

# CHI PHI FRATERNITY



## **Accreditation Rubric Fall 2017**

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## **Purpose**

The Accreditation program was created many years ago during a challenging time in our fraternity. We were in need of a way to monitor the health of our Chapters and provide the support that many of them needed. This would mean stronger Chapters and better use of the fraternity's resources.

The following are the major purposes of the program.

### **Chapter Audit**

The primary purpose of this program is to monitor the health of our Chapters and Colonies. By requiring our Chapters and colonies to submit information throughout the year, we can adequately determine their health and evaluate their growth. This also allows the national organization to determine strengths and weaknesses and tailor programs to improve the overall organization.

### **Informing Field Executives**

The objective for field executives is to work with Chapters and colonies to help them grow and improve. Often, they are given insufficient information to make their work, especially their in-person visits, ineffective. The information collected and feedback provided by graders will better arm them for their jobs. This will enable them to target specific areas in which our Chapters and colonies need improvement.

### **Awards and Recognition**

This program will provide an even playing field on which to evaluate Chapters for rewards. Our current awards program is independent of accreditation and can even have conflicting results. This new program will allow for better integration of the two programs in a way that provides clarity to the disposition of awards.

## **Eight Pillars**

The latest revision of the program presents accreditation based on the following eight (8) pillars.

### **Recruitment**

A key to the success of our organization is the recruitment of new men that fit with the values of the fraternity and will strengthen our brotherhood. It is important for Chapters and colonies to have a well planned approach to recruitment. They should well define the process by which they recruit as well as the criteria by which they select men. They also need to make clear the expectations of all members. By reviewing a Chapter or Colony's approach to recruitment we can help them continue to grow their Chapter in quantity and quality.

### **Risk Management**

The longevity of our Chapters is often dependent on strong risk management practices. Too often Chapters are closed due to violations that could have easily prevented by better policies. This is particularly true for social events but also applies to a wide array of potential crises. It is important to take a more proactive approach with our Chapter and Colony's plans for risk management to help prevent many repercussions, from fines to suspensions to closures.

### **Financial Management**

All Chapters are responsible for collecting and dispensing money to operate. It is important that they have proper methods for managing money and show an ability to plan for income and expenses. Our goal is to ensure our Chapters remain solvent and stay out of debt.

### **Total Membership Education**

Strong academics and continuing education are a hallmark of this organization. It is important that our Chapters emphasize this to all of their members. We expect our Chapters and colonies to maintain programs that encourage excellent performance in the classroom. We expect that they have comprehensive plans for onboarding new members as well as to continue to educate their existing members. This is all part of our mission of building better men.

### **Ritual**

The one area that distinguishes us from all other organizations is our ritual. We expect our Chapters to respect our rich heritage and place an emphasis on properly performing our ritual. This includes maintaining a complete set of equipment and performing ritual on a regular basis.

### **Alumni Relations**

Our alumni play an important role in the success of our Chapters and colonies. Through advising and support, alumni ensure our Chapters and colonies stay on the right path. We expect that our Chapters and colonies maintain strong connections and keep their alumni involved as much as possible.

### **Chapter Operations**

There are several key ingredients to a Chapter operating smoothly. A Chapter is expected to have by-laws by which they operate as well as clear goals and a strategic plan. This section ensures that our Chapters and colonies have a clear focus and meaning behind their operations.

### **Organizational Networking**

It is important for our Chapters to be involved in their campus and local communities. We take great pride in our service and philanthropy and in developing leaders inside and outside the classroom.



## **Rewards Levels**

The latest revision of the program has three levels of rewards and are as follows.

### **Accredited**

This is the minimum level to pass accreditation. These Chapters and colonies are doing what is expected by our national organization but should continue to strive for more.

### **Accredited with Honors**

This level is being added to encourage our Chapters and colonies to strive for excellence. Chapters and colonies that are Accredited with Honors are exceeding the minimum expectations and will be recognized for their strong efforts.

### **Accredited with Distinction**

Chapter and colonies that go above and beyond and truly achieve excellence will be awarded Accredited with Distinction. These Chapters and colonies will stand out as models for our organization and will be rewarded for their outstanding effort.

## Overall Grading

Section	Document	Number of Points Available		Number of Points Obtained	Percentage	Document Weighting		Overall Score
		Chapter	Colony			Chapter	Colony	
Recruitment	Recruitment Program	40	40	##	%	15	18	##
	Membership Selection Criteria	12	12	##	%	3	6	##
	Obligations of Membership	20	20	##	%	3	3	##
Risk Management	Risk Management Educational Program	23	23	##	%	3	3	##
	Social Event Policy	40	40	##	%	15	18	##
	Guest List	10	4	##	%	4	4	##
	Crisis Management Plan	40	40	##	%	10	8	##
Financial Management	Budget	19	19	##	%	10	10	##
	Account Statements	4	4	##	%	3	3	##
	Invoices	6	6	##	%	2	2	##
Total Membership Education	Academic Program	9	9	##	%	10	13	##
	New Member Education Program	85	85	##	%	10	13	##
	Educational Programs	69	23	##	%	6	6	##
Ritual	Ritual Equipment Inventory	361	0	##	%	3	0	##
	Rituals Performed	38	26	##	%	5	4	##
Alumni Relations	Alumni Advisory Board	9	9	##	%	3	3	##
	Alumni Roster	4	0	##	%	3	0	##
	Alumni Newsletter	13	13	##	%	5	2	##
	Alumni Event	10	0	##	%	3	0	##
Chapter Operations	By-laws	10	10	##	%	10	10	##
	Goals and Strategic Plan	85	55	##	%	10	10	##
	Code of Conduct	10	10	##	%	3	3	##
	Greek Advisor Letter	12	12	##	%	4	4	##
Organizational Networking	Roster	29	26	##	%	4	4	##
	Community Service Event	14	14	##	%	5	5	##
	Social Media	12	12	##	%	2	2	##
	Campus Event	14	14	##	%	5	5	##
National Staff Verification	National Programming	30	30	##	%	4	4	##
	Miscellaneous	10	9	##	%	5	5	##
	Mid-Year and End-of-Year Reports	8	8	##	%	2	2	##
Deductions	Late Submission	-1	-1	##	%	-5	-5	##
	Improper File Naming	-1	-1	##	%	-5	-5	##
	Risk Management Violation	-1	-1	##	%	-15 Max	-18 Max	##
	Hazing Violation	-1	-1	##	%	-10 Max	-13 Max	##
<b>Total</b>						<b>170</b>	<b>170</b>	<b>##</b>



## **Score Calculation**

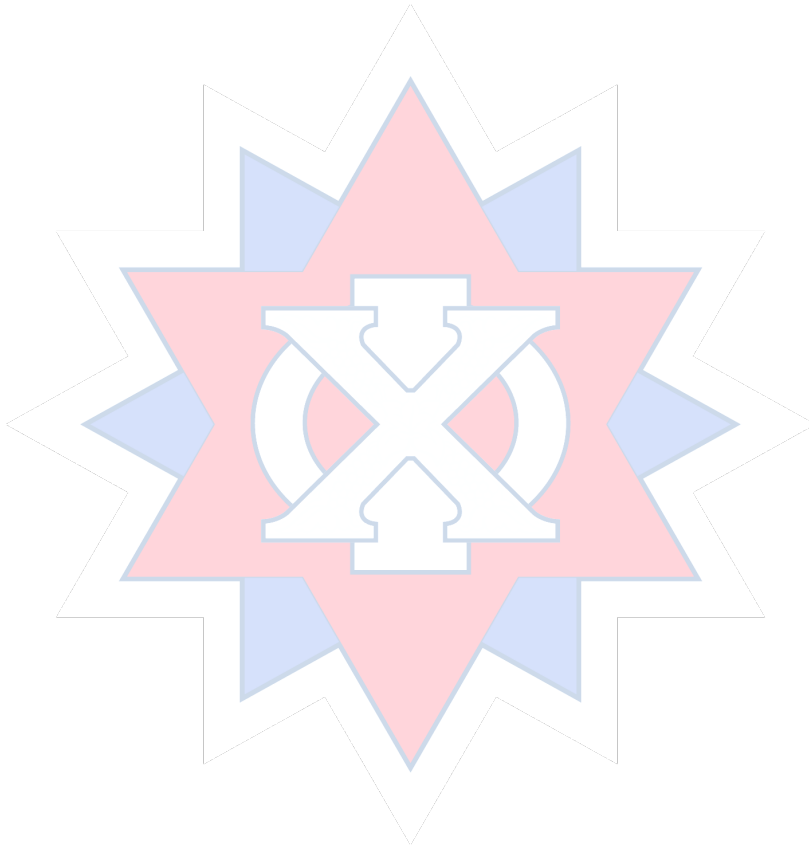
The next several sheets cover each individual document. These sheets explain the grading of each document and every item that is expected. Every item has a number of points assigned. The document total is seen in columns 3 and 4 above. When graded, we will take the total number of points awarded by the grader and place that in column 5 above. We will then convert that score to a percentage and place the percentage in column 6. Columns 7 and 8 indicate the weight of that document as compared to all of the other documents. They also indicate the total number of points possible. To calculate the overall score for that document, we will multiply the weight in column 7 or 8 by the percentage in column 6. This total will be placed in column 9. The sum of all scores in column 9 will be the Chapters total.

## **Accreditation Levels**

Accredited - 100 Points

Accredited with Honors - 145 Points

Accredited with Distinction - 162 Points



# Recruitment

## Recruitment Program

*Description:* A written copy of your Chapter or Colony's plan and approach to recruitment

*Files to be Submitted:* Recruitment Program - Chapter/Colony Name

*Templates to be Used:* None

*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Contains a statement on the Chapter/Colony's policies regarding the use of alcohol, controlled substances/illegal drugs, and other inappropriate recruiting activities.	5	5
Lists the clear short-term and long-term goals of the Chapter/Colony in regards to recruitment.	5	5
Outlines the expectations of the Recruitment Chairmen, the Recruitment Committee, and all other members in regards to recruitment.	5	5
Outlines the structure and organization of the Chapter/Colony's recruitment program.	5	5
Incorporates strategies to recruit during periods outside the main "Rush" or recruitment period on campus.	5	5
Presents a timeline of the recruitment period AND a timeline of what recruitment looks like outside of the main "Rush" or recruitment period on campus.	5	5
Includes detailed event descriptions (including purposes) of all recruitment events.	5	5
The recruitment program utilizes the Chi Phi Fraternity's core values of Truth, Honor, and Personal Integrity or concepts of important rhetoric such as the Creed or True Gentleman, as part of the recruitment process.	5	5
<b>Total</b>	<b>40</b>	<b>40</b>

## Membership Selection Criteria

*Description:* A written copy of your Chapter or Colony's criteria used for membership selection  
*Files to be Submitted:* Membership Selection Criteria - Chapter/Colony Name  
*Templates to be Used:* None  
*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Selection criteria align with the values of the national organization and the local chapter	3	3
Selection criteria are consistent with and reflect the obligations of membership	3	3
The selection criteria reflect the Chapter/Colony's short and long term recruitment goals	3	3
The selection criteria are quantifiable	3	3
<b>Total</b>	<b>12</b>	<b>12</b>

## Obligations of Membership

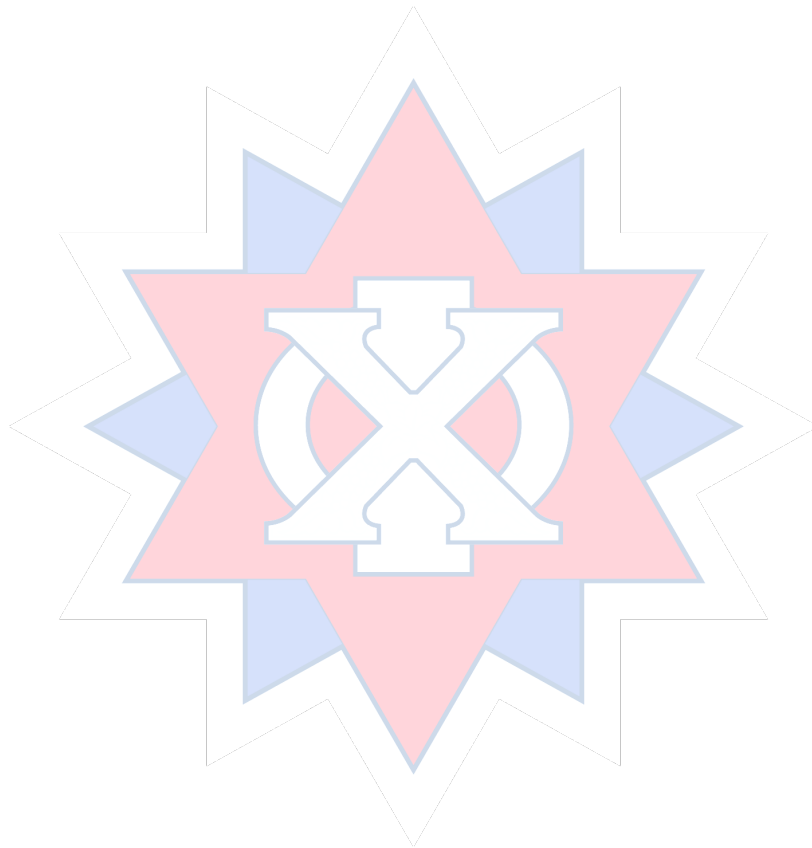
*Description:* A written copy of your Chapter or Colony's obligations of membership for all members including New Members

*Files to be Submitted:* Obligations of Membership - Chapter/Colony Name

*Templates to be Used:* None

*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
The obligations of membership include:		
Financial obligations to the Fraternity	1	1
Time commitment expectations	1	1
Academic expectations	1	1
The obligations are in compliance with all National and Local Bylaws and Constitutions	1	1
The obligations of membership are the same for new members and active brothers	3	3
The obligations of membership are in compliance with the following portions of the Chi Phi Fraternity's Personal Safety Policy:		
Hazing	1	1
Alcohol and Drugs	1	1
Non-Discrimination	1	1
The obligations of membership correlate with the values of Chi Phi	3	3
The obligations of membership are given to the new members in writing	3	3
The obligations of membership are quantifiable and can be used to hold brothers accountable	4	4
<b>Total</b>	<b>20</b>	<b>20</b>



# **Risk Management**

## Risk Management Educational Program

*Description:* A description and attendance sheet for the risk management speech, presentation, program, etc. that your Chapter or Colony attended

*Files to be Submitted:* Risk Management Educational Program - Chapter/Colony Name  
Risk Management Educational Program Attendance Sheet - Chapter/Colony Name

*Templates to be Used:* Event Attendance Sheet

*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Includes date, time, and location	2	2
Lists the sponsor of the event	2	2
Chi Phi was the primary sponsor of the event*	1	1
Describes the planning of the event if sponsored by Chi Phi or details on preparation for the event if only attended	4	4
Describes the event in detail	4	4
Describes the impact on the chapter and/or campus	4	4
Describes chapter follow-up to event (seminars, group discussions, etc.)	2	2
Member Attendance (using attendance sheet)		
More than 50% of the membership attended	1	1
More than 75% of the membership attended+	1	1
More than 90% of the membership attended++	1	1
Greek Advisor signs for verification	1	1
<b>Total</b>	<b>23</b>	<b>23</b>

\* Additional point to be awarded

+ Includes point for 50% for a total of 2 points

++ Includes points for 75% and 50% for a total of 3 points

## Social Event Policy

*Description:* A written copy of your Chapter or Colony's guide to managing risk at social events  
*Files to be Submitted:* Social Event Policy - Chapter/Colony Name  
*Templates to be Used:* None  
*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
<b>Sober Monitors</b>		
Identifies how many brothers will serve this duty during the event	1	1
Defines the roles of each duty station	1	1
Outlines incentives/consequences for serving as a sober monitor	1	1
Identifies specific roles of New Members/Brothers serving sober duty and expectations of all Brothers	1	1
Includes length of time (shifts, entire event, rotate through positions, etc.)	1	1
Identifies contact and protocol in case of an emergency	1	1
<b>Serving of Alcohol</b>		
Explains in detail what BYOB looks like	2	2
Explains in detail how "check-in" works (is it done at the event, prior, etc.)	2	2
Explains in detail how alcohol is monitored (wristbands, tickets, etc.)	2	2
Explains in detail where alcohol is stored during the event	2	2
Explains in detail what happens to any remaining alcohol at the end of the night	2	2
<b>Off-Campus Chapter Events</b>		
Explains in detail the process of planning and executing an off-campus event	2	2
Explains in detail contract/food/alcohol expectations and requirements	2	2
Explains in detail how guests are checked in and how alcohol is monitored	2	2
Explains in detail how guests will be transported to and from the event	2	2
Explains in detail how guests are notified of the event	2	2
<b>Guest List</b>		
Explains how guests are added to the list	1	1
Describes the limits to the number of guests and cut-off time for adding guests	1	1
Explains how Brothers access the guest list	1	1
Explains what information is collected on the guest list	1	1

Continued on next page.



Items to Be Included	Points Allotted	
	Chapter	Colony
Health and Safety of Guests and Brothers		
Explains in detail how the Chapter/Colony ensures that the Chapter/Colony or event is not violating any fire codes	2	2
Plan identifies all of the following key contacts: Public Safety/Campus Police Chi Phi Advisor Faculty Advisor Hazing Hotline Emergency Services National Office	2	2
Explains in detail points of contact during the event (i.e. Alpha, if Alpha isn't present then the Eta, etc.)	2	2
Explains in detail when to contact the Alpha, when to call 911, etc.	2	2
Explains in detail the steps the Chapter or Colony is taking to ensure that all guests remain safe and that those serving sober duty/all brothers are trained and prepared to respond if needed	2	2
<b>Total</b>	<b>40</b>	<b>40</b>

## Guest Lists

*Description:* Copy(ies) of your Chapter or Colony's guest lists from an event(s)

*Files to be Submitted:* Guest List Template - Chapter/Colony Name

Guest List 1 - Chapter/Colony Name

Guest List 2 - Chapter/Colony Name

Guest List 3 - Chapter/Colony Name

*Templates to be Used:* None

*File Formats Accepted:* Excel (Template Only)

PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Chapter provides a blank template of a guest list used at all events in which alcohol is present	1	1
Chapter includes one completed guest list that were used throughout the semester. Date/time/location of the event should be indicated on the guest list.	3	3
Chapter includes two completed guest lists that were used throughout the semester. Date/time/location of the event should be indicated on the guest list.*	3	0
Chapter includes three completed guest lists that were used throughout the semester. Date/time/location of the event should be indicated on the guest list.^	3	0
<b>Total</b>	<b>10</b>	<b>4</b>

\* Includes points for one guest list for a total of 6 points

^ Includes points for two guest lists for a total of 9 points

## Crisis Management Plan

*Description:* A written copy of your Chapter or Colony's plan for responding to crises of various severity levels

*Files to be Submitted:* Crisis Management Plan - Chapter/Colony Name

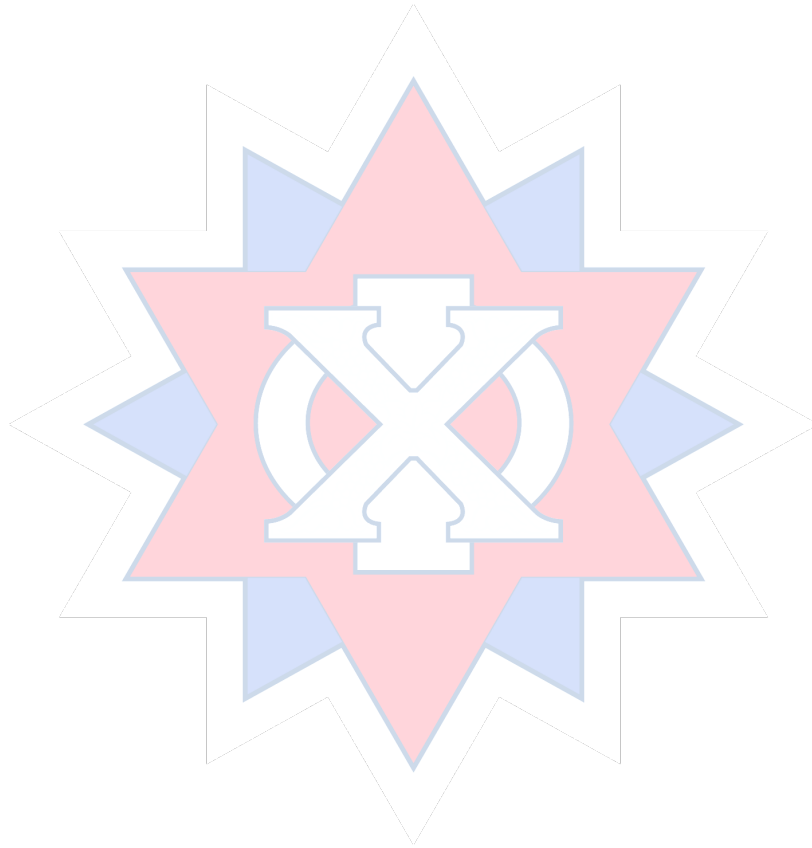
*Templates to be Used:* None

*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Provides a list of contacts to include the following:		
University Administrators	1	1
Emergency Personnel (Ambulance, Police, Public Safety, etc.)	1	1
Greek Advisor	1	1
Faculty Advisor	1	1
Alumni Advisory Board*	1	1
National Office Staff	1	1

Continued on next page.

Items to Be Included	Points Allotted	
	Chapter	Colony
Explains in detail the procedures and protocols for the following:		
Low level incidents		
Lists examples of what qualifies	1	1
Includes notifying national office within 72 hours	1	1
Includes policy on talking to the media	1	1
Lists key points of contact	1	1
Explains in detail roles and responsibilities for officers and members	2	2
Explains in detail immediate responses	2	2
Explains in detail long-term responses	2	2
Mid level incidents including examples of what qualifies		
Lists examples of what qualifies	1	1
Includes notifying national office within 72 hours	1	1
Includes policy on talking to the media	1	1
Lists key points of contact	1	1
Explains in detail roles and responsibilities for officers and members	2	2
Explains in detail immediate responses	2	2
Explains in detail long-term responses	2	2
High level incidents including examples of what qualifies		
Lists examples of what qualifies	1	1
Includes notifying national office within 72 hours	1	1
Includes policy on talking to the media	1	1
Lists key points of contact	1	1
Explains in detail roles and responsibilities for officers and members	2	2
Explains in detail immediate responses	2	2
Explains in detail long-term responses	2	2
Explains how members are educated on the plan	4	4
<b>Total</b>	<b>34</b>	<b>34</b>



# **Financial Management**

## Budget

*Description:* A written copy of your Chapter or Colony's budget and financial statements

*Files to be Submitted:* Budget - Chapter/Colony Name

*Templates to be Used:* None

*File Formats Accepted:* Excel, PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
<b>Income Statement (Traditional Budget)</b>		
Income		
Dues income correlates to dues per person multiplied by the number of brothers (this may include different dues for brothers and new members)	1	1
Chapter identifies its expected collection rate. If 100%, chapter should identify a service being used to ensure this is possible.	1	1
Expenses		
Expenses correspond to areas of chapter operations and appear to be all inclusive	3	3
The following items are included:		
National Dues	1	1
National Insurance	1	1
Overall		
Shows projected and actual income and expenses side by side	2	2
Projected income matches projected expenses	1	1
<b>Cash Flow Statement (Budget over time)</b>		
Shows a breakdown by month or smaller time frame	1	1
Breakdown shows projected and actual income and expenses	2	2
Chapter/Colony projects solvency at all times (Planned income should always be enough to cover planned expenses)	1	1
Income and expenses correspond to those on the income statement	2	2
<b>Dues Register</b>		
Dues collected matches actual income on income statement	1	1
Register shows all dues collected and any outstanding member debts	1	1
Chapter has no members in debt	1	1
<b>Total</b>	<b>19</b>	<b>19</b>

## Account Statements

*Description:* Copy(ies) of your Chapter or Colony's account statement(s) and a register reconciling all items

*Files to be Submitted:* Account Statement 1 - Chapter/Colony Name  
 Account Statement 2 - Chapter/Colony Name  
 Account Statement 3 - Chapter/Colony Name  
 Account Statement 4 - Chapter/Colony Name  
 Account Statement 5 - Chapter/Colony Name  
 Account Statement 6 - Chapter/Colony Name  
 Account Statement Register - Chapter/Colony Name

*Templates to be Used:* None

*File Formats Accepted:* PDF

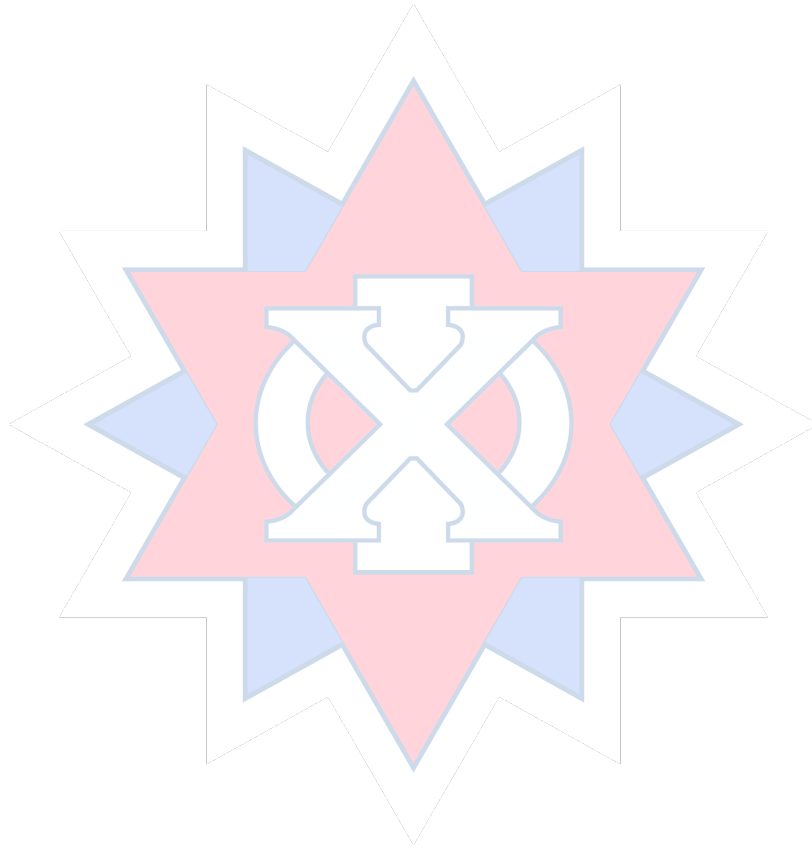
Items to Be Included	Points Allotted	
	Chapter	Colony
Chapter maintains balances in accounts used to pay for expenses (these can be savings or checking accounts at a bank, OmegaFi or other third-party accounts, and University accounts)	1	1
Accounts show evidence of use to pay for chapter expenses	1	1
Chapter provides all monthly account statements and a register showing that all line items are reconciled (register should note the corresponding account and/or statement for each item)	2	2
<b>Total</b>	<b>4</b>	<b>4</b>

## Invoices

*Description:* Copy(ies) of your Chapter or Colony's invoice(s)  
*Files to be Submitted:* Invoice 1 - Chapter/Colony Name  
 Invoice 2 - Chapter/Colony Name  
*Templates to be Used:* None  
*File Formats Accepted:* Excel, PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Option 1: 3rd Party Service		
Chapter uses a service such as OmegaFi to charge its members and ensure money is collected. This can be a University or 3rd party service	6	6
Option 2: Self Collected		
Invoice contains the following items:		
Chapter identification (Address, phone, contact person)	1	1
Invoice Date	1	1
Invoice Number	1	1
Area for itemized charges and total being billed	1	1
Payment due date	1	1
Payment instructions	1	1
<b>Total</b>	<b>6</b>	<b>6</b>





# **Total Membership** **Education**

## Academic Program

*Description:* A written copy of your Chapter or Colony's academic plan  
*Files to be Submitted:* Academic Program - Chapter/Colony Name  
*Templates to be Used:* None  
*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Identifies goals of the Academic Program	1	1
Identifies academic requirements for all members, committee chairs, officers	1	1
Identifies expectations of the academic chairman, the academic committee, and the chapter/colony to engage and utilize the Academic Program	1	1
Identifies incentives for brothers meeting or exceeding academic standards	1	1
Identifies steps taken to support brothers who do not meet academic standards of the chapter/colony	1	1
Identifies consequences for brothers who fall below the academic standards of the chapter/colony	1	1
Identifies strategies to connect new members and brothers to academic resources on campus	1	1
Identifies strategies to connect the chapter/colony to the faculty advisor	1	1
Identifies strategies to make sure the chapter/colony submits for the Sparks Medal every academic year	1	1
<b>Total</b>	<b>9</b>	<b>9</b>

## New Member Education Program

*Description:* A written copy of your Chapter or Colony's New Member Education program  
*Files to be Submitted:* New Member Education Program - Chapter/Colony Name  
*Templates to be Used:* None  
*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Program is aligned with the following policies		
Personal Safety Policy	7	7
Electronic Use Policy	3	3
Schedule of events given to new members includes date of initiation	2	2
Pinning date to Initiation date is less than 6 weeks (4 weeks for colonies)	10	10
Program includes goals that explain how the program is helping to develop active and engaged brothers	5	5
Program outlines expectations for new members and brothers	5	5
Big/Little Program or Equivalent		
Program explains who oversees the process	2	2
Program explains how pairs are chosen	5	5
Program details the ceremony/reveal	5	5
Program details the event after the ceremony/reveal	5	5
Program explains how brothers are made aware of acceptable behavior	3	3
Program explains how academic expectations for new members are conveyed to include the following:		
GPA expectations for new members	1	1
Steps the chapter/colony takes to ensure academics stays a priority	2	2
Role of the faculty advisor in assisting new members academically	2	2
Academic expectations for new members are congruent with those for brothers	1	1
Incentives to encourage strong academic performance	2	2

Continued on next page.

Items to Be Included	Points Allotted	
	Chapter	Colony
Schedule of events covering the following minimum topics:		
Chi Phi expectations (GreekLifeEdu, dues, etc.)		
Event includes date, time, location	1	1
Description includes all specific topics covered	2	2
Description explains how the material is taught	2	2
Risk Management		
Event includes date, time, location	1	1
Description includes all specific topics covered	2	2
Description explains how the material is taught	2	2
Chapter Operations/Officer Positions		
Event includes date, time, location	1	1
Description includes all specific topics covered	2	2
Description explains how the material is taught	2	2
Ritual including New Member ceremonies		
Event includes date, time, location	1	1
Description includes all specific topics covered	2	2
Description explains how the material is taught	2	2
Local/National History		
Event includes date, time, location	1	1
Description includes all specific topics covered	2	2
Description explains how the material is taught	2	2
<b>Total</b>	<b>85</b>	<b>85</b>

## Total Member Education Programs

*Description:* Written descriptions and attendance for the educational presentations or programs your Chapter or Colony attended

*Files to be Submitted:* Total Member Education Programs - Chapter/Colony Name  
 Total Member Education Program 1 Attendance Sheet - Chapter/Colony Name  
 Total Member Education Program 2 Attendance Sheet - Chapter/Colony Name  
 Total Member Education Program 3 Attendance Sheet - Chapter/Colony Name

*Templates to be Used:* Event Attendance Sheet

*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
<b>Program 1</b>		
Includes date, time, and location	2	2
Lists the sponsor of the event	2	2
Chi Phi was the primary sponsor of the event*	1	1
Describes planning of the event if sponsored by Chi Phi or details on preparation for the event if only attended	4	4
Describes the event in detail	4	4
Describes the impact on the chapter and/or campus	4	4
Describes chapter follow-up to the event (seminars, group discussions, etc.)	2	2
<b>Member Attendance (using attendance sheet)</b>		
More than 50% of the membership attended	1	1
More than 75% of the membership attended+	1	1
More than 90% of the membership attended++	1	1
Greek/Chapter/Faculty/Alumni Advisor signs for verification	1	1

\* Additional point to be awarded

+ Includes point for 50% for a total of 2 points

++ Includes points for 75% and 50% for a total of 3 points

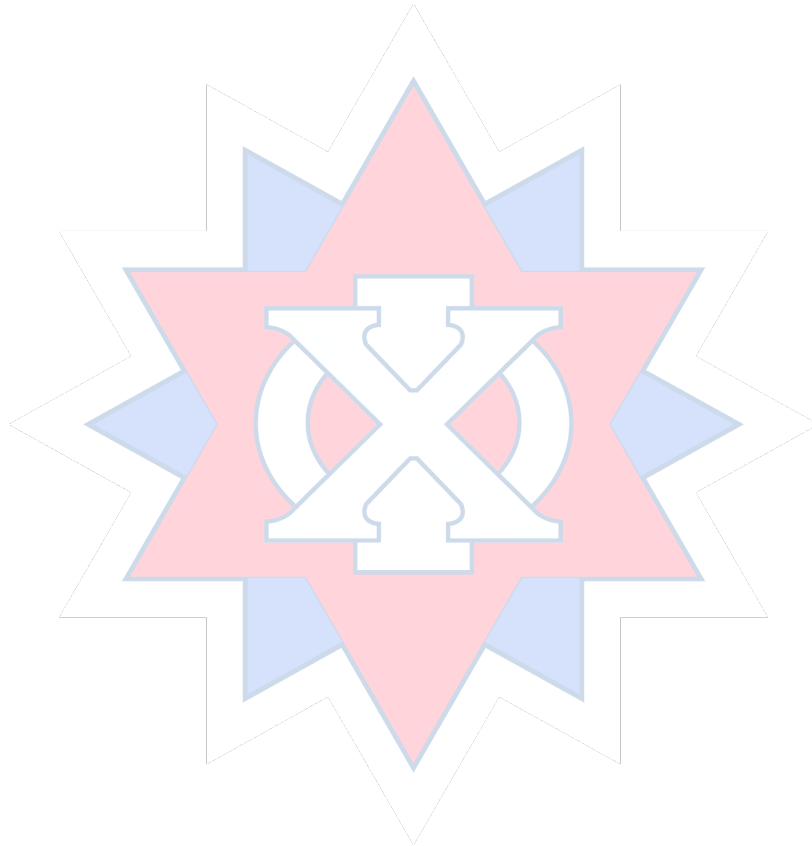
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Items to Be Included	Points Allotted	
	Chapter	Colony
<b>Program 2</b>		
Includes date, time, and location	2	0
Lists the sponsor of the event	2	0
Chi Phi was the primary sponsor of the event*	1	0
Describes planning of the event if sponsored by Chi Phi or details on preparation for the event if only attended	4	0
Describes the event in detail	4	0
Describes the impact on the chapter and/or campus	4	0
Describes chapter follow-up to the event (seminars, group discussions, etc.)	2	0
<b>Member Attendance (using attendance sheet)</b>		
More than 50% of the membership attended	1	0
More than 75% of the membership attended+	1	0
More than 90% of the membership attended++	1	0
Greek/Chapter/Faculty/Alumni Advisor signs for verification	1	0
<b>Program 3</b>		
Includes date, time, and location	2	0
Lists the sponsor of the event	2	0
Chi Phi was the primary sponsor of the event*	1	0
Describes planning of the event if sponsored by Chi Phi or details on preparation for the event if only attended	4	0
Describes the event in detail	4	0
Describes the impact on the chapter and/or campus	4	0
Describes chapter follow-up to the event (seminars, group discussions, etc.)	2	0
<b>Member Attendance (using attendance sheet)</b>		
More than 50% of the membership attended	1	0
More than 75% of the membership attended+	1	0
More than 90% of the membership attended++	1	0
Greek/Chapter/Faculty/Alumni Advisor signs for verification	1	0
<b>Total</b>	<b>69</b>	<b>23</b>

\* Additional point to be awarded

+ Includes point for 50% for a total of 2 points

++ Includes points for 75% and 50% for a total of 3 points



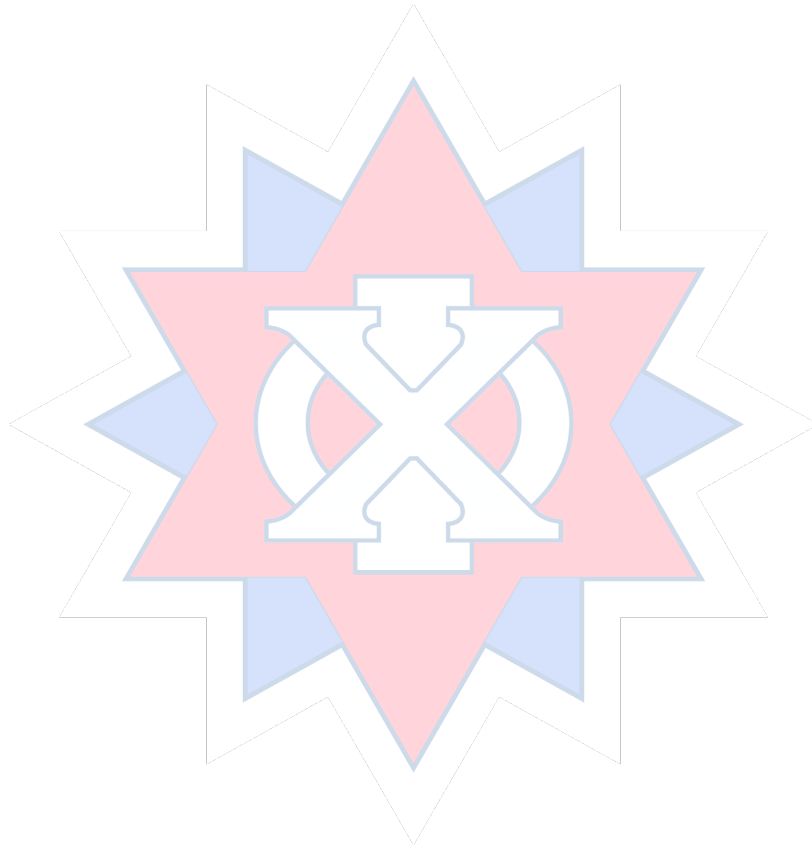
# Ritual

## **Ritual Equipment Inventory**

Please see separate password protected document for ritual secrets.

## **Rituals Performed**

Please see separate password protected document for ritual secrets.



# **Alumni Relations**



## Alumni Advisory Board

*Description:* A contact list of the members of your Chapter or Colony's Alumni Advisory Board to include descriptions of their roles

*Files to be Submitted:* Alumni Advisor 1 - Chapter/Colony Name  
Alumni Advisor 2 - Chapter/Colony Name  
Alumni Advisor 3 - Chapter/Colony Name

*Templates to be Used:* Alumni Advisory Board Template

*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Advisor 1		
Phone number and email are listed	1	1
Detailed explanation of role	1	1
Signature of verification	1	1
Advisor 2		
Phone number and email are listed	1	1
Detailed explanation of role	1	1
Signature of verification	1	1
Advisor 3		
Phone number and email are listed	1	1
Detailed explanation of role	1	1
Signature of verification	1	1
<b>Total</b>	<b>9</b>	<b>9</b>

## Alumni Roster

*Description:* A contact list of the alumni from your Chapter or Colony to include the most recent graduated class

*Files to be Submitted:* Alumni Roster - Chapter/Colony Name

*Templates to be Used:* None

*File Formats Accepted:* Excel, PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Recent Graduates		
Chapter has phone numbers for its most recent graduates	1	0
Chapter has email addresses for its most recent graduates	1	0
Chapter has mailing addresses for its most recent graduates	1	0
The roster is built upon each semester and contains all graduates from Fall 2016 forward	1	0
<b>Total</b>	<b>4</b>	<b>0</b>

## Alumni Newsletter

*Description:* A copy of the most recent alumni newsletter sent to your Chapter or Colony's alumni  
*Files to be Submitted:* Alumni Newsletter - Chapter/Colony Name  
*Templates to be Used:* None  
*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Newsletter was sent within the last 6 months	2	2
Article 1	2	2
Article 2	2	2
Article 3	2	2
Contains a section of alumni updates	2	2
Contains a calendar of upcoming events encouraging alumni participation	2	2
Alumni advisor signs certifying distribution to alumni	1	1
<b>Total</b>	<b>13</b>	<b>13</b>

## Alumni Event

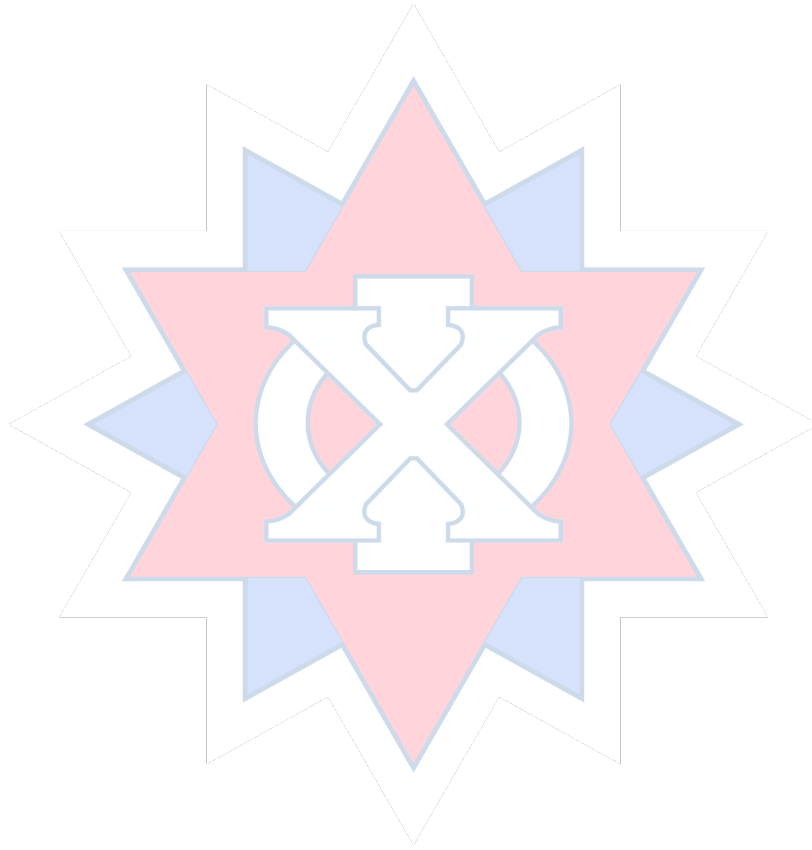
*Description:* A written description of your Chapter or Colony's most recent event held for Chapter or Chi Phi alumni

*Files to be Submitted:* Alumni Event - Chapter/Colony Name  
Alumni Event Attendance Sheet - Chapter/Colony Name

*Templates to be Used:* Event Attendance Sheet

*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Lists the date and time of event (held within last 6 months)	1	0
Lists the location of event	1	0
Describes in detail the planning of the event	2	0
Describes the event in detail	3	0
Attendance (using attendance sheet)		
Lists alumni in attendance	1	0
Lists undergraduate members in attendance	1	0
Alumni advisor signs for verification	1	0
<b>Total</b>	<b>10</b>	<b>0</b>



# **Chapters Operations**

## By-Laws

*Description:* A copy of your Chapter or Colony's by-laws  
*Files to be Submitted:* By-Laws - Chapter/Colony Name  
*Templates to be Used:* None  
*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Lists the most recent changes, updates, and reviews of by-laws	2	2
By-laws have been reviewed within the last 12 months	2	2
By-laws do not conflict with any Chi Phi Fraternity Risk Management Policies	2	2
By-laws contain GPA requirements for the following:		
Pledging	1	1
Initiation	1	1
Member in good standing	1	1
Voting in chapter meetings	1	1
<b>Total</b>	<b>10</b>	<b>10</b>

## Goals and Strategic Plan

*Description:* A written copy of your Chapter or Colony's short and long term goals as well as strategic plan, mission and vision statements, and SWOT analysis

*Files to be Submitted:* Goals and Strategic Plan - Chapter/Colony Name

*Templates to be Used:* None

*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Chapter has a mission statement	4	1
Chapter has a vision statement	4	1
Chapter has a SWOT analysis	5	5
Short Term Goal 1		
SMART		
Specific	1	1
Measurable	1	1
Attainable	1	1
Relevant	1	1
Timely	1	1
Includes steps being taken to accomplish the goal	5	5
Goal is compliant with all Chi Phi Fraternity Risk Management Policies	2	2
Short Term Goal 2		
SMART		
Specific	1	1
Measurable	1	1
Attainable	1	1
Relevant	1	1
Timely	1	1
Includes steps being taken to accomplish the goal	5	5
Goal is compliant with all Chi Phi Fraternity Risk Management Policies	2	2
Short Term Goal 3		
SMART		
Specific	1	0
Measurable	1	0
Attainable	1	0
Relevant	1	0
Timely	1	0
Includes steps being taken to accomplish the goal	5	0
Goal is compliant with all Chi Phi Fraternity Risk Management Policies	2	0

Continued on next page.

Items to Be Included	Points Allotted	
	Chapter	Colony
Long Term Goal 1		
SMART		
Specific	1	1
Measurable	1	1
Attainable	1	1
Relevant	1	1
Timely	1	1
Includes steps being taken to accomplish the goal	5	5
Goal is compliant with all Chi Phi Fraternity Risk Management Policies	2	2
Long Term Goal 2		
SMART		
Specific	1	1
Measurable	1	1
Attainable	1	1
Relevant	1	1
Timely	1	1
Includes steps being taken to accomplish the goal	5	5
Goal is compliant with all Chi Phi Fraternity Risk Management Policies	2	2
Long Term Goal 3		
SMART		
Specific	1	0
Measurable	1	0
Attainable	1	0
Relevant	1	0
Timely	1	0
Includes steps being taken to accomplish the goal	5	0
Goal is compliant with all Chi Phi Fraternity Risk Management Policies	2	0
<b>Total</b>	<b>85</b>	<b>55</b>



## Code of Conduct

*Description:* A written copy of your Chapter or Colony's code of conduct for all members

*Files to be Submitted:* Code of Conduct - Chapter/Colony Name

*Templates to be Used:* None

*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
The code of conduct refers to expected behavior of all members	1	1
The code of conduct reflects the core values of Chi Phi	1	1
The code of conduct describes appropriate behavior for the following:		
New Member Education	1	1
Recruitment	1	1
Classroom	1	1
Social Events	1	1
Philanthropy and Community Service	1	1
Interfraternal Relations	1	1
National Programs	1	1
Social Media	1	1
<b>Total</b>	<b>10</b>	<b>10</b>

## Greek Advisor Letter

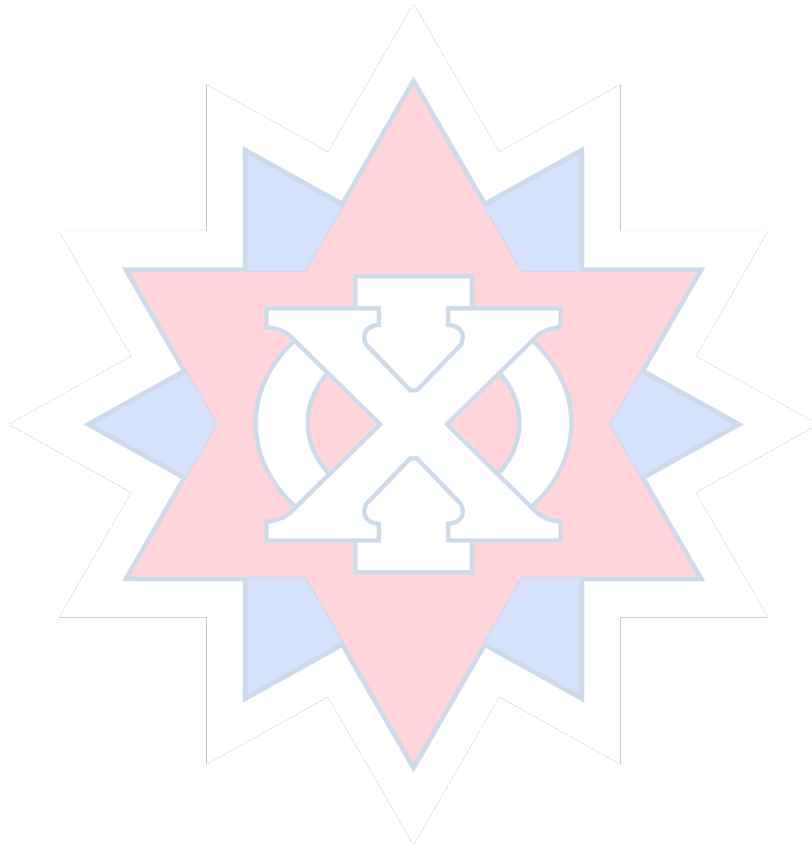
*Description:* A letter from your Chapter or Colony's Greek Advisor  
*Files to be Submitted:* Greek Advisor Letter - Chapter/Colony Name  
*Templates to be Used:* None  
*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Chapter Recognition		
Chapter is recognized by the university	1	1
Chapter is recognized by IFC	1	1
Risk Management		
Chapter has had no risk management violations this term	2	2
Chapter is considered to be in good standing	2	2
Academics+		
GPA is higher than the all-Fraternity average	1	1
GPA is higher than the all-male average	1	1
GPA is higher than the all-Greek average	1	1
GPA is greater than or equal to 3.0/4.0	1	1
GPA is greater than or equal to 3.25/4.0*	1	1
GPA is greater than or equal to 3.5/4.0^	1	1
<b>Total</b>	<b>12</b>	<b>12</b>

\* Includes point for 3.0/4.0 for a total of 2 points

^ Includes points for 3.0/4.0 and 3.25/4.0 for a total of 3 points

+ Greek Advisor must provide chapter GPA and either certify all items or provide GPAs necessary to perform calculations



# Organizational Networking

## Roster

*Description:* A contact list of the members of your Chapter or Colony  
*Files to be Submitted:* Roster - Chapter/Colony Name  
*Templates to be Used:* Combined Roster  
*File Formats Accepted:* Excel

Items to Be Included	Points Allotted	
	Chapter	Colony
Roster of all brothers and new members includes:		
First and Last Name	1	1
Class Year	1	1
Email Address	2	2
Phone Number	2	2
Home Address	1	1
Fraternity committee on which they serve	1	1
The following chapter officers are denoted with election dates within the last 12 months (appointment dates for colonies)		
Alpha	1	1
Beta	1	1
Gamma	1	1
Delta	1	1
Epsilon	1	1
Zeta	1	1
Eta	1	1
Theta	1	1
Iota	1	1
Campus Involvement		
Every member is involved in at least one organization outside Chi Phi	3	3
More than 10% of the membership holds a leadership position in an outside organization	1	0
More than 15% of the membership holds a leadership position in an outside organization*	1	0
More than 20% of the membership holds a leadership position in an outside organization^	1	0

\* Includes point for more than 10% for a total of 2 points

^ Includes points for more than 10% and 15% for a total of 3 points

+ Includes point for 5 hours for a total of 2 points

++ Includes points for 10 and 15 hours for a total of 3 points

Continued on next page.

Items to Be Included	Points Allotted	
	Chapter	Colony
Community Service Hours per Member		
Each member completes a minimum of 5 hours	1	1
Each member completes a minimum of 10 hours+	1	1
Each member completes a minimum of 15 hours++	1	1
Community Service Total Chapter Hours		
Chapter averages 5 hours per man	1	1
Chapter averages 10 hours per man+	1	1
Chapter averages 15 hours per man++	1	1
<b>Total</b>	<b>29</b>	<b>26</b>

\* Includes point for more than 10% for a total of 2 points

^ Includes points for more than 10% and 15% for a total of 3 points

+ Includes point for 5 hours for a total of 2 points

++ Includes points for 10 and 15 hours for a total of 3 points

## Community Service Event

*Description:* A written description and attendance sheet for your Chapter or Colony's community service event

*Files to be Submitted:* Community Service Event - Chapter/Colony Name  
Community Service Event Attendance Sheet - Chapter/Colony Name

*Templates to be Used:* Event Attendance Sheet

*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Description of the event includes:		
Date and time	1	1
Location	1	1
Organization the work was done for	1	1
Details on planning of the event	2	2
Detailed description of the event	2	2
Description of the impact on the community	2	2
Member Attendance (using attendance sheet)		
At least 50% of the membership participated	2	2
At least 75% of the membership participated*	1	1
At least 90% of the membership participated^	1	1
Member of the agency signs for verification	1	1
<b>Total</b>	<b>14</b>	<b>14</b>

\* Includes points for 50% for a total of 3 points

^ Includes points for 50% and 75% for a total of 4 points

## Social Media

*Description:* Links to all of your Chapter or Colony's social media accounts.

*Files to be Submitted:* Social Media - Chapter/Colony Name

*Templates to be Used:* None

*File Formats Accepted:* Excel, PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Website		
Link works (i.e. website or account exists)	1	1
Complies with the Chi Phi Fraternity's Electronic Use Policy	1	1
Information is current and up-to-date	1	1
Facebook		
Link works (i.e. website or account exists)	1	1
Complies with the Chi Phi Fraternity's Electronic Use Policy	1	1
Information is current and up-to-date	1	1
Instagram		
Link works (i.e. website or account exists)	1	1
Complies with the Chi Phi Fraternity's Electronic Use Policy	1	1
Information is current and up-to-date	1	1
Twitter		
Link works (i.e. website or account exists)	1	1
Complies with the Chi Phi Fraternity's Electronic Use Policy	1	1
Information is current and up-to-date	1	1
<b>Total</b>	<b>12</b>	<b>12</b>

## Campus Event

*Description:* A written description and attendance sheet for your Chapter or Colony's event held for the campus

*Files to be Submitted:* Campus Event - Chapter/Colony Name  
Campus Event Attendance Sheet - Chapter/Colony Name

*Templates to be Used:* Event Attendance Sheet

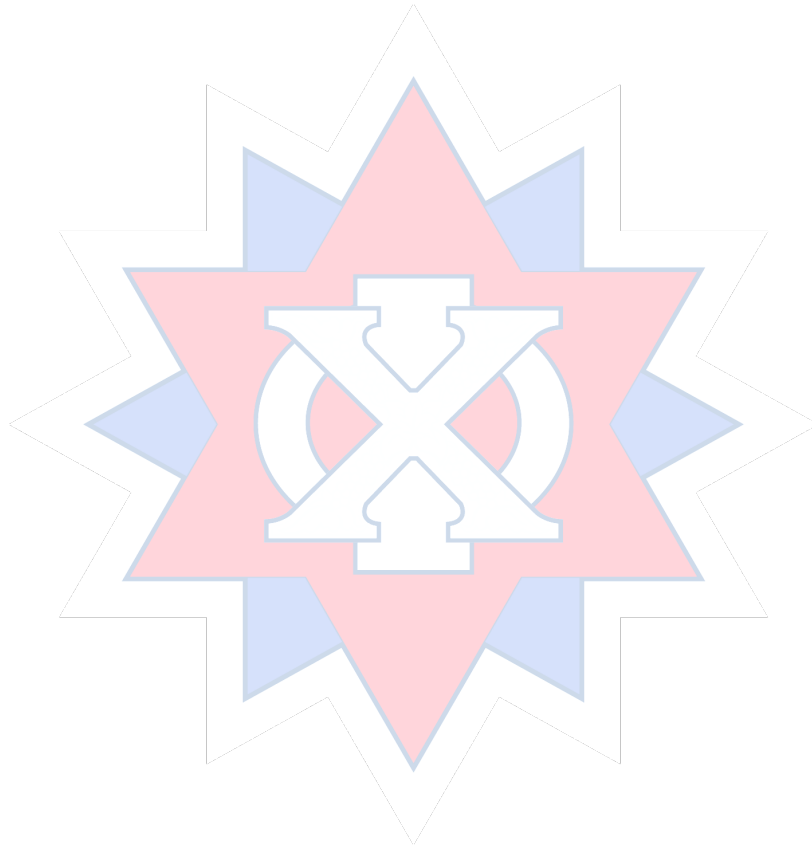
*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
Description of the event includes:		
Date and time	1	1
Location	1	1
Chapter sponsored or co-sponsored the event	1	1
Details on planning of the event	2	2
Detailed description of the event	2	2
Description of the impact on the campus	2	2
Member Attendance (using attendance sheet)		
At least 50% of the membership participated	2	2
At least 75% of the membership participated*	1	1
At least 90% of the membership participated^	1	1
Alumni Advisor signs for verification	1	1
<b>Total</b>	<b>14</b>	<b>14</b>

\* Includes points for 50% for a total of 3 points

^ Includes points for 50% and 75% for a total of 4 points





# **National Staff Verification**

## National Programming

*Description:* Verification of your Chapter or Colony's attendance at national programming  
*Files to be Submitted:* None  
*Templates to be Used:* None  
*File Formats Accepted:* N/A

Items to Be Included	Points Allotted	
	Chapter	Colony
<b>Fall</b>		
<b>Officer/Chair Webinars</b>		
Alpha	1	1
Beta	1	1
Gamma	1	1
Delta	1	1
Epsilon	1	1
Zeta	1	1
Eta	1	1
Theta	1	1
Iota	1	1
Academic Chair	1	1
Accreditation Chair	1	1
Philanthropy Chair	1	1
Social Chair	1	1
<b>College of Excellence</b>		
Chapter sent at least one (1) member to COE	2	2
Chapter sent at least two (2) members to COE+	2	2
<b>Congress</b>		
Chapter sent one (1) delegate to the last Congress	5	5
Chapter sent two (2) or more delegates to the last Congress+	8	8
<b>Spring</b>		
<b>Alpha's Academy</b>		
Chapter president attended Alpha's Academy	6	6
<b>Regional Leadership Alliance</b>		
At least 50% of the executive council attended RLA	6	6
At least 75% of the executive council attended RLA*	6	6
At least 10% of the chapter membership attended RLA	6	6
At least 15% of the chapter membership attended RLA^	6	6
<b>Total</b>	<b>30</b>	<b>30</b>

\* Includes point for 50% for a total of 2 points

^ Includes point for 10% for a total of 2 points

+ Includes points for one (1) member/delegate for a total of 4 points

## Miscellaneous

*Description:* A verification of various information on your Chapter or Colony  
*Files to be Submitted:* None  
*Templates to be Used:* None  
*File Formats Accepted:* N/A

Items to Be Included	Points Allotted	
	Chapter	Colony
Chapter filed its 990N	1	0
GreekLifeEDU has been completed by all members	2	2
New Member Report was submitted on time	1	1
Initiation Report was submitted on time	1	1
Chapter initiated at least 80% of its new member class	2	2
Chapter has no maintenance or risk management balance due to the national fraternity	1	1
Chapter has a functioning alumni advisory board	2	2
<b>Total</b>	<b>10</b>	<b>9</b>

## Mid-Year and End-of-Year Reports

*Description:* A verification of your Chapter or Colony's Mid-Year and End-of-Year Reports

*Files to be Submitted:* Mid Year Report - Chapter/Colony Name  
Or  
End of Year Report - Chapter/Colony Name

*Templates to be Used:* None

*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
All officers have been updated in Vault	1	1
All officer contact information is correct	1	1
Rosters have been updated to indicate graduating seniors	1	1
Status of all members on your roster is accurate	1	1
Name and contact info for the Faculty Advisor is correct	1	1
Name and contact info for the Chapter Advisor is correct	1	1
Name, title, and contact info for the Greek Advisor is correct	1	1
Chapter Eternal has been updated	1	1
<b>Total</b>	<b>8</b>	<b>8</b>

## Deductions

*Description:* Penalties for not following directions prescribed as well as risk management and hazing violations. This section will be graded by the national office.

*Files to be Submitted:* None

*Templates to be Used:* None

*File Formats Accepted:* N/A

Items to Be Included	Points Allotted	
	Chapter	Colony
Documentation submitted late	-1	-1
Files not properly named	-1	-1
Risk Management Violation (Lose all points awarded for Social Event Policy)	-1	-1
Hazing Violation (Lose all points awarded for New Member Education Program)	-1	-1