# Accreditation
# 151ˢᵗ Congressional Committee Information

## Chi Phi Fraternity
### Building Better Men *est. December 24, 1824*

# Contents

## Introduction

The Purpose of this report is to allow members of the Accreditation Committee at the 151st Congress to review the Accreditation Program, created as per the 145th Congress.  In this report, committee members will find a variety of resources, explanations, and findings that are the result of several years of work by alumni volunteers and members of the National Staff.  Should the committee find that additional changes are needed, they may make them and the amended program will be put forth to the National Staff and Grand Council. As you will find in Congress Motion 2299 from the 145th Congress, the Accreditation Committee has had five full years of data collection to help guide the fraternity in the next year. With this being highlighted, this information does not require any additional legislation at the 151st Congress.  The duties and responsibilities of the Committee are to focus upon further refining the program and suggestions and feedback for implementation.

## Congress Motion 2299

The specific language of motion 2299 from the 145th Congress can be seen below:

"The Committee on Chapter Accreditation having reviewed a memorandum dated July 15, 2010 proposing to establish a Chapter Accreditation Program from the Grand Council's Standing Committee on Accreditation, hereby moves that Congress authorize the Grand Council to proceed with implementation of a Chapter Accreditation Program in accordance with the standing committee's memorandum and the Congress committee's comments thereon, with the proviso that the proposed incentives and developmental mandates therein be subject to review and modification by the Grand Council and its Standing Accreditation Committee during and following an initial trial period."

## Background

The Chi Phi Fraternity is the model of all value-based organizations that have come after us.  We expect our chapters to be accountable to our founding principles and demonstrate mission and action congruence in all that they do.  Many Greek communities, colleges and universities, as well as, inter/national Greek organizations have instituted accreditation processes over the past several years to assist their chapters in living up to their founding principles and affirm their relevance to their respective communities.  This incentive-based accreditation program effectively reinforces mission and action congruence and also achieves the following objectives; provide the ability to benchmark the Fraternity's overall performance and forecast trends, streamline our resources in assisting our Chapters/Colonies and provide our groups with objective, documentable standards for achievement and recognition.

Designed specifically with the Fraternity's primary strategic plan objectives in mind, the program examines our chapters' operations in ten areas using the previous Chi Phi Standards of Chapter Excellence as its foundation.  During the three-year development and trial implementation phase, the Grand Council's Accreditation Committee met in person and via teleconference, conferred with professionals in other organizations, as well as, officials at Emory, Bucknell and Lehigh Universities and piloted an accreditation program in survey form with a sample of 43 of our active chapters and colonies. In addition, this program was based on previous groundwork established by former staff, alumni and undergraduate volunteers in effort to create a developmental resource to aid our active chapters, colonies and alumni organizations.  The categories included in the Accreditation Program are:

**Continuity – Recruitment and Retention**; **Proactive Risk Management**; **Asset Stewardship – Financial and Property Management; Academic Health**; **Total Membership Development**; **Heritage and Traditions**; **Chapter/Colony Operations**; **Organizational Networking and Community Engagement**; **Leadership Advancement**; and **Alumni Relations.**

Our value as a national fraternity can only be achieved and preserved by the principles upheld by our individual chapters and brothers. To maintain distinction, Chi Phi has long sought to develop a reliable, objective and fair method of holding ourselves accountable to the Standards of Excellence befitting the prestige of our Order. We believe this program is that mechanism.

The Chi Phi Chapter Accreditation Program is a developmental assessment and awards program that acknowledges those Chapters/Colonies that meet and exceed our standards. In this program, Chapters are responsible for a two part semi-annual self-assessment submission composed of a survey and relevant supporting documentation. In order for this process to take root in our Chapters and Colonies, we expect them to establish their own standing accreditation committee to manage and support the process.

Recognizing the value of achievement and the need for institutional adoption throughout all levels of the Fraternity, included are the incentives for those Chapters that achieve accreditation for two consecutive semester, as well as, incentives for Chapters that achieve two consecutive semester of a higher standard or "Accreditation with Distinction", which were proposed by the 146th Congressional Accreditation Committee. Additionally, the 146th Congressional Accreditation Committee proposed selection of developmental mandates for a chapter that fails to achieve accredited status for two or more consecutive semesters. It is believed that these increasingly significant developmental mandates assist in achieving two of the main goals of the Chapter Accreditation Program: ensuring an operational standard within all Chi Phi Chapters and helping to improve Chapter health. Developmental mandates begin after two consecutive semester of failing to achieve accredited status and progressively increase with each additional semester spent below expectations.

This document includes the Relative Questions and Answers, the Accreditation Program Criteria, the required supporting documentation, and proposed Incentives and Developmental Mandates.

Throughout this document, the term Chapter is used and meant to include both "Chapters" and "Colonies."

## Common Questions and Answers

**Why would my chapter need to apply for accreditation every semester?**

With the adoption and implementation of the Accreditation Program by this Congress, applying for accreditation every term will give the Grand Council, your alumni advisors and the National Office a better understanding of how your chapter is functioning and in what areas you may need further assistance. Your chapter and the National Fraternity as a whole will benefit the most from timely and cumulative reporting so that trends can be spotted and support for specific issues can be provided. It will also give you and your Chapter a much clearer direction for goal setting and provide critical analysis of areas in need of improvement.

**Is completing the program mandatory?**

Yes, the 145th Congress approved Motion 2299 which charged the Grand Council and National Staff with implementing an accreditation program for all Chapters of the Chi Phi Fraternity. Over the course of the following year the Accreditation Committee and Grand Council in conjunction with the National Staff conducted a trial phase. During the trial phase different criteria for accreditation and the method of survey were analyzed and adjusted, with the program before you being the final product. The program has been formulated with the strong support of the Grand Council, National Staff, and Educational Trust. The program promotes accountability among our chapters and its members, which is consistent with the Strategic Objectives adopted by the 144th Chi Phi Congress.

The specific language of motion 2299 from the 145th Congress can be seen below:

"The Committee on Chapter Accreditation having reviewed a memorandum dated July 15, 2010 proposing to establish a Chapter Accreditation Program from the Grand Council's Standing Committee on Accreditation, hereby moves that Congress authorize the Grand Council to proceed with implementation of a Chapter Accreditation Program in accordance with the standing committee's memorandum and the Congress committee's comments thereon, with the proviso that the proposed incentives and developmental mandates therein be subject to review and modification by the Grand Council and its Standing Accreditation Committee during and following an initial trial period."

**How does my chapter achieve "Accreditation with Distinction?"**

Your chapter must perform at an exceptional level, placing within the top 10% of all chapters surveyed on the criteria used to measure chapter performance and provide the supporting documentation.

**What are the benefits of achieving "Accreditation with Distinction" status, and how do I convince my chapter Brothers that this is something for which we should strive?**

If your chapter becomes "Accredited with Distinction" for two consecutive terms, you could receive the following:

- Thomas A. Gehring Chapter Excellence Award Presented at the Annual Congress
- Issuance of a $10 per non-graduating member rebate to the chapter
- The issuance of a Recruitment Scholarship equal to one new member fee and one initiation fee to the chapter
- A $100 Travel Reimbursement Check for RLA Participation

- A Perpetual Plaque in your Chapter and the National Office reflecting the achievement
- Recognition in the Chi Phi Chakett in the form of an article on the Chapter and its officers
- Two COE, UIFI, Futures Quest, or other Grand Council approved educational program Registration Fees[1]

**What happens if my chapter does not meet accreditation standards?**

If a chapter does not meet the accreditation standards it will receive a detailed report highlighting the areas that need improvement.  The chapter will also receive a visit from a National Staff member that will be specifically designed to help the chapter excel in the areas that need attention.  Additionally, Chapters who fail to attain accreditation in any one academic year are ineligible for all Chapter Awards presented at Congress, excluding those awards of the "most improved" nature.

Should a chapter not be accredited for a second consecutive term, the chapter will be provided with a revised action plan to achieve accreditation status and will incur a series of developmental mandates, found later in this report.

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[1] The Grand Council has final approval of all incentives and developmental mandates to ensure financial feasibility and allow for changes based on budgetary ability and changing programming and national resources.

## Proposed Incentives for Groups Achieving Accredited Status

Since it was first conceived, some type of incentive structure has been fundamental to the idea that would become the Accreditation Program. The following proposed incentives were formulated after consultation with undergraduate members of the fraternity, members of the National Staff, the Grand Council, and other Alumni volunteers.

**Two Consecutive Semesters of Accreditation**

- Automatic Consideration for all Chapter awards given at Congress
- A workshop facilitated by the National Fraternity on the subject of the Chapter's choosing from within the curriculum offerings of the National Fraternity
- The issuance of a Recruitment Scholarship equal to one new member fee and one initiation fee to the chapter
- A $100 Travel Reimbursement Check for RLA Participation
- One COE, UIFI, Futures Quest, or other Grand Council Approved educational program Registration fee[1]

**Two Consecutive Semesters of Accreditation with Distinction**

- Thomas A. Gehring Chapter Excellence Award Presented at the Annual Congress
- Issuance of a $10 per non-graduating member rebate to the chapter
- The issuance of a Recruitment Scholarship equal to one new member fee and one initiation fee to the chapter
- A $100 Travel Reimbursement Check for RLA Participation
- A Perpetual Plaque in your Chapter and the National Office reflecting the achievement
- Recognition in the Chi Phi *Chakett* in the form of an article on the Chapter and its officers
- Two COE, UIFI, Futures Quest, or other Grand Council approved educational program Registration Fees[1]

## Average Financial Rewards to Accredited and Accredited with Distinction Chapters

| Average Accredited Chapter Financial Rewards (2 consecutive semesters) | | Average Chapter Assumptions | |
|---|---|---|---|
| RLA Travel Rebate | $100 | Chapter Size | 34 |
| NM and Initiation Fee Rebate | $330 | | |
| Total Financial Reward | $430 | | |

| Average Accredited with Distinction Chapter Financial Rewards (2 consecutive semesters) | |
|---|---|
| RLA Travel Rebate | $100 |
| NM and Initiation Fee Rebate | $330 |
| Insurance Rebate | $340 |
| Total Financial Reward | $770 |

An important detail to note is that the Accreditation Committee recommends that moving forward all incentives and financial rewards be at the discretion of the Grand Council and the National Staff. Further details regarding the financial incentives may be found in the Additional Terms and Conditions section of this report.

## Proposed Developmental Mandates for Groups Failing to Achieve Accredited Status

Failure to comply with the accompanying developmental mandates in a reasonable amount of time results in an automatic suspension of the chapter until they are compliant.

**Two Semester of Failure to Achieve Accreditation**

- The submission of an action plan to the Grand Council, Executive Director, Alumni Advisor and Campus Greek Advisor outlining those measures the Chapter is taking to attain Accredited status

**Three Consecutive Semesters Failing to Achieve Accreditation**

- $10 per man increase in per member insurance assessment until Chapter attains Accreditation
- Required participation of all officers and at least 50% of all Members in the next Regional Leadership Alliance or a National Fraternity facilitated webinar or teleconference to be approved by the National Fraternity
- Probationary Status/Limited Social Eligibility to be lifted with satisfactory progress towards Accredited status to be determined by the National Staff and Grand Council
- Required Creation of an Alumni Advisory Board with a Minimum of 4 Certified Alumni Advisors (webinar available)
- The attendance of the current or incoming Alpha to that academic year's Alpha academy

**Four Consecutive Semesters Failing to Achieve Accreditation**

Previous Developmental Mandates, plus:

- National Certified Trainer to conduct Officer Transition and Training – funded by Chapter/Alumni
- The submission of a revised action plan to the Grand Council, Executive Director, Alumni Advisor and Campus Greek Advisor outlining those measures the Chapter and each individual member are taking to attain Accredited status, with entries from every active undergraduate Brother and the Chapter's Alumni Advisory Board members detailing their roles in helping the chapter regain Accredited status

**Five Consecutive Semesters Failing to Achieve Accreditation**

Previous Developmental Mandates, plus:

- Submission to the Court of the Grand Council to be held at the next face to face Grand Council meeting, or Chi Phi Congress, whichever occurs first.

## Additional Proposed Terms and Conditions
### Accreditation with Distinction

- Accreditation with Distinction is defined as scoring at or above the 90th percentile in the given semester.  It should be noted that is not a score of 90 or better, but better than 90% of the other chapters who completed the accreditation form for the given semester.

### Financial Incentives

- Financial incentives will be paid out of the Risk Management Fund (RMF).
- Financial incentives will be issued in the form of a check to the chapter.
- All financial incentives are to be at the discretion of the Grand Council.  This allows for flexibility in the dollar amounts granted so as to allow for adjustments made necessary by changes in available funding.

### Risk Management Incidents/Violations

- In the event of a report of a violation of the Fraternity or a host University's risk management policies, the National Staff and Grand Council will review the chapter's most recent accreditation report.  Based upon the Grand Council's assessment, a Chapter's score in the Risk Management portion of the Accreditation form, or their overall score, may be made contingent upon the Chapter's cooperation and compliance with University and Fraternity imposed sanctions.  Additionally, the chapter may have points deducted from their Accreditation score for the current semester, or be subject to an outright cancellation of their score for the current semester.

## Survey Questions
The complete survey can be found in Appendix A

## Supporting Documentation List
The complete list of required documents can be found in Appendix B

## Supporting Documentation Rubric
The complete rubric can be found in Appendix C

## Review of the 150<sup>th</sup> Congress Accreditation Motions and Resolutions

**Motion 2456-** The Accreditation Committee moves that the physical fitness, sexual health, and career planning educational programming requirements be modified to provide 10 areas requiring 3 be completed each semester. **Motion passes unanimously.**

**Motion 2454-** The accreditation committee moves that the accreditation question requiring 10% chapter growth each year be removed from the program. **Motion passes.**

**Resolution 2455-** Whereas the accreditation committee wants to encourage chapter growth and health, be it resolved that the standing committee shall provide a replacement question or questions for the 10% growth requirement that appeals to the majority of our chapters within one year. **Resolution passes.**

**Resolution 2457-** Whereas the educational programming requirements are limited in scope and repetitive for chapters, be it resolved that the standing committee create 10 areas not limited to such as life skills, personal finance, hazing prevention, sexual assault prevention, first aid, sexual health, and mental health. Motion to amend the resolution to "not limited to in front of 10 such areas". **Amendment passes. Amended resolution passes.**

**Resolution 2458-** Whereas the requirement to recruit 25% of a chapter or colony's membership annually does not specify whether these are new members or initiates, be it resolved that the standing committee revise this question to provide needed clarity.

## Improvements and Changes to the Program since 150<sup>th</sup> Congress

Based off of recommendations from the 150<sup>th</sup> Chi Phi Congressional Accreditation Committee, several improvements to the process were made during the 2015-2016 academic year. These changes include:

- Revision of the Supporting Documentation Rubric to provide additional clarification on requirements.
- Further Grading Changes: additional graders were used, further dividing the work load and allowing for a more timely grading process. Graders were also provided with additional training and staff did spot checking of documentation grading and feedback to ensure consistency and accuracy. This resulted in fewer requests from Chapters for grading reconsideration than ever before.
- Change in the submission process: Chapters no longer use the portal to submit their Chapter Survey and Supporting Documents. Now, they complete the Chapter Survey questions via an

Excel document and for the Supporting Documents they submit via email in a Zip Folder. This resulted in a much smoother process for not only Chapters but also graders (as documents were easily shared with them.)

## Topics for Discussion and Review by the Committee

While the Standing Committee does not feel any major changes to the content of the program are necessary, it does realize that tweaks and continued process improvements might be beneficial. Items that the Standing Committee would like the Congressional Committee to discuss, review, and provide feedback regarding are:

1. **What did your Chapter think of the Spring 2016 submission process?**
2. **Has your Chapter found the Accreditation Rubric helpful when preparing to submit Accreditation? Why or why not?**
3. **Do you feel that the documents asked to submit for Accreditation are relevant to your Chapter and its operations?**
4. **Are there different types of documents you feel that your Chapter should be submitting for Accreditation in order to get feedback from the National Office?**
5. **Do you feel that the current point system accurately reflects if a Chapter should be Accredited or not? Why or why not?**
6. **Any other questions your Chapter may have about the Accreditation Process?**

See Appendix A for space to answer these questions or write down any notes about these questions.

## Historical Trends

See below for the breakdown of Accredited with Distinction, Accredited, and Not Accredited for the 2015-2016 year:

|  | **Fall 2015** | **Spring 2016** |
|---|---|---|
| **Accredited with Distinction** | 5 | 5 |
| **Accredited** | 32 | 29 |
| **Not Accredited** | 14 | 17 |

**Appendix A: 2015-16 Accreditation Committee Questions to Review**

1.  **What did your Chapter think of the Spring 2016 submission process?**

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2.  **Has your Chapter found the Accreditation Rubric helpful when preparing to submit Accreditation? Why or why not?**

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3.  **Do you feel that the documents asked to submit for Accreditation are relevant to your Chapter and its operations?**

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_____

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4.  **Are there different types of documents you feel that your Chapter should be submitting for Accreditation in order to get feedback from the National Office?**

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5.  **Do you feel that the current point system accurately reflects if a Chapter should be Accredited or not? Why or why not?**

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6.  **Any other questions your Chapter may have about the Accreditation Process?**

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**Appendix B: 2015-16 Accreditation Instructions and Supporting Documentation**

# SPRING 2016 ACCREDITATION

The Spring 2016 Accreditation submission process is changing to a format that is designed to be more user friendly. This new process will allow Chapters to work on accreditation at their own pace as well as still receive a detailed score sheet with grader feedback. However, in order to ensure this process goes smoothly, **please read through and follow the directions below carefully**. If you have any questions, please reach out to Erin Caldwell at Caldwell@chiphi.org.

## *CHAPTER SURVEY*
1) Download the Chapter Survey from www.chiphi.org/accreditation or by clicking this link: Chapter Survey
2) If prompted, you want to enable macros. (These are for National Office use only.)
3) Click on the dropdown arrow in **Cell C2** and find your Chapter.
4) Answer the questions in the survey providing names, email address, and contact numbers as it requests. *NOTE: The questions on this survey have not changed from previous semesters.*
5) For the yes or no questions, please be sure to **write out "Yes" or "No**".
6) When you have completed the survey save it with the following file name: **CHAPTER NAME**.xlsm
   a. Chapter Name should be entered as it appears in Cell C2.
   b. Ensure it is being saved as an Excel Macro-Enabled Workbook (.xlsm)
   c. For example: PHI LAMBDA THETA.xlsm

## *SUPPORTING DOCUMENTS*
1) Listed below is a table of all supporting documentation that is required for accreditation. *NOTE: Again, all documentation being requested is the same from previous semesters.*
2) Review the list carefully and refer back to the Accreditation Rubric for specific details on what should be included in each document.
3) In order for your submissions to be sorted and, therefore, graded correctly ensure that you are saving the document with the correct file name. This should follow the table provided in Appendix 1. Examples are listed below.
   a. Recruitment Program-ALPHA-ALPHA
   b. Social Event Policies-EPSILON
   c. Budget-ALPHA-PI
**4) All documents are to be either in PDF format or an Excel Spreadsheet. Word documents will not be accepted.**
**5)** If you have any questions regarding supporting documentation or would like someone from the National Office Staff to review your documents prior to submitting, feel free to reach out to your Field Executive by **no later than Wednesday, April 20th.**
   a. JP Peters:            peters@chiphi.org
   b. Justin Munson:        munson@chiphi.org
   c. Christian Madrid:     madrid@chiphi.org

## SUBMISSION PROCESS
1) Once you have completed the Chapter Survey and have all Supporting Documentation that you plan on submitting for accreditation, save it to a zip folder.
   a. If you are unsure of how to do this review the following link: How to Create a Zip Folder
   b. The Zip Folder should be saved as your **CHAPTER NAME**.
2) You will then email your zip folder to accreditation@chiphi.org.
3) Submission deadline is **SUNDAY, MAY 1, 2016 BY 11:59PM.**
4) If you have any questions or problems contact either your Field Executive or Erin Caldwell.

# *Appendix 1: Supporting Document Table*

| Supporting Document | Save As |
|---|---|
| Recruitment Program | Recruitment Program-CHAPTER NAME |
| Obligations of Membership | Obligations of Membership-CHAPTER NAME |
| Membership Selection Criteria | Membership Selection Criteria-CHAPTER NAME |
| Greek Advisor Risk Management Letter | Greek Advisor Risk Management Letter-CHAPTER NAME |
| Risk Management Program | Risk Management Program-CHAPTER NAME |
| Social Event Policies | Social Event Policies-CHAPTER NAME |
| Crisis Management Plan | Crisis Management Plan-CHAPTER NAME |
| Guest List | Guest List-CHAPTER NAME |
| Budget | Budget-CHAPTER NAME |
| Invoices | Invoices-CHAPTER NAME |
| 990N Tax Verification | 990N Tax Verification-CHAPTER NAME |
| Savings Account Statement | Savings Account Statement-CHAPTER NAME |
| Academic Program | Academic Program-CHAPTER NAME |
| New Member Education Program | New Member Education Program-CHAPTER NAME |
| GreekLifeEdu Verification | GreekLifeEdu Verification-CHAPTER NAME* |
| Educational Programming | Educational Programming-CHAPTER NAME |
| Ritual Equipment Inventory | Ritual Equipment Inventory-CHAPTER NAME |
| Ritual Performed | Ritual Performed-CHAPTER NAME |
| By-Laws | By-Laws-CHAPTER NAME |
| Officer and Committee Chair Roster | Officer and Committee Chair Roster-CHAPTER NAME |
| Strategic Plan | Strategic Plan-CHAPTER NAME |
| IFC Recognition | IFC Recognition-CHAPTER NAME |
| University Recognition | University Recognition-CHAPTER NAME |
| National or Local Philanthropy Event | National or Local Philanthropy Event-CHAPTER NAME |
| Co/Sponsored Campus Event | Campus Event-CHAPTER NAME |
| Website | Website-CHAPTER NAME |
| Chapter Goals | Chapter Goals-CHAPTER NAME |
| Code of Conduct | Code of Conduct-CHAPTER NAME |
| Campus Organization List | Campus Organization List-CHAPTER NAME** |
| Chapter Advisory Board | Chapter Advisory Board-CHAPTER NAME |
| Alumni Newsletter | Alumni Newsletter-CHAPTER NAME |
| Alumni Event | Alumni Event-CHAPTER NAME |
| Graduating Class Contact Information | Graduating Class Contact Information-CHAPTER NAME |
| Alumni Installation Ceremony | Alumni Installation Ceremony-CHAPTER NAME |

*GreekLifeEdu Verification: there is nothing that needs to be submitted for this. The National Office will verify completion.

**Campus Organization List: for this supporting document, please include both the roster indicating service hours completed for each member AND the roster indicating involvement in other organizations for each member.

**Appendix C: 2015-16 Accreditation Grading Rubric**

# Supporting Document Rubric 2015-2016

# Chi Phi Fraternity Chapter Accreditation Program

## Continuity- Recruitment and Retention

For the Continuity- Recruitment and Retention section you are required to submit the following documentation:

- A written copy of your Chapter or Colony's recruitment program
  1. The recruitment program is in compliance with Chi Phi Fraternity's risk management policy, including:
     a. Events are free of alcohol and controlled substances/illegal drugs
     b. Other inappropriate recruiting activities
  2. The recruitment program is comprehensive including the following:
     a. Goals
     b. Structure/Organization for the purpose of recruitment
     c. Event descriptions and purposes
     d. Member expectations for recruitment
  3. The recruitment program clearly outlines all aspects of their plan.
  4. The recruitment program is re-creatable.
  5. The recruitment program utilizes the Chi Phi Fraternity's core values of truth, honor, personal integrity or concepts of founding documents, such as the creed or true gentleman, as part of their recruitment process.

- A copy of the obligations of membership which you distribute to potential New Members
  1. The obligations for membership in alliance with the expectations of a brother, including:
     a. Encourage individual development
     b. Promote adjustment to college life
     c. Build respect for the individual
     d. Stimulate intellectual growth
     e. Promote an understanding of the fraternity
     f. Promote the diffusion of culture and social graces
     g. Promote friendship
     h. Provide a beneficial life long experience for every member
  2. The obligations for membership are compliant with Chi Phi Fraternity's risk management policy, including:
     a. Obligations are free of hazing;
     b. Obligations are alcohol-free and drug-free;
     c. Obligations do not violate the Chi Phi non-discrimination.
  3. The obligations are in alignment with the values of Chi Phi Fraternity, which are:
     a. Based on truth, honor, and personal integrity

    b. Includes values of friendship, respect, honesty, responsibility, commitment, and personal development
  4. The obligations for membership are achievable during the New Member process.
    a. The obligations can be completed in no more than eight weeks.
  5. The obligations for membership are given to the New Members in writing.
    a. Document is given to each new member, whether electronically or physically.
  6. The obligations of membership are quantifiable (i.e. Abstract concepts like gain a greater understanding of the concept of brotherhood, are discouraged)

- A copy of the membership selection criteria your Chapter or Colony uses in the recruitment process
  1. Selection criteria align with the values of the Chi Phi Fraternity.
  2. The selection criteria are consistent with the obligations for membership.
  3. The selection criteria given to potential members prior to initiation.

## Proactive Risk Management

For the Proactive Risk Management section you are required to submit the following documentation:

- A copy of a letter from your campus Greek Advisor verifying that your Chapter or Colony has not had any risk management violations this term
  1. A letter is submitted from the Greek advisor or university administrator.
  2. The letter does not mention risk management violations.

- Program date, time, topic, presenter and sponsoring group of the risk management program your chapter attended this term. The number of brothers in attendance should also be noted
  1. The explanation of the program does include program date, time, topic, presenter(s) and sponsoring program.
  2. The program can be modeled for other chapters (e.g. explanation could be re-created).
  3. The number of brothers in attendance is included in the report.
  4. The program addresses how the risk management policy is instituted, why it is important to follow the policy or other relevant risk management challenges for today's college students.

- A Guest List Template used for social events with alcohol.
  1. Space for name and date of event.
  2. Space for guest name, date of birth, inviting person/brother, and time in/time out.

- Social Event Policies
  1. Job descriptions and responsibilities for all event management personnel are clearly outlined.
  2. An outside individual could understand the responsibilities of event management personnel.
  3. Other event policies which ensure a safe, well managed, well planned, and well monitored event are addressed within the plan.
  4. A plan is included for educating members and event management personnel on the policies and procedures within the document.

- Comprehensive Crisis Management Plan
  1. Procedures for low level, mid-level, and high level incidents are outlined, including point of authority, communications, and immediate and long range procedures.
  2. Natural disasters such as tornados, fire, and other location appropriate weather circumstances are addressed including, point of authority, communications, and immediate and long range procedures.
  3. Communication points of contact, such as university administrator, National Office, chapter advisor, alumni association president, and house corporation president, are listed with contact information.
  4. National policies such as contacting the National Office within 72 hours of an incident which involves injury or emergency personnel are included appropriately.
  5. Roles and responsibilities for officers and members are clearly outlined for all situations.
  6. A plan for reviewing and educating members and officers on the plan is included.

## Asset Stewardship – Financial and Property Management

For the Asset Stewardship – Financial and Property Management section you are required to submit the following documentation:

- A written copy of your Chapter or Colony's budget for the current term
  1. The budget does itemize spending based on events or elements of the chapter.
  2. The budget reflects spending throughout the semester.
  3. The budget reflects expected expense versus actual expense.

- A copy of each of the various types of invoices issued to members for dues, fees, and/or rent
  1. The invoice itemizes cost for chapter members.
  2. The invoice includes national dues and insurance.
  3. The invoice is a model for chapters to use.

- Copy of 990N submission verification from most recent filing
  1. The chapter submitted their recent 990N.
  2. The chapter submitted information to the controller at the National Headquarters.

- Savings account (University accounts can be used to meet this criterion as long as the spending from the account is not limited to property improvement but includes usage for educational or programmatic expenses.)
  1. The chapter has a saving account (university account).
  2. The budget reflects their savings (university earnings) for the account.
  3. The chapter submits a current statement with their report.

## Academic Health

For the Academic Health section you are required to submit the following documentation:

- A letter from your campus Greek Advisor verifying your Chapter or Colony's GPA as well as the all-fraternity and all-men's average GPAs.
  1. The chapter submits a letter for their campus advisor or administrator.
  2. The letter is signed or verified by the campus advisor or administrator.
  3. The chapter is at or above the all-fraternity average.
  4. The chapter is at or above the all-men's average.

- A copy of the portion of your Chapter or Colony's bylaws outlining the GPA requirements for:
  1. Pledging
  2. Initiation
  3. A "member in good standing" status
  4. Voting in Chapter meetings
  5. Eligibility to hold elected or appointed office

  1. The chapter or colony has bylaws regarding pledging.
  2. The chapter or colony has bylaws regarding initiation.
  3. The chapter or colony has bylaws regarding a "member in good standing" status.
  4. The chapter or colony has bylaws regarding voting in chapter.
  5. The chapter or colony has bylaws regarding eligibility to hold elected or appointed office.
  6. The bylaws are compliant with the Chi Phi Risk Management policy and minimum standards.

- Chapter academic program that does all of the following:
  1. Engages members with academic resources and/or advisors
  2. Recognizes achievement
  3. Assist members not in 'good standing"
  1. The chapter or colony has an academic program.
  2. The chapter or colony academic program engages members with academic resources and/or advisors (e.g. chapter study hours cannot be the only element).
  3. The chapter or colony recognizes achievement of scholastic excellence.
  4. The chapter or colony assists members not in 'good standing."

## Total Member Education

For the Total Member Education section you are required to submit the following documentation:

- A written copy of your Chapter or Colony's New Member/Candidate's education program
  1. The chapter or colony provides the new member education program.
  2. The chapter or colony program includes
     a. Syllabus and/or outline of the program,
     b. Program goals
     c. Elements of the Program
        i. History of Chi Phi
        ii. Values of Chi Phi
        iii. Chi Phi Standards
        iv. Organization of Chapter/Fraternity
        v. GreekLifeEdu
  3. The program is compliant with the Chi Phi Fraternity's Risk Management Policy.
  4. New members can start at any point during their time in the new member process.
  5. The program is completed in no more than 8 weeks.

- Written verification of the educational programming your Chapter or Colony provided initiated members Each Total Membership Education program should include:
     a. Topic or title of the program

b. A brief description of the program and how it was meant to assist in a member's development
c. Date, time, presenter, and number of Brothers in attendance
d. Sponsoring Group (Chapter or another campus organization)
- Each of the educational programs has sufficient documentation.
- Another chapter or colony could re-create the program based on the documentation.
- The program is in conjunction with total member education.
- The Chapter has conducted at least three programs in the semester time frame.
- The topics/developmental areas are diverse. Developmental areas can include but are not limited to: Career planning, Physical Fitness, STDs/Sexual Health, Social Development/Etiquette, Leadership Development and Personal Awareness, Life Skills.

## Heritage and Traditions

For the Heritage and Traditions section you are required to submit the following documentation:

- An inventory of all of your Chapter's ritual equipment.
  1. The chapter provides an inventory of ritual equipment.
  2. The Zeta signs to verify the inventory is accurate.

## Chapter Operations

For the Chapter Operations section you are required to submit the following documentation:

- A complete written copy of your Chapter or bylaws
  1. The chapter or colony provides a complete copy of their chapter bylaws.
  2. The bylaws compliant with the Chi Phi Risk Management Policy.
  3. The bylaws been updated in the previous two years.

- A complete roster of all Chapter or Colony officers and committee chairman including their dates of elections and length or term
  1. The chapter or colony provides a complete roster of officers or committee chairmen.
  2. All executive council officers are elected for a one-year term.
  3. The roster includes date of election.
  4. The roster complies with the Chi Phi Fraternity national constitution.

- A copy of your Chapter or Colony's Strategic Plan
  1. The chapter or colony provides a copy of their strategic plan.
  2. The chapter or colony utilizes measurable goals to determine the success of their strategic plan.
  3. The chapter utilizes short and long term goals to structure their strategic plan.

- Provide a list with contact information of your Chapter Advisory Board members.
  1. The list has 3-5 members.
  2. Contact information including email address and phone number are provided.

## Organizational Networking & Community Engagement

For the Organizational Networking & Community Engagement section you are required to submit the following documentation:

- A letter from the IFC President or advisor verifying chapter recognition status with IFC
  1. The chapter provides a letter from IFC President or advisor recognizing their status with IFC or Greek council.
  2. The letter is signed or verified by IFC President or advisor.

- A letter from the Fraternity/Sorority Advisor verifying chapter recognition status with the university
  1. The chapter or colony provides a letter discussing their recognition by the university.
  2. The letter is signed or verified by the Fraternity/Sorority advisor.

- A link to your Chapter or Colony's website
  1. The chapter or colony provides a link for their website.
  2. The link for the website works.
  3. The website complies with the Chi Phi Fraternity's Electronic Media policy.
  4. The website information appears current and up-to-date.

- A complete Chapter or Colony roster including the campus organizations they belong to and how they completed their community
  1. The chapter or colony provides a roster of members and their campus organizations.
  2. The roster includes the community service that they complete.

- A brief written description of the service project the Chapter or Colony completed with the local Boys and Girls club, RAINN, or other local agency verified by a staff member of the agency.
  1. The chapter works with the local Boys and Girls club, RAINN, or another local non-profit agency.
  2. The description is detailed and provides sufficient knowledge of the service and civic engagement of the chapter.
  3. The project can be re-created by another chapter or colony.
  4. A staff member at the agency verifies the description.

- A brief written description of the campus wide event the Chapter or Colony sponsored or co-sponsored as verified by the Chapter or Colony Alpha
  1. The chapter or colony provides a brief written description of a campus-wide event sponsored or co-sponsored by the chapter or colony.
  2. The description details and provides sufficient knowledge of the program.
  3. The program can be re-created by another chapter or colony.

## Leadership Advancement

For the Leadership Advancement section you are required to submit the following documentation:

- A written copy of your Chapter or Colony's short and long term goals
  1. The chapter or colony provides a written list of short-term goals.
  2. The chapter or colony provides a written list of long-term goals.
  3. The chapter or colony gives ways to accomplish these goals.
  4. The goals meet the SMART goals elements.
  5. The goals are compliant with the Chi Phi Risk Management Policy.

- A written copy of your Chapter or Colony's Code of Conduct
  1. The chapter or colony provides a copy of their Code of Conduct.

2. The Code of Conduct includes in the Chapter or Colony's bylaws.
3. The Code of Conduct is compliant with the Chi Phi Risk Management Policy.
4. The Code of Conduct is part of the Total Member Education/New Member Education program.

- A roster of all Brothers & New Members including the officer positions they hold in other campus organizations as verified by the Chapter or Colony Advisor
    1. The chapter or colony provides a roster of all brothers and new members.
    2. The roster includes all officer positions they hold in other campus organizations.
    3. The chapter or colony advisor verifies the roster.

## Alumni Relations

For the Alumni Relations section you are required to submit the following documentation:

- A copy of your Chapter or Colony's most recent alumni newsletter/update
    1. The chapter or colony provides the most recent alumni newsletter/update.
    2. The newsletter provides updates about the chapter.
    3. The newsletter provides information regarding alumni news and reports.
    4. The newsletter sent out in the most recent academic term/semester.

- A brief written description of the Alumni event your Chapter or Colony held this most recent term as verified by the Chapter or Colony Advisor
    1. The chapter or colony provides a written description of their alumni event(s) for the most recent academic term.
    2. The description provides sufficient details for reporting or replication by other chapters or colonies.
    3. The alumni event complies with Chi Phi Risk Management Policy.

- An up to date copy of the contact information for your Chapter or Colony's most recent graduates or graduating class (*If a chapter or colony has no graduating members, they must provide documentation stating that information*.)
    1. The chapter or colony provides a current copy of contact information for recent graduates.  (A chapter or colony will not lose points for having no graduating members as long as documentation is provided.)
    2. The roster includes email and mailing address.
    3. For the National Office: The chapter or colony roster compliant with the list of initiated members in the database at the National Office.

- Date of last performed Alumni Installation Ceremony (*If a chapter or colony has no graduating members, they must provide documentation stating that information.)*
    1. The chapter or colony the date of last performed Alumni Installation Ceremony.
    2. Verified by Alumni Chair, Alpha or Gamma.

**Appendix D: 2015-16 Accreditation Survey**

## Chapter and Campus Information

| | |
|---|---|
| A1 | Chapter |
| A2 | President Contact Information: Name |
| A3 | President Contact Information: Phone Number |
| A4 | President Contact Information: Email Address |
| A5 | Lead Chapter Advisor Contact Information: Name |
| A6 | Lead Chapter Advisor Contact Information: Phone Number |
| A7 | Lead Chapter Advisor Contact Information: Email Address |
| A8 | Campus Greek Advisor Contact Information: Name |
| A9 | Campus Greek Advisor Contact Information: Phone Number |
| A10 | Campus Greek Advisor Contact Information: Email Address |
| A11 | Does your campus prohibit recruitment for first semester Freshman? |
| A12 | Does your campus prohibit recruitment of all freshmen? |
| A13 | Does your Chapter have a house? |
| A14 | How many IFC fraternities are there on your campus? |
| A15 | What is the average fraternity size on your campus (including new/associate members)? |
| A16 | Total Chapter Membership at the beginning of the academic year. This does not include any New Members. |
| A17 | Total Chapter Membership for the current term, including New Members. |
| A18 | What is the campus average new member class size (for the applicable semester)? |
| A19 | How many non-initiated New Members are currently in your Chapter? |
| A20 | What is the all-men's GPA average on your campus (for the most recent past term)? |
| A21 | What is the all-fraternity GPA average on your campus (for the most recent past term)? |
| A22 | What is your Chapter's GPA on your campus (for the most recent past term)? |
| A23 | What was your Chapter's New Member GPA on your campus (for the most recent past term)? |
| A24 | How many men did your Chapter pledge during the current term? |
| A25 | How many of those men did your Chapter initiate during the current term? |

## Continuity - Recruitment and Retention

| | |
|---|---|
| 001 | Is your Chapter at or above the campus average for Fraternity Chapter size? |
| 002 | Has your Chapter membership increased by more than 10% in the last year? |
| 003 | Does your Chapter have a dynamic, written, and Chapter-adopted recruitment program? |
| 004 | Does your Chapter provide a written copy of your Chapter's obligations of membership to potential New Members? |
| 005 | Does your Chapter require a minimum 2.5 high school GPA for first semester Freshman? |
| 006 | Does your Chapter require a minimum 2.5 college GPA for potential new members? |
| 007 | Does your Chapter have an objective values-based selection process for recruitment? |
| 008 | Did your Chapter have an Alumni, faculty, or staff facilitated recruitment planning program? |
| 009 | Does the Chapter recruit at least 25% of its membership annually? |
| 010 | Did the Chapter initiate at least 80% of its most recent new member class? |
| 011 | Have any initiated members left the Chapter this term for any reason other than graduation or transfer to another school? (Study Abroad members will return and are not considered in this question.) |

## Proactive Risk Management

| | |
|---|---|
| 101 | Has your Chapter had any violations of the Chi Phi Personal Safety Policy or of your campus' risk management policy in the current term? |
| 102 | How many violations of the Chi Phi Personal Safety Policy? |
| 103 | Has your Chapter educated all New Members about the Chi Phi Personal Safety Policy in the last semester? |

| | | |
|---|---|---|
| 104 | Has your Chapter educated all Initiated members about the Chi Phi Personal Safety Policy in the last semester? |
| 105 | Did your Chapter maintain guest lists for all its social events with alcohol this term? |
| 106 | Did your Chapter maintain guest lists for all its social events this term? |
| 107 | Has your Chapter attended at least one risk management related educational program this past term? |
| 108 | Is your Chapter's recruitment, bidding, new member, and initiation process entirely alcohol-free? |
| 109 | Does your Chapter have written social event policies? |
| 110 | Does your chapter have a written comprehensive crisis management plan? |

## Asset Stewardship - Financial and Property Management

| | |
|---|---|
| 201 | Does your Chapter have a written budget for its current term? |
| 202 | Are periodic (monthly/weekly) budget-to-actual statements/updates provided to your membership? |
| 203 | Do your members receive written or electronic invoices for all dues/rent/fees? |
| 204 | Is your Chapter current on all financial obligations to its campus and its IFC? |
| 205 | Does your Chapter have a maintenance or risk management account balance due to the Fraternity exceeding 30 days? |
| 206 | Does your Chapter have a maintenance or risk management account balance due to the Fraternity exceeding 60 days? |
| 207 | Does your Chapter have a maintenance or risk management account balance due to the Fraternity exceeding 90 days? |
| 208 | Has your Chapter filed its 990N with the IRS for its most recent fiscal year? |
| 209 | Did your Chapter maintain a savings account or similar restricted account equivalent to or in excess of 5% of its budget for the term? |
| 210 | Have all New Member reports been submitted to the Fraternity for the current academic term? |
| 211 | Have all Initiation reports been submitted to the Fraternity for the current academic term? |
| 212 | Was your Chapter fined for late reporting of any New Member reports this term? |
| 213 | Was your Chapter fined for late reporting of any Initiation reports this term? |

## Academic Health

| | |
|---|---|
| 301 | Was your Chapter's GPA higher than the all-mens GPA average (in the most recent past term)? |
| 302 | Was your Chapter's GPA higher than the all-fraternity GPA average (in the most recent past term)? |
| 303 | Do your Chapter's bylaws include minimum GPA requirements for pledging? |
| 304 | Do your Chapter's bylaws include minimum GPA requirements for initiation? |
| 305 | Do your Chapter's bylaws include minimum GPA requirements for a "member in good standing" status? |
| 306 | Do your Chapter's bylaws include minimum GPA requirements for voting in Chapter meetings? |
| 307 | Do your Chapter's bylaws include minimum GPA requirements for eligibility to hold an elected or appointed office? |
| 308 | Do your Chapter bylaws include minimum GPA requirements for eligibility to attend Chapter-sponsored social events? |
| 309 | Does your Chapter have an academic program that does all of the following: engages members with academic resources and/or advisors, recognizes achievement and assist members not in good standing. |
| 310 | Does your Chapter have a designated study area and/or designated quiet/study hours? |

| 311 | Does your Chapter have an active faculty advisor who met with the Chapter at least once this term? |
|---|---|
| 312 | Provide the page, article, and section numbers for the following GPA requirements in your Chapter/Colony bylaws. Pledging |
| 313 | Provide the page, article, and section numbers for the following GPA requirements in your Chapter/Colony bylaws. Initiation |
| 314 | Provide the page, article, and section numbers for the following GPA requirements in your Chapter/Colony bylaws. A member in good standing status |
| 315 | Provide the page, article, and section numbers for the following GPA requirements in your Chapter/Colony bylaws. Voting in Chapter meetings |
| 316 | Provide the page, article, and section numbers for the following GPA requirements in your Chapter/Colony bylaws. Eligibility to hold elected or appointed office |

## Total Membership Development

| 401 | Does your Chapter have a written new member/candidate education program? |
|---|---|
| 402 | How long does your New Member/Candidate education program last (in weeks)? |
| 403 | Does your Chapter's New Member/Candidate education program adhere to all policies and guidelines of Chi Phi Fraternity and of your campus? |
| 404 | Is your Chapter's New Member/Candidate education program completely free of any activities which could be deemed inappropriate? |
| 405 | Have all current-term New Members completed GreekLifeEdu? |
| 406 | Does your Chapter place an emphasis on internal communication and dissemination of information to all of its brothers and new members/candidates, such as but not limited to dissemination of Executive Council and Chapter meeting minutes, holding regular Committee meetings, notification of all members regarding Chapter status and recognition issues? |
| 407 | Does your Chapter employ a total membership education (with graduating class specific programming) including guest speakers and resources from their host institution, Alumni, National staff and community? |
| 408 | Did your Chapter provide initiated members with developmental/educational programming during this academic term as part of a Total Membership Education Program? |

## Heritage and Traditions

| 501 | Does your Chapter have a complete set of properly maintained ritual equipment? |
|---|---|
| 502 | Did your Chapter perform the Pledging Ceremony this term? |
| 503 | Did your Chapter perform the Initiation Ceremony this term? |
| 504 | Did your Chapter perform the Grand Lecture this term? |
| 505 | Did your Chapter perform Libations this term? |
| 506 | Did your Chapter perform the Candle Ceremony this term? |
| 507 | Does your Chapter incorporate ritual into New Member/Candidate education by means of a post-initiation seminar? |
| 508 | Are all Chapter meetings held in accordance with Chi Phi customs and usages? |
| 509 | Does your Chapter make its members aware of ritual education opportunities such as programming offered at RLAs and the Goliard Program? |

## Chapter/Colony Operations

| 601 | Does your Chapter have written and approved bylaws? |
|---|---|
| 602 | Does your Chapter utilize a committee system? |
| 603 | Does every initiated member serve on a committee? |
| 604 | Does every New Member/Candidate serve on a committee? |
| 605 | Does your Chapter elect all Greek Letter officers (Alpha through Eta) on an annual basis? |
| 606 | Does your Chapter have an active 3 to 5 member Alumni or Chapter Advisory Board? |

| | |
|---|---|
| 607 | Does your Chapter communicate regularly (biweekly or more often) with its Alumni Advisor? |
| 608 | Does your Chapter conduct a transition/succession management plan? |
| 609 | Does your Chapter have a written Strategic Plan? |
| 610 | Does your Chapter review its Strategic Plan each semester? |
| 611 | Does your Chapter educate its members on the Accreditation Program each semester? |
| 612 | Does your Chapter have an operational Brotherhood/Judicial Board? |

## Organizational Networking and Community Engagement

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|---|---|
| 701 | Does your Chapter maintain appropriate recognition as a student organization by your IFC? |
| 702 | Does your Chapter maintain appropriate recognition as a student organization by your host institution? |
| 703 | Did at least 10% of the Chapter attend the most recent Regional Leadership Alliance? |
| 704 | Did your Chapter's executive officers (Alpha, Beta, Delta, Gamma, Eta) participate in one of this semester's Officer Teleconferences or related webinars (Fall Semester) or RLA Officer Track (Spring Semester)? |
| 705 | Did your Chapter send delegates to the most recent Chi Phi Congress? |
| 706 | Does your Chapter maintain a proactive approach to Public Relations with all Greek audiences including but not limited to maintaining attendance at all IFC meetings and participation in Greek sponsored events (Greek Week, philanthropy week, freshman move-in, etc.)? |
| 707 | Does your Chapter maintain a proactive approach to Public Relations with all non-Greek audiences including but not limited to member's parents, faculty, administration, neighbors and non-Greek student organization, such co-sponsoring events with non-Greek organizations, hosting events where faculty/staff are invited, hosting parent events, etc. |
| 708 | Does your Chapter have a webpage that has been updated within the current term? |
| 709 | Does all the Chapter's membership (initiates and un-initiated Candidates/New Members) participate in at least one campus organization (in addition to Chi Phi)? |
| 710 | Did your Chapter members complete at least 5 hours of Community Service per man during the current academic term? |
| 711 | Total community service hours completed by the whole Chapter/Colony? This includes new members and active Brothers. |
| 712 | Did your Chapter complete a service project benefitting the Boys and Girls Clubs of America, RAINN, or the local Chapter of some other national service organization this term? |
| 713 | What national philanthropic organization does the Chapter support on an on-going basis? |
| 714 | What national philanthropic organization does the Chapter support on an on-going basis? Other answer |
| 715 | Did your Chapter complete a philanthropy project this term? |
| 716 | How many philanthropic dollars has the Chapter has raised this term? |

## Leadership Advancement

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|---|---|
| 801 | Does your Chapter have a documented current list of short and long-term goals? |
| 802 | Are your Chapter's goals and objectives monitored and assessed at least quarterly? |
| 803 | Does the Executive Council review and update expectations for every office during the officer transition period? |
| 804 | Are those officer expectations monitored and assessed at least monthly? |

| 805 | Did your Chapter's Brotherhood Board coordinate at least one event and program (i.e. retreats, special dinners, rituals, recognition programs) to promote brotherhood during the current term? |
|------|------|
| 806 | Does the Brotherhood Board use and enforce a Code of Conduct for all Brothers, Candidates/New Members, and Alumni? |
| 807 | Do any current Chapter members hold campus leadership positions (student government, club offices, student senate, student paper, etc.)? |
| | ## Alumni Relations |
| 901 | Does your Chapter have a leadership position whose responsibilities specifically include Alumni Relations? |
| 902 | Did the Chapter send out a newsletter/update to its Alumni this most recent term? |
| 903 | Did the Chapter help coordinate an event for Alumni this most recent term? |
| 904 | Did the Chapter invite Alumni to at least one recruitment or Chapter social event this academic year? |
| 905 | Is the Alumni Installation Ceremony conducted annually for graduating seniors? |
| 906 | Does your Chapter collect and maintain contact information for graduating seniors? |