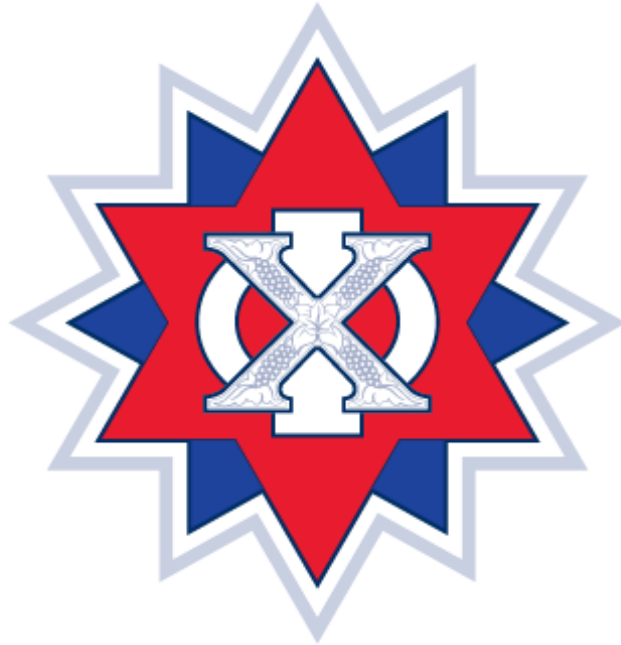


**Accreditation**  
**152<sup>nd</sup> Congressional Committee**  
**Information**



# **Chi Phi Fraternity**

**Building Better Men** *est. December 24, 1824*

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## Contents

Introduction .....	2
Congress Motion 2299 .....	2
Background .....	2
Common Questions and Answers .....	4
Why would my chapter need to apply for accreditation every semester? .....	4
Is completing the program mandatory?.....	4
How does my chapter achieve “Accreditation with Distinction?” .....	4
What happens if my chapter does not meet accreditation standards? .....	4
Proposed Developmental Mandates for Groups Failing to Achieve Accredited Status .....	6
Additional Proposed Terms and Conditions .....	6
Survey Questions.....	8
Supporting Documentation List .....	8
Supporting Documentation Rubric.....	8
Review of the 150 <sup>th</sup> Congress Accreditation Motions and Resolutions .....	8
Improvements and Changes to the Program since 150 <sup>th</sup> Congress.....	8
Topics for Discussion and Review by the Committee.....	9
Appendix A: 2015-16 Accreditation Committee Question’s to Review.....	10
Appendix B: 2015-16 Accreditation Instructions and Supporting Documentation .....	12
Appendix C: 2015-16 Accreditation Grading Rubric.....	15

## **Introduction**

The Purpose of this report is to allow members of the Accreditation Committee at the 152nd 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 six 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 152<sup>nd</sup> 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 145<sup>th</sup> 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 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.

## **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.

### **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 151<sup>st</sup> Congress Accreditation Motions and Resolutions

No motions were submitted.

## 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 151<sup>st</sup> Congress

Based off of recommendations from the 151<sup>st</sup> Chi Phi Congressional Accreditation Committee, several improvements to the process were made during the 2016-2017 academic year. These changes include:

- Complete 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.
- Continued with same 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 2016-2017 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.

## **Appendix A: 2016-2017 Accreditation Committee Questions to Review**

**1. What did your Chapter think of the 2016-2017 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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**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: 2016-2017 Accreditation Instructions and Document Checklist**

## SPRING 2017 ACCREDITATION

The Spring 2017 Accreditation submission process is changing to a format that is designed to be more user friendly. This 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](mailto:Caldwell@chiphi.org).

### CHAPTER SUBMISSION FORM

- 1) Download the Chapter Submission Form from [www.chiphi.org/accreditation](http://www.chiphi.org/accreditation)
- 2) Answer the questions in the form providing names, email address, and contact numbers as it requests.
- 3) When you have completed the form save it with the following file name: **CHAPTER NAME.xls**
  - a. For example: PHI LAMBDA THETA.xlsx

### SUPPORTING DOCUMENTS

- 1) The Documentation Checklist provides a table of all supporting documentation that is required for accreditation.
- 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 the Documentation Checklist. Examples are listed below.
  - a. Recruitment Program-ALPHA-ALPHA
  - b. Social Event Policy-EPSILON
  - c. Budget-ALPHA-PI
  - d. *Note: failure to title documents correctly will receive a five point deduction from the overall score*
- 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 Monday, April 17, 2017.**
  - a. Justin Munson: [munson@chiphi.org](mailto:munson@chiphi.org)
  - b. Christian Madrid: [madrid@chiphi.org](mailto:madrid@chiphi.org)
  - c. Dan Coutcher [coutcher@chiphi.org](mailto:coutcher@chiphi.org)

### SUBMISSION PROCESS

- 1) Once you have completed the Chapter Submission Form 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 [accreditation@chiphi.org](mailto:accreditation@chiphi.org) your zip folder.
- 3) Submission deadline is **MONDAY, MAY 1, 2017 BY 11:59PM.**
  - a. *Note: submissions received on May 2<sup>nd</sup> (even at 12:00 a.m.) will be marked late and receive a five point deduction from the overall score.*
- 4) If you have any questions or problems contact either your Field Executive or Erin Caldwell.

<b>Documents to Appear in Zip Folder (Alphabetical)</b>	<b>Included?</b>
Academic Program - Chapter Name	
Account Statement 1 - Chapter Name	
Account Statement 2 - Chapter Name	
Account Statement 3 - Chapter Name	
Account Statement 4 - Chapter Name	
Account Statement 5 - Chapter Name	
Account Statement 6 - Chapter Name	
Account Statement Register - Chapter Name	
Alumni Advisor 1 - Chapter Name	
Alumni Advisor 2 - Chapter Name	
Alumni Advisor 3 - Chapter Name	
Alumni Event - Chapter Name	
Alumni Event Attendance Sheet - Chapter Name	
Alumni Newsletter - Chapter Name	
Alumni Roster - Chapter Name	
Budget - Chapter Name	
By-laws - Chapter Name	
Campus Event - Chapter Name	
Campus Event Attendance Sheet - Chapter Name	
Code of Conduct - Chapter Name	
Community Service Event - Chapter Name	
Community Service Event Attendance Sheet - Chapter Name	
Crisis Management Plan - Chapter Name	
End-of-Year Report - Chapter Name	
Goals and Strategic Plan - Chapter Name	
Greek Advisor Letter - Chapter Name	
Guest List 1 - Chapter Name	
Guest List 2 - Chapter Name	
Guest List 3 - Chapter Name	
Guest List Template - Chapter Name	
Invoice 1 - Chapter Name	
Invoice 2 - Chapter Name	
Membership Selection Criteria - Chapter Name	
New Member Education Program - Chapter Name	
Obligations of Membership - Chapter Name	
Recruitment Program - Chapter Name	
Risk Management Educational Program - Chapter Name	
Risk Management Educational Program Attendance Sheet - Chapter Name	
Ritual Equipment Inventory - Chapter Name	
Rituals Performed - Chapter Name	
Roster - Chapter Name	
Social Event Policy - Chapter Name	
Social Media - Chapter Name	
Total Member Education Program 1 Attendance Sheet - Chapter Name	
Total Member Education Program 2 Attendance Sheet - Chapter Name	
Total Member Education Program 3 Attendance Sheet - Chapter Name	
Total Member Education Programs - Chapter Name	

## **Appendix C: 2016-2017 Accreditation Grading Rubric**

# CHI PHI FRATERNITY



**Accreditation Rubric  
Spring 2017**



# Contents

Purpose.....	4
Eight Pillars .....	5
Rewards Levels.....	7
Overall Grading .....	8
Score Calculation.....	9
Accreditation Levels.....	9
Recruitment.....	10
Recruitment Program.....	11
Membership Selection Criteria .....	12
Obligations of Membership .....	13
Risk Management.....	14
Risk Management Educational Program .....	15
Social Event Policy .....	16
Guest Lists.....	18
Crisis Management Plan .....	19
Financial Management .....	21
Budget .....	22
Account Statements.....	23
Invoices .....	24
Total Membership Education .....	25
Academic Program .....	26
New Member Education Program .....	27
Total Member Education Programs.....	29
Ritual.....	31
Ritual Equipment Inventory .....	31
Rituals Performed .....	31
Alumni Relations .....	32
Alumni Advisory Board.....	33
Alumni Roster .....	34
Alumni Newsletter .....	35
Alumni Event.....	36
Chapters Operations .....	37
By-Laws.....	38
Goals and Strategic Plan .....	39
Code of Conduct.....	41
Greek Advisor Letter .....	42
Organizational Networking.....	43
Roster .....	44

Community Service Event.....	46
Social Media .....	47
Campus Event .....	48
National Staff Verification .....	49
National Programming .....	50
Miscellaneous .....	51
Mid-Year and End-of-Year Reports.....	52
Deductions .....	53

## **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.

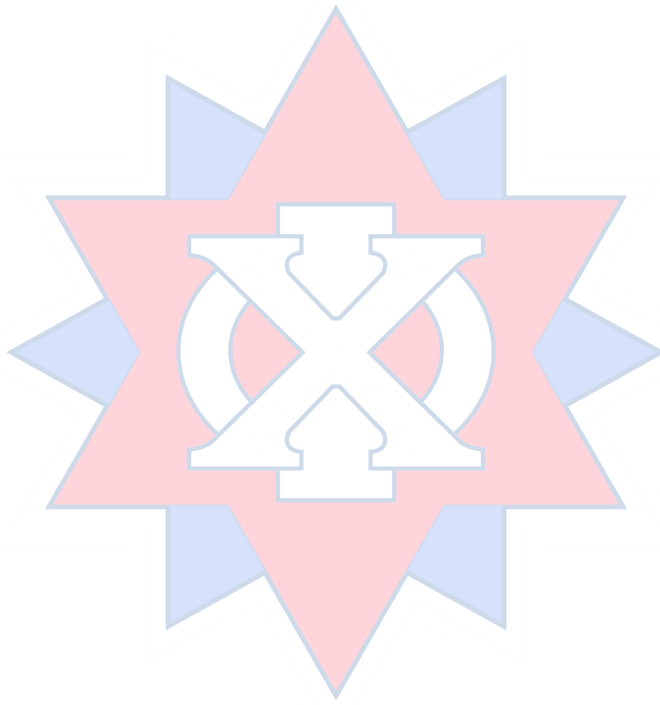
## **Accreditation Levels**

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

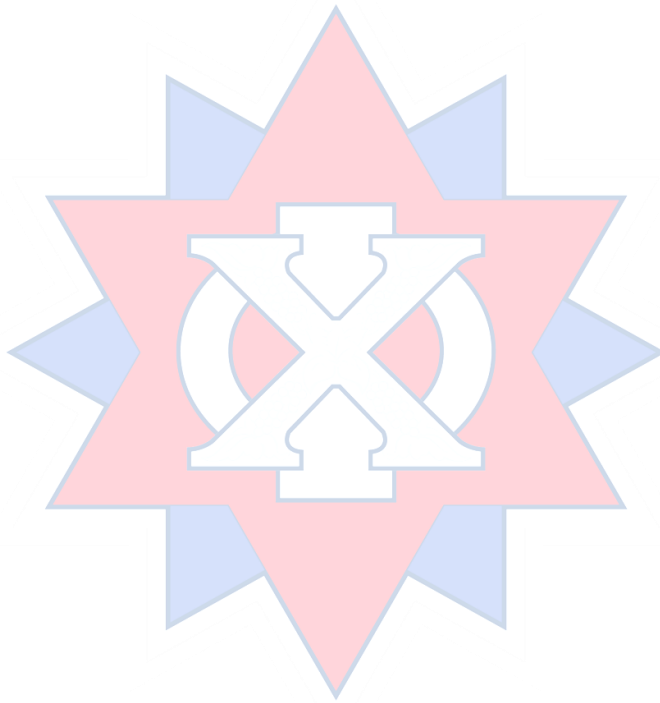
*Description:* A written copy of your Chapter or Colony's obligations of membership for all members including New Members

*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
<b>Health and Safety of Guests and Brothers</b>		
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

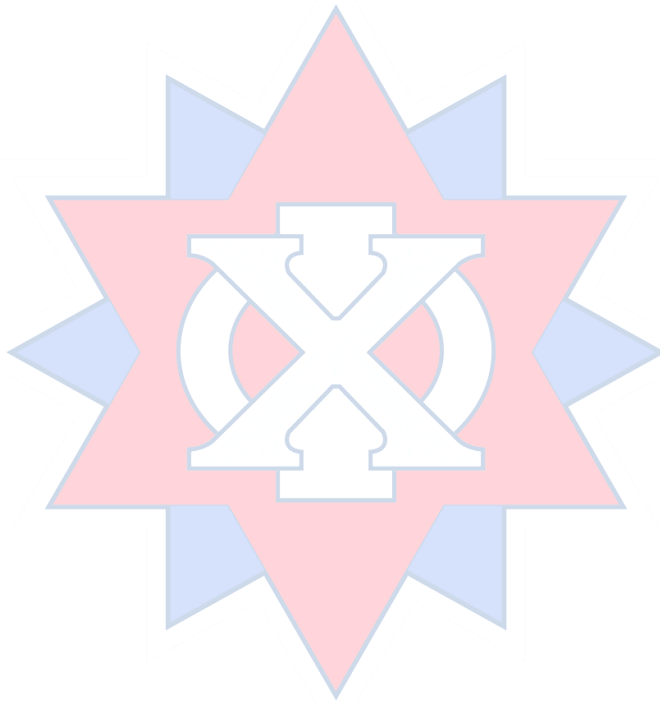
*Templates to be Used:* None

*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)

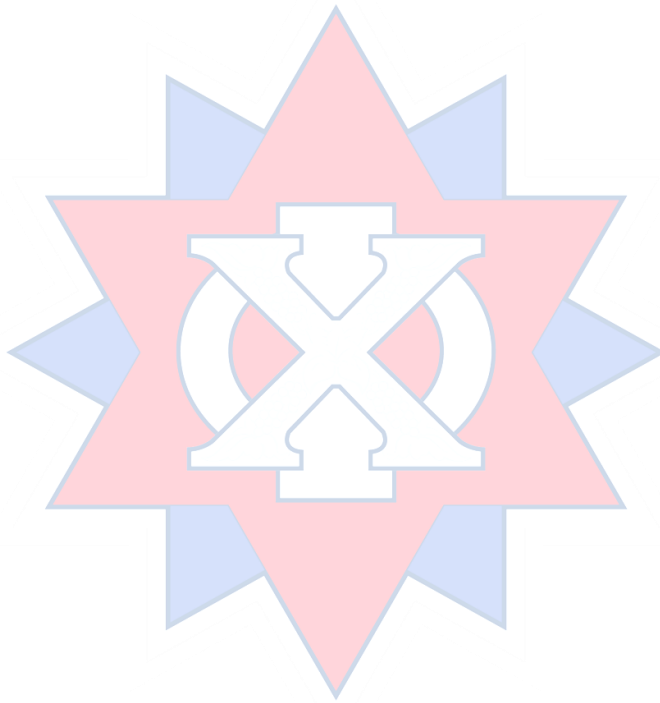
*Files to be Submitted:* Invoice 1 - Chapter/Colony Name

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

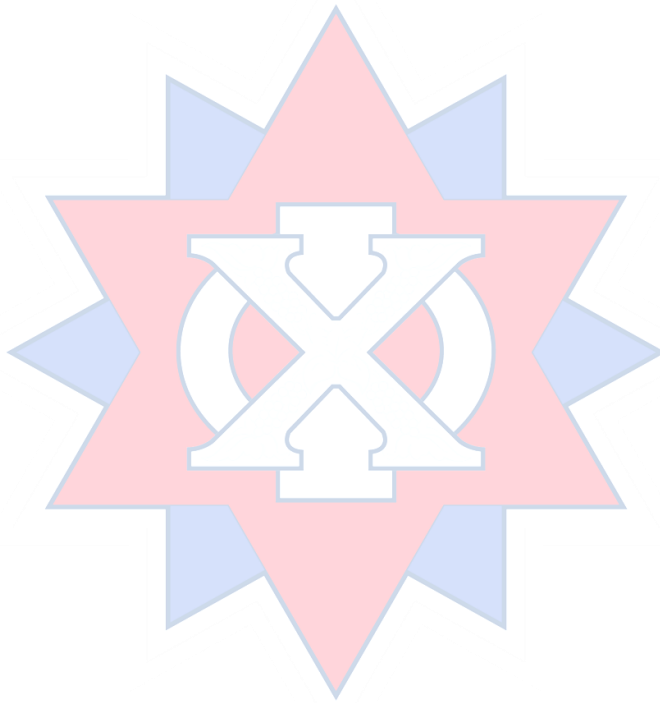
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Items to Be Included	Points Allotted	
	Chapter	Colony
<b>Program 2</b>		
Includes date, time, and location	2	0
Lists the sponsor of the event	2	0
Chi Phi was the primary sponsor of the event*	1	0
Describes planning of the event if sponsored by Chi 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



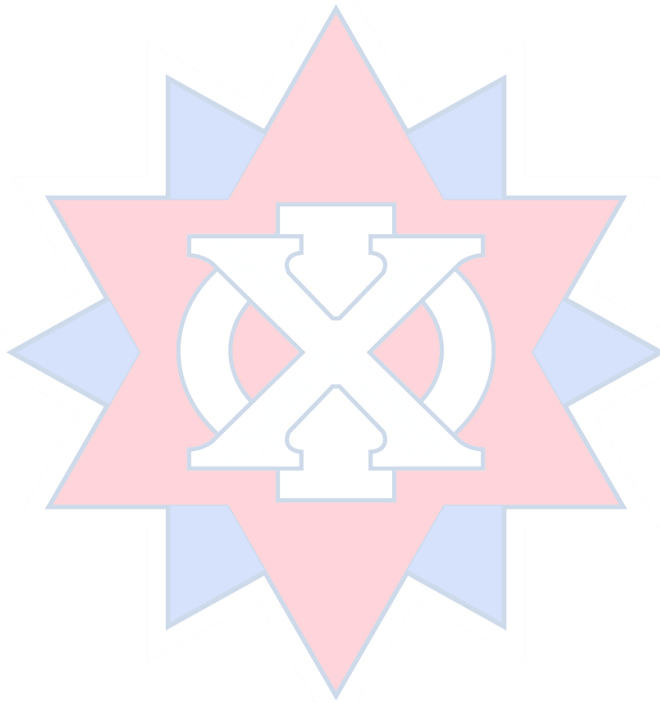
# Ritual

## **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

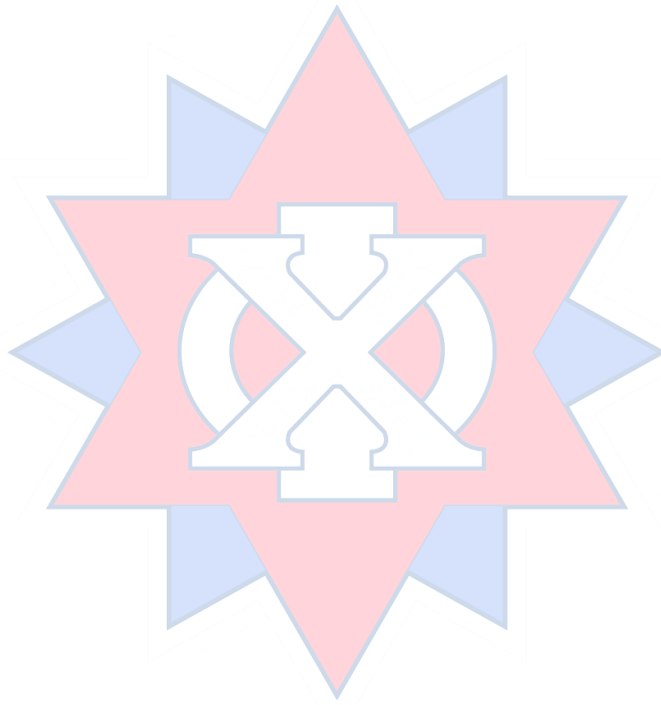
*Description:* A written description of your Chapter or Colony's most recent event held for Chapter or Chi Phi alumni

*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

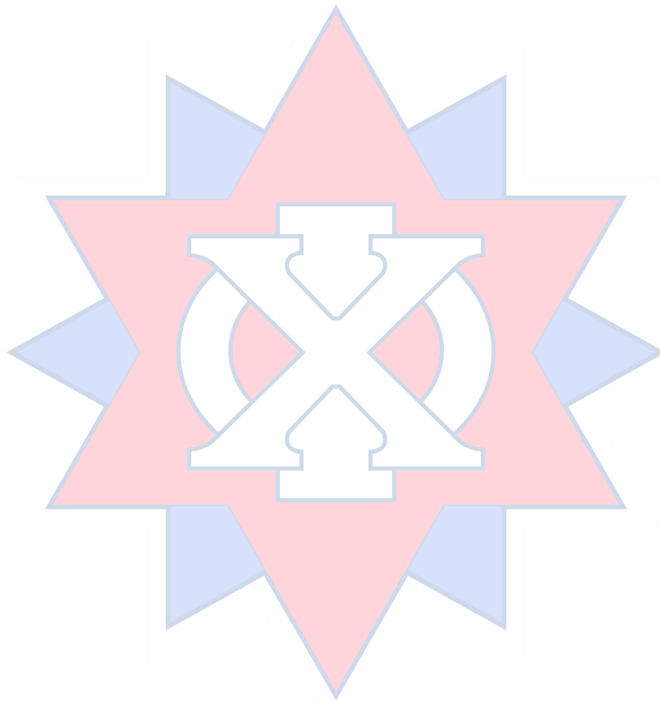
*Description:* A letter from your Chapter or Colony's Greek Advisor  
*Files to be Submitted:* Greek Advisor Letter - Chapter/Colony Name  
*Templates to be Used:* None  
*File Formats Accepted:* PDF

Items to Be Included	Points Allotted	
	Chapter	Colony
<b>Chapter Recognition</b>		
Chapter is recognized by the university	1	1
Chapter is recognized by IFC	1	1
<b>Risk Management</b>		
Chapter has had no risk management violations this term	2	2
Chapter is considered to be in good standing	2	2
<b>Academics+</b>		
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

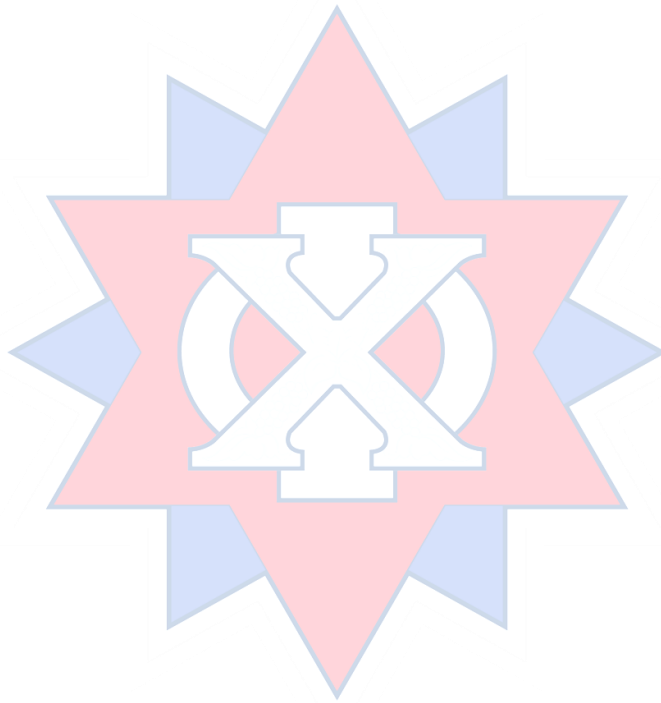
*Templates to be Used:* Event Attendance Sheet

*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