

Toward the Sustainability of Cooperative Living at Purdue University

I. Brief History

Purdue University was founded in 1869 as a land-grant university, with the mission of providing an affordable education to students in agriculture and the mechanical arts. In 1935, a group of young men moved into a house funded by Reverend William McFadden. This house, called the Wesley Boys' House, was the first cooperative house on Purdue's campus. By 1940, there were sixteen houses in the cooperative community, and their mission was to create a cooperative learning environment while maintaining affordable housing. Students in cooperatives cooked and cleaned for themselves, elected leaders to manage their day-to-day affairs, and developed important leadership and life skills as a result. Throughout the years, cooperative houses have been formed, merged, improved, strengthened, and sadly, some have been discontinued.

II. Cooperative Living Today

There are currently twelve separate cooperative housing organizations on Purdue's campus: five men's houses and seven women's houses. The oldest house that still thrives on campus opened its doors in 1936. In total, there are roughly 400 Purdue students that are part of the cooperative community every year. The biggest organization has a house capacity of 68 members and the smallest organization has a house capacity of 17 members. Each house is governed by their executive board, comprised of elected student members of the house that serve in roles including

President, Treasurer, Recruitment Chair, Risk Manager, and Alumni Chair. They enjoy the fact that they are all student-run, with no “house moms” or “maintenance men.” All of the cooking, cleaning, budgeting, fixing, planning and other responsibilities are led and completed by the students. This keeps costs down and makes cooperative housing amongst the most affordable living options on campus. Most houses also have a Corporation and/or Alumni board made up of alumni from the specific house. These boards act like a corporate office for a company. They deal with big picture items and capital expenses such as a mortgage, large maintenance requirements, and legal dealings such as insurance and non-profit status. The three boards associated with each house (Executive Board, PCC, and Corporation Board) all govern different parts of each organization.

Below are the current Cooperative Houses that make up the Purdue-only Cooperative Community:

A. Men’s Organizations, year founded and current capacity:

Gemini Cooperative, 1972, 52

Marwood Cooperative, 1936, 26

Circle Pines Cooperative, 1939, 64

Chauncey Cooperative, 1937, 22

Beta Upsilon Chi (formally known as Fairway Cooperative), 1958, 68

B. Women’s Organizations, year founded and current capacity:

Stewart Cooperative, 1986, 33

Maclure Cooperative, 1966, 23

Shoemaker Cooperative, 1938, 39

Ann Tweedale Cooperative, 1937, 40

Twin Pines Cooperative, 1952, 29

Devonshire Cooperative, 1997, 17

Glenwood Cooperative, 1939, 35

III. The Purdue Cooperative Council (PCC)

Within cooperative housing, there is a governing group of student members called the Purdue Cooperative Council (PCC), comprised of 17 elected board members and 12 house presidents. This group of students guides and somewhat governs the cooperatives on a year-to-year basis. They coordinate large events in the community such as philanthropic fundraisers, they assist in the implementation of risk management policies, they organize the recruitment of new members, and they sponsor an annual talent show. PCC also provides a link between individual cooperative houses and Purdue University. The PCC President often meets with Purdue University officials and other leaders on campus. Other Council members meet regularly with University administrators such as the Vice President of Risk Management, the Vice President of Finance and the Vice President of Marketing. The 17 board members are interviewed and elected by the outgoing Council at the end of the academic year. However, the house presidents are individually voted on by the members of their own house at the end of the calendar year. PCC is essential to the unity, tradition, culture and continuity of the cooperative community.

IV. Purdue's Office of Fraternity, Sorority and Cooperative Life (FSCL)

The work of the FSCL Office is directed towards creating the conditions for the FSC community to contribute meaningfully to the institutional mission and supporting the safety and success of every student. The Purdue FSCL Office supports the FSC community by building its work around five strategies: Assessment, Personnel, Risk Prevention, Organization-Level Development, and Housing. Essential functions of the FSCL Office include:

- Community advocacy
- Alumni, volunteer and community engagement
- Training, development, and coaching for students, alumni and volunteers
- Supporting student self-governance at the individual, chapter, and council level.
- Creating recognition and incentives to celebrate innovative practices that address university priorities for the student experience.
- Establishing a long-term continuity plan for fraternity, sorority and cooperative housing that is safe, financially secure, relevant to future generations and supported by students and stakeholders.
- Partnering with interdisciplinary groups of stakeholders to explore the underlying causes and contributors of problematic behavior, including The Office of Student Rights and Responsibilities, Purdue Police, Health and Wellness, the Office of Institutional Equity, the Center for Advocacy, Response and Education and other related offices.
- Investing in evidence-based and research-supported strategies for addressing risky, unhealthy and problematic behavior.

V. History of Purdue Research Foundation (PRF) Involvement

Bruce Pershing of PRF was invited to address the Task Force in January of 2018 regarding the turnover of funds and responsibility from PRF to individual

cooperative house corporations. He provided a history of the Purdue Student Housing Corporation (PSHC), for which he served as Assistant Treasurer from 1983 to 1996. Residents in each of the nine cooperative houses were considered members and appointed a director from each house to PSHC, which in turn elected officers. PSHC served as landlord to the houses, collecting rent, providing maintenance and establishing a reserve fund for maintenance purposes. In addition to PSHC, there was also SCA (Student Cooperative Association) which handled the social aspect of cooperative life, so there was some dual governance. On 4/30/2000, PSHC was dissolved. The properties were deeded by PRF to the individual alumni housing corporation boards, and \$30,000 was also given to each of these houses. Chauncey, Devonshire and Marwood, who owned their own houses, did not receive this money. In addition, a \$500,000 endowment was created to provide scholarships and leadership development opportunities for members. Rationale for the dissolution included discipline, recruitment and competition issues, but also that the houses wanted more control.

VI. The Purdue Cooperative Life Task Force

The Purdue Cooperative Life Task Force is a FY 2017-18 ad hoc group comprised of Student Life Advisory Council members, Student Life staff members, alumni and student members of cooperative houses. In appointing this group, Vice Provost for Student Life (VPSL) Dr. Beth McCuskey stated the following:

“There is a long and storied history of cooperative houses at Purdue, and we want to do everything we can to ensure their successful future.”

Task Force Members:

Bob Miles (Co-Chair), member of Student Life Advisory Council, Fairway Alumnus
Bob Mindrum (Co-Chair), VPSL staff member

Skyler Clingan, PCC President
Hollyn Culley, PCC Past President, Twin Pines Alumna
Brandon Cutler, Director of FSCL
Scott Downey, College of Agriculture, former Chauncey Faculty Advisor
Mark Diekman, College of Agriculture, Chauncey Alumnus and Advisor
Alex Eickholtz, PCC Alumni Relations Chair
Brie Landis, former PCC Chair of Alumni Engagement
Tom Lester, member of Student Life Advisory Council
Joyce Miles, Student Life Advisory Council, Twin Pines Alumna
Mark Rosenberger, Past PCC President, Circle Pines Alumnus
Chris Skiba, Student Life Director of Capital Projects

Task Force Charge:

- Review and analyze the status of current cooperative houses, to include gender balance, occupancies, capacities, governance/oversight, pricing and financial stability. A matrix of these and other metrics is recommended for comparison purposes.
- Recommend a process for assessing the facility needs of the cooperative houses.
- Identify potential sources of capital to renovate existing houses or construct new ones. Possibilities may include development/fundraising, public-private partnerships, etc.
- Develop a financial model(s) that would allow cooperative houses to be financially sustainable.
- Design a forecasting model based upon perceived demand that would justify the construction of new cooperative houses.

- Pursue the possibility of themed cooperative houses (e.g., Honors, International, Assisted Living) or even a Cooperative Village similar to the Greek Village concept.

Expectations and Deliverables:

- Conduct meetings/conference calls as least monthly beginning in September, 2017.
- Provide written, quarterly updates on progress.
- Present findings at an onsite meeting prior to June 30, 2018.
- Generate a final, written report by July 31, 2018.

Future Plans:

Once the task force has completed its work and submitted its report and recommendations, there are plans to initiate an ongoing Cooperative Alumni Advisory Council, which will move forward to implement the recommendations of the task force, beginning in the fall of 2018.

VII. Task Force Process

The Task Force met regularly beginning in October of 2017 and completed its work in August of 2018. A general outline and chronology of their work is shown below, with references to more detailed documents:

- A. **A “Clear Purpose” exercise** was conducted in December of 2017. Similar to a SWOT analysis, this exercise helped the task force focus on their charge. Results are shown in Attachment A.

- B. An Assessment Information List** was developed to be used in requesting data about the 12 cooperative houses. See Attachment B.
- C. House Self-Assessments** by all 12 cooperative houses were conducted at the request of PCC and were provided to the task force. An example of the self-assessment is shown in Attachment C.
- D. A Data Matrix** was developed on 12 key assessment items, to be used for comparison and discussion purposes. See Attachment D.
- E. The Cooperative House Community Assessment Report**, similar to the Data Matrix but including grade point and average cost averages, was reviewed by the task force. See Attachment E.
- F. Team Visits** to each of the 12 cooperative houses were conducted, using teams of two task force members each. Other attendees included the house advisors, corporate board members and executive board members.
- G. SWOT Analyses** were developed by the task force teams for each of the 12 houses. Confidentiality of the information was assured, but an aggregate of the SWOT results is shown in Attachment F.
- H. Best Practices** for corporate boards, house executive boards and alumni boards were generated after the team visits. This document is seen as one of the central results of the task force's work and critical to the future of the cooperative houses. See Attachment G.

- I. **Organizational and Rubric Scales** were developed for use by the 12 houses in assessing their current performance relative to the Best Practices. See Attachments H and I.

- J. **A Financial Sustainability Model** was developed to assist the houses in understanding the amount of capital reserve necessary to maintain their houses long-term. **Sensitivity Analyses** were also done for each house to demonstrate the effects of interest income and inflation assumptions in the model. See Attachments J and K.

- K. **Building a Case for Alumni Engagement in Cooperative Housing** was seen as a critical step for houses to pursue as they seek support, financial and otherwise, from their alumni. See Attachment L.

- L. **A Presentation to the Vice Provost for Student Life (VPSL)** was given on July 25, 2018 in which the task force presented initial findings and recommendations. See Attachment M.

M. Recommendations/Next Steps

The following items represent the final recommendations and “next steps” to be undertaken as a result of the task force’s work:

1. Meet with the Purdue Cooperative Council (PCC) in the fall of 2018 to discuss the white paper, to present the “best practices,” to encourage the cooperative houses to complete the rubric and organizational scales

as part of their self-assessment efforts and start implementation, and to answer any questions.

2. Meet with house presidents at the PCC President's Meeting to present the individual SWOT analyses, the financial sustainability model, and the attendant sensitivity analyses relative to interest income and inflation assumptions.
3. Present the best practices and financial sustainability information to a joint meeting of corporate/alumni board members and respond to questions.
4. Encourage Purdue Admissions and University Residences to provide information on cooperative houses to "overflow" students who cannot readily gain access to residence halls.
5. Encourage PCC and the individual cooperative houses to update their websites and to utilize a common branding and unified message about cooperative living.
6. Establish an ongoing Student Life Cooperative Advisory Council to implement the task force recommendations and to provide ongoing support for cooperative living.
7. Determine the proper level of assistance, coordination and collaboration needed from the newly formed Cooperative Advisory Council, the FSCL staff, the Purdue Cooperative Council, the house executive boards, and

the house corporate/alumni boards in order to efficiently and effectively support cooperative living at Purdue.

The Purdue Cooperative Life Task Force wishes to thank all 12 of the cooperative houses, their advisors and their corporate/alumni board representatives for their assistance and involvement in this process. Through the implementation of the Best Practices and careful consideration of their individual finances, and with assistance and support from the Cooperative Advisory Council and the FSCL Office, we believe that the legacy of cooperative living at Purdue can be sustained for many years to come. We also thank the Vice Provost for Student Life, Dr. Beth McCuskey, for her vision and commitment to this process.

Attachment G

COOPERATIVE LIFE BEST PRACTICES

I. Corporate Board

A. General

- Make “Corporate Board” the formal name (i.e., versus Alumni Board) unless the house has both of these entities.
- Establish a sound business and corporate board model.
- Hold meetings with house E-Board at least biannually.
- Establish guidelines to indicate which services, repairs and replacements are corporate responsibilities versus house responsibilities.
- Prepare the long-range plan (see Item C).
- Provide the house with a list of recommended vendors and service companies.
- Develop an atmosphere of transparency and trust with house members, including the following:
 - Establish monthly fees and explain to house members how they were derived, including allowances to reserve.
 - Include the house president and treasurer on the corporate board, with voting privileges if possible.
 - Share corporate financial reports with house members.
- Meet annually with corporate representatives from all of the cooperative houses to discuss like problems and solutions.
- Review service contacts (e.g., trash pickup, telephone, cable, internet, insurance, etc.) on a regular basis to ensure cost and quality, and renegotiate if possible.

B. Finances

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- Review annual house operating budget and provide feedback to house E-Board.
- Develop an agreement with house E-Board as to which items are included in the house operating budget and which items are in the corporate budget.
- Maintain separate financial accounts for the corporate board and house.
- Provide a template to the house treasurer that generates budget-to-actual reporting on at least a quarterly basis.
- Provide the house treasurer with a state tax-exempt card for making purchases.
- Arrange for annual financial audits of both house and corporate books by a third party (not necessarily a CPA – could be the house advisor).
- Develop a fundraising philosophy and an action plan.

C. Long Range Planning

- Develop a long-range plan for maintenance to include the expected life of the item and the repair or replacement costs. A partial list is as follows:
 - Roof
 - Plumbing upgrade
 - Electrical upgrade
 - Painting (inside and out)
 - Parking lot repair
 - Appliances
 - Heating, ventilating and air conditioning
 - Interior furnishings
- Utilize the attached financial model that incorporates the age of the house, square footage, general condition and current reserves as a guide for the long-range plan.
- Determine the reserve required to meet ongoing capital needs and establish a plan to work toward establishing the appropriate reserve (may entail increasing monthly fees).

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D. Insurance

- Review and comply with the University's requirements for liability insurance.
- Provide Officers and Directors insurance for both house and corporate boards.
- Review insurance for replacement value.
- Explore possibility of all houses purchasing insurance from the same company to achieve better rates.

II. House Executive Board

A. General

- Make the House Alumni chairman a member of E-Board.
- Have E-Board officers serve on an annual basis, or at least the president and treasurer.
- Develop and maintain a checklist for opening and closing the house.
- Develop and/or review manuals for each officer and committee chair that are updated annually and passed on to the successor.
- Encourage members to take an active role in house repairs and maintenance.
- Consider having members and house share 50/50 toward the cost of approved, individual room projects.
- Establish a plan to monitor the house during breaks when the house is vacant, particularly during winter break and summer.

B. House Operations

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- Ensure attendance at officer training sessions conducted by the PCC.
- Develop and/or review manual for house rules.
- Develop and/or review manual for house duties.
- Have all kitchen workers trained and certified in ServeSafe.

C. Promotion and Recruitment

- Participate in as many campus-wide events as possible to promote cooperative living.
- Notify alumni of recruitment dates and encourage them to spread the word in their local areas.
- Advise high school guidance counselors of recruitment dates and request their assistance.
- Encourage members to invite their friends and classmates to participate in recruitment.
- Utilize social media and websites to inform students and prospective students about cooperative living.
- Encourage Purdue Admissions to provide information on cooperative living to overflow students. Seek assistance from the Vice Provost for Student Life.

III. Alumni Board

Note: if the house does not have a separate alumni board, the responsibilities below would fall to the corporate board.

- Provide training on alumni relations and fundraising.
- Host an alumni dinner/event to welcome the graduating seniors into the alumni group.
- Host pledge class annual reunions at the house to better engage alumni.
- Publish a monthly electronic newsletter to inform alumni of house activities, awards, etc. and to keep them engaged.

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- Develop an alumni board.
- Have the pledge class utilize composite pictures to update the alumni list and work with the PAA to obtain current emails.
- Keep alumni aware of house needs and encourage them to help with fundraising efforts to meet those needs.

Attachment H

COOPERATIVE LIFE BEST PRACTICES RUBRIC

I. Corporate Board

A. General

- i. Make “Corporate Board” the formal name (i.e., versus Alumni Board) unless the house has both entities.

orporation Board exists. House members are the only entities of the organization.	ual alumni are present in the business function of the house, but an established board does not exist.	orporation Board exists but lacks functionality as a business entity.	ation Board functions as the formal entity and manages alumni business.	ation Board and Alumni Board are both established and functioning independently
1	2	3	4	5

- ii. Establish a sound business and corporate board model.

orporation Board exists and there is not established business model.	is established but has no developed business model.	orporation Board exists and handles business as it is presented.	orporation Board functions under a model, but the model is not clearly established will all entities.	orporation Board has a developed model that is communicated and followed by Board Members and the House.
1	2	3	4	5

- iii. Hold meetings with house E-Board at least biannually.

orporation board is meeting.	orporation Board is meeting occasionally, but little to no current house member is involved.	orporation Board has an established meeting schedule (annual or biannual) with minimal house participation.	orporation Board has an established meeting schedule (annual or biannual) with house member present and participating.	orporation Board meets biannually with members of the house and the Executive Board with equal participation by all parties.
1	2	3	4	5

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COOPERATIVE LIFE BEST PRACTICES RUBRIC

- iv. Establish guidelines to indicate which services, repairs and replacements are corporate responsibilities versus house responsibilities.

lack of understanding between corporation responsibilities and house responsibilities.	single entity, house or corporation, hold all the responsibility for services, repairs and replacements.	responsibilities are divided between the house and corporation, but clarity of the responsibilities lacks.	house and Corporation share responsibilities on services, repairs and replacements.	and established guidelines between house responsibilities and corporation responsibilities.
1	2	3	4	5

- v. Prepare the long-range plan (see Item C).

no long-range plan exists.	capacity to develop a long-range plan exists, but no plan has been established.	acknowledgment of the need for a long-range plan, but no clear plan has been established.	long-range plan is established, but responsibilities to achieve the plan is unclear.	long-range plan is established with clear responsibilities for the house and corporation.
1	2	3	4	5

- vi. Provide the house with a list of recommended vendors and service companies.

no list of recommended vendors or service companies exists.	request for vendors on the house is delayed due to a lack of vendor knowledge.	when a problem arises, the house has some information to begin to remedy the problem.	list of recommended vendors exists but is not wholesome for the issues managed by the house.	wholesome list of recommended vendors is provided to the house including multiple sources.
1	2	3	4	5

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COOPERATIVE LIFE BEST PRACTICES RUBRIC

- vii. Develop an atmosphere of transparency and trust with house members, including the following:
- Establish monthly fees and explain to house members how they were derived, including allowances to reserve.
 - Include the house president and treasurer on the corporate board, with voting privileges if possible.
 - Share corporate financial reports with house members.

and Corporation boards operate independently from one another with no communication.	and Corporation board with primarily independently, however occasional collaboration and communication exists.	and Corporation boards work together on a limited basis. House members have no voting privileges on the board. Limited reports are provided between the two boards.	and Corporation boards primarily work together. Communication between the boards is established but limited. House member have limited privileges on the Corporation board.	and Corporation boards work alongside each other with mutual oversight and reporting.
1	2	3	4	5

- viii. Meet annually with corporate representatives from all of the cooperative houses to discuss like problems and solutions.

poration board works independently from all other organizations.	ation Board has a limited understanding of how other corporation board operate, but no communication with other boards.	hen a problem arises, the Corporation Board may discuss problems and solutions with other cooperative houses.	ation Board occasionally discusses problems and solutions with members of other house corporation boards.	ation representatives has an established schedule for meeting with other corporation representatives to discuss problems and solutions.
1	2	3	4	5

- ix. Review service contacts (e.g., trash pickup, telephone, cable, internet, insurance, etc.) on a regular basis to ensure cost and quality and renegotiate if possible.

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Service contracts are not reviewed by members of the house or by the Corporation Board.	Members independently review service contracts on an intermittent basis.	When advised by house members, the Corporation Board will review service contracts and provide feedback.	Corporation board reviews service contracts, but rarely handles renegotiation.	Corporation Board has a regular review period for all service contracts and handles renegotiation if required.
1	2	3	4	5

B. Finances

- i. Review annual house operating budget and provide feedback to house E-Board.

Operating budget exists, and knowledge of house operating expenses is limited.	Understanding of the house operating income and expenses exist but there is no clear annual budget.	Complete annual house operating budget exists and is managed solely by the house.	Corporation Board views the house operating budget irregularly and/or feedback is limited.	Annual operating budget for the house exists and is regularly reviewed by the Corporation Board.
1	2	3	4	5

- ii. Develop an agreement with house E-Board as to which items are included in the house operating budget and which items are in the corporate budget.

Budget for either organization exists.	Budget exists but items may not be distinctly divided between house and corporate budgets.	Budget items are divided between the house and corporate budget.	Items are split between budgets with an understanding, but no acknowledged agreement.	Agreement between the E-Board and the Corporation Board exists with an understanding of how items are divided.
1	2	3	4	5

- iii. Maintain separate financial accounts for the corporate board and house.

Financial records are kept.	Financial records are kept but not maintained.	Financial records are kept and maintained together.	Financial records are kept independently but managed together.	Corporation Board and house keep and maintain independently financial records.
1	2	3	4	5

Attachment H

COOPERATIVE LIFE BEST PRACTICES RUBRIC

- iv. Provide a template to the house treasurer that generates budget-to-actual reporting on at least a quarterly basis.

financial planning or reporting exists.	al reporting happens, but only on an as needed basis with no template or guidance.	Boards report financial information, but development is determined by the individual preparing the records.	ncial reporting is done through a provided template but not on an established basis.	s provide templates and report on a quarterly basis.
1	2	3	4	5

- v. Provide the house treasurer with a state tax-exempt card for making purchases.

se is not registered for non-profit tax exemption.	use is tax exempt but seldomly uses the exemption status and does not have an exemption card.	Board maintains the tax exemption card and is used occasionally on purchases.	reasurer understands state tax-exemption status and utilizes it on purchases but does not have a card.	se treasurer has a state tax-exempt card and utilized it when making all purchases.
1	2	3	4	5

- vi. Arrange for annual financial audits of both house and corporate books by a third party (not necessarily a CPA – could be the house advisor).

ncial records for are kept and audits exist.	ncial records are kept, but are seldom, if ever, audited.	Financial audits are completed internally between the house and the corporation.	ncial audits are completed by a third party, but on a periodic basis.	ncial audits for both the corporation and house are completed by a third party on an annual basis.
1	2	3	4	5

- vii. Develop a fundraising philosophy and an action plan.

ncial philosophy or plan exists	ganization operates financially but lacks knowledge of a philosophy and a plan.	Organization operates without either a financial philosophy or an action plan.	nization has a financial philosophy and plan, but lack is implementation.	nization has a developed financial philosophy with an implemented action plan.
1	2	3	4	5

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COOPERATIVE LIFE BEST PRACTICES RUBRIC

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COOPERATIVE LIFE BEST PRACTICES RUBRIC

C. Long Range Planning

- i. Develop a long-range plan for maintenance to include the expected life of the item and the repair or replacement costs. A partial list is as follows:
- o Roof
 - o Plumbing upgrade
 - o Electrical upgrade
 - o Painting (inside and out)
 - o Parking lot repair
 - o Appliances
 - o Heating, ventilating and air conditioning
 - o Interior furnishings

nowledge or plan of item life exists, and repairs are cumbersome.	r repair and maintenance of items happen on an as needed basis. No long-term plan is in place.	wledge of proper item maintenance, repair and replacement exists.	n exists but may not be wholesome or implemented fully.	tablished maintenance, repair, and replacement plan exists and is implemented for all necessary elements of the house.
1	2	3	4	5

- ii. Utilize the attached financial model that incorporates the age of the house, square footage, general condition and current reserves as a guide for the long-range plan.

ong-term reserve exists.	s exists to cover capital needs for the house, but no plan to maintain the fund exists.	icient fund exists and is managed, but a financial model for development does not exist.	and reserve exist but may not be wholesome or implemented fully.	r the attached plan, or a similar plan is utilized to plan and finance capital needs for the organization. The reserve is established and provides security to the house.
1	2	3	4	5

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- iii. Determine the reserve required to meet ongoing capital needs and establish a plan to work toward establishing the appropriate reserve (may entail increasing monthly fees)

ong-term reserve exists.	erve exists but does not cover ongoing capital needs. No plan for establishing and maintaining a reserve exists.	cient fund exists and but lack a plan for utilization.	and reserve exist but may not be wholesome or implemented fully.	shed reserve with a plan for reserve growth and use for capital needs.
1	2	3	4	5

D. Insurance

- i. Review and comply with the University’s requirements for liability insurance.

ability insurance exists	ity insurance exists but does not meet university requirements.	y insurance exists but the university requirements are unknown and not reviewed.	ty insurance policy once complied with University requirement, but requirements are not reviewed.	ersity requirements for liability insurance are often reviewed and are met by current policy.
1	2	3	4	5

- ii. Provide officers and directors insurance for both house and corporate boards.

nsurance policy exists	nce policy covers limited individual on the house or corporate boards.	ce covers members of the corporate board members, but no house officers.	ce covers corporate board members and a limited number of house officers.	rance for officers and directors for both house and corporate boards exist.
1	2	3	4	5

- iii. Review insurance for replacement value.

nce policy does not exist	rance policy exist, but replacement value is unknown and/or may not be covered.	rance policy exists and covers the replacement value but is never reviewed.	urance policy covers replacement value but is seldomly reviewed.	ce completely covers the replacement value and is consistently reviewed.
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Attachment H

COOPERATIVE LIFE BEST PRACTICES RUBRIC

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- iv. Explore possibility of all houses purchasing insurance from the same company to achieve better rates.

does not have a current insurance policy.	insurance coverage and records is unknown.	use has an individual insurance policy; however it may have high rates.	use has an individual insurance policy with acceptable rates.	se is a part of a group insurance policy which reduces rates.
1	2	3	4	5

Attachment H

COOPERATIVE LIFE BEST PRACTICES RUBRIC

II. House Executive Board

A. General

- i. Make the House Alumni Chairman a member of E-Board.

does not have an Alumni Chairman position.	use elects an Alumni Chairman, but there are no clear responsibilities for the position.	has an Alumni Chairman, but the position seldomly meets the responsibilities	has an Alumni Chairman that accomplishes responsibilities but is not a member of the Executive Board.	Alumni Chairman is successful in fulfilling responsibilities and is a contributing member to the E-Board.
1	2	3	4	5

- ii. Have E-Board officers serve on an annual basis, or at least the president and treasurer.

use officers serve for an annual term.	house officers by be elected for an year long term, but may or may not be on the E-Board.	President and Treasurer serve on the Executive Board on an annual basis.	officers on the E-Board serve for an annual term, but not all.	members of the House Executive Board serve together for the same annual term.
1	2	3	4	5

- iii. Develop and maintain a checklist for opening and closing the house.

s no process for routinely checking the house before, during, and/or after long breaks.	on-formal process for opening and closing the house exists but may not be an assigned responsibility.	house regularly opens and closes the house during breaks, and an officer or member has the responsibility to check the house status, but no formal checklist.	house has a checklist for the opening and closing procedures for the house and the responsibility is assigned to a member/officer, but checklist is outdated or irrelevant.	house has an established opening and closing procedure checklist that is regularly maintained and updated.
1	2	3	4	5

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- iv. Develop and/or review manuals for each officer and committee chair that are updated annually and passed on to the successor.

Transition between officers or chairs currently exists.	Transition between officers only exists at the will of the transitioning officers and no manual or documentation is passed.	Transition between officers exists and manuals are passed, but seldomly explained to new officer.	Officer transitions include discussion the position and the passing of a manual or documentation, but manual is seldomly updated.	Officer transition is a formal process with discussion between officers and retiring officer regularly update the manual during their term.
1	2	3	4	5

- v. Encourage members to take an active role in house repairs and maintenance.

Repairs and maintenance is seldomly occurs in the house.	Repairs and maintenance occur, but members are seldomly involved.	Repairs and maintenance are handled solely by a officer of the house.	Repairs and maintenance is completed exclusively by a few members of the house.	Members take an active role in the regular repair and maintenance of the house.
1	2	3	4	5

- vi. Consider having members and house share 50/50 toward the cost of approved, individual room projects.

Individual room improvement projects are discouraged in the house.	Members are exclusively required to cover all cost associated with an individual room improvement.	House has an approval process for individual rooms improvements, but members cover all cost.	Individual room improvement project have an approval process and house seldomly covers approved costs.	Members and the house share a 50/50 cost for individual room improvement projects, and projects have an approval process.
1	2	3	4	5

- vii. Establish a plan to monitor the house during breaks when the house is vacant, particularly during winter break and summer.

House is left unoccupied and unmonitored during breaks.	House is seldomly monitored during breaks and no plan is established.	House is always occupied during breaks, but no plan for monitoring the house exists and no individual is responsible.	House is monitored over the summer by individuals, but no established plan exists.	Established plan for monitoring the house during breaks is established and
---------------------------------------------------------	-----------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------	----------------------------------------------------------------------------

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COOPERATIVE LIFE BEST PRACTICES RUBRIC

				individuals hold the responsibility.
1	2	3	4	5

B. House Operations

i. Ensure attendance at officer training sessions conducted by the PCC.

Officer never attends PCC conducted officer trainings.	Officer mentions PCC officer training sessions, but individual decide to attend.	Officers attend officer training sessions conducted by PCC but attendance is not monitored or enforced	Officers attend officer training sessions conducted by PCC and lack of attendance is enforced.	Officer regularly attends officer training sessions conducted by PCC with complete attendance from officers.
1	2	3	4	5

ii. Develop and/or review manual for house rules.

Standard for house rules exists.	Rules exist but are either not followed or are not in a form to be reviewed.	Rules exist and are followed but are seldomly reviewed and/or revised.	Rules are followed and are regularly reviewed and revised.	Rules are kept within a manual and a process for regular reviewal and revision of the rules exists.
1	2	3	4	5

iii. Develop and/or review manual for house duties.

Standard for house duties exists.	Duties exist but are either not followed or are not in a form to be reviewed.	Duties exist and are followed but are seldomly reviewed and/or revised.	Duties are followed and are regularly reviewed and revised, but lack accountability.	Duties are kept within a manual and a process for regular reviewal and revision of the duties exists, along with a procedure for accountability.
1	2	3	4	5

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iv. Have all kitchen workers trained and certified in ServeSafe.

Individuals in the house are certified in ServeSafe.	a few members of the house are trained and certified in ServeSafe.	Some members of the house are trained and certified in ServeSafe but are not always present in the kitchen during preparation.	all kitchen workers are trained and certified in ServeSafe, but at least one certified individual is in the kitchen at all working times.	all kitchen workers are trained and certified in ServeSafe.
1	2	3	4	5

C. Promotion and Recruitment

i. Participate in as many campus-wide events as possible to promote cooperative living.

house never participates in campus-wide events and promotion is not a priority.	house promotes cooperative living, but seldomly participated in campus-wide events.	some mandatory campus-wide events are participated in by the house.	house regularly participate in campus-wide events, but solely promote house interests rather than cooperative living.	house participates in numerous campus wide events and promotes all of cooperative living.
1	2	3	4	5

ii. Notify alumni of recruitment dates and encourage them to spread the word in their local areas.

alumni are never contacted about the recruitment process.	alumni are notified about recruitment but only after the process is complete.	alumni are informed about recruitment but are not instructed on how they can help.	alumni are notified of recruitment and are encouraged to spread the word to their communities.	alumni are regularly informed about cooperative recruitment and are active in spreading the word.
1	2	3	4	5

iii. Advise high school guidance counselors of recruitment dates and request their assistance.

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COOPERATIVE LIFE BEST PRACTICES RUBRIC

does not have an active role is spreading recruitment dates.	individually reaches out to their communities about recruitment dates, but never within high schools.	ers of the house reach out to their personal guidance counselors and schools about recruitment dates.	se actively participates alongside PCC is discussing recruitment with high school guidance counselors.	actively participates in discussing with high school guidance counselors about cooperative living and how they can advise students.
1	2	3	4	5

iv. Encourage members to invite their friends and classmates to participate in recruitment.

ers do not have an active role is spreading recruitment dates.	embers only discuss cooperative recruitment when prompted by friends or classmates.	ers often talk to friends and classmates about cooperative living but don't reach out about recruitment.	bers share recruitment information with their friends and classmates.	embers personally reach out to their current and past friends and classmates with an invite to cooperative recruitment and encourage them to participate.
1	2	3	4	5

v. Utilize social media and websites to inform students and prospective students about cooperative living.

and members do not have an active role is spreading recruitment dates.	embers only discuss cooperative living and recruitment on social media when prompted.	ers often use social media to share their cooperative living message, but the house lacks a social media presence.	bers and the house use social media to share about cooperative living.	ers and the house have an active presence on social media and work to inform student about cooperative living and recruitment.
1	2	3	4	5

vi. Encourage Purdue Admissions to provide information on cooperative living to overflow students. Seek assistance from the Vice Provost for Student Life.

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COOPERATIVE LIFE BEST PRACTICES RUBRIC

se seldomly fills with cooperative recruitment and no additional actions are taken to fill available spots.	is open to fill open spots when approached, but never actively reaches out.	e independently tries to reach out to overflow students about cooperative living availabilities.	use understands how admissions and the Vice Provost office could be utilized but would seldom reach out in times of need.	use understands how admissions and the Vice Provost office could be utilized and is willing to work with those offices in times of need.
1	2	3	4	5

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III. Alumni Board

Note: if the house does not have a separate alumni board, the responsibilities below would fall to the corporate board.

i. Provide training on alumni relations and fundraising.

ning or communication between alumni and house exists.	hold responsibility for alumni relations and fundraising but lack training and follow through with one or both.	ard handles all alumni relations and fundraising without training members.	er are trained on alumni relations and fundraising, but are not active in participating.	relations and fundraising are actively pursued by the Board and member are often trained on how they can help.
1	2	3	4	5

ii. Host an alumni dinner/event to welcome the graduating seniors into the alumni group.

ommunication between alumni and house exists.	ni board has not role in welcoming member to the alumni group. It is left to the will of the graduating members.	duating members are informally welcomed to the group.	ing seniors are welcomed to the alumni through a personal correspondence.	Board regularly host an event to formally welcome graduating seniors as alumni.
1	2	3	4	5

iii. Host pledge class annual reunions at the house to better engage alumni.

ommunication between pledge classes exist after graduation.	ons of pledge classes are seldom to occur.	lge classes often hold reunions but never at the house.	ge Class regularly hold reunions at the house, but current members of the house are seldomly engaged.	ge Class regularly hold reunions at the house and members of the house are actively engaged in the event.
1	2	3	4	5

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- iv. Publish a monthly electronic newsletter to inform alumni of house activities, awards, etc. and to keep them engaged.

Communication between alumni and members.	Alumni are seldomly informed of house activities, awards, etc.	Alumni are periodically engaged in house business via occasional newsletters.	Alumni and house independently publish newsletters.	Alumni Board and house members collaborate to regularly publish an electronic newsletter.
1	2	3	4	5

- v. Develop an alumni board.

Handling alumni relations exists.	House Alumni Chairman individually handles all alumni relations.	Alumni Chairman and Corporation board are the sole entities handling alumni relations.	Individual alumni board exists, but seldomly handles alumni relations.	Alumni board is established with clear expectations on how to handle alumni relations.
1	2	3	4	5

- vi. Have the pledge class utilize composite pictures to update the alumni list and work with the Purdue Alumni Association to obtain current contact information.

Alumni information is gathered or kept.	System for gathering and storing alumni information exists, but some source (composites) of alumni names exist.	Alumni list is established but is seldomly used or updates.	House classes independently work to update alumni information.	House classes are actively engaged working with the Alumni Association to update alumni list.
1	2	3	4	5

- vii. Keep alumni aware of house needs and encourage them to help with fundraising efforts to meet those needs.

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COOPERATIVE LIFE BEST PRACTICES RUBRIC

ommunication between alumni and members.	i are seldom informed of fundraising efforts and needs.	ni are informed of house fundraising efforts but seldom understand the needs.	umni are informed of fundraising efforts and needs.	ni are often informed of house fundraising efforts and needs, and actively participate in efforts.
1	2	3	4	5

Attachment I

COOPERATIVE LIFE BEST PRACTICES Organizational scale

I. Corporate Board

a. General

	1	2	3	4	5	
i. Make “Corporate Board” the formal name (i.e., versus Alumni Board) unless the house has both of these entities	●	●	●	●	●	Excellent
ii. Establish a sound business and corporate board model.	●	●	●	●	●	Excellent
iii. Hold meetings with house E-Board at least biannually.	●	●	●	●	●	Excellent
iv. Establish guidelines to indicate which services, repairs and replacements are corporate responsibilities versus house responsibilities.	●	●	●	●	●	Excellent
v. Prepare the long-range plan (see Item C).	●	●	●	●	●	Excellent
vi. Provide the house with a list of recommended vendors and service companies.	●	●	●	●	●	Excellent
vii. Develop an atmosphere of transparency and trust with house members, including the following:						
<ul style="list-style-type: none"> Establish monthly fees and explain to house members how they were derived, including allowances to reserve. 	●	●	●	●	●	Excellent
<ul style="list-style-type: none"> Include the house president and treasurer on the 						

- corporate board, with voting privileges if possible.
- Share corporate financial reports with house members.

viii. Meet annually with corporate representatives from all of the cooperative houses to discuss like problems and solutions.	1	2	3	4	5	Excellent
	●	●	●	●	●	
ix. Review service contacts (e.g., trash pickup, telephone, cable, internet, insurance, etc.) on a regular basis to ensure cost and quality and renegotiate if possible.	1	2	3	4	5	Excellent
	●	●	●	●	●	

b. Finances

i. Review annual house operating budget and provide feedback to house E-Board.	1	2	3	4	5	Excellent
	●	●	●	●	●	
ii. Develop an agreement with house E-Board as to which items are included in the house operating budget and which items are in the corporate budget.	1	2	3	4	5	Excellent
	●	●	●	●	●	
iii. Maintain separate financial accounts for the corporate board and house.	1	2	3	4	5	Excellent
	●	●	●	●	●	
iv. Provide a template to the house treasurer that generates budget-to-actual reporting on at least a quarterly basis.	1	2	3	4	5	Excellent
	●	●	●	●	●	
v. Provide the house treasurer with a state tax-exempt card for making purchases.	1	2	3	4	5	Excellent
	●	●	●	●	●	
vi. Arrange for annual financial audits of both house and corporate books by a third party (not necessarily a	1	2	3	4	5	Excellent
	●	●	●	●	●	

CPA – could be the house advisor).

vii. Meet annually with corporate representatives from all of the cooperative houses to discuss like problems and solutions.

1	2	3	4	5	
●	●	●	●	●	Excellent

viii. Develop a fundraising philosophy and an action plan.

1	2	3	4	5	
●	●	●	●	●	Excellent

c. Long Range Planning

i. Develop a long-range plan for maintenance to include the expected life of the item and the repair or replacement costs. A partial list is as follows:

- Roof
- Plumbing upgrade
- Electrical upgrade
- Painting (inside and out)
- Parking lot repair
- Appliances
- Heating, ventilating and air conditioning
- Interior furnishings

1	2	3	4	5	
●	●	●	●	●	Excellent

ii. Utilize the attached financial model that incorporates the age of the house, square footage, general condition and current reserves as a guide for the long-range plan.

1	2	3	4	5	
●	●	●	●	●	Excellent

iii. Determine the reserve required to meet ongoing capital needs and establish a plan to work toward establishing the appropriate reserve (may entail increasing monthly fees).

1	2	3	4	5	
●	●	●	●	●	Excellent

d. Insurance

i. Review and comply with the University's requirements for liability insurance.	1	2	3	4	5	Excellent
ii. Provide officers and directors insurance for both house and corporate boards.	1	2	3	4	5	Excellent
iii. Review insurance for replacement value.	1	2	3	4	5	Excellent
iv. Explore possibility of all houses purchasing insurance from the same company to achieve better rates.	1	2	3	4	5	Excellent

II House Executive Board

e. General

i. Make the House Alumni chairman a member of E-Board.	1	2	3	4	5	Excellent
ii. Have E-Board officers serve on an annual basis, or at least the president and treasurer.	1	2	3	4	5	Excellent
iii. Maintain separate financial accounts for the corporate board and house.	1	2	3	4	5	Excellent
iv. Develop and maintain a checklist for opening and closing the house.	1	2	3	4	5	Excellent
v. Develop and/or review manuals for each officer and committee chair that are updated annually and passed on to the successor.	1	2	3	4	5	Excellent

vi. Encourage members to take an active role in house repairs and maintenance.	1	2	3	4	5	Excellent
vii. Consider having members and house share 50/50 toward the cost of approved, individual room projects.	1	2	3	4	5	Excellent
viii. Establish a plan to monitor the house during breaks when the house is vacant, particularly during winter break and summer.	1	2	3	4	5	Excellent

f. House Operations

i. Ensure attendance at officer training sessions conducted by the PCC.	1	2	3	4	5	Excellent
ii. Develop and/or review manual for house rules.	1	2	3	4	5	Excellent
iii. Develop and/or review manual for house duties.	1	2	3	4	5	Excellent
iv. Have all kitchen workers trained and certified in ServeSafe.	1	2	3	4	5	Excellent

g. Promotion and Recruitment

i. Participate in as many campus-wide events as possible to promote cooperative living.	1	2	3	4	5	Excellent
ii. Notify alumni of recruitment dates and encourage them to spread the word in their local areas.	1	2	3	4	5	Excellent

iii. Advise high school guidance counselors of recruitment dates and request their assistance.	1	2	3	4	5	
	●	●	●	●	●	Excellent

iv. Encourage members to invite their friends and classmates to participate in recruitment.	1	2	3	4	5	
	●	●	●	●	●	Excellent

v. Utilize social media and websites to inform students and prospective students about cooperative living.	1	2	3	4	5	
	●	●	●	●	●	Excellent

vi. Encourage Purdue Admissions to provide information on cooperative living to overflow students. Seek assistance from the Vice Provost for Student Life.	1	2	3	4	5	
	●	●	●	●	●	Excellent

II. Alumni Board

**Note: if the house does not have a separate alumni board, the responsibilities below would fall to the corporate board.

i. Provide training on alumni relations and fundraising.	1	2	3	4	5	
	●	●	●	●	●	Excellent

ii. Host an alumni dinner/event to welcome the graduating seniors into the alumni group.	1	2	3	4	5	
	●	●	●	●	●	Excellent

iii. Host pledge class annual reunions at the house to better engage alumni.

1	2	3	4	5	
●	●	●	●	●	Excellent

iv. Publish a monthly electronic newsletter to inform alumni of house activities, awards, etc. and to keep them engaged.

1	2	3	4	5	
●	●	●	●	●	Excellent

v. Develop an alumni board.

1	2	3	4	5	
●	●	●	●	●	Excellent

vi. Keep alumni aware of house needs and encourage them to help with fundraising efforts to meet those needs.

1	2	3	4	5	
●	●	●	●	●	Excellent

Attachment L

Building a Case for Alumni Engagement in Cooperative Housing

It's a great time to be a Boilermaker! A Purdue degree is highly valued all over the world! The football program has turned the corner! The basketball program is top ten ranked. Students are paying less for their Purdue education, and those in cooperative housing are paying even less! President Daniels regards cooperative living as not only an affordable place to stay but an excellent educational experience.

In October, Vice Provost for Student Life, Dr. Beth McCuskey, expressed her support with this comment: *"There is a long and storied history of cooperative houses at Purdue, and we want to do everything we can to ensure their successful future."* However, as cooperative housing continues to face numerous challenges, it becomes increasingly obvious that strong alumni networks can provide invaluable resources. Alumni connections across all 12 cooperative houses are limited in many instances. Knowing cooperative alumni already have a strong affinity for Purdue and specifically their house, what are some of the "Best Practice" strategies that could be employed?

- **Develop an alumni database**
- **Create electronic newsletter**
 - Include current house member news**
 - Include alumni member updates**
 - Include house challenges-remodeling/renovations**
 - Include house GPA and other honors to the house**
- **Invite alumni to house events**
- **Encourage alumni to visit during Homecoming**

- **Develop ongoing task force of alumni to assist with engagement activities**
- **Consider an alumni mentoring of current members**
- **Establish social media page where alumni and current members can share stories, photos and information**
- **Ask alumni in the greater Lafayette area to attend house meetings**
- **Invite alumni to house clean up, landscaping, etc.**
- **Each house appoint a current member as an Alumni liaison**
- **Create an alumni visit folder with FAQs for members to reference if needed**
- **Establish an alumni mentoring program within the house new membership program**

Why would a cooperative house want to expend the time, energy and resources to engage alumni?

Engaged alumni have resources and are the most obvious supporters of their own house. However, asking for money the first (or only) time you contact them, does not yield the best return. Engaging alumni in as many touch points as possible before you need monetary assistance will certainly guarantee a better return. Many alumni aren't engaged simply because no one has ever reached out to them once they leave Purdue. The Purdue Alumni office has a database of cooperative alumni and a staff person whose goal is to engage more cooperative alumni. The Alumni office also has other resources that could work together to support the current houses and their alumni.

Alumni have valuable history about the house and can be instrumental in making sure the legacies are passed down through the years. Our oldest cooperative houses are over 80 years old and are part of Purdue’s rich history. Failure to engage alumni may result in losing an important aspect of cooperative history.

Assessment for House Alumni Engagement

This should be used to evaluate and improve certain aspects of your house’s alumni engagement and connections. Reassess this scale one year after implementing any of the above recommendations.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Our house has an alumni database that is easily accessible to house members.					
Our house has regular engagement with alumni through dinners, homecoming, or meeting attendance.					
Our house is supported by our alumni.					
Our alumni donate to our house with time or financial resources.					
We should have more alumni engagement.					