

Introduction

After you have used this workbook to prepare all your answers, you will submit the online version via the Resource Center.

As you proceed through the questions, there will be additional documentation you are REQUIRED to submit via email to support your answers. These items will be indicated with>>>SUBMISSION REQUIRED<<<.

A copy of your current chapter bylaws must be submitted as part of this report. You will be asked to highlight and label certain passages as submission requirements.

It will be best to complete the online submission at one time. However, if you need to leave the process we encourage you to use the same computer when you return. This will increase the possibility of picking up where you left off (depending on your system, recent updates, etc.)

Chapter Information

Please provide the following information concerning your Chapter:

* 1. Chapter Name:

* 2. Your Contact information

Name and Roll #:

Title:

Email Address:

Phone Number:

RITUAL

Standard #1 - Ritual

Purpose and Requirements for Accreditation - Each chapter shall conduct Ritual meetings on a regular basis and demonstrate its respect for The Ritual by performing ceremonies properly and encouraging the respect of members for our founding principles. Members should strive to exemplify the ideals of Founders Fox, Packard, Waite, Brainerd, Buel, Farnum, Raymond, and Starbuck as presented in The Ritual of Theta Xi.

To achieve accreditation for this Standard, the chapter and its members shall:

- Conduct at least two Ritual meetings per month

- Conduct Ritual meetings appropriately and correctly as evaluated by staff or advisors through the Ritual Observation Process

- Be in possession of a current, updated version of The Ritual

- Submit a copy of chapter meeting minutes as outlined below.

* 3. The chapter conducts at least two Ritual meetings per month.

Yes

No

* 4. Is chapter business, that is actions that require a vote or ceremony, conducted only at Ritual meetings?

Yes

No

* 5. What is the number located on your chapters copy of The Ritual? (This number is located on the front page.)

* 6. Does the chapter keep accurate minutes (not electronically, on notebook paper, etc.) in the bound book provided by Fraternity Headquarters as explained in the Vice President's section of *The Guide for Officers*?

Yes - >>>**SUBMISSION REQUIRED**<<< - To receive credit the chapter will submit a **SCANNED COPY** of minutes from a meeting that took place this academic year. All signs and symbols related to Ritual should be blacked out.

No

* 7. Are all Initiation Ceremony roles memorized by chapter members?

Yes

No

* 8. Does the chapter review *The Ritual* in-depth with all new brothers within two weeks of their initiation?

Yes

No

* 9. During Spring semester, what percentage of the active members have recited their secrets successfully?

10. Does the chapter perform the Graduating Member Ceremony?

Yes

No

RECRUITMENT

Standard #2 - Recruitment / Membership

Purpose and Requirements for Accreditation - Setting and achieving membership goals shall be considered one of the highest priorities of the chapter. The goal shall be established to maintain a membership level that provides a meaningful Fraternity experience to every undergraduate brother.

To achieve accreditation for this Standard, the chapter and its members shall:

- Maintain an active roster that is greater than or equal to the average fraternity chapter size on their campus OR meet the recruitment goal established with the Director of Fraternal Growth
- Maintain accurate membership records and communicate reports and information in a timely and appropriate manner with Fraternity Headquarters

* 11. How many members does the chapter currently have?

12. What is the average IFC chapter size at your college/university?

* 13. What is the chapter's highest assigned roll number?

14. Please list the name and roll number of each member you know is not returning to the chapter for Fall Term 2017. For each name, indicate if the member is "G" (Graduating) or "LS" (Leaving School).

* 15. Did the chapter conduct a Recruitment Training Event (retreat/workshop) at least once during the year which is attended by at least 50% of the chapter.

Yes

No (If no, skip to Standard #3)

16. Please provide the following information about the recruitment retreat or workshop:

- Title of event
- Date of event
- Location of event
- Number of chapter members in attendance
- Number of alumni members present
- Name of the presenter(s)/facilitator(s)

17. Provide a 2-3 sentence description of the recruitment workshop or retreat.

MEMBERSHIP DEVELOPMENT & EDUCATION

Standard #3 - Membership Development & Education

Purpose and Requirements for Accreditation - Each chapter shall conduct ongoing education for associate and initiated members. These programs should address current challenges facing the chapter and topics that are of benefit to the membership.

For associate member education, all chapters should utilize the most current version of Alpha Nine: The Core Education Program for Associate Members, hereafter referred to as Alpha Nine. The program contains eight parts including the Associate Member Ceremony, five education sessions, and The Ritual Initiation Ceremony.

Questions #1 through #14 request information about how your chapter implements Alpha Nine.

Questions #15 through #17 requests information about how your chapter provides education for all members.

To achieve accreditation in this area, the chapter and its members shall:

-Conduct Associate Member education as outlined and required in Alpha Nine

-Ensure all newly initiated members complete the "Managing Risk" risk management education program

-Complete ongoing education for all chapter members by hosting or attending speakers, programs, activities, or other events to further individual education

-Ensure that all associate members are initiated within 63 days of pinning (49 days for All True Men chapters and chapters/colonies organized after July 1, 2009)

* 18. Does the chapter conduct a public Associate Member Ceremony as outlined in Alpha Nine?

Yes

No

Were individuals, other than chapter members, invited to this ceremony? If so, please list them.

19. Core Education Program One:

Indicate all activities conducted as part of Core Education Program One.

- Getting acquainted - Here's What I'm Bringing
- Reducing Risk - Yes or No
- Personal Conduct discussion

* Please explain how the chapter teaches or explains the topics of *Core Education Program One* into AM Education:

20. Core Education Program Two: Indicate all activities conducted as part of Core Education Program Two.

- Individual Financial Obligation
- Chapter Bylaws
- Introduction of Leadership Initiative
- Duties of Chapter Officers and Committee Presentation
- What do we Expect

* Please explain how the chapter teaches or explains the topics of Core Education Program Two into AM Education:

21. **Core Education Program Three:** Indicate all activities conducted as part of Core Education Program Three.

Theta Xi Trivia Quest

Chapter History and Role of Alumni

Values in Action

* Please explain how the chapter teaches or explains the topics of Core Education Program Three into AM Education:

* 22. **Core Education Program Four:** Indicate all activities conducted as part of Core Education Program Four.

Campus Greek Community

District Organization

Wheel of Life & Personal Goals

* Please explain how the chapter teaches or explains the topics of Core Education Program Four into AM Education:

23. **Core Education Program Five:** Please indicate all activities conducted as part of Core Education Program Five.

Thomas Cole Raymond Statement

Living your Ritual

What Ritual means to Brothers

* Please explain how the chapter teaches or explains the topics of Core Education Program Five into AM Education:

* 24. **"Building The Bonds" Camping Trip or Retreat:** As outlined in Alpha Nine, this event should be an alcohol-free, overnight trip away from the chapter house. The event should focus on building friendships through communication and discussion of Theta Xi values and should be attended by all associate members and big brothers though other chapter members are welcome.

Does the chapter conduct a Building The Bonds camping trip or retreat as explained in Alpha Nine?

Yes

No (If no, skip to question #10)

* 25. In the spaces below, provide information about your chapter's "Building the Bonds" camping trip / retreat.

Title of event:

Date of event:

Location:

Number of Associate Members in attendance:

Number of initiated members in attendance:

26. Provide a short description of the "Building the Bonds" camping trip / retreat listed above: (topics covered, goals, set, etc.)

* 27. Does the chapter maintain an active Big Brother program consistent with the description found in Alpha Nine.

Yes

No

Provide a short description of the Big Brother program the chapter uses.

* 28. Does the chapter conduct an orientation meeting with big brothers (without little brothers present) to review the responsibilities of a big brother along with a schedule of events and appropriate activities?

Yes

No

* 29. How many days are there between the Associate Member Ceremony and Initiation?

* 30. What activities does the chapter conduct that are not specifically outlined in Alpha Nine? Provide a short description of each activity.

* 31. Does the chapter sponsor any activities with Associate Members that include alcohol?

Yes

No

List any AM event(s) where alcohol was available:

* 32. Does the chapter provide Associate Members with a printed schedule of events that includes the day, time, and location of all associate member activities? To receive credit you must submit a scanned copy of this schedule with your electronically submitted materials.

Yes - >>>**SUBMISSION REQUIRED**<<< - To receive credit you must submit a scanned copy of this schedule with your electronically submitted materials.

No

* 33. Does the chapter host or attend workshops that address personal health and wellness attended by at least 50% of the chapter?

Yes >>>**SUBMISSION REQUIRED**<<< - To receive credit you must submit information for each program or workshop that lists the date, time, location and title of event, along with the number of chapter members present. Scanned flyers and sign in sheets can be submitted with electronic materials.

No

34. Other than nationally hosted leadership academies, has the chapter hosted or attended at least one leadership skills training session with at least 50% of the membership in attendance? (Examples include, but may not be limited to, healthy relationships, resume/career planning, personal finance, etiquette, etc.)

Yes >>>**SUBMISSION REQUIRED**<<< - To receive credit you must submit a scanned copy of an attendance sheet with your electronically submitted materials.

No

35. Does the chapter host or attend programming for all members, including upperclassmen?

Yes >>>**SUBMISSION REQUIRED**<<< - To receive credit you must submit information for each program or workshop that lists the date, time, location and title of event, along with the number of chapter members present. Scanned flyers and sign in sheets can be submitted with electronic materials.

No

SCHOLARSHIP

Standard #4 - Scholarship

Purpose and Requirements for Accreditation - Each chapter shall maintain a collective cumulative grade point average (GPA) of at least 2.7 on a 4.0. Additionally, Chapters should strive to maintain a collective grade point average of 0.2 above the all-men's average on its campus. To receive a bid, associate members must have a GPA that is greater than or equal to a 2.5 on a 4.0 scale.

To achieve accreditation in this area, the chapter and its members shall:

- Have a minimum chapter cumulative GPA of 2.7 on a 4.0 scale

- Supply official documentation from the College/University providing Chapter GPA information and standing within the fraternity community for fall, winter, and spring as applicable to your college/university

- * 36. Provide a copy of each of the most recent chapter cumulative grade reports (including chapter GPA and ranking among all IFC/IGC groups on campus) as issued by your College/University

Please check below which reports will be included. Reports should be included with electronic submissions.

>>>SUBMISSION REQUIRED<<< - Spring 2017 GPA and Ranking Report

>>>SUBMISSION REQUIRED<<< - Fall 2018 GPA and Ranking Report

>>>SUBMISSION REQUIRED<<< Winter 2018 GPA and Ranking Report

- * 37. Do your chapter bylaws include GPA requirements to receive a bid, to remain in good standing, and to run for and retain office? To receive credit these items must be highlighted in the submitted chapter bylaws.

What is the GPA required to affiliate as an Associate Member / be initiated?

What is the GPA required to remain in good standing?

What is the GPA required to run for, and retain, an officer position?

* 38. Does the chapter provide academic achievement awards (monetary, house points, public recognition, etc.) to members? To receive credit, the chapter must provide a list of those awards including the name of the award, the qualifications to receive it, and the names of the most recent recipients.

Yes - >>>**SUBMISSION REQUIRED**<<< - To receive credit, the chapter must provide a list of those awards including the name of the award, the qualifications to receive it, and the names of the most recent recipients. This information should be included with your electronic submissions.

No

* 39. Does the chapter have a written policy for addressing poor academic performance by members? To receive credit, the chapter must submit a copy of this policy.

Yes - >>>**SUBMISSION REQUIRED**<<< - To receive credit the chapter will submit a copy of this policy with your electronic submissions.

No

* 40. Does the chapter host or attend a workshop on academic success? If so, provide the following information about the workshop.

Title of event:

Date of event:

Location:

Number of chapter members who participated:

Number of alumni members in attendance:

Name of Presenter/Facilitator:

FINANCES

Standard #5 - Finances

Purpose and Requirements for Accreditation - Each chapter shall maintain a sound financial position that enables them to meet all financial obligations.

To achieve accreditation for this Standard, the chapter and its members shall:

- Use OmegaFi Vault Billing Services (unless exempt)
- Be current on all financial obligations
- Maintain accurate financial records
- File the required IRS Tax Form 990 annually and submit a copy to Fraternity Headquarters

* 41. Does the chapter owe money to any of the following groups? Check all boxes that apply.

- Fraternity Headquarters
- Chapter Alumni Association/Housing Corporation
- Campus IFC/IGC
- The chapter does not owe money to any of the above

* 42. Is the chapter currently using the services of Omega Financial to bill its members and track billing and receivables information?

- Yes
- No
- No, the chapter is exempt

* 43. What is the chapter's EIN (Tax ID number) issued by the Internal Revenue Service?

* 44. Did the chapter file Form 990 with the Internal Revenue Service this year? To receive credit, the chapter must submit a copy, or other confirmation, of the submission.

- Yes - >>>**SUBMISSION REQUIRED**<<< - To receive credit the chapter will submit a copy of your 2016 IRS Tax Return 990 or a printout of the confirmation email from the IRS stating the return was filed
- No. (If no, complete the next question.)
- If the chapter did not file, or cannot provide a copy of, the required IRS Tax Form 990/990-n for 2016 please state why:

* 45. What methods did the chapter use to track its income, expenses, outstanding receivables and payables? (Check all that apply.)

- Omega Financial
- Third-party bookkeeper/accountant
- Chapter maintained computer program such as QuickBooks
- Chapter maintained electronic spreadsheets or other manual input system
- None of the above

Use information from the chapter's financial records for 2017-18, to complete questions #6 through #13.

If your chapter is not able to easily access this information at ANY time, your systems may not be adequate. Contact Fraternity Headquarters for assistance.

* 46. Provide the following information about the chapter's **INCOME** in 2017-18

Total income received for the year:

Total dues charged to members for the year:

Total rent charged to members for the year:

Total all other income (including "out of house" fees, fines, registration fees, purchases of items such as t-shirts or tickets to formal, etc.):

* 47. Provide the following information about the chapter's **EXPENSES** in 2017-18:

Total expenses paid by the chapter for the year:

Total amount spent on Recruitment:

Total amount spent on Educational Programming:

Total amount spent on Social Activities:

Total amount paid to Fraternity HQ for initiations:

Total amount paid to Fraternity HQ for annual fees (Chapter Services Fees and Risk Management Assessments):

Total all other expenses paid:

* 48. Does the chapter have a checking account?

Yes

If yes, what is the account balance?

No

49. Does the chapter have a savings account?

Yes

If yes, what is the balance?

No

* 50. Does the chapter create an annual budget providing for income and expenses for the entire school year? To receive credit, the chapter must submit a copy of this budget along with your electronic submissions.

Yes - >>>**SUBMISSION REQUIRED**<<< - To receive credit the chapter will submit a copy of the Chapter's annual budget for this school year with your electronic submissions.

No

* 51. Does the chapter have an assistant treasurer position?

Yes

No

* 52. Does the chapter have text within its by-laws explaining the dues and collections practices and policies? To receive credit, the chapter must highlight this section in the submitted bylaws.

Yes >>>**SUBMISSION REQUIRED**<<< - To receive credit the chapter will submit a copy of the Chapter's annual budget for this school year with your electronic submissions.

No

* 53. Does the chapter budget money for member travel for Convention, Presidents Academy, Rising Stars Academy and Newell District Leadership Academy?

Yes

No

CHAPTER OPERATIONS

Standard #6 - Chapter Operations

Purpose and Requirements for Accreditation - Each chapter shall strive to maintain effective operations; promote and enforce positive behavior on the part of all members, and encourage active member participation within the chapter, the campus community, and at all Fraternity district and national events.

To achieve accreditation for this Standard, the chapter and its members shall:

- Maintain accurate records by submitting all forms to Fraternity Headquarters on a timely basis including, but not limited to, Membership Reports, Associate Member Reports, Initiation Reports, and Form A's.
- Maintain good standing for chapter operations - no unauthorized initiations, risk management violations, campus or Fraternity sanctions, etc.
- Attend national events including Convention, Vredenburg Presidents Academy, Rising Stars Academy, and Newell District Leadership Academy

* 54. Does every member of the chapter serve on at least one committee?

- Yes
- No
- If yes, please list all committees.

* 55. Does the chapter elect executive board officers for terms of one calendar year, with elections at the end of the fall term?

- Yes
- No

In what month(s) is/are election(s) held for the executive board officers?

* 56. Are officer transition meetings/training conducted?

- Yes
- No

* 57. Does the chapter maintain an up-to-date website or social media site?

- Yes
- No
- Have site, but it's not up-to-date

Please list the chapter website and/or social media site(s). ONLY THOSE LISTED WILL BE CONSIDERED FOR AWARDS

* 58. What is the chapter's current housing status?

- Chapter house owned by an alumni association or an alumni-controlled housing corporation
- Chapter house (a free-standing structure) owned by the university
- Chapter housing (such as a separate residence hall or floors) owned by the university
- Chapter house leased by the entire chapter (on one lease) from a landlord
- Chapter house with each individual member leasing from the landlord
- Not housed

59. What short term goals does the chapter have?

60. What long term goals does the chapter have?

CAMPUS RELATIONS & COMMUNITY RELATIONS

Standard #7 - Campus Relations & Community Service

Purpose and Requirements for Accreditation - Each chapter shall strive to maintain a positive presence on the campus of the host institution and in the community. The chapter should stress personal commitment and leadership on the campus and in the surrounding community.

To achieve accreditation for this Standard, the chapter and its members shall:

- Conduct at least two service projects per year in support of multiple sclerosis, Habitat for Humanity, and/or a community group
- All chapter members actively participate in at least one campus club or organization
- Build and maintain positive relationships with the campus community

* 61. Provide the following information for the 2017-18 academic year:

Total number of service projects

Total \$ raised:

Total number of man hours:

Total number of projects in support of multiple sclerosis:

Total \$ raised for multiple sclerosis:

Total number of man hours given to projects in support of multiple sclerosis:

Total number of projects in support of Habitat for Humanity:

Total \$ raised for Habitat for Humanity:

Total number of man hours given to projects in support of Habitat for Humanity:

Total number of projects in support of other groups:

Total \$ raised for other groups:

Total number of projects in support of other groups:

* 62. Is each member of the chapter actively involved with at least one campus or community club or organization?

Please submit a roster of members which identifies which organization(s) they actively participate in with your electronic submissions. Highlight any members who hold leadership roles (and which ones) in those organizations.

- Yes - >>>**SUBMISSION REQUIRED**<<< - To receive credit the chapter will submit a roster of members indicating campus organizations they participate in. Include leadership roles held if applicable
- No

* 63. Does the chapter host or attend at least one leadership skills training session other than Theta Xi national programs such as Vredenburg Presidents Academy, Rising Stars Academy and Newell District Leadership Academy?

- Yes
- No
- If yes, please provide a short description of the event including date, time, location, name of program/presenter, and number of members present.

* 64. List any campus programs the chapter is involved in as a group, including but not limited to, intramurals.

* 65. Did the chapter sponsor an event to promote good relations with campus faculty - such as a faculty and staff recognition luncheon or dinner, an award banquet for staff, an appreciation campaign, etc?

- Yes
- No

If yes, briefly describe the event:

* 66. Does the chapter have an organization for parents and/or host events that include parents?

Yes

No

If yes, please provide a short description of the organization and/or events held.

RISK PREVENTION

Standard #8 - Risk Prevention

Purpose and Requirements for Accreditation - Each chapter shall strive to maintain a safe and responsible presence on campus and in the community. It is expected that the chapter and its members will act in a responsible manner at all times. To ensure proper risk prevention/management the chapter shall provide risk prevention education for all members at least once per semester.

To achieve accreditation for this Standard, the chapter and its members shall:

- Conduct or attend at least one risk management presentation per semester/term with at least 50% of members attending
- Ensure that all members understand, and have access to, printed versions of the Theta Xi Risk Management Policy through an annual review of the policy

* 67. Did the chapter host or attend a risk prevention/management presentation at least once during the Fall Semester/Term which was attended by at least 50% of the chapter?

Title of event:

Date of event:

Location:

Presenter(s):

Percentage of chapter members who participated:

Number of alumni members who participated:

Number of other attendees (non-members) who participated:

68. Provide a short description of the Fall Semester/Term Risk prevention/management presentation: (activities, goal of program, etc.)

* 69. Did the chapter host or attend a risk prevention/management presentation at least once during the Spring Semester/Term which was attended by at least 50% of the chapter?

Title of event:

Date of event:

Location:

Presenter(s):

Percentage of chapter members who participated:

Number of alumni members who participated:

Number of other attendees (non-members) who participated:

70. Provide a short description of the Spring Semester/Term Risk prevention/management presentation: (activities, goal of program, etc.)

* 71. Does the chapter have a specific written risk management plan for social events which outlines individuals' responsibilities, details for alcohol control during events, explains the plan for emergencies that may arise, etc.? (This plan is not the same as the Theta Xi Risk Management Policy.)

- Yes - >>>**SUBMISSION REQUIRED**<<< - To receive credit the chapter must submit a copy of their risk management plan with their electronic submissions.
- No, the chapter does not have a written risk management plan

* 72. Does the chapter provide, and review, a written copy of the *Theta Xi Risk Management Policy* with each member within the first four weeks of the fall semester/term? The review must be documented. To receive credit, chapters must provide proof of this review through chapter meeting minutes or meeting agenda and sign in sheet. These items should be submitted with other electronic submissions. .

- Yes - >>>**SUBMISSION REQUIRED**<<< - To receive credit, chapters must provide proof of this review through chapter meeting minutes or meeting agenda and sign in sheet. These items should be submitted with other electronic submissions.
- No, the chapter does not review the *Risk Management Policy* during Ritual a meeting at the beginning of the school year

* 73. Has the chapter established, and included in its bylaws, a judicial review or standards board that meets as necessary and holds members accountable for violations of chapter, campus, and/or Fraternity policies? If so, please highlight this section in the submitted bylaws.

- Yes >>>**SUBMISSION REQUIRED**<<< - To receive credit, the chapter must highlight this section in their submitted bylaws. These items should be submitted with other electronic submissions.
- No

* 74. Was the chapter sanctioned by any of the following groups during the 2016-17 academic year?

- Grand Lodge
- College/University Office
- Campus IFC
- Other

If yes, please give a status report/update on the situation:

ALUMNI RELATIONS

Standard #9 - Alumni Relations

Purpose and Requirements for Accreditation - Each chapter should maintain a chapter advisor, faculty advisor, and functioning alumni association. Chapters should maintain consistent contact with alumni members.

To achieve accreditation for this Standard, the chapter and its members shall:

- Have a Chapter Advisor appointed by the National President
- Actively communicate with the chapter's entire alumni base at least once per semester

* 75. Does the chapter have a Chapter Advisor that has been appointed by the National President? (A Chapter Advisor must be an initiated brother and may or may not be a faculty member.)

- Yes - please provide their name, email address, and phone number in the box below.
- No

Chapter Advisor name, email, and phone number:

* 76. Does the chapter meet with the Chapter Advisor at least once per semester?

- Yes
- No

Comments

* 77. Does the chapter have a Faculty Advisor. (A Faculty Advisor must be a faculty or staff member of the school and may or may not be an initiated brother.)

- Yes - please provide their name, email address, and phone number in the box below.
- No
- Faculty advisor name, email, and phone number:

* 78. Does the chapter meet in person with the alumni association or housing corporation officers at least twice per year?

- Yes
- No
- No, we do not have a functioning Alumni Association or Housing Corporation

* 79. What methods does the chapter use to communicate with alumni (list below)?>>>**SUBMISSION REQUIRED**<<< To receive credit, the chapter must submit examples of contact with the entire alumni base including, but not limited to, social media accounts, copies of newsletters, list serves, mass email, etc. These items should be included with the chapters electronic submissions.

* 80. Does the chapter host at least one alumni event each fall (such as a Homecoming event)?

In the spaces below, provide information about your Fall 2016 Alumni Event.

Title of event:

Date of event:

Location:

Number of chapter members who participated:

Number of alumni members who participated:

81. Provide a short description of the Fall 2016 Alumni Event listed above:

82. Provide a short description of any other Fall Alumni Events you would like to report including the detailed information requested above such as name, date, location, attendees, etc:

* 83. Does the chapter host at least one alumni event each spring (such as a Founder's Day or "6294" event)?

In the spaces below, provide information about your Spring 2017 Alumni Event.

Title of event:

Date of event:

Location:

Number of chapter members who participated:

Number of alumni members who participated:

84. Provide a short description of the Spring Alumni Event listed above:

85. Provide a short description of any other Spring Alumni Events you would like to report including the detailed information requested above such as name, date, location, attendees, etc:

* 86. How many alumni do you consider to be actively involved with your chapter on an on-going basis?

- 0 - 10
- 10-20
- 20 or more