit.** Occupant's obligations under the terms of this Sublease shall be secured, in part, by its Membership Deposit with the Chapter, the terms of which Membership Deposit are controlled by the Membership Agreement separately executed by Occupant. From time to time in Chapter's sole discretion and in accordance with applicable law, Chapter may apply all or any portion of the Membership Deposit to satisfy all or any part of Occupant's obligations under this Sublease. Such application of the Membership Deposit shall not prevent Chapter from claiming damages in excess of the Membership Deposit and shall not be deemed Chapter's waiver of any other right or remedy of Chapter under this Sublease, which rights and remedies may include those provided for an event of default by Occupant under this Sublease. In the event that all or any part of the Membership Deposit has been used by Chapter as permitted by and in accordance with the terms of this Sublease, or by Landlord as permitted by and in accordance with the terms of the Master Lease, Occupant shall, upon demand, immediately deposit with Chapter a sum equal to the amount so applied by Chapter so that Chapter shall have the full amount of the Membership Deposit on hand at all times during the Sublease Term, including any extension, renewal, or holdover term. Notwithstanding the above terms to the contrary, Occupant acknowledges and agrees that the Membership Deposit also secures the Chapter's obligations under the Master Lease and that Occupant benefits materially from the Chapter possessing the Premises pursuant to the Master Lease. Occupant agrees and consents to Landlord and Manager holding and administering the Membership Deposit in accordance with the Master Lease.

**8. Guaranty.** Chapter requires Occupant to obtain a Guaranty as additional collateral for Occupant's obligations under this Sublease, which Guaranty shall be in the form prescribed by Chapter, attached to this Sublease, and shall be from a guarantor approved by Chapter. In the event Occupant cannot obtain a Guaranty acceptable to the Chapter (and as required by the Landlord), then Occupant may substitute such Guaranty with the following: (a) an additional Membership Deposit of \$[ADD AMOUNT] to be added to the Membership Deposit previously paid by Occupant to Chapter pursuant to the Membership Agreement, and (b) a renter's insurance policy reasonably acceptable to the Chapter, premium prepaid for the term of this Sublease, with a minimum general liability policy coverage of no less than \$100,000, which shall be evidence by an insurance certificate from the issuing insurance carrier.

**9. Default of Occupant.** In the event that Occupant shall default in the payment of Room Rent when due or shall default in performing any of the terms and provisions of this Sublease, the Master Lease (including the Rules), the Chapter's bylaws or the Fraternity laws, and Occupant fails to cure such default within ten (10) days from written notice by Chapter, then Chapter (or Landlord as its designee) shall be entitled to promptly remove Occupant and Occupant's possessions from the Room and from the Premises without further notice; provided, however, such removal shall be in compliance with any



## Appendix 2: Master Lease

applicable state law or regulation and, provided further, such removal shall be in addition to any other remedies available to the Chapter under the terms of this Sublease, the Master Lease, the Chapter's bylaws, the Fraternity's laws, or the law. **DEFAULT OF OCCUPANT UNDER THE TERMS OF THIS SUBLEASE OR THE MASTER LEASE SHALL NOT RELIEVE OCCUPANT OF THE OBLIGATION TO PAY ROOM RENT FOR THE REMAINING TERM OF THIS SUBLEASE, REGARDLESS OF WHETHER OR NOT OCCUPANT REMAINS IN POSSESSION OF THE ROOM.**

**10. Modifications.** Occupant agrees and acknowledges that the Master Lease may be modified and amended by the Chapter and Landlord in accordance with the terms set forth therein and without advance notice to and/or consent of Occupant, and Occupant agrees to be bound by any such modifications. This Sublease may not be modified or amended without the express written agreement of Chapter, Occupant and Landlord, which has expressly approved this form of sublease. Except for completion of the provided blanks and signatures, all other mark-outs or hand-written additions shall not become effective and a part of this Lease unless and until the Chapter and Landlord acknowledges its consent to such modifications.

**12. Indemnity.** Occupant agrees to indemnify, defend and hold harmless Chapter and Landlord from and against any and all claims of any nature whatsoever for damages or injury to persons or property arising out of or related in any manner to Occupant's use or occupancy of the Room or the Premises, and all expenses thereof (including reasonable attorneys' fees and court costs). The foregoing indemnity excludes claims arising directly from the gross negligence or willful misconduct of Chapter or Landlord.

**15. Miscellaneous.** The laws of the state in which the Premises is located shall govern the validity, performance and enforcement of this Sublease. Time is of the essence of this Sublease and whenever a certain day is stated for payment or performance of any obligation of Occupant or Chapter, the same enters into and becomes a part of the consideration. All notices required or permitted to be given under this Sublease shall be given in person or by certified U.S. Mail, return receipt requested, if between Chapter and Occupant, or by certified U.S. Mail, return receipt requested, if to or from Landlord and the other parties, at the address set forth above in Paragraph 1. If any clause or provision of this Sublease is illegal, invalid or unenforceable under present or future laws, the remainder of this Sublease shall not be affected thereby, and in lieu of each clause or provision of this Sublease which is illegal, invalid or unenforceable, there shall be added as a part of this Sublease a clause or provision as nearly identical to the said clause or provision as may be legal, valid and enforceable. This Sublease contains the entire agreement of the parties and no representations, inducements, promises or agreements, oral or otherwise, between the parties not embodied herein shall be of any force or effect. In the event of a conflict between the terms of this Sublease and the Master Lease, the terms of the Master Lease shall govern. This Sublease and Occupant's Room shall not be subleased or assigned without the express written consent of Chapter and Landlord, and then only by an approved written agreement by all parties. Landlord shall be deemed a designated third party beneficiary to the terms of this Sublease, and Landlord shall be entitled to enforce all of the terms of this Sublease as if Landlord was the Chapter. **OCCUPANT AGREES THAT IT HAS BEEN PROVIDED AN OPPORTUNITY TO REVIEW THE TERMS OF THIS SUBLEASE WITH AN ATTORNEY PRIOR TO ITS EXECUTION AND HAS DONE SO, OR THEY HAVE OTHERWISE VOLUNTARILY WAIVED THE OPPORTUNITY FOR SUCH LEGAL CONSULTATION.** The parties agree that they and their agents have fully and jointly participated in the preparation and negotiation of this Lease, and that no court, administrative body, or other entity interpreting or construing this Lease shall presume that its terms shall be more strictly construed against one party over another by virtue of who may have drafted any portion of this Lease. Furthermore, the parties acknowledge and agree that certain terms of this Lease regarding the Membership Deposit, possession by Tenant and Occupant, Rules, and such similar and related Lease and Sublease terms may vary from and modify applicable law as the same may be enacted now or in the future, and all such modifications are expressly intended by each party to supersede federal, state and/or local law, as applicable, but only as may be permitted by law. In the event of any dispute, controversy or claim

**Appendix 2: Master Lease**

between the parties regarding this Sublease, the parties agree to submit said dispute to binding arbitration after first trying to amicably mediate the dispute between themselves, all in accordance with Paragraph 25 of the Master Lease. The use of headings herein is solely for the convenience of indexing the various paragraphs hereof and shall in no event be considered in construing or interpreting any provision of this Sublease. This Sublease may be signed in one or more counterparts with the same force and effect as if all signatures were contained in a single original instrument.

**IN WITNESS WHEREOF**, the parties have hereunto set their hands and seals as of the day, month and year first above written.

**“CHAPTER”**:

By: \_\_\_\_\_

Print Name:

Print Title:

**“OCCUPANT”**:

By: \_\_\_\_\_

Print Name:

**Appendix 2: Master Lease**

**LEASE GUARANTY FOR CHAPTER HOUSE ROOM SUBLEASE**

In consideration for, and as an inducement to the Chapter (as all such capitalized terms are defined in the Sublease) to enter into that certain Chapter House Room Lease attached hereto (the "Sublease") by and between Occupant and Chapter, the undersigned guarantor ("Guarantor") hereby guarantees to Chapter, its successors, assigns and designated beneficiaries, the payment of all sums of money now or hereafter due from Occupant to Chapter under the Sublease. No delay or failure on the part of Chapter in enforcing any of its rights or remedies against Occupant or Guarantor or the release of any party from liability hereunder or under the Sublease or of any security thereto shall affect or impair any rights or remedies that Chapter may have against Occupant or Guarantor.

Guarantor's obligations hereunder shall not be terminated, reduced or affected in any way by Occupant's bankruptcy or other insolvency or by reason of the assertion by Chapter against Occupant of any right or remedy for the enforcement of the obligations of Occupant under the Sublease, or by reason of the waiver by Chapter of, or its failure to enforce, any of the terms, covenants or conditions of the Sublease, or the granting of any indulgence or extension of time or other forbearance to Occupant; provided, however, any such forbearance shall be applicable to the relevant payment by the undersigned to the same extent applicable to Occupant. The undersigned Guarantor waives notice of acceptance of this Guaranty.

If Chapter shall employ attorneys to perform legal services in connection with the Sublease or this Guaranty in connection with any default by Occupant or Guarantor, Guarantor shall, in addition to all other amounts owed to Chapter, be obligated to pay Chapter's reasonable attorneys' fees and court costs.

All duties and obligations of Guarantor pursuant to this Guaranty shall be binding upon the heirs, representatives, successors and assigns of Guarantor. This Guaranty shall be governed by and construed in accordance with the laws of the state where the Premises is located. Any dispute, controversy or claim between the parties regarding this Guaranty shall be subject to the arbitration provisions of the Master Lease and Sublease, and Guarantor expressly agrees to submit itself to said arbitration. Guarantor's address for notices shall be as set forth below until changed by written notice to Chapter. Notices shall be given pursuant to the notice provision of the Sublease. Landlord shall be deemed a designated third party beneficiary to the terms of this Guaranty and, upon any default by Chapter under the Master Lease, Landlord shall be entitled, upon written notice to Guarantor, to enforce all of the terms of this Guaranty as if Landlord was the Chapter.

SIGNED, SEALED AND DELIVERED as of even date with the Sublease.

By: \_\_\_\_\_(SEAL)

By: \_\_\_\_\_(SEAL)

Print Guarantor's Name:

Print Guarantor's Name:

Address: \_\_\_\_\_

Address: \_\_\_\_\_

Relationship to Occupant: \_\_\_\_\_

Relationship to Occupant: \_\_\_\_\_

**Appendix 2: Master Lease**

**EXHIBIT “E”**

**Account Management Agreement**

(attached)

**Appendix 2: Master Lease**

**EXHIBIT “F”**

**Tenant’s Bylaws**

(attached)

**Appendix 3: Account Management Agreement**

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**12.1 Account Management Agreement**



Note: The content of the following Agreement is for information purposes. This Agreement is an F&H Template, and is NOT the actual Account Management Agreement document that the chapter signed with F&H.

THIS ACCOUNT MANAGEMENT AGREEMENT (this “**Agreement**”) is executed as of \_\_\_\_\_, 20\_\_\_\_ by \_\_\_\_\_ (“**Chapter**”) and Greek Housing Management, LLC, an Illinois limited liability company (“**Manager**”). In exchange for the consideration set forth below, Chapter and Manager agree as follows:

**ARTICLE I. BACKGROUND**

The Chapter is a fraternity chapter within the Sigma Alpha Epsilon Fraternity (the “Fraternity”). The Chapter is comprised of undergraduate members, neophytes and pledge members who are enrolled in the host university (the “Members”), as such membership may grow and contract from time to time.

An affiliate of Manager, \_\_\_\_\_ Housing, LLC (“Landlord”), owns that certain fraternity house located at \_\_\_\_\_, \_\_\_\_\_ (the “Premises”), which Premises is presently leased by the Chapter pursuant to that certain Lease Agreement executed by both Chapter and Landlord (as may be amended and the term extended from time to time, the “Lease”). In turn, the Chapter subleases rooms in the Premises to its Members (each room is a “Room”), and each such resident Member executes a sublease with the Chapter (the “Sublease”) as well as a “Membership Agreement” (as defined in the Lease).

As a requirement of the Lease and to insure timely receipt of rent payments from the Chapter under the Lease and various payments from the Members under their respective Subleases and Membership Agreements, Manager and Chapter have agreed to enter into this Agreement so that Manager may assist the Chapter in managing its financial affairs and its obligations under the Lease and Membership Agreements, as such duties are more particularly described below. Additionally, the parties acknowledge and agree that Landlord is a designated beneficiary under the terms of this Agreement, and Landlord would not have entered into the Lease with Chapter unless Chapter agreed to be bound by the terms of this Agreement.

**ARTICLE II. APPOINTMENT OF MANAGER, TERM**

Appointment. Chapter appoints Manager as the sole and exclusive manager and agent for the Project described below, subject to the terms of this Agreement. Manager accepts this appointment to manage the Project and Chapter’s agent, subject to the terms of this Agreement.

Term. The “Term” of this Agreement commences on the date first written above and ending on the date which is six (6) months after the termination of the Lease. Notwithstanding the preceding sentence: (a) if the Lease terminates, but the Chapter continues to operate as a recognized chapter in good standing with the Fraternity, then the Term shall end six (6) months after the termination of the Lease; and, (b) if the Lease terminates and the Chapter is no longer recognized by the Fraternity as a chapter in good standing (e.g., the Chapter has been suspended by the Fraternity), then the Term shall end upon the date that the Landlord specifies by written notice to the Fraternity’s Executive Director that all reasonable attempts have been made to collect the below described Chapter Income and to pay for any and all of the below described Chapter Expenses.

**ARTICLE III. MANAGER'S DUTIES**

### **Appendix 3: Account Management Agreement**

Manager shall execute its duties under this Agreement in a reasonable manner consistent with good industry practices for properties similar to the Premises and consistent with the terms of this Agreement; and, Chapter agrees to actively assist the Manager in a reasonable and timely manner so that Manager may perform its duties under this Agreement in an efficient manner. To the extent funds are available for such purposes in the Chapter Accounts (as described below), Manager shall take all reasonably necessary actions for the execution of the Project in accordance with the Annual Budget (as described below). In addition to the other duties and responsibilities of the Manager as may be provided in this Agreement, Manager shall perform the following (collectively, the “Project”):

Manager has prepared and submitted to the Chapter, and the Chapter has approved, an “Annual Budget”, which is attached hereto as Exhibit “A”. The Annual Budget includes the estimated expenses for operating the Premises and Chapter each year, including but not limited to the following (collectively, the “Chapter Expenses”):

- rent and other financial obligations arising under the Lease (collectively, “Lease Expenses”);
- dues, Health & Safety fees and other expenses collected by the Fraternity (collectively, “Fraternity Expenses”);
- as applicable, salaries and wages for a house director, cook, janitor and such other employees of the Chapter, including expenses of a payroll service, worker’s compensation insurance, and employer taxes (collectively, “Employee Expenses”);
- as applicable, food and related expenses for operating a meal plan for the Members (collectively, “Food Expenses”); and,
- miscellaneous expenses involving the Premises and the Chapter, including but not limited to repairs to the Premises assigned to the Chapter under the Lease (collectively, “Miscellaneous Expenses”).

The Annual Budget also includes the estimated sources of revenue paid by the Chapter’s Members to pay for the Chapter Expenses, including but not limited to the following (collectively, “Chapter Income”):

- rents collected under the Subleases (“Room Rents”);
- “Membership Deposits” (as defined in the Lease) collected pursuant to the Membership Agreement and any other deposit (by whatever name) collected pursuant to any Sublease or pursuant to the terms of any applicable Chapter policy (“Deposits”);
- parlor fees collected from Members who do not reside in the Premises and who have not executed Subleases (“Parlor Fees”);
- monies paid by the Members for the Fraternity Expenses (“Fraternity Dues”);
- as applicable, monies paid by the Members for the operation of a meal plan (“Food Service Fee”); and,
- as applicable and from time to time, other sources of revenue collected by the Chapter and/or third parties to pay for specific expenses related to the Premises and the operation of the Chapter, including, for example, special tenant improvements under the Lease for which the Chapter is responsible (“Miscellaneous Fees”).

As the context requires in this Agreement, the term “Chapter Income” also may include and refer to monies paid by Members and other persons for the social and philanthropic functions of the Chapter (“Social Fees”); provided, however, such social function expenses and Social Fees shall not be accounted for by the Manager in the Annual Budget on a line item basis nor shall the Manager oversee or administer such expenses and fees as it is the express intent of the parties that **THE CHAPTER SHALL BE SOLELY RESPONSIBLE FOR MANAGING ALL SOCIAL AND PHILANTHROPIC PROGRAM INCOME AND EXPENSES**. The Chapter shall timely inform the Manager of its Social Fees for each applicable budget year. The initial Annual Budget covers the calendar period shown on the attached Annual Budget. At least thirty (30) days prior to the next calendar period, Manager, with the advice and counsel of the Chapter’s designated representative(s), shall prepare a new Annual Budget for the coming year, which new Annual Budget shall be approved or disapproved by the Chapter within fifteen (15) days after receipt; provided, however, line items on the Annual Budget which

### **Appendix 3: Account Management Agreement**

are not discretionary (for example only, Lease Expenses and Fraternity Expenses) may not be disapproved by the Chapter. In good faith, the Chapter and Manager will work to timely resolve any of the Chapter's objections and suggested improvements to the Annual Budget. Until the Chapter approves the proposed new Annual Budget, the Annual Budget for the previous year will remain in effect;

In connection with efficiently managing the revenue and expenses shown on the Annual Budget by all parties, Manager shall designate a third party to provide accounting and cash management functions for the Chapter and Manager, which service provider may change from time to time in the Manager's discretion (the "Cash Management Provider"). As directed by the Manager, the Chapter agrees to execute any agreements and related documents reasonably requested by the Cash Management Provider to fully subscribe to its services, and the CHAPTER AGREES TO ACTIVELY ASSIST THE MANAGER WITH FULLY IMPLEMENTING THE ACCOUNTING, CASH MANAGEMENT, LEASING AND FACILITY MANAGEMENT FUNCTIONS MADE AVAILABLE BY THE CASH MANAGEMENT PROVIDER FROM TIME TO TIME, INCLUDING BUT NOT LIMITED TO THE USE OF ONLINE FORMS AND PROCESSES WITH RESPECT TO THE SAME. The Chapter agrees to timely cooperate with Manager to train all of its Members and occupants in the use of the Cash Management Provider systems as may be required to fully utilize the same. With respect to the Project, all expenses incurred in connection with the Cash Management Provider and their system shall be paid by the Chapter. Furthermore, to insure accurate bookkeeping and timely payment of all Chapter Expenses, from time to time, Manager may adopt reasonable policies to limit the Chapter's access to certain functions of the system provided by the Cash Management Provider and the Chapter agrees to adhere to such policies. Manager agrees to assist the Chapter with any dispute with the Cash Management Provider;

Unless expressly authorized by Manager in writing and then subject to such additional terms as Manager may require to efficiently manage the Project described in this Agreement, the Chapter agrees to exclusively maintain all Chapter banking and accounting functions using the systems provided by the Cash Management Provider. UNDER NO CIRCUMSTANCES WHATSOEVER SHALL THE CHAPTER OPEN OR MAINTAIN BANK ACCOUNTS OR SIMILAR FINANCIAL ACCOUNTS (OR USE CASH ACCOUNTS) WITH A BANK OR PARTY OTHER THAN THE CASH MANAGEMENT PROVIDER. In the event the Chapter fails to adhere to the aforementioned requirement, Manager may increase its Annual Fee by \$2,500.00 for each year that Chapter maintains such other accounts, and this additional fee shall be paid by Chapter promptly upon demand by Manager to compensate Manager for its additional work in servicing the Project;

In connection with the administration of the Project, Manager and Chapter agree to establish five (5) or more cash accounts within the Cash Management Provider's program, which accounts initially shall consist of the following (the "Chapter Accounts"):

- (i) Chapter Operations Account, to pay for Lease Expenses, Employee Expenses, Food Expenses, and Miscellaneous Expenses;
- (ii) Deposit Account, to maintain the Deposits and to pay for irregular Chapter Expenses, such as repairs to the Premises;
- (iii) Fraternity Expenses Account, to pay for Fraternity Expenses;
- (iv) Chapter Social Account, to pay for Chapter social and philanthropic expenses; and,
- (v) Chapter Reserve Account, to pay for unforeseen and unbudgeted expenses incurred from time to time by the Chapter and to pay for Chapter Expenses prior to the collection of all Chapter Income as a short-term advance.

The Manager shall have the authority to deposit and withdraw funds from any of the Chapter Accounts as reasonably necessary to make timely payments towards the Chapter Expenses from any of the Chapter Accounts. Furthermore, with respect to the Chapter Expenses, the Manager shall have the authority to make payments for services and materials provided by third parties (or reimburse persons for the same) from the Chapter Operations Account, Fraternity Expenses Account, Deposit Account and Chapter Reserve Account and, upon request, the Chapter agrees to timely consent to any such payments as such consent may be required by the Cash Management Provider. Except to transfer funds in and out of the Social Account to one of the other Chapter Accounts, the Manager shall have no other access to the Chapter's Social Account, and the Chapter shall be solely responsible for making all distributions from the Social Account. With the advance consent of



### **Appendix 3: Account Management Agreement**

the Manager, and pursuant to policies adopted from time to time by the Manager and in accordance with the systems of the Cash Management Provider, the Chapter also may make payments to third parties from any of the Chapter Accounts;

With the active cooperation and assistance of the Chapter, Manager shall timely allocate Chapter Income to the various Chapter Accounts, and to pay the Chapter Expenses as outlined on the Annual Budget and as otherwise permitted by this Agreement. In the event Chapter Income is insufficient at any time to pay for all of the Chapter Expenses then due and payable, Manager shall prioritize payment of the Chapter Expenses in its sole discretion, but generally within the following order of payment priority: (i) Lease Expenses, (ii) Fraternity Expenses; (iii) Employee Expenses, (iv) Food Expenses, and (v) Miscellaneous Expenses;

In case of an emergency or unforeseen cost overrun within any line item of the Annual Budget, Manager may re-allocate Chapter Income and transfer monies between Chapter Accounts to pay for such expenses, provided that the Manager in good faith believes such action is necessary to prevent liability on the part of Chapter, to prevent damage to the Premises, to prevent injury to any person, or to prevent the suspension of any service or vendor reasonably related to the operation of the Premises and the Chapter. Manager shall promptly notify Chapter by telephone and e-mail within 48 hours of any such emergency expenditures;

The Manager shall assist the Chapter in its collection of the Chapter Income; provided, however, the day-to-day collection of Chapter Income is the primary responsibility of the Chapter and not the Manager. The parties agree that all Room Rents, Parlor Fees, Food Service Fees, Social Fees and Miscellaneous Fees shall first be paid into the Chapter Operations Account. Furthermore, the parties agree that all Fraternity Dues shall be first paid into the Fraternity Expenses Account, and all Deposits shall be first paid into the Deposit Account. From time to time, based upon reasonable cash flow considerations and pending Chapter Expenses that have or will become due, in its discretion Manager shall transfer Social Fees to the Chapter Social Account. Additionally, based upon reasonable cash flow considerations and pending Chapter Expenses that have or will become due, in its discretion Manager may transfer additional Chapter Income into the Chapter Social Account upon request of the Chapter. At the end of each accounting period, the Manager shall transfer all remaining Chapter Income in the Chapter Accounts (except Deposits being held for the benefit of Members) to the Chapter Reserve Account; provided, however, Manager may use funds in the Chapter Reserve Account to "prime" any of the other Chapter Accounts as reasonably may be needed for cash flow purposes in the next accounting period which funds shall be deemed a short-term advance until Chapter Income is collected to replenish the same.

**NOTWITHSTANDING THE PRECEDING SENTENCE, THE CHAPTER AGREES THAT ALL EXCESS RENTAL INCOME SHALL BE DEPOSITED BY MANAGER INTO THE CHAPTER RESERVE ACCOUNT AND, THEREAFTER, MAY ONLY BE APPLIED TO FUTURE LEASE EXPENSES NOT COVERED BY ACTUAL RENTAL INCOME IN ANY GIVEN YEAR;**

The Chapter expressly delegates to Manager, as its lawful agent and attorney-in-fact, the duty to seek collection of all past due accounts of its Members. Accordingly, in its sole discretion, the Manager may retain outside parties, such as collection agencies and collection attorneys, as may be needed to collect Chapter Income from delinquent Members, provided that the Chapter shall be responsible for the expenses of all such collection efforts. The Chapter agrees to cooperate on a timely basis and execute such documents as may be reasonably requested from any such collection agency and/or collection attorney retained by the Manager. All costs of third party collection shall be paid by the Chapter or its Members pursuant to Chapter policies established from time to time;

Manager shall assist the Chapter with preparing and filing any federal, state or local tax returns or filings, including the withholding of employee payroll taxes, as may be required by law; however, the Chapter shall be primarily responsible for coordinating such tax related matters. With respect to any income tax returns or similar tax filings, the Chapter agrees to use any accounting firm utilized by the Cash Management Provider or, if no such accounting firm exist with the Cash Management Provider, with an accounting firm designated by the Manager. With respect to employee wages and related expenses, the Chapter agrees to use a payroll service designated by the Manager and to obtain worker's compensation insurance and such other related insurance policies from an insurance vendor designated by Manager from time to time. Upon request by Manager, the Chapter shall execute any agreements and related documents reasonably requested by the above described

### **Appendix 3: Account Management Agreement**

vendors, and all such third party vendor expenses shall be paid by the Chapter. Manager agrees to assist the Chapter with any dispute concerning the above described vendors;

Pursuant to the terms of the Lease, Manager shall assist the Chapter in hiring various employees for the Project, including but not limited to the "House Director" (as such term is defined in the Lease), cook and janitor. All such employees shall be deemed Chapter employees and shall not be deemed employees of Manager, and all such Chapter employees shall be compensated directly by the Chapter and not by Manager. Notwithstanding the foregoing, Manager, as the Chapter's agent, shall advertise, screen, interview, hire, train, supervise, provide performance reviews and terminate the Chapter's employees in consultation with the Chapter, the Landlord and other constituent parties, such as the Fraternity, host university and alumni advisors, all at the Chapter's cost and expense. The Chapter agrees to cooperate in a commercially reasonable manner with Manager with respect to the employment matters set forth above and as reasonably requested by Manager; provided, however, the Chapter shall have no authority to hire or terminate any such employee without the Manager's advance written consent and, unless otherwise directed by Manager, all such employees shall report directly to Manager as the Chapter's agent. All employee compensation shall be approved by the Chapter in accordance with the Annual Budget process. With respect to the House Director, the parties agree as follows: (1) House Director will live-in the Premises in the room or suite provided by Landlord for such purposes and the House Director shall not be charged by Chapter for any fees or expenses related to such occupancy, and, to the extent the Chapter maintains a meal service, the House Director shall enjoy all meal service privileges without additional expense; (2) the House Director shall be at least twenty-five (25) years of age, not be an undergraduate student at the host university, not be a recent alumnus of the Chapter (i.e., should be more than three years from graduation), and demonstrate skills and maturity necessary to handle the duties assigned to said House Director; and, (3) the duties and minimum performance requirements of the House Director are set forth in Exhibit "B";

With respect to any hourly wage employees, the Chapter's designated representative shall be responsible for timely reporting all hours worked by said employees to the designated payroll service for the timely processing of employee paychecks and Manager agrees to assist the Chapter with any such reporting;

Utilizing the accounting systems of the Cash Management Provider, Manager will assist the Chapter with generating financial reports on all Chapter Accounts and tracking Chapter Income and Chapter Expenses against the approved Annual Budget. From time to time and as applicable, Manager, with the advice and counsel of the Chapter's designated representative(s), shall prepare a revised Annual Budget to reconcile with actual Chapter Income and Chapter Expense performance in the then current year, which revised Annual Budget shall be approved or disapproved by Chapter within fifteen (15) days after receipt; provided, however, line items on the Annual Budget which are not discretionary (for example, Lease Expenses and Fraternity Expenses) may not be disapproved by the Chapter;

Manager shall provide clerical support and other employees as reasonably required to administer the Project; provided, however, the Chapter shall assist the Manager with its duties by maintaining a current and accurate roster of Members, including phone numbers, mailing addresses, and e-mail addresses, all in accordance with the procedures designated by Manager and/or the Cash Management Provider. All matters pertaining to the employment, supervision, compensation, promotion, and discharge of Manager employees are the responsibility of the Manager; Manager employees shall not be deemed Chapter employees; and

Notwithstanding the foregoing, the parties agree to timely and reasonably cooperate with the other on all matters directly or indirectly related to the Project.

#### **ARTICLE IV. MANAGEMENT FEES AND REIMBURSABLE EXPENSES**

Manager agrees to administer the Project for an annual fee (the "Annual Fee"), which is determined as follows:

(a) a "Base Fee" of Five Thousand One Hundred and Fifty No/100 Dollars (\$5,150.00) for the first fiscal year of this Agreement, which Base Fee shall be increased by three percent (3%) for each subsequent fiscal year during the Term of this Agreement. The Base Fee shall be deemed earned as July 1 of each calendar year, and shall be due and payable to Manager in four (4) equal installments, with 25% of the Base Fee each due on October 1, November 1, February 1, and March 1 of each calendar year;

### **Appendix 3: Account Management Agreement**

(b) a “Variable Fee” of \$80.00 per Member, per year, for the first fiscal year of this Agreement, which Variable Fee shall be increased by three percent (3%) for each subsequent fiscal year during the Term of this Agreement. The Variable Fee shall be due and payable to Manager in six (6) equal installments which correspond to the “Rent Installment Due Dates” set forth in the Lease for the Fall and Spring academic semesters. In the event the Chapter’s membership increases or decreases during each fiscal year, the Variable Fee shall be adjusted and pro-rated based upon the Chapter’s actual membership at the time each installment payment becomes due; provided, however, no “credit” shall be made to the Chapter for Members who graduate, resign, are expelled or otherwise leave the Chapter after the sixth and final installment payment becomes due and payable to Manager; and

(c) a “Processing Fee” equal to any and all “late fees” charged to Chapter Members who fail to timely pay dues, fees, deposits and such other financial obligations as the same become due and payable to the Chapter as compensation to Manager for processing said late fees and, if required, referring such past due accounts to collection agencies.

Additionally, to the extent Manager incurs expenses associated with the Project, the Chapter shall pay Manager for these reimbursable expenses immediately upon demand and upon submittal of appropriate written receipts or other evidence of such payments by Manager.

#### **ARTICLE V. TERMINATION**

Termination by Manager. Prior to the expiration of the Term, this Agreement may be terminated by either party, with or without cause, by giving the other at least sixty (60) days prior written notice of termination. Chapter acknowledges and agrees that its termination of this Agreement without Landlord’s written consent may constitute a default under the terms of the Lease.

Obligations on Termination. Upon termination of this Agreement, neither party shall have further rights or obligations under this Agreement, except those rights and obligations, if any, that accrued before the effective date of the termination or that expressly survive termination. Upon termination (i) the Manager shall provide the Chapter with all information reasonably requested by the Chapter to effect the continued operation of the Project; (ii) the Manager shall relinquish all access to the Project and all books and records related to the Project, however, Manager may retain copies of those books and records; and (iii) the Chapter shall pay any fees and reimbursable expenses due to Manager as of the effective date of termination.

#### **ARTICLE VI. DEFAULT AND REMEDIES**

Default. The following are defaults under this Agreement: (a) the failure of either party to pay or perform any obligations required under this Agreement or under the terms of the Lease, which failure continues for seven (7) days after the date on which notice of the failure has been received by the failing party (or such longer cure period as may be provided with respect to defaults under the Lease); or (b) with respect to the Project, theft, fraud, or other knowing or intentional misconduct by either party, including its officers, directors, members, employees and agents.

Remedy. Upon any default by the Chapter not cured within any cure period, Manager immediately may terminate this Agreement and/or may seek negotiation and arbitration of the default pursuant to Section 8.4 below. Upon any default by the Manager not cured within any cure period, the Chapter immediately may seek negotiation and arbitration of the default pursuant to Section 8.4 below. The parties acknowledge and agree that a default under or termination of this Agreement may constitute a default under Lease.

#### **ARTICLE VII. INSURANCE AND INDEMNITY**

Chapter's Insurance. The Chapter shall maintain, at the Chapter's expense, all insurance policies required under the Lease, by this Agreement and by law.

Manager's Insurance. The Manager shall obtain, at Manager’s expense, commercial general liability insurance and employee theft and dishonesty coverage in such commercially reasonable amounts determined by the Manager.

Indemnity. The Chapter shall indemnify, defend, and hold harmless Manager, its officers, directors, members, employees and agents, from claims, demands, causes of action, losses, damages, fines, penalties, liabilities, costs and expenses, including attorneys’ fees and court costs (“Claims”) arising from (i) the negligence or misconduct

### **Appendix 3: Account Management Agreement**

of the Chapter, its officers, directors, Members, employees and agents, or (ii) the breach of this Agreement by the Chapter, including its officers, directors, Members, employees and agents, or (iii) any incorrect information supplied by the Chapter, its officers, directors, Members, employees and agents, or (iv) any material fact known by the Chapter, its officers, directors and employees, concerning the Project that the Chapter fails to disclose to the Manager, or (v) any Claim whatsoever made by a Member, employee, guest, invitee or third party vendor of the Chapter, directly or indirectly against Manager (none of whom shall be deemed third party beneficiaries under the terms of this Agreement), or (vi) the Chapter's operation of the Premises; provided, however, the Chapter shall not be responsible under this indemnity clause for any Claim that arises solely from the Manager's gross negligence or willful misconduct. The Manager shall indemnify, defend and hold harmless the Chapter from Claims arising solely from the Manager's gross negligence or willful misconduct. Manager expressly shall not be liable to the Chapter, its officers, directors, Members, employees, agents, guests and invitees, for any action, conduct, loss or any other form of liability caused directly or indirectly by third party providers employed by the Chapter, whether or not at the direction of the Manager, including but not limited to the third party providers described in this Agreement. The terms of this Paragraph shall survive any termination of this Agreement.

#### ARTICLE VIII. MISCELLANEOUS

**Notices.** Any notice required to be given under this Agreement shall be in writing and shall be sent by hand delivery, by a recognized overnight delivery service, by United States Mail (certified, with return receipt requested), or by e-mail if acceptance by the intended party is confirmed. All notices are effective when received, provided that any notice sent by overnight delivery service or United States Mail which is rejected or not claimed by the recipient, shall be deemed delivered as of the date of last attempted delivery. All notices to the Manager shall be sent to the Manager care of the President and the Executive Director of SAE Financial and Housing Corporation, 1856 Sheridan Road, Evanston, Illinois 60201, or as otherwise communicated to the Chapter by written notice. All notices to the Chapter shall be sent to the Chapter's Eminent Archon, Eminent Treasurer, and House Director, at the Chapter's address set forth in the Lease or as otherwise communicated to the Manager by written notice.

**Assignment.** Manager may assign its rights and obligations under this Agreement to any person or party without the prior written consent of the Chapter.

**Power of Attorney.** Chapter does hereby make, constitute and appoint Manager, with full power of substitution as the Chapter's true and lawful attorney-in-fact, to act in, manage, and conduct all business affairs in connection with any of the Manager's duties set forth in this Agreement, for and on behalf of the Chapter, in the name, place, and stead of the Chapter, and for use and benefit of the Chapter, and the act and deed of the Chapter, with full power, authority, and discretion to do any act whatsoever concerning said Project with the same force and effect as if the Chapter could or might do themselves if present and as reasonably necessary, efficient and convenient to fulfill Manager's duties as set forth above; provided, however, this power of attorney is limited by the rights of the Chapter described in this Agreement to expressly approve or disapprove certain actions, instruments and decisions. This power of attorney is coupled with an interest and shall be effective for the Term of this Agreement and shall not be revoked or terminated without prior written notice to both the Chapter and Manager. All such persons may rely upon this power as being in full force and effect without any further inquiry whatsoever. As may be requested by the Manager from time to time, the Chapter agrees to execute in favor of the Manager any power of attorney instrument required by a third party provider or as may be necessary and convenient for the Manager to administer the Project. Notwithstanding the foregoing, nothing in this Agreement shall be construed to create a partnership, joint venture, agency, employer-employee relationship between the Chapter and the Manager. THE PARTIES AGREE AND ACKNOWLEDGE THAT MANAGER IS NOT LICENSED BY ANY STATE TO PROVIDE THE SERVICES DESCRIBED IN THIS AGREEMENT BUT, RATHER, THE PARTIES ACKNOWLEDGE AND AGREE THAT MANAGER AND CHAPTER ARE AFFILIATED PARTIES BY VIRTUE OF THE SIGMA ALPHA EPSILON FRATERNITY AND FOR THE PURPOSE OF COMPLYING WITH ANY SELF-MANAGEMENT EXEMPTIONS THAT MAY BE PROVIDED BY STATE OR LOCAL LAW FOR THE PROVISION OF SUCH MANAGEMENT SERVICES. If requested by Manager, Chapter agrees to cooperate with Manager to apply and seek enforcement of any self-management exemptions under state or local law, if and as applicable.

### **Appendix 3: Account Management Agreement**

**Governing Law & Arbitration.** This Agreement and the rights and obligations of the parties shall be governed by and construed in accordance with the laws of the State of Illinois. The parties agree to negotiate between themselves any controversy or claim arising out of or relating to this Agreement, or the breach thereof, for a period of fourteen (14) days after the dispute is first documented in writing by one party to the other and written demand for negotiation is first made. Thereafter, if not resolved by negotiation, the parties agree that any such controversy or claim arising out of or relating to this Agreement, or the breach thereof, shall be settled by arbitration by a single arbitrator mutually selected by the parties in accordance with the American Arbitration Association's Commercial Arbitration Rules (including the Optional Rules for Emergency Measures of Protection), and judgment on the award may be entered in any court having jurisdiction thereof; provided, however, it is not the intent of the parties to arbitrate with the American Arbitration Association unless mutually agreed by the parties. The scheduled hearing shall be held at a location in Evanston, Illinois designated by the arbitrator (or, if the parties mutually agree, in the state in which the Premises is located). The arbitrator shall be a qualified, impartial person, who is a licensed attorney, and said arbitrator shall have had at least ten (10) years of experience immediately prior to the date of the demand with active involvement or experience in fraternity or sorority housing and/or student housing. The arbitrator shall render his/her decision and award within sixty (60) days of referral. Such decision and award shall be final, binding and conclusive on the parties and counterpart copies of the same shall be delivered to each of the parties. In rendering such a decision and award, the arbitrator shall not add to, subtract from or otherwise modify the provisions of this Agreement. Any arbitration conducted pursuant to this Agreement may include by consolidation or joinder and upon demand of the Manager and Chapter, any person or entity not a party to this Agreement, if such person or entity is involved in a common question of law or fact or the presence of such person is required in order for complete relief to be accorded in the arbitration, and such party or entity otherwise agrees or has previously agreed to such arbitration. Because of the expedited arbitration process agreed to by the parties, there shall be no discovery except for the following: seven (7) days prior to the scheduled hearing, the parties shall exchange all documents which the parties intend to use at the scheduled hearing. Each party shall pay its own fees and expenses related to arbitration, including their own attorneys, experts and witnesses; provided, however, if requested by either party in their pleadings, the arbitrator in its sole discretion may award the prevailing party attorney fees and other litigation expenses in such amount as the arbitrator deems reasonable or commensurate with the award provided, if any. Each party also shall pay one-half (1/2) of the fees and expenses of the arbitrator. After all of the evidence has been presented, and the hearing concluded, the arbitrator shall issue an award within fifteen (15) days). The arbitrator shall have no authority to award punitive damages or exemplary damages. Each party acknowledges that, by entering into these provisions, it has agreed to arbitrate any disputes or controversy described in this Paragraph, and that such agreement necessarily entails a waiver of numerous rights that the party might have were such disputes to be determined other than pursuant to arbitration. Nonetheless, each party knowingly and voluntarily waives all rights that it might otherwise have, including without limitation: the right to litigate such disputes in a state court forum or federal court forum having jurisdiction over this matter; the right to conduct discovery in accordance with the rules of the court in which the litigation concerning the dispute might otherwise be filed; the right to trial in such court, including without limitation the right to trial by jury; the right to obtain certain damages and remedies that might not be awardable by the arbitrator pursuant to this Paragraph; and the right to an appeal of the arbitrator's award. The foregoing enumeration of the rights waived by the party are not intended to be exclusive, and the fact that any right is not specifically listed here shall have no effect on the fact that such right is waived by virtue of the agreement to arbitrate disputes as provided herein.

**Authority.** Each individual executing this Agreement below on behalf of each respective party, represents and warrants to the other party that he has the full power and authority to execute this Agreement.

**Miscellaneous.** Time is of the essence. This Agreement represents the final agreement between the Chapter in the Manager related to management of the Project and may not be amended except in a written document executed by both parties. Both parties acknowledge and agree that the terms of this Agreement were jointly negotiated and drafted, and each party had the opportunity to review the same with an attorney prior to its execution. No right or remedy set forth in this Agreement and conferred upon or reserved to either of the parties is intended to be exclusive of any other right or remedy; all remedies provided for in this Agreement shall be cumulative. If any part of this Agreement shall be declared invalid or unenforceable, then such invalid term shall be severed from this Agreement and shall not affect the validity of the remainder of this Agreement or the

**Appendix 3: Account Management Agreement**

application of such term or provision to any other entity or circumstance. With respect to any default by any party, no delay or omission of the other party to exercise any right or remedy provided by this Agreement shall constitute a waiver of such right or remedy, and every such right or remedy may be exercised at any time during the continuance of such default. The terms of the Lease are incorporated herein by this reference. The Exhibits attached to this Agreement are incorporated herein by this reference. This Agreement may be executed in one or more counterparts, all of which together shall be deemed the same instrument.

[SIGNATURE PAGE FOLLOWS]

**Appendix 3: Account Management Agreement**

[SIGNATURE PAGE FOR ACCOUNT MANAGEMENT AGREEMENT]

**IN WITNESS WHEREOF**, the parties have hereunto set their hands and seals as of the day, month and year first above written.

**“MANAGER”:**

Greek Housing Management, LLC, an Illinois limited liability company

By: SAE Financial and Housing Corporation, an Ohio corporation, its sole member

By: \_\_\_\_\_

Name:

Title:

[SEAL]

**“CHAPTER”**

[Complete Full Chapter Name and Entity]

By: \_\_\_\_\_

Name:

Its: President

Attest: \_\_\_\_\_

Name:

Its: Secretary

[SEAL]

**Appendix 3: Account Management Agreement**

**EXHIBIT "A"**

**Annual Budget**

**(attached)**



**Appendix 3: Account Management Agreement**

**EXHIBIT "B"**

**Minimum Performance Requirements for House Director**

## **Appendix 4: Kitchen Supplement**

### **13 Appendix 4: Kitchen Supplement**

#### **13.1 Kitchen Supplement**

Please request Kitchen Supplement from the F&H Coordinator of Leasing and Membership or the F&H Facilities Manager.

## Appendix 5: House Rules

### 14 Appendix 5: House Rules

#### 14.1 Chapter House Rules



#### CHAPTER HOUSE RULES

1. As a Brother and member of the fraternity, all members and guests can expect behavior and attitudes commensurate to those expressed in the True Gentleman, from and toward each other.
2. Alcohol in the PUBLIC AREAS of the Chapter House (the House) is prohibited at all times. Alcohol may not be consumed in PRIVATE ROOMS by anyone who is under 21 years of age or in the presence of a person who is under 21 years of age.
3. Smoking/chewing of tobacco and other material in all areas of the House and grounds is prohibited except for the parking lot (25 feet away from any door). All ash and butts must be removed immediately and all areas shall be clean at all times.
4. The possession and/or use on House premises of any drugs or narcotics, including marijuana – the possession of which or the use of which may subject the individual and/or the Association to criminal penalties under the laws of the United State – is prohibited and will constitute grounds for immediate termination of lease.
5. Electrical extension cords and electric strung lights (ex: “Christmas lights”) are not allowed in any interior space in the House.
6. No modifications to furniture in suites or common areas are allowed.
7. Residents and guests shall not remove any window screens.
8. No personal furniture such as futons, beds, couches, or dressers are allowed in the Chapter House. Only furniture that is provided by SAE F&H is allowed.
9. Self-adhesive carpet tiles or other adhesive floor coverings are prohibited in any rooms.
10. No swimming pools are allowed on property.
11. No bicycles are allowed inside the building unless arrangements are made with the House Director (HD).
12. Use of nails or screws into walls/trim is not allowed. Use of 3M Command Strips is recommended.
13. No microwaves, hotplates or other cooking appliances are allowed in rooms. Prepared meals must be eaten in the dining room. Fast food may be eaten in the privacy of an individual’s room, but in no common areas except for the dining room
14. All dishes and cooking utensils are to be washed in the kitchen cleaning area only.
15. The use and access of the kitchen is only available to the cook and HD. Use of the kitchen is not allowed by chapter members.
16. Refrigerators, air-conditioners, and space heaters are not permitted.
17. Persons living in the house are responsible for the removal of their garbage and trash from the house to the outside receptacles.
18. No pets allowed. This includes pets of potential guests or girlfriends.
19. The possession of firearms or handguns is prohibited, including in members’ vehicles in the parking lot. The

## Appendix 5: House Rules

possession of fireworks, explosives, hazardous chemicals, or gasoline in the house is prohibited. No candles lighted or unlighted are allowed in the house at any time (the only exception would be on a birthday cake or in connection with a fraternity ritual).

20. No overnight guests in rooms are permitted without the approval of the House Manager, HD, or the Eminent Archon (EA).
21. Each member of the Fraternity and resident of the House is personally responsible for the conduct of his guests. All guests within the House shall be escorted by a member, who shall be personally responsible for the conduct, safety and well-being of their guest. Entertaining guests in the House is a privilege for both the member and the guest, which may be suspended or revoked by the EA, the HD, the Eminent Deputy Archon or the House Manager if that privilege is abused.
22. Only the locks provided on room doors are to be used. No other locks, chains, etc., are to be used.
23. The front and back doors of the house are to be kept locked at all times except on the occasion of Fraternity social functions.
24. All room and mailbox keys are to be returned to the House Manager at termination of the lease.
25. The parking facilities are the responsibility of the chapter.
26. The first floor, basement, front yard and patio are the responsibility of the House Manager. They are to be kept neat and clean at all times. The House Manager is empowered to require assistance from residents in maintaining upkeep and may levy fines for failure to cooperate. Condition and cleanliness of the House interior is the regular responsibility of the entire Active Chapter. The cleanliness and upkeep of the bathroom and halls on each floor are the individual responsibility of each resident on the floor. Guidelines and schedules of maintenance and Housekeeping tasks are administered by the House Manager.
27. The TV and stereo are the property of the House and may be used only with the permission of the House Manager and the EA.
28. All personal belongings are to be kept in the individual's room, large objects, such as footlockers, etc. may be stored elsewhere in the House with the permission of the House Manager. It may be necessary for a member to rent an offsite storage facility for personal property
29. Noise will be kept at a minimum after 11 p.m. on weeknights (except Friday). During the week (except Friday) the living room and dining room are to be used as study rooms. The parlor room may be used by those desiring to play cards, watch TV, etc.

### Notes:

Any infractions to these rules will result in an automatic fine of \$100.00 per day, per infraction (per the lease agreement) by the Facilities Manager/Facilities Manager. Malicious damage to property can result in immediate eviction from the property.

For serious or frequent infractions of the House Rules, the House Manager or EA may levy fines. Fines may be appealed to the Chapter Executive Board or the SAE F&H within one week from the date of the fine.

Damage to individual rooms and common areas will be repaired at occupant's expense. Use of the membership deposit to repair damage is at the sole discretion of SAE F&H. If any monies are used for repair, it is the responsibility of the chapter member to deposit additional funds to maintain the membership deposit amount.

## Appendix 6: Move-In/Move-Out Checklist

### 14.2 Move In – Move Out



Date \_\_\_\_\_  
TO: Sigma Alpha Epsilon Residents

FROM: Greek Housing Management, LLC

RE: **Room Inventory Form/Membership Deposit Refund Form**

Attached please find the Room Inventory Form/Membership Deposit Refund Form that needs to be completed as you move into your room. When you move in, please complete the sections titled “Check In”. The house director and/or house manager will keep the form on file until you move out.

During the move out process, please complete the “Check Out” sections. The following procedures must be completed in order for us to process your security deposit refund.

- Make a check-out appointment with the house director and/or house manager.
- Return all keys. There will be a charge for keys not returned.
- Make sure closet doors, screens, storm windows, and window stops are in their proper place.
- Remove all personal belongings even if you are returning next year.
- Remove all posters, tapestries, stickers, and other decorations from all surfaces including walls, ceilings, doors, windows, furniture.
- Remove screws, nails, hooks, tape, and other substances used to attach items to all surfaces. Damage to walls will cost \$10 per hole, plus painting costs.
- Wash off all surfaces. All furniture must be cleaned inside and out. Dust and vacuum. Window sills must be cleaned and dusted. There will be a \$100 cleaning fee for any resident who does not clean his room.
- Remove all trash from room. Do not throw trash and personal belongings into the hallways or common areas. Place all trash in dumpster. There will be a \$25 charge per bag if trash is not placed in dumpster.
- All mattresses must be checked and inspected on both sides. Any damage from any type of accident or spill will cost \$100 to replace mattress.
- Damage to carpet - If the carpet is stained, there will be a \$100 charge for carpet cleaning.
- Damage to blinds, fans, light fixtures – there will be a replacement charge for these items.

The house director and/or house manager will mail the completed forms to Greek Housing Management, LLC. Residents who have not properly completed this form will not receive their security deposit refund or qualify to have the deposit credit applied to his statement. Resident forfeits his security deposit in the event this form is not properly completed.

If you have any questions, please contact our office at (847) 424-3016 from 8:00 a.m. to 5:00 p.m. Monday through Friday.

**Appendix 6: Move-In/Move-Out Checklist**

**GREEK HOUSING MANAGEMENT, LLC (“GHM”)**

**ROOM INVENTORY FORM/MEMBERSHIP DEPOSIT REFUND**

Name \_\_\_\_\_ Room Number \_\_\_\_\_

School \_\_\_\_\_ Chapter \_\_\_\_\_ Key Number \_\_\_\_\_

Mail Refund to \_\_\_\_\_  
 Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_  
 Zip \_\_\_\_\_

CHECK-IN					
Number of Items	Item(s)	Fair	Good	Exc	Needs Repair
	Rug(s)				
	Carpet				
	Bed(s)				
	Mattress(es)				
	Desk(s)				
	Dresser(s)				
	Desk Chair(s)				
	Mirror(s)				
	Wardrobe(s)				
	Chest(s)				
	Lamp(s)				
	Fan(s)				
	Walls/Ceilings				
	Door(s)				
	Light Fixture(s)				

CHECK-OUT					
Number of Items	Item(s)	Fair	Good	Exc	Needs Repair
	Rug(s)				
	Carpet				
	Bed(s)				
	Mattress(es)				
	Desk(s)				
	Dresser(s)				
	Desk Chair(s)				
	Mirror(s)				
	Wardrobe(s)				
	Chest(s)				
	Lamp(s)				
	Fan(s)				
	Walls/Ceilings				
	Door(s)				
	Light Fixture(s)				
	Vacuum/Dusted				
	Trash Removed				

THIS FORM IS REQUIRED TO BE COMPLETED AND SUBMITTED TO GREEK HOUSING MANAGEMENT, LLC, 1856 SHERIDAN ROAD, EVANSTON, IL 60201 UPON MOVING OUT OF THE RESIDENCE IN ACCORDANCE WITH THE SECURITY DEPOSIT AGREEMENT. TENANT FORFEITS HIS SECURITY DEPOSIT IN THE EVENT THIS FORM IS NOT COMPLETED, SIGNED BY THE TENANT, THE HOUSING DIRECTOR AND/OR AUTHORIZED REPRESENTATIVE OF GREEK HOUSING MANAGEMENT, LLC. HOUSING DIRECTOR AND/OR GREEK HOUSING MANAGEMENT, LLC REPRESENTATIVE SHALL MAIL THE ORIGINAL TO NATIONAL HEADQUARTERS.

CHECK-IN	
Keys received?	Yes _____ No _____
Member signature	_____
Date	_____
House Director signature	_____
Date	_____

CHECK-OUT	
All keys returned?	Yes _____ No _____
I understand that any outstanding financial obligations which I have not paid or any additional expense caused by my failure to pass room check when vacating the room will be withheld from my refund.	
Member signature	_____

**Appendix 6: Move-In/Move-Out Checklist**

<p><b>Internal Use Only</b></p> <p>Date Received _____ Received by _____</p> <p>Ledger Account # _____</p> <p>Amount refunded \$ _____</p> <p>Amount applied to statement \$ _____</p>	<p>Date _____</p> <p>House Director signature _____</p> <p>Date _____</p> <p>Chapter Treasurer signature _____</p> <p>Date _____</p> <p><b>To be completed by Chapter Treasurer</b></p>
<p><b>Completed by GREEK HOUSING MANAGEMENT, LLC</b></p> <p>Balance due to GHM, LLC \$ _____</p> <p>Estimated necessary repairs or damages \$ _____</p> <p>Explanation (if any) _____</p> <p>_____</p>	<p>The above member of the _____ Chapter is cleared of debt except as noted below:</p> <p>Balance due to chapter \$ _____</p>

**Appendix 7: Reports**



# GREEK HOUSING MANAGEMENT, LLC

## **House Director Inspection Semester Checklist**

Please fill this out completely. There may be sections that you will want to copy for duplicate rooms such as the bedrooms and the basement, etc. Send the completed form to Rudy Cerrone at [RCerrone@SAE.net](mailto:RCerrone@SAE.net). Form should be completed at the beginning and conclusion of each semester.

Chapter Name		
House Director Name		Date
Lot Dimensions	House Size (Sq. Feet)	House Style and Color
No. of Bedrooms	No. of Bathrooms	House Faces
Daytime Street Traffic		Nighttime Street Traffic
Sidewalks north ____ south ____ east ____ west ____	Total Members living in house at move-in _____	Total Members living in house currently _____
Current condition of electrical (detail any on-going issues)		
Current condition of plumbing (detail any on-going issues)		
Current condition of heating (detail any on-going issues)		
Current condition of air conditioning (detail any on-going issues)		
Current condition of life-safety/security systems (detail any on-going issues)		
Current condition of intercom systems (detail any on-going issues)		
Current condition and function of internet/cable/telephone systems (detail any on-going issues)		



Appendix 7: Reports



# GREEK HOUSING MANAGEMENT, LLC

## House Director Inspection Semester Checklist

Chapter Name \_\_\_\_\_

Date \_\_\_\_\_

**Visible Condition of the Property**

Using the key below, apply the letter that best describes the condition of each item.

Exterior		Exterior	
FEATURE	CONDITION	FEATURE	CONDITION
Front door		Downspouts	
Front screen or storm door		Eaves	
Front door lock/key card/key fob card or finger reader		Driveway	
Back screen or storm door		Shed	
Additional doors		Fences	
Additional door lock/key card/key fob card or finger reader		Garage	
Additional screen or storm door		Outdoor lighting	
Screen and storm windows		Parking	
Glass and frames		Drainage	
Siding/brick, etc.		Trees	
Mailbox		Landscaping	
Doorbell (specify door location)		Retaining wall	
House number		Soil movement	
Garbage container/enclosure		Yard	
Recycling containers		Other	
Paint and trim			
Patios and decks			
Roof and flashing, venting			
Chimney			
Gutters			

Key	Comments
M - Missing	
G - Good condition	
S - Scratched	
D - Damaged	
B - Broken	
R - Repair/Replacements needed	

Appendix 7: Reports



# GREEK HOUSING MANAGEMENT, LLC

## House Director Inspection Semester Checklist

Chapter Name \_\_\_\_\_

Date \_\_\_\_\_

Parking Lot (size____ spaces____)		Interior Appearance (list floor _____)	
FEATURE	CONDITION	FEATURE	CONDITION
Sufficient space		Public areas	
Cracks		Walls	
Cleaning		Ceiling	
Stripping		Floors	
Bricks		Lights and switches	
Lighting		Outlets	
Sidewalks		Baseboards	
Trim		Trim	
Drainage		Other	
Other			

Key	Comments
M - Missing	
G - Good condition	
S - Scratched	
D - Damaged	
B - Broken	
R - Repair/Replacements needed	

**Appendix 7: Reports**



# GREEK HOUSING MANAGEMENT, LLC

## House Director Inspection Semester Checklist

Chapter Name \_\_\_\_\_

Date \_\_\_\_\_

Kitchen (floor _____)		Dining Room(floor _____)	
FEATURE	CONDITION	FEATURE	CONDITION
Windows		Windows	
Floor		Carpet or floor	
Walls		Walls	
Ceiling		Ceiling	
Lights and switches		Lights and switches	
Outlets		Equipment	
Stove		Outlets	
Chemical fire system over the stove		Baseboards	
Dishwashers		Trim	
Refrigerator		Tables	
Freezers		Chairs	
Sink		Other	
Disposal			
Ice machine			
Grease pit			
Beverage machine			
Cabinets and counter			
Baseboards			
Trim			
Other			

Key	Comments
M - Missing	
G - Good condition	
S - Scratched	
D - Damaged	
B - Broken	
R - Repair/Replacements needed	

Appendix 7: Reports



# GREEK HOUSING MANAGEMENT, LLC

## House Director Inspection Semester Checklist

Chapter Name \_\_\_\_\_

Date \_\_\_\_\_

Living Room (floor _____)	
FEATURE	CONDITION
Door	
Windows	
Carpet or floor	
Walls	
Ceiling	
Outlets, including cable outlet	
Lights and switches	
Furniture	
Other	

Hallways & Stairwells (floor _____)	
FEATURE	CONDITION
Floor	
Walls	
Ceiling	
Lights and switches	
Outlets	
Baseboards	
Stair treads	
Stair structure	
Landing and handrail	
Other	

Key		Comments
M	- Missing	
G	- Good condition	
S	- Scratched	
D	- Damaged	
B	- Broken	
R	- Repair/Replacements needed	

Appendix 7: Reports



# GREEK HOUSING MANAGEMENT, LLC

## House Director Inspection Semester Checklist

Chapter Name \_\_\_\_\_

Date \_\_\_\_\_

Bedrooms (floor _____ )				
FEATURE	CONDITION – PLEASE INCLUDE THE BEDROOM #			
	Bedroom	Bedroom	Bedroom	Bedroom
Door				
Windows				
Window covering				
Carpet or floor				
Walls				
Ceiling				
Lights and switches				
Outlets				
Closet				
Baseboards				
Trim				
Mattresses				
Box springs				
Bed frame				
Desks				
Chair				
Chests				
Other				

Key	Comments
M - Missing	
G - Good condition	
S - Scratched	
D - Damaged	
B - Broken	
R - Repair/Replacements needed	

Appendix 7: Reports



# GREEK HOUSING MANAGEMENT, LLC

## House Director Inspection Semester Checklist

Chapter Name \_\_\_\_\_

Date \_\_\_\_\_

Bathrooms (floor _____ )				
FEATURE	CONDITION			
	Bathroom 1	Bathroom 2	Bathroom 3	Bathroom 4
Bathroom floor & location				
Door				
Window				
Floor				
Walls				
Ceiling				
Sink				
Tub/shower				
Toilet				
Cabinet, shelves, closet				
Towel bars				
Lights and switches				
Outlets				
Baseboards				
Trim				
Ceiling Fans				
Other				

Key	Comments
M - Missing	
G - Good condition	
S - Scratched	
D - Damaged	
B - Broken	
R - Repair/Replacements needed	

Appendix 7: Reports



# GREEK HOUSING MANAGEMENT, LLC

## House Director Inspection Semester Checklist

Chapter Name \_\_\_\_\_

Date \_\_\_\_\_

Fireplace (floor_____)	
FEATURE	CONDITION
Damper	
Firebox	
Chimney	
Spark arrestor	
Rain cap	
Other	

Plumbing(floor_____)	
FEATURE	CONDITION
Pressure	
Drainage	
Hot water	
Washer	
Dryer	

Safety Equipment (floor_____)	
FEATURE	CONDITION
Fire alarms	
Sprinkler system	
Smoke detectors	
Vent hoods	
Fire extinguishers (how many extinguishers?)	
Exit lights	
Are there any new code requirements?	
Other	

Hot Water Heater (floor_____)	
FEATURE	CONDITION
Properly strapped	
Reasonable temperature	
Pressure control	
Other	

Key	Comments
M - Missing	
G - Good condition	
S - Scratched	
D - Damaged	
B - Broken	
R - Repair/Replacements needed	

Appendix 7: Reports



# GREEK HOUSING MANAGEMENT, LLC

## House Director Inspection Semester Checklist

Chapter Name \_\_\_\_\_

Date \_\_\_\_\_

Basement	
FEATURE	CONDITION
Door	
Windows	
Floor	
Walls	
Ceiling	
Storage	
Foundation	
Lights and switches	
Outlets	
Baseboards	
Trim	
Sump pump	
Stairs	
Furniture	
Other	

Key	Comments
M - Missing	
G - Good condition	
S - Scratched	
D - Damaged	
B - Broken	
R - Repair/Replacements needed	





# GREEK HOUSING MANAGEMENT, LLC

## House Director Inspection Semester Checklist

Chapter Name \_\_\_\_\_

Date \_\_\_\_\_

Please list the top five major improvements, in order of importance, that you feel need to be made to the house.

1.

2.

3.

4.

5.

Appendix 7: Reports



# GREEK HOUSING MANAGEMENT, LLC

## House Director Monthly Inspection Checklist

To \_\_\_\_\_ School \_\_\_\_\_

From \_\_\_\_\_ Chapter \_\_\_\_\_ Date \_\_\_\_\_

*This report should be completed each month and received by Jonathan Sharp, [jsharp@sae.net](mailto:jsharp@sae.net), no later than the 10th of each month. Please provide a summary statement of activities of each of the areas listed on this report. A Greek Housing Management, LLC Coordinator will follow up with you about any further questions or information necessary. Thank you for your input. (Please attach a word document for any additional comments.)*

### FOOD SERVICE

Please comment on menu planning and member satisfaction. Be sure to note any new ideas that are working well for you and/or any concerns that you may need assistance before responding to. Have the chapter

members reported any concerns that need to be addressed? \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ N/A

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

### HOUSE CLEANING

Please comment on the general condition of the common areas, bathrooms, and dining/kitchen areas. Are they well maintained and cleaned routinely? \_\_\_\_\_ Yes \_\_\_\_\_ No

Is the current cleaning staff sufficient? \_\_\_\_\_ Yes \_\_\_\_\_ No

Are they performing their duties properly and have a good attendance record? \_\_\_\_\_ Yes \_\_\_\_\_ No

Have the chapter members reported any cleaning concerns that need to be addressed? \_\_\_\_\_ Yes \_\_\_\_\_ No

Be sure to note any new ideas and/or concerns that need to be brought to the Greek Housing Management, LLC attention.

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

Appendix 7: Reports



# GREEK HOUSING MANAGEMENT, LLC

## House Director Monthly Inspection Checklist

### GENERAL MAINTENANCE

Please list all general maintenance projects that took place during the month. This should include indoor and outdoor projects. Be sure to include routine cleaning projects such as lawn, landscaping, leaf removal, painting, and general/miscellaneous repairs. Have the chapter members reported any maintenance concerns which need to be addressed? \_\_\_\_\_ Yes \_\_\_\_\_ No

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

### LAWNSCAPING AND SNOWREMOVAL

Please comment on condition of landscaping and parking lot. Are contracted service providers maintaining property in an attractive and well-kept manner? \_\_\_\_\_ Yes \_\_\_\_\_ No

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

### BEHAVIORIAL ISSUES

Please comment on any issues related to member behavior. Be sure to note any new ideas that are working well for you and/or any concerns that you may need assistance before responding to. Have the chapter members reported any concerns that need to be addressed? \_\_\_\_\_ Yes \_\_\_\_\_ No

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

Are you attending weekly executive board meetings? \_\_\_\_\_ Yes \_\_\_\_\_ No

Any Additional Comments? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Appendix 8: Alcohol Free Petition



GREEK HOUSING  
MANAGEMENT, LLC

Petition for Exemption from Alcohol Free Housing Restriction

**This Petition must be submitted for each academic semester.** Until Landlord provides Tenant with its signed approval of this Exemption allowing Tenant and its residents, members and guests of legal drinking age to possess and consume alcohol on the Premises for the applicable time period, the entire Premises (without exception) shall remain alcohol free.

Tenant Name: \_\_\_\_\_ Exemption Period: \_\_\_\_\_

1. Is Tenant presently in good standing with the host university and in the past nine (9) months, Tenant has received no warning, probation or other form of disciplinary sanctions (including, for example, academic warning or probation) by any university department or fraternity governance organization? \_\_\_\_\_ [If “No”, please attach detailed explanation.]

2. Please provide the following for the most recent academic reporting period:

Academic reporting period: \_\_\_\_\_ Tenant’s Grade Point Average (GPA): \_\_\_\_\_  
University’s All Student GPA: \_\_\_\_\_ All Men’s GPA: \_\_\_\_\_  
Fraternity Men’s GPA: \_\_\_\_\_ Fraternity Rank (x out of total #): \_\_\_\_\_

3. Is Tenant presently in good standing with the Sigma Alpha Epsilon Fraternity and in the past nine (9) months, Tenant has received no warning, probation or other form of disciplinary sanctions by the Fraternity or Province? \_\_\_\_\_ [If “No”, please attach detailed explanation.]

4. Is Tenant presently in compliance with all terms of the Lease (including but not limited to payment of Rent) and in the past nine (9) months, Tenant has not violated any terms, conditions or Rules of the Lease, whether or not cited by Landlord, the House Director or any other person? \_\_\_\_\_ [If “No”, please attach detailed explanation.]

5. In the past nine (9) months, has Tenant, including all of its members, received any complaints from neighbors or has been cited by the police department or host university regarding noise, littering, public intoxication, underage drinking or other form of inappropriate behavior? \_\_\_\_\_ [If “Yes”, please attach detailed explanation.]

Under oath and penalty of perjury, my signature below confirms that the above information, including all attachments, is true and correct as of this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_:

Requested by: \_\_\_\_\_, President

Attested by: \_\_\_\_\_, Secretary

Subject to the terms of the Lease, Landlord \_\_\_\_\_ (“grants” or “denies”) Tenant the above requested Exemption for the specified Exemption Period only.

Approved By: \_\_\_\_\_, its \_\_\_\_\_  
Date: \_\_\_\_\_

**Appendix 8: Alcohol Free Petition**

**\*\*Internal Use Only\*\***

Petition Reviewed By: \_\_\_\_\_

Initial Each:

\_\_\_\_\_ Information Confirmed with Host University

Specify Source:

\_\_\_\_\_ Information Confirmed with Fraternity

Specify Source:

\_\_\_\_\_ Information Confirmed with House Director

Specify Source:

\_\_\_\_\_ Information Confirmed with Facilities Manager

Specify Source:

Comments: