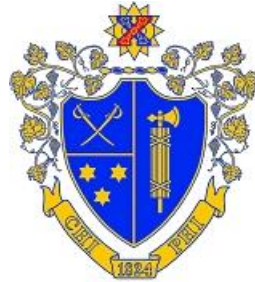


# CHI PHI FRATERNITY



## **2019 Chapter Accreditation Rubric Yearly Submission**

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## **Purpose**

The Accreditation program was created many years ago during a challenging time in our Fraternity. We were in need of a way to monitor the health of our Chapters and Colonies 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 Leadership Consultants**

The objective for Leadership Consultants 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 and Colonies for awards. 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.

## **Yearly Submission Process**

At the 2018 Congress in Richmond, Virginia, a Motion was passed to establish an annual submission process for Chapters that have successfully been accredited. This process was to cover a calendar year, thus covering one Alpha's term. Any Chapter which was not accredited in the Fall semester submission would have to submit a full submission in Spring semester. Colonies are still required to submit every semester.

## **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 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 educating 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. This will be the top 20% of passing Chapters in the process. Chapters or Colonies at this level will be invited to apply for the Thomas Gehring Award for Chapter Excellence.

### **Accredited with Distinction**

This level will be awarded to the top four Chapters or Colonies with the highest scores. These Chapters and Colonies will stand out as models for our organization and will be rewarded for their outstanding effort. Chapters or Colonies at this level will be invited to apply for the Thomas Gehring Award for Chapter Excellence. Additionally, there will be a \$2,000 Educational Grant awarded to the four Chapters and Colonies.

## Overall Grading

| Section                     | Document                            | Number of Points | Number of Points Obtained | Percentage | Document Weighting | Overall Score |
|-----------------------------|-------------------------------------|------------------|---------------------------|------------|--------------------|---------------|
|                             |                                     | Chapter          |                           |            | Chapter            |               |
| Recruitment                 | Recruitment Program                 | 40               |                           | 0%         | 18                 | 0.00          |
|                             | Obligations of Membership           | 20               |                           | 0%         | 5                  | 0.00          |
| Risk Management             | Risk Management Educational Program | 46               |                           | 0%         | 6                  | 0.00          |
|                             | Social Event Policy                 | 40               |                           | 0%         | 15                 |               |
|                             | Guest List                          | 24               |                           | 0%         | 8                  |               |
|                             | Crisis Management Plan              | 40               |                           | 0%         | 10                 |               |
| Financial Management        | Budget                              | 44               |                           | 0%         | 10                 |               |
|                             | Invoices                            | 12               |                           | 0%         | 2                  |               |
| Total Membership Education  | Academic Program                    | 9                |                           | 0%         | 10                 |               |
|                             | New Member Education Program        | 160              |                           | 0%         | 20                 |               |
|                             | Educational Programs                | 138              |                           | 0%         | 12                 |               |
| Ritual                      | Ritual Equipment Inventory          | 361              |                           | 0%         | 3                  |               |
|                             | Rituals Performed                   | 38               |                           | 0%         | 5                  |               |
| Alumni Relations            | Chapter Advisory Board              | 9                |                           | 0%         | 3                  |               |
|                             | Alumni Roster                       | 4                |                           | 0%         | 3                  |               |
|                             | Alumni Newsletter                   | 28               |                           | 0%         | 5                  |               |
|                             | Alumni Event                        | 20               |                           | 0%         | 3                  |               |
| Chapter Operations          | Bylaws                              | 10               |                           | 0%         | 10                 |               |
|                             | Goals and Strategic Plan            | 116              |                           | 0%         | 10                 |               |
|                             | Code of Conduct                     | 16               |                           | 0%         | 4                  |               |
|                             | Greek Advisor Letter                | 12               |                           | 0%         | 4                  |               |
| Organizational Networking   | Roster                              | 35               |                           | 0%         | 4                  |               |
|                             | Community Service Event             | 28               |                           | 0%         | 5                  |               |
|                             | Social Media                        | 12               |                           | 0%         | 2                  |               |
|                             | Campus Event                        | 28               |                           | 0%         | 8                  |               |
| National Staff Verification | National Programming                | 50               |                           | 0%         | 8                  |               |
|                             | Miscellaneous                       | 22               |                           | 0%         | 5                  |               |
|                             | Mid-Year and End-of-Year Reports    | 16               |                           | 0%         | 2                  |               |
| Deductions                  | Late Submission                     | -1               |                           |            | -5                 |               |
|                             | Improper File Naming                | -1               |                           |            | -10 Max            |               |
|                             | Risk Management Violation           | -1               |                           |            | -15 Max            |               |
|                             | Hazing Violation                    | -1               |                           |            | -20 Max            |               |
| Bonus                       | Non-Alcoholic Socials               | 4                |                           |            | 4 Max              |               |
|                             | Diversity Education                 | 2                |                           |            | 2 Max              |               |
|                             | TIPS Training                       | 6                |                           |            | 6 Max              |               |
| <b>Total</b>                |                                     |                  |                           |            | <b>200</b>         | <b>0.00</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**

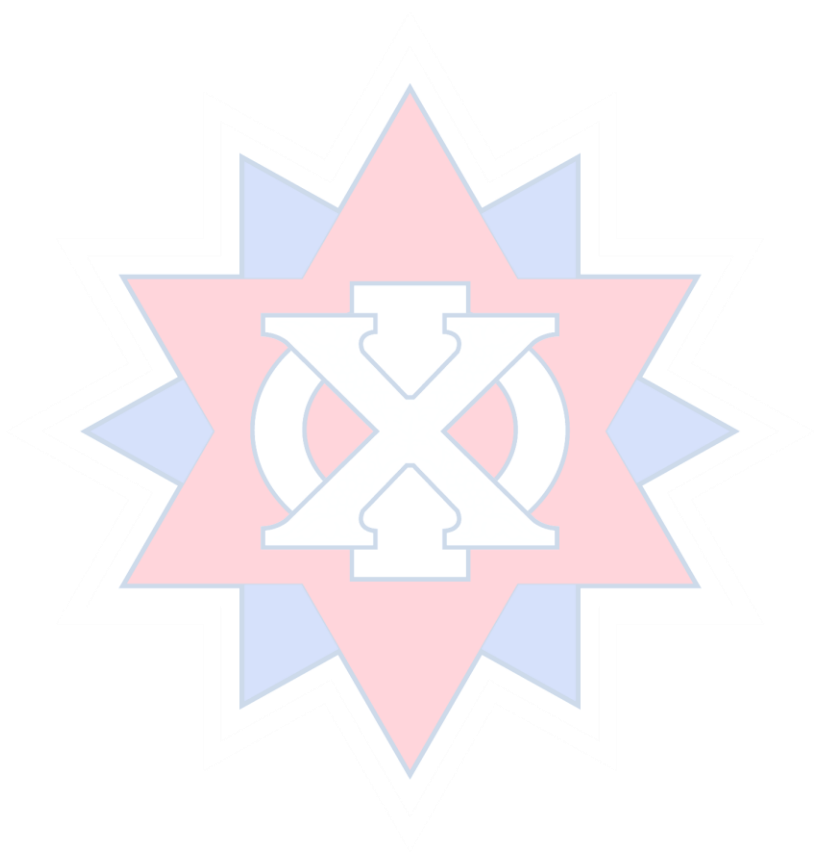
Accredited - 120 Points

Accredited with Honors – Top 20% of Accredited Chapters and Colonies

Accredited with Distinction – Top 4 Chapters and Colonies\*

\*Only applies the semesters the Colony apply on Chapter requirements, not the first semester applying on the Colony requirements.





# Recruitment

## Recruitment Program

*Description:* A written copy of your Chapter's Recruitment Program  
*Files to be Submitted:* Recruitment Program Yearly- Chapter Name  
 Recruitment Program Fall - Chapter Name  
 Recruitment Program Spring- Chapter Name  
*Templates to be Used:* None  
*File Formats Accepted:* PDF

| Recruitment Program – Chapter Name<br>Items to Be Included  | Requirements |  |
|---|--------------|--|
|   | Yearly       |  |
| Contains a statement on the Chapter's policies regarding the use of alcohol, controlled substances/illegal drugs, and other inappropriate recruiting activities.  | 2            |  |
| Outlines the expectations of the Iota, the Recruitment Committee, and all other members in regard to recruitment.   | 2            |  |
| Incorporates strategies to recruit during periods outside the main "Rush" or recruitment period on campus.  | 14           |  |
| 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. | 2            |  |
| Lists the clear short-term and long-term goals of the Chapter in regard to recruitment for the year.  | 10           |  |

| Recruitment Program by Semester - Chapter Name<br>Specific Items to Be Included   | Requirements |           |
|---|--------------|-----------|
|   | Spring 2018  | Fall 2018 |
| 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 for each semester. | 5            | 5         |
| Includes detailed event descriptions (including purposes) of all recruitment events by semester.  | 10           | 10        |

## Obligations of Membership

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

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

*Templates to be Used:* None

*File Formats Accepted:* PDF

| Program Items to Be Included  | Requirements |
|---|--------------|
|   | Yearly       |
| The obligations of membership include:  |              |
| Financial obligations to the Fraternity   | 1            |
| Time commitment expectations  | 1            |
| Academic expectations   | 1            |
| The obligations are in compliance with all National and Local Bylaws and Constitutions  | 1            |
| The obligations of membership are the same for New Members and Initiated Brothers   | 3            |
| The obligations of membership are in compliance with the following portions of the Chi Phi Fraternity's Personal Safety Policy: |              |
| Hazing  | 1            |
| Alcohol and Drugs   | 1            |
| Non-Discrimination  | 1            |
| The obligations of membership correlate with the Values of Chi Phi  | 3            |
| The obligations of membership are given to the New Members in writing   | 3            |
| The obligations of membership are quantifiable and can be used to hold Brothers accountable                                     | 4            |

# **Risk Management**

## Risk Management Educational Program

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

*Files to be Submitted:* Risk Management Educational Program Fall - Chapter Name  
Risk Management Educational Program Attendance Sheet Fall-Chapter Name  
Risk Management Educational Program Spring - Chapter Name  
Risk Management Educational Program Attendance Sheet Spring - Chapter Name

*Templates to be Used:* Event Attendance Sheet

*File Formats Accepted:* PDF

| Semester Items to Be Included  | Requirements |           |
|--|--------------|-----------|
|  | Spring 2018  | Fall 2018 |
| 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.<br>- If sponsored by Chi Phi, please provide planning details<br>- If only attended by Chapter, describe in detail how the Chapter prepared for the event | 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         |

\* 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's guide to managing risk at social events  
*Files to be Submitted:* Social Event Policy - Chapter Name  
*Templates to be Used:* None  
*File Formats Accepted:* PDF

|   | Requirements |
|---|--------------|
| Program Items to Be Included  | Yearly       |
| <b>Sober Monitors</b>   |              |
| Identifies how many Brothers will serve this duty during the event                                    | 1            |
| Defines the roles of each duty station  | 1            |
| Outlines incentives/consequences for serving as a sober monitor                                       | 1            |
| Identifies specific roles of New Members/Brothers serving sober duty and expectations of all Brothers | 1            |
| Includes length of time (shifts, entire event, rotate through positions, etc.)                        | 1            |
| Identifies contact and protocol in case of an emergency   | 1            |
| <b>Serving of Alcohol</b>   |              |
| Explains in detail what BYOB looks like   | 2            |
| Explains in detail how "check-in" works (is it done at the event, prior, etc.)                        | 2            |
| Explains in detail how alcohol is monitored (wristbands, tickets, etc.)                               | 2            |
| Explains in detail where alcohol is stored during the event   | 2            |
| Explains in detail what happens to any remaining alcohol at the end of the night                      | 2            |
| <b>Third-Party Vendor/Off-Campus Chapter Events</b>   |              |
| Explains in detail the process of planning and executing an off-campus event                          | 2            |
| Explains in detail contract/food/alcohol expectations and requirements                                | 2            |
| Explains in detail how guests are checked in and how alcohol is monitored                             | 2            |
| Explains in detail how guests will be transported to and from the event                               | 2            |
| Explains in detail how guests are notified of the event   | 2            |
| <b>Guest List</b>   |              |
| Explains how guests are added to the list   | 1            |
| Describes the limits to the number of guests and cut-off time for adding guests                       | 1            |
| Explains how Brothers access the guest list   | 1            |
| Explains what information is collected on the guest list  | 1            |
| <b>Health and Safety of Guests and Brothers</b>   |              |
| Explains in detail how the Chapter ensures that the Chapter or event is not violating any fire codes  | 2            |

|   |   |
|---|---|
| Plan identifies all of the following key contacts:<br>Public Safety/Campus Police<br>Chi Phi Advisor<br>Faculty Advisor<br>Hazing Hotline<br>Emergency Services<br>National Office    | 2 |
| Explains in detail points of contact during the event (i.e. Alpha, if Alpha isn't present then the Eta, etc.)   | 2 |
| Explains in detail when to contact the Alpha, when to call 911, etc.  | 2 |
| Explains in detail the steps the Chapter 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 |

## Guest Lists

*Description:* Copy(ies) of your Chapter's guest lists from an event(s)  
*Files to be Submitted:* Guest List Template - Chapter Name  
 Guest List Fall 1 - Chapter Name  
 Guest List Fall 2 - Chapter Name  
 Guest List Fall Non-Alcoholic – Chapter Name  
 Guest List Spring 1 - Chapter Name  
 Guest List Spring 2 - Chapter Name  
 Guest List Spring Non-Alcoholic – Chapter Name

*Templates to be Used:* None  
*File Formats Accepted:* Excel (Template Only)  
 PDF

| Semester Items to Be Included   | Requirements |           |
|---|--------------|-----------|
|   | Spring 2018  | Fall 2018 |
| 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 was 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            | 3         |
| Chapter included a third completed guest list that was used for a non-alcoholic social event (excludes philanthropy, community service, and academic events). This social must be hosted by the Chapter and involves guests/another organizations. Date/time/location of the event should be indicated on the guest list. | 5            | 5         |

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

### Bonus Point Available:

Chapter submits up to additional guest list for events is a non-alcoholic social (excludes philanthropy, community service, and academic events). This social must be hosted by the Chapter and involves guests/another organizations. Each Chapter will be awarded 1 point per guest list, up to 2 extra points each semester.

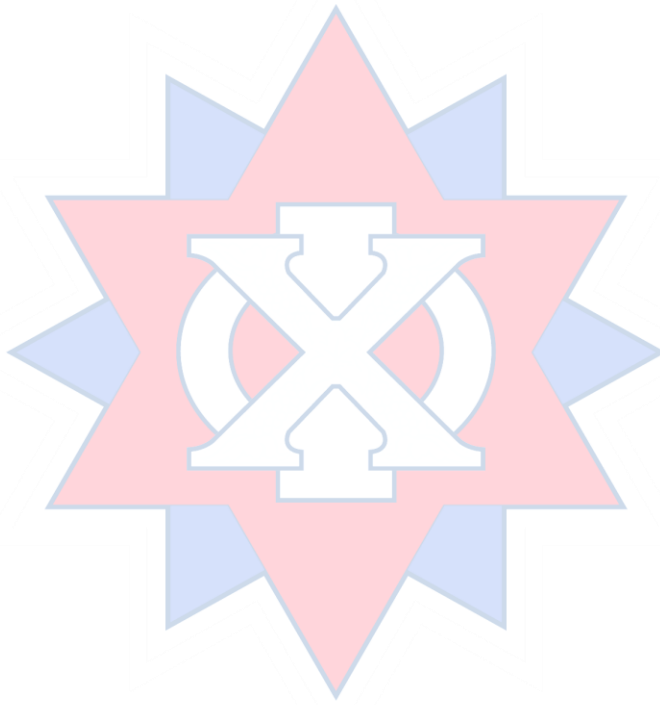


## Crisis Management Plan

*Description:* A written copy of your Chapter's plan for responding to crises of various severity levels  
*Files to be Submitted:* Crisis Management Plan - Chapter Name  
*Templates to be Used:* None  
*File Formats Accepted:* PDF

| Semester Items to Be Included  | Requirements |
|--|--------------|
|  | Yearly       |
| Provides a list of contacts to include the following:                  |              |
| University Administrators  | 1            |
| Emergency Personnel (Ambulance, Police, Public Safety, etc.)           | 1            |
| Greek Advisor  | 1            |
| Faculty Advisor  | 1            |
| Alumni Advisory Board*   | 1            |
| National Office Staff  | 1            |
| Explains in detail the procedures and protocols for the following:     |              |
| Low level incidents  |              |
| Lists examples of what qualifies                                       | 1            |
| Includes notifying National Office within 72 hours                     | 1            |
| Includes policy on talking to the media                                | 1            |
| Lists key points of contact  | 1            |
| Explains in detail roles and responsibilities for officers and members | 2            |
| Explains in detail immediate responses                                 | 2            |
| Explains in detail long-term responses                                 | 2            |
| Mid level incidents including examples of what qualifies               |              |
| Lists examples of what qualifies                                       | 1            |
| Includes notifying National Office within 72 hours                     | 1            |
| Includes policy on talking to the media                                | 1            |
| Lists key points of contact  | 1            |
| Explains in detail roles and responsibilities for officers and members | 2            |
| Explains in detail immediate responses                                 | 2            |
| Explains in detail long-term responses                                 | 2            |
| High level incidents including examples of what qualifies              |              |
| Lists examples of what qualifies                                       | 1            |
| Includes notifying National Office within 72 hours                     | 1            |
| Includes policy on talking to the media                                | 1            |
| Lists key points of contact  | 1            |
| Explains in detail roles and responsibilities for officers and members | 2            |
| Explains in detail immediate responses                                 | 2            |
| Explains in detail long-term responses                                 | 2            |
| Explains how members are educated on the plan                          | 4            |

\* Hierarchy of board members should be provided in case the primary advisor is unavailable



# **Financial Management**

## Budget

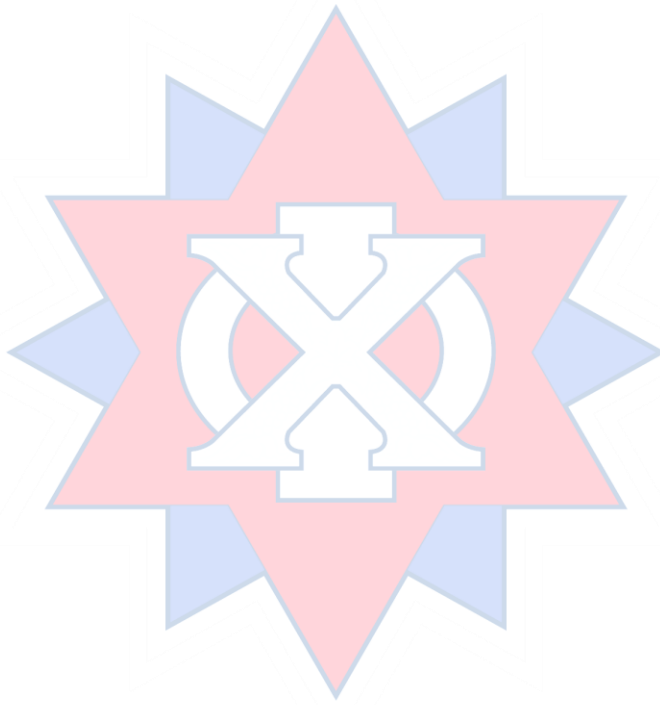
*Description:* A written copy of your Chapter's budget and financial statements  
*Files to be Submitted:* Budget Fall - Chapter Name  
 Budget Spring - Chapter Name  
*Templates to be Used:* None  
*File Formats Accepted:* Excel, PDF

| Semester Items to Be Included   | Requirements |           |
|---|--------------|-----------|
|   | Spring 2018  | Fall 2018 |
| Income Statement (Traditional Budget)   |              |           |
| 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 of 90%.<br>If above 90% is used, the 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         |
| Cash Flow Statement (Budget over time)  |              |           |
| Shows a breakdown by month or smaller time frame  | 1            | 1         |
| Breakdown shows projected and actual income and expenses  | 2            | 2         |
| Chapter 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         |
| Dues Register   |              |           |
| 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         |
| Financial Oversight/Audit   |              |           |
| Chapter identifies a system (I.e. Alumnus oversight/audit, financial committee, or auditing service) used to ensure Chapters financial health                 | 3            | 3         |

## Invoices

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

| Program/Semester Items to Be Included   | Requirements |           |
|---|--------------|-----------|
|   | Spring 2018  | Fall 2018 |
| 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 third-party service | 12           |           |
| Option 2: Self Collected  |              |           |
| Invoice for each semester 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         |



**Total Membership**  
**Education**

## Academic Program

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

| Program Items to Be Included   | Requirements |
|--|--------------|
|  | Yearly       |
| Identifies goals of the Academic Program   | 1            |
| Identifies academic requirements for all members, committee chairs, officers   | 1            |
| Identifies expectations of the Academic Chairman, the Academic Committee, and the Chapter to engage and utilize the Academic Program | 1            |
| Identifies incentives for Brothers meeting or exceeding academic standards   | 1            |
| Identifies steps taken to support Brothers who do not meet academic standards of the Chapter   | 2            |
| Identifies consequences for Brothers who fall below the academic standards of the Chapter  | 1            |
| Identifies strategies to connect New Members and Brothers to academic resources on campus  | 1            |
| Identifies strategies to connect the Chapter to the Faculty Advisor  | 1            |

## New Member Education Program

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

| Semester Items to Be Included   | Requirements |           |
|---|--------------|-----------|
|   | Spring 2018  | Fall 2018 |
| 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 Brother 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 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         |
| Schedule of events covering the following five minimum topics:  |              |           |
| 1. 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         |
| 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         |
| 3. 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         |
| 4. 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 |
| 5. 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 |



## Total Member Education Programs

- Description:* Written descriptions and attendance for the educational presentations or programs your Chapter attended. You should submit the following information for each of the **three** Total Membership Education Programs in the Fall and Spring.
- Files to be Submitted:* Total Member Education Fall Programs - Chapter Name  
 Total Member Education Fall Program 1 Attendance Sheet - Chapter Name  
 Total Member Education Fall Program 2 Attendance Sheet - Chapter Name  
 Total Member Education Fall Program 3 Attendance Sheet - Chapter Name  
 Total Member Education Spring Programs - Chapter Name  
 Total Member Education Spring Program 1 Attendance Sheet - Chapter Name  
 Total Member Education Spring Program 2 Attendance Sheet - Chapter Name  
 Total Member Education Spring Program 3 Attendance Sheet - Chapter Name
- Templates to be Used:* Event Attendance Sheet
- File Formats Accepted:* PDF

| Semester Items to Be Included (for each program)   | Requirements |           |
|--|--------------|-----------|
|  | Spring 2018  | Fall 2018 |
| Program  |              |           |
| 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         |
| 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/ChapterFaculty/Alumni Advisor signs for verification   | 1            | 1         |

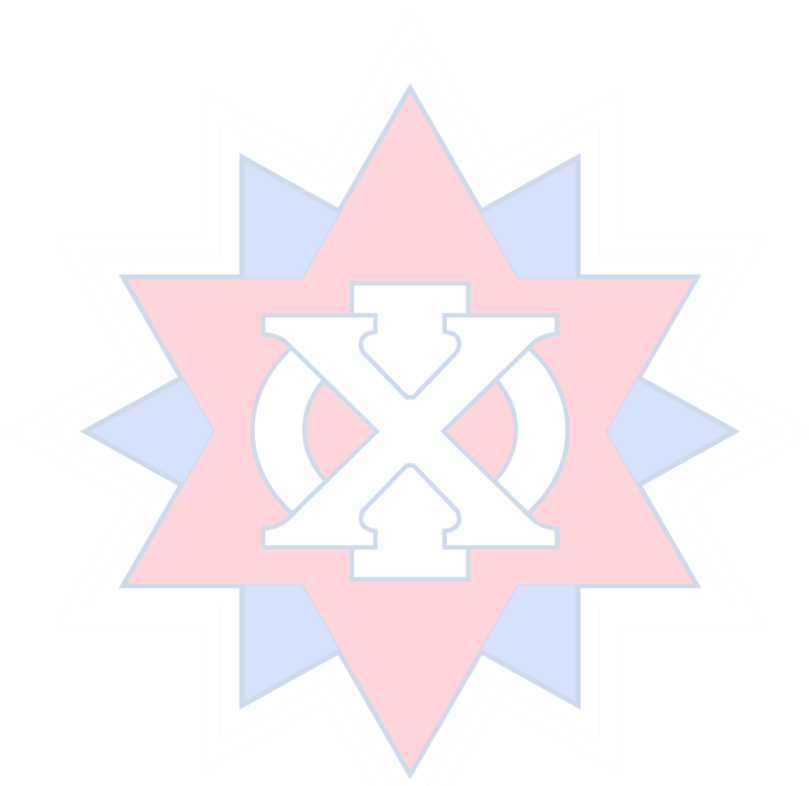
\* Additional point to be awarded

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

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

### Bonus Points Available:

- Chapter provides a TME session on a Social Justice or Diversity related topic pertaining to race, religion, sex/gender, sexual identity (LGBT+), economic status, or disability/mental health issues. You can receive a bonus point for each semester. Chapters can earn 1
- Chapter host in-person alcohol risk reduction or risk management training by National Office or their representative.



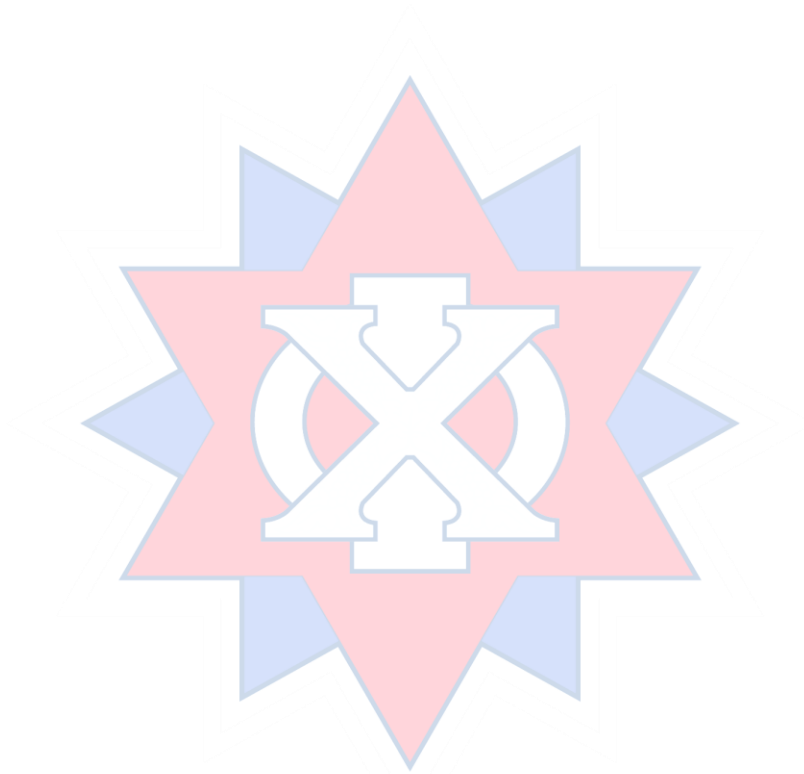
# Ritual

## **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**

## Chapter Advisory Board

*Description:* A contact list of the members of your Chapter Alumni Advisory Board to include descriptions of their roles. Each person must sign to verify they know their role on the committee.

*Files to be Submitted:* Chapter Advisory Board – Chapter Name

*Templates to be Used:* Chapter Advisory Board Form

*File Formats Accepted:* PDF

| Program Items to Be Included      | Requirements |
|-----------------------------------|--------------|
|                                   | Yearly       |
| Chapter Advisory Board Form       |              |
| Phone number and email are listed | 2            |
| Detailed explanation of role      | 5            |
| Signature of verification         | 2            |

## Alumni Roster

*Description:* A contact list of the Alumni from your Chapter to include the most recent graduated class (Spring 2018)  
*Files to be Submitted:* Alumni Roster - Chapter Name  
*Templates to be Used:* None  
*File Formats Accepted:* Excel, PDF

| Program Items to Be Included   | Requirements |
|--|--------------|
|  | Yearly       |
| Recent Graduates   |              |
| Chapter has phone numbers for its most recent graduates                                    | 1            |
| Chapter has email addresses for its most recent graduates                                  | 1            |
| Chapter has mailing addresses for its most recent graduates                                | 1            |
| The roster is built upon each semester and contains all graduates from Spring 2018 forward | 1            |

## Alumni Newsletter

*Description:* A copy of the year's Alumni newsletters sent to your Chapter and Alumni. This will be verified by chiphi@chiphi.org being copied on Alumni Newsletter.

*Files to be Submitted:* Alumni Newsletter Fall - Chapter Name  
Alumni Newsletter Spring - Chapter Name

*Templates to be Used:* None

*File Formats Accepted:* PDF

| Semester Items to Be Included   | Requirements |           |
|---|--------------|-----------|
|   | Spring 2018  | Fall 2018 |
| Newsletter was sent each semester                                       | 4            | 4         |
| Contains a section of Alumni updates                                    | 2            | 2         |
| Contains a calendar of upcoming events encouraging Alumni participation | 4            | 4         |
| Alumni Advisor signs certifying distribution to Alumni                  | 2            | 2         |
| Received by the National Office via chiphi@chiphi.org                   | 2            | 2         |

## Alumni Event

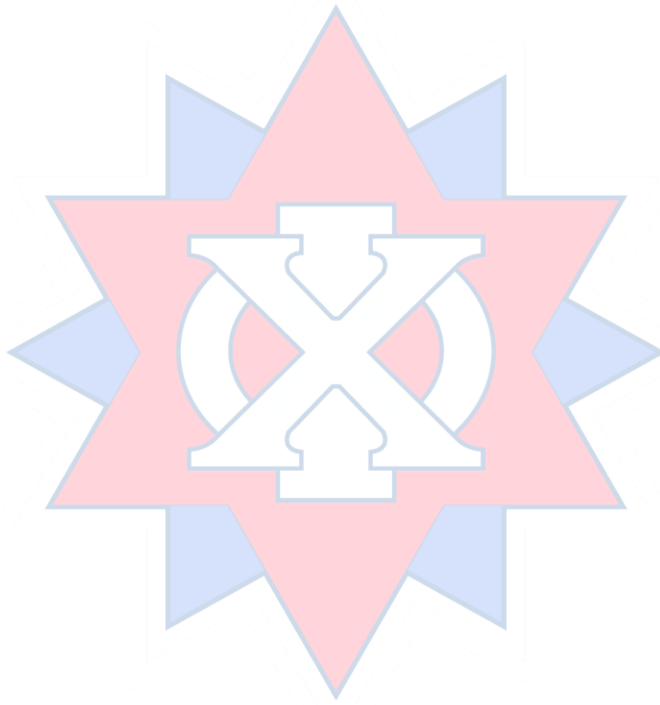
*Description:* A written description of your Chapter's most recent event held for Chapter or Chi Phi Alumni

*Files to be Submitted:* Alumni Event - Chapter Name  
Alumni Event Attendance Sheet Fall - Chapter Name  
Alumni Event Attendance Sheet Spring - Chapter Name

*Templates to be Used:* Event Attendance Sheet

*File Formats Accepted:* PDF

| Semester Items to Be Included                                   | Requirements |           |
|---|--------------|-----------|
|   | Spring 2018  | Fall 2018 |
| Lists the date and time of event each semester                  | 1            | 1         |
| Lists the location of event                                     | 1            | 1         |
| Describes in detail the planning of the event                   | 2            | 2         |
| Describes the event in detail                                   | 3            | 3         |
| Attendance (using attendance sheet)                             |              |           |
| Lists Alumni in attendance                                      | 1            | 1         |
| Lists undergraduate members in attendance                       | 1            | 1         |
| Alumni Advisor signs for verification for each semester's event | 1            | 1         |



# **Chapters Operations**



## Bylaws

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

|   | Requirements |
|---|--------------|
| Program Items to Be Included  | Yearly       |
| Lists the most recent changes, updates, and reviews of bylaws               | 2            |
| Bylaws have been reviewed within the last 12 months                         | 2            |
| Bylaws do not conflict with any Chi Phi Fraternity Risk Management Policies | 2            |
| Bylaws contain GPA requirements for the following:                          |              |
| Pledging  | 1            |
| Initiation  | 1            |
| Member in good standing   | 1            |
| Voting in Chapter meetings  | 1            |

## Goals and Strategic Plan

*Description:* A written copy of your Chapter's short and long term goals as well as strategic plan, mission and vision statements. You will submit three long term goals (for the year or longer) and three semester/short term goals for each semester.

*Files to be Submitted:* Goals and Strategic Plan Overview - Chapter Name  
Goals and Strategic Plan Fall Goals - Chapter Name  
Goals and Strategic Plan Spring Goals - Chapter Name

*Templates to be Used:* None

*File Formats Accepted:* PDF

| Program Items to Be Included   | Requirements |
|--|--------------|
|  | Yearly       |
| Chapter has a Mission Statement  | 4            |
| Chapter has a Vision Statement   | 4            |
| Long Term Goal 1   |              |
| SMART  |              |
| Specific   | 1            |
| Measurable   | 1            |
| Attainable   | 1            |
| Relevant   | 1            |
| Timely   | 1            |
| Includes steps being taken to accomplish the goal                      | 5            |
| Goal is compliant with all Chi Phi Fraternity Risk Management Policies | 2            |
| Long Term Goal 2   |              |
| SMART  |              |
| Specific   | 1            |
| Measurable   | 1            |
| Attainable   | 1            |
| Relevant   | 1            |
| Timely   | 1            |
| Includes steps being taken to accomplish the goal                      | 5            |
| Goal is compliant with all Chi Phi Fraternity Risk Management Policies | 2            |
| Long Term Goal 3   |              |
| SMART  |              |
| Specific   | 1            |
| Measurable   | 1            |
| Attainable   | 1            |
| Relevant   | 1            |
| Timely   | 1            |
| Includes steps being taken to accomplish the goal                      | 5            |
| Goal is compliant with all Chi Phi Fraternity Risk Management Policies | 2            |

| Semester Items to Be Included  | Requirements |           |
|--|--------------|-----------|
|  | Spring 2018  | Fall 2018 |
| Semester/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         |
| Semester/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         |
| Semester/Short Term Goal 3   |              |           |
| 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         |

## Code of Conduct

*Description:* A written copy of your Chapter's Code of Conduct for all members  
*Files to be Submitted:* Code of Conduct - Chapter Name  
*Templates to be Used:* None  
*File Formats Accepted:* PDF

| Program Items to Be Included  | Requirements |
|---|--------------|
|   | Yearly       |
| The Code of Conduct refers to expected behavior of all members        | 4            |
| The Code of Conduct reflects the Core Values of Chi Phi               | 4            |
| The Code of Conduct describes appropriate behavior for the following: |              |
| New Member Education  | 1            |
| Recruitment   | 1            |
| Classroom   | 1            |
| Social Events   | 1            |
| Philanthropy and Community Service                                    | 1            |
| InterFraternal Relations  | 1            |
| National Programs   | 1            |
| Social Media  | 1            |

## Greek Advisor Letter

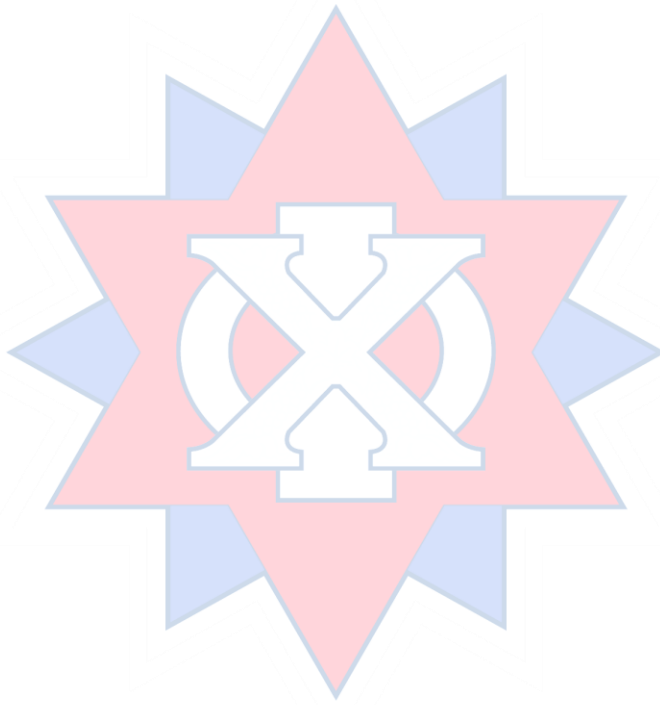
*Description:* A letter from your Chapter's Greek Advisor  
*Files to be Submitted:* Greek Advisor Form - Chapter Name  
*Templates to be Used:* Greek Advisor Form  
*File Formats Accepted:* PDF

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

\* 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  
*Files to be Submitted:* Roster - Chapter Name  
*Templates to be Used:* Combined Roster  
*File Formats Accepted:* Excel

| Program Items to Be Included  | Requirements |           |
|---|--------------|-----------|
|   | Yearly       |           |
| Roster of all Brothers and New Members includes:  |              |           |
| First and Last Name   | 1            |           |
| Class Year  | 1            |           |
| Email Address   | 2            |           |
| Phone Number  | 2            |           |
| Home Address  | 1            |           |
| Fraternity committee on which they serve  | 1            |           |
| The following Chapter officers are denoted with election dates within the last 12 months (appointment dates for Colonies) |              |           |
| Alpha   | 1            |           |
| Beta  | 1            |           |
| Gamma   | 1            |           |
| Delta   | 1            |           |
| Epsilon   | 1            |           |
| Zeta  | 1            |           |
| Eta   | 1            |           |
| Theta   | 1            |           |
| Iota  | 1            |           |
| Campus Involvement  |              |           |
| Every member is involved in at least one organization outside Chi Phi   | 3            |           |
| More than 10% of the membership holds a leadership position in an outside organization                                    | 1            |           |
| More than 15% of the membership holds a leadership position in an outside organization*                                   | 1            |           |
| More than 20% of the membership holds a leadership position in an outside organization^                                   | 1            |           |
| Community Service Hours per Member per semester   | Spring 2018  | Fall 2018 |
| 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 per Semester  |              |           |
| Chapter averages 5 hours per man  | 1            | 1         |
| Chapter averages 10 hours per man+  | 1            | 1         |
| Chapter averages 15 hours per man++   | 1            | 1         |

\* 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 community service event for each semester

*Files to be Submitted:* Community Service Event Fall - Chapter Name  
Community Service Event Attendance Sheet Fall - Chapter Name  
Community Service Event Spring - Chapter Name  
Community Service Event Attendance Sheet Spring - Chapter Name

*Templates to be Used:* Event Attendance Sheet

*File Formats Accepted:* PDF

| Semester Items to Be Included                | Requirements |           |
|--|--------------|-----------|
|  | Spring 2018  | Fall 2018 |
| 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         |

\* 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's social media accounts.  
*Files to be Submitted:* Social Media - Chapter Name  
*Templates to be Used:* None  
*File Formats Accepted:* Excel, PDF

| Program Items to Be Included                                 | Requirements |
|--|--------------|
|  | Yearly       |
| Website  |              |
| Link works (i.e. website or account exists)                  | 1            |
| Complies with the Chi Phi Fraternity's Electronic Use Policy | 1            |
| Information is current and up-to-date                        | 1            |
| Facebook   |              |
| Link works (i.e. website or account exists)                  | 1            |
| Complies with the Chi Phi Fraternity's Electronic Use Policy | 1            |
| Information is current and up-to-date                        | 1            |
| Instagram  |              |
| Link works (i.e. website or account exists)                  | 1            |
| Complies with the Chi Phi Fraternity's Electronic Use Policy | 1            |
| Information is current and up-to-date                        | 1            |
| Twitter  |              |
| Link works (i.e. website or account exists)                  | 1            |
| Complies with the Chi Phi Fraternity's Electronic Use Policy | 1            |
| Information is current and up-to-date                        | 1            |

## Campus Event

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

*Files to be Submitted:* Campus Event Fall - Chapter Name  
 Campus Event Attendance Sheet Fall - Chapter Name  
 Campus Event Spring - Chapter Name  
 Campus Event Attendance Sheet Spring - Chapter Name

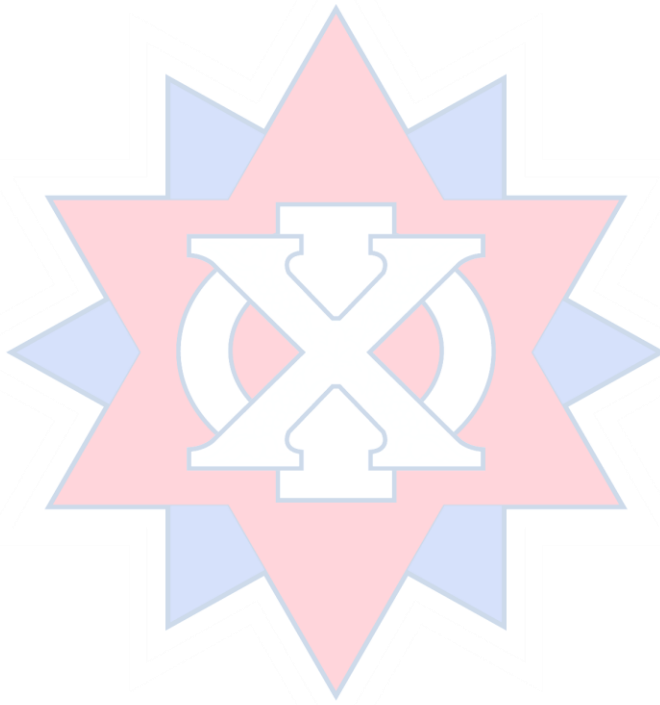
*Templates to be Used:* Event Attendance Sheet

*File Formats Accepted:* PDF

| Semester Items to Be Included                | Requirements |           |
|--|--------------|-----------|
|  | Spring 2018  | Fall 2018 |
| 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         |

\* 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's attendance at National programming  
*Files to be Submitted:* None  
*Templates to be Used:* None  
*File Formats Accepted:* N/A

| Items to Be Included   | Requirements |           |
|--|--------------|-----------|
|  | Spring 2018  | Fall 2018 |
| <b>Fall</b>  |              |           |
| <b>Officer/Chair Webinars</b>                                |              |           |
| Alpha  | -            | 1         |
| Beta   | -            | 1         |
| Gamma  | -            | 1         |
| Delta  | -            | 1         |
| Epsilon  | -            | 1         |
| Zeta   | -            | 1         |
| Eta  | -            | 1         |
| Theta  | -            | 1         |
| Iota   | -            | 1         |
| Academic Chair   | -            | 1         |
| Accreditation Chair  | -            | 1         |
| Philanthropy Chair   | -            | 1         |
| Social Chair   | -            | 1         |
| <b>Regional Ritual Retreat</b>                               |              |           |
| Chapter sent at least one (1) member to RRR                  | -            | 2         |
| Chapter sent at least two (2) members to RRR+                | -            | 2         |
| <b>Congress</b>  |              |           |
| Chapter sent one (1) delegate to the last Congress           | -            | 5         |
| Chapter sent two (2) or more delegates to the last Congress+ | -            | 8         |
| <b>Spring</b>  |              |           |
| <b>Alphas and Thetas Academy</b>                             |              |           |
| Chapter Alpha attended Alphas Academy                        | 5            | -         |
| Chapter Theta attended Thetas Academy                        | 5            | -         |
| <b>Regional Leadership Alliance</b>                          |              |           |
| At least 50% of the executive council attended RLA           | 3            | -         |
| At least 75% of the executive council attended RLA           | 2            | -         |
| At least 10% of the Chapter membership attended RLA          | 3            | -         |
| At least 15% of the Chapter membership attended RLA          | 2            | -         |

## Miscellaneous

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

| Items to Be Included   | Requirements |
|--|--------------|
|  | Yearly       |
| Chapter filed its 990N   | 1            |
| Chapter has no maintenance or risk management balance due to the National fraternity | 5            |
| Chapter has a functioning Alumni Advisory Board                                      | 2            |

| Items to Be Included                                    | Requirements |           |
|---|--------------|-----------|
|   | Spring 2018  | Fall 2018 |
| 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 initiated at least 90% of its New Member class+ | 1            | 1         |

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

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

*Description:* A verification of your Chapter's Mid-Year and End-of-Year Reports  
*Files to be Submitted:* Mid-Year Report - Chapter Name  
 End-of-Year Report - Chapter Name  
*Templates to be Used:* None  
*File Formats Accepted:* PDF

| Items to Be Included   | Requirements |           |
|--|--------------|-----------|
|  | Spring 2018  | Fall 2018 |
| 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         |

## 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 |           |
|---|-----------------|-----------|
|   | Spring 2018     | Fall 2018 |
| Documentation submitted late  | -5 max          |           |
| Files not properly named  | -10 max         |           |
| Risk Management Violation (Lose all points awarded for Social Event Policy)                           | -15 max         | -15 max   |
| Hazing Violation (Lose all points awarded for New Member Education Program for Semester of violation) | -10 max         | -10 max   |

## Bonus Points

*Description:* Bonus points awarded for special initiatives and focuses of the University. You can submit these items in the area that they count toward your Accreditation points. Fill out the Bonus Point Award Form for the Staff to look at your submissions to access for points.

*Files to be Submitted:* Bonus Points Form – Chapter name

*Templates to be Used:* Bonus Points Award Form

*File Formats Accepted:* N/A

| Items to Be Included  | Points Allotted |           |
|---|-----------------|-----------|
|   | Spring 2018     | Fall 2018 |
| Chapter event is a non-alcoholic social (excludes philanthropy, community service, and academic events). This social must be hosted by the Chapter and involves guests/another organizations.   | +3 Max          | +3 Max    |
| Chapter provides an TME session on a Social Justice or Diversity related topic pertaining to race, religion, sex/gender, sexual identity (LGBT+), economic status, or disability/mental health issues. You can receive a bonus point for each semester with 70% attendance. | +1 Max          | +1 Max    |
| Chapter host in-person alcohol risk reduction or risk management training by National Office or their representative.   | +3 Max          | +3 Max    |