Chapter Standards of Excellence Guide
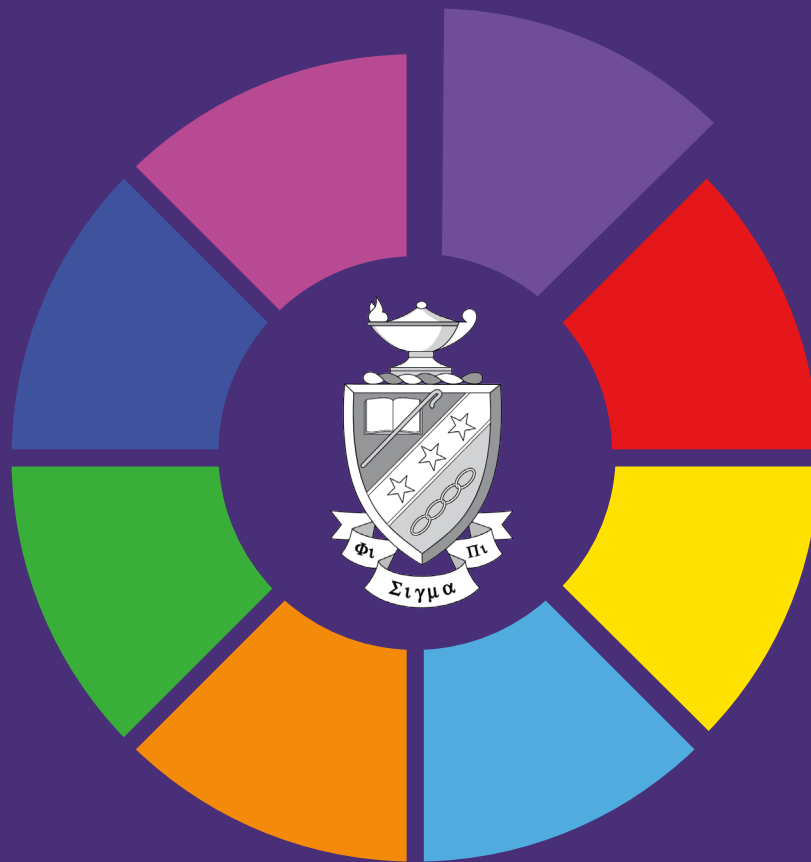
Your guide to being a truly Excellent Phi Sigma Pi Chapter

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The Chapter Standards of Excellence

The Chapter Standards of Excellence (CSE) offers an online evaluation resource to empower Chapters to annually meet the highest standards of Chapter governance, management and mission-driven operations. It has been developed to provide transparency for what it means to achieve excellence and be eligible for awards such as the Joseph Torchia Outstanding Chapter Award, which is the highest designation a Chapter can achieve annually. The Chapter Standards of Excellence replaces the previous Form 110 evaluation method. The availability of forms throughout the year and due dates will be more manageable. This will streamline the process and provide clearer expectations.

The Chapter Standards of Excellence consists of 8 Guiding Principles covering over 40 focus areas and benchmarks. Together these outline best practices and governing requirements of a Chapter's operations, training, Member development and two structured implementation programs: the Tripod Event and Recruitment. This program is designed to provide the basic concepts of leading a non-profit organization, for that is exactly what each Chapter is - a non-profit entity with the mission to improve humanity with honor.

The 8 Guiding Principles

FINANCE AND OPERATION

CHAPTER DEVELOPMENT

COMMUNICATION

COMPLIANCE AND ETHICS

Chapter Standards Of Excellence

PUBLIC AWARENESS AND ENGAGEMENT

CHAPTER LEADERSHIP AND GOVERNANCE

CHAPTER SUSTAINABILITY

STRATEGY AND EVALUATION

Chapter Development
Focus: Leadership in Action, Leadership Academy, Chapter Visits, Chapter Programming

Communication
Focus: National Office, Faculty Advisor, Alumni Advisory/Board, Sheltering Institution

Public Awareness & Engagement
Focus: National Guidelines, Campus/Community Outreach, Social Media

Chapter Sustainability
Focus: Membership Development, Member Onboarding, Member Retention

Strategy & Evaluation
Focus: Mission Driven Scholarship, Leadership, Fellowship as Social Change Agent and Strategic Planning, Evaluation

Chapter Leadership & Governance
Focus: Executive Board Operations, Officers, Committee Chairs, Communication with Chapter

Compliance & Ethics
Focus: National Convention Representation, National Policies, Chapter Policies

Finance & Operations
Focus: Budget, Funding Plan, Dues and Fees, Outside Funding

Chapter Standards of Excellence Scoring Guide

This guide is designed to help you track progress throughout the year and learn how to complete each task. Through submissions of Officer and Committee forms in this guide the Chapter will be able to watch their progress throughout the academic year in the Chapter Admin Portal under "Reports" > "CSE Reports" > "CSE Score Card Report."

Expectations

The 40+ focus areas serve as the standards for excellence. The expectation is that each Chapter works towards achieving these standards over the coming years. These standards are intentionally challenging yet relevant to serving as a basis for running a strong and effective Chapter. **It is important that Chapters understand that it is not required, or even expected, that Chapters will complete every task every year (with the exception of National Constitution requirements). Chapters should use these tasks and pieces to track growth and help set goals for improvement.**

Chapter Development

Focus: To ensure that existing Chapter Members continue to learn and grow through programming opportunities such as Leadership in Action, Leadership Academy, Chapter Visit and Chapter Programming.

*This task is a National Constitution requirement

☐ **Hold two Risk Management programs for Chapter Members and Initiates***

☐ **Participate in an annual Chapter visit by National Office***

☐ **Have one active Student Member Leadership in Action Facilitator**

☐ **Host two Leadership in Action Modules**

☐ **Send at least two Student Members to Leadership Academy**

☐ **Send a Delegate to National Convention***

TASK DETAILS

1. Hold two (2) Risk Management programs for Chapter Members and Initiates

How does your Chapter complete this task? The Chapter must hold and report at least two Risk Management events in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting at least two Risk Management events in the Chapter Admin Portal under "Chapter Standards of Excellence"> "Risk Management Summary."

2. Participate in an annual Chapter visit by the National Office

How does your Chapter complete this task? Your Chapter must participate in the scheduled visit from the National Office. This visit may be virtual or in person with the Chapter Services Team, in person with the Leadership Advancement Team or a virtual/ in person visit from the Expansion Team. Which type of visit your Chapter receives will be determined and communicated to your Chapter leadership.

Who completes this task? The National Office will report the completed visit and the Chapter Standards of Excellence Report will reflect the completion of the task.

3. Have one (1) Active Student Member Leadership in Action Facilitator

How does your Chapter complete this task? At least one active Student Member must be a Leadership in Action Facilitator. If your Chapter does not have a Leadership in Action Facilitator, they can become one at National Convention, Leadership Academy or attend one of the provided virtual trainings.

Who completes this task? The National Office will file a report if the Chapter has a Facilitator and the Chapter Standards of Excellence Report will reflect the completion of the task.

4. Host two (2) Leadership in Action Modules

How does your Chapter complete this task? Hold at least two (2) Leadership in Action Local Modules for your Chapter. Chapters can request Modules at phisigmapi.org/modules. The Chapter must have the attendees sign up via the link sent to them by the National Office for their points to be included in their records.

Who completes this task? The National Office will file a report if the Chapter has hosted at least two (2) Modules for the Chapter.

5. Send at least two (2) Student Members to Leadership Academy

How does your Chapter complete this task? At least two (2) Student Members from your Chapter must attend Leadership Academy. Chapters may attend any of the locations. The Chapter must register, attend and complete the program to complete the task.

Who completes this task? The National Office will file a report if the Chapter sent two Student Members to the Leadership Academy and the Chapter Standards of Excellence Report will reflect the completion of the task.

6. Send a Delegate to National Convention

How does your Chapter complete this task? At least one (1) Member from your Chapter must attend National Convention. The Delegate must register and attend all sessions of the Grand Chapter Meeting to complete the task.

Who completes this task? The National Office will file if the Chapter registered a Delegate and that Delegate (or their Alternate) attended all sessions of the Grand Chapter Meeting. The Chapter Standards of Excellence Report will reflect the completion of the task.

Communications

Focus: To ensure that supportive relationships are developed and maintained with the National Office, Faculty Advisor, Alumni Advisor/ Board and sheltering institution.

*This task is a National Constitution requirement
^ This form is only available in the spring

☐ **Meet with your Chapter Advisor twice in the Academic Year^**

☐ **Have a Chapter Advisor***

☐ **Send minimum of two published communications to Alumni*^**

☐ **Invite Alumni to a minimum of one event^**

☐ **Invite President or Provost to a minimum of one sponsored Phi Sigma Pi event^**

TASK DETAILS

1. Meet with your Chapter Advisor twice in the Academic Year

How does your Chapter complete this task? Report this in the Chapter Year End Administrative Summary.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "End of Year Submissions" > "Administration Summary."

2. Have a Chapter Advisor

How does your Chapter complete this task? Report the Chapter's Alumni Advisor and/or Faculty Advisor in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting their Advisor in the Chapter Admin Portal under "Officer Updates."

3. Send minimum of two published communications to Alumni

How does your Chapter complete this task? Report this in the Chapter Year End Alumni Relations Summary.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "End of Year Submissions" > "Alumni Relations Summary."

4. Invite Alumni to a minimum of one event

How does your Chapter complete this task? Report this in the Chapter Year End Alumni Relations Summary in the Chapter Admin Portal.

Who completes this ask? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "End of Year Submissions" > "Alumni Relations Summary."

5. Invite University/College President or Provost to a minimum of one Phi Sigma Pi sponsored event

How does your Chapter complete this task? Report this in the Chapter Year End Administration Summary.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "End of Year Submissions" > "Administration Summary."

Public Awareness

Focus: To ensure that National Guidelines are adhered to, significant campus and community outreach is a part of a Chapter's public relations and that quality social media practices are in place.

*This task is a National Constitution requirement
^ This form is only available in the spring

- ☐ **Have a local philanthropy**
- ☐ **Support HOBY**
- ☐ **Application of style and graphic guides**
- ☐ **Hours to plan and execute service events**
- ☐ **Social media profiles are active/accurate^**
- ☐ **Press release submissions***

TASK DETAILS

1. Have a local philanthropy

How does your Chapter complete this task? The Chapter must report their local philanthropy in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting the local philanthropy in the Chapter Admin Portal under "Chapter Standards of Excellence" > "Tripod Event Form" > "If it was a philanthropy event, what is the name of the local philanthropic partner?" for the event(s) that your Chapter held, or participated in, that benefited your local philanthropy.

2. Support HOBY

How does your Chapter complete this task? The Chapter must report their support of our national philanthropic partner in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting their support of HOBY in the Chapter Admin Portal under "Chapter Standards of Excellence" > "Tripod Event Form" > "If it was a philanthropy event, what is the name of the local philanthropic partner?" for the event(s) that your Chapter held, or participated in, that benefited HOBY.

3. Application of style and graphic guides

How does your Chapter complete this task? The Chapter should use the Style Guide and the Logo and Brand Guidelines located in the Resource Center. Examples of incorrect terms that would cause a Chapter to not complete this task are Rush instead of Recruitment, using "Honors" in National Honor Fraternity or Co-ed instead of Gender inclusive. Incorrect or inappropriate uses of the logo will also cause a Chapter to be marked as incomplete for this task.

Who completes this task? The National Office will file a report if the Chapter has used the Style Guide and/or if and if the Chapter made a reasonable effort to correct any erroneous language when contacted by the National Office.

4. Hours to plan and execute service events

How does your Chapter complete this task? The Chapter must report their service hours in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting their service hours in the Chapter Admin Portal under "Chapter Standards of Excellence" > "Tripod Event Form" > "# of hours to plan and execute event" for the event(s) that your Chapter held, or participated in, that included service hours.

5. Social media accounts are active/accurate

How does your Chapter complete this task? The Chapter must report their social media accounts in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "End of Year Submissions" > "Administration Summary."

6. Press release submissions

How does your Chapter complete this task? The Chapter must report their press releases in the Chapter Admin Portal. The Chapter must submit at least one (1) press release each year.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "Tripod Event Form" > "Was there media exposure for the event?"

Chapter Sustainability

Focus: To ensure effective and meaningful Membership Development, Member onboarding and Member Retention.

* This task is a National Constitution requirement
^ This form is only available in the spring

☐ **Host Alumni Ritual Ceremony**

☐ **Meets or exceeds new Member outreach**

☐ **Fulfillment of National Initiation Program requirements***

☐ **Chapter approved Initiate program requirements***

☐ **Hosted Recruitment events (fall)***

☐ **Hosted Recruitment events (spring)***

☐ **Host information sessions***

☐ **Initiate retention rate (fall)**

☐ **Initiate retention rate (spring)**

☐ **Resignation/Expulsion retention rate**

TASK DETAILS

1. Hold the Alumni Ritual Ceremony

How does your Chapter complete this task? The Chapter must perform and report the Alumni Chapter Ceremony in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting that they performed the Alumni Ritual Ceremony, when applicable, in the Chapter Admin Portal under "Chapter Standards of Excellence"> "Alumni Relations Summary."

2. Meet or exceeds new Member outreach

How does your Chapter complete this task? Your Chapter must report if they participated in Surge, used a new Potential Member list, and all the questions under the Recruitment section of the Recruitment form, as well as the number Pinned, in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting their new Member outreach in the Chapter Admin Portal under "Chapter Standards of Excellence">
"Recruitment/Initiation Planning" > "Recruitment Form" > "Recruitment" and "Pinning."

3. Fulfillment of National Initiation Program requirements

How does your Chapter complete this task? Your Chapter must report if they completed all of the items listed under Initiation Program section of the Recruitment form in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting their new Member outreach in the Chapter Admin Portal under "Chapter Standards of Excellence">
"Recruitment/Initiation Planning" > "Recruitment Form" > "Initiation Program."

4. Chapter approved Initiate program requirements

How does your Chapter complete this task? Your Chapter must approve the Initiation Program.

Who completes this task? The Chapter is responsible for reporting their approval date in the Chapter Admin Portal under "Chapter Standards of Excellence"> "Recruitment/Initiation Planning" > "Recruitment Form" > "What date your Chapter approved the Initiation Program." List the date that your Chapter approved the Initiation Program.

5. Hosted Recruitment events (fall)

How does your Chapter complete this task? Your Chapter must hold at least two Recruitment Events in the fall.

Who completes this task? The Chapter is responsible for reporting at least two Recruitment events in the Chapter Admin Portal under "Chapter Standards of Excellence">
"Recruitment/Initiation Planning" > "Recruitment Form" > "Hosted 2 or more Recruitment events." You will report both your fall and winter/spring events at once under Recruitment in the Recruitment Form.

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6. Hosted Recruitment events (spring)

How does your Chapter complete this task? Your Chapter must hold at least two Recruitment Events in the spring.

Who completes this task? The Chapter is responsible for reporting at least two Recruitment events in the Chapter Admin Portal under "Chapter Standards of Excellence"> "Recruitment/Initiation Planning" > "Recruitment Form" > "Hosted 2 or more Recruitment events." You will report both your fall and winter/spring events at once under Recruitment in the Recruitment Form.

7. Host Information Sessions

How does your Chapter complete this task? Your Chapter must hold at least two Informational Sessions in the fall and also in the winter/spring.

Who completes this task? The Chapter is responsible for reporting at least two Information Sessions in the Chapter Admin Portal under "Chapter Standards of Excellence"> "Recruitment/Initiation Planning" > "Recruitment Form" > "Hosted 2 or more Informational Sessions (invitational meetings)." You will report both your fall and winter/spring sessions at once under Recruitment in the Recruitment Form.

8. Initiate retention rate (fall)

How does your Chapter complete this task? Your Chapter must meet or exceed the Initiate retention rate in the fall. A successful retention is at least 85% of those pinned going through the Induction Ceremony and marked in the Initiate to Member form as a Student Member. "Fall" is defined as July 1 through December 31 of the current academic year.

Who completes this task? The National Office will file a report if the Chapter has met their Initiate retention rate in the fall.

9. Initiate retention rate (spring)

How does your Chapter complete this task? Your Chapter must meet or exceed the Initiate retention rate in the fall. A successful retention is at least 85% of those pinned going through the Induction Ceremony and marked in the Initiate to Member form as a Student Member. "Spring" is defined as January 1 through June 30 of the current academic year.

Who completes this task? The National Office will file a report if the Chapter has met their Initiate retention rate in the spring.

10. Resignation/Expulsion retention rate

How does your Chapter complete this task? Your Chapter must mark those in the Chapter Admin Portal who have resigned or who have been expelled.

Who completes this task? The National Office will file a report if the Chapter has properly captured their expelled and resigned Members.

Strategy & Evaluation

Focus: To ensure that mission driven Scholarship, Leadership and Fellowship events are held and that strategic planning and evaluation of these events are in place.

* This task is a National Constitution requirement
^ This form is only available in the spring

☐ **Academic year goals submitted*^**

☐ **Hosted at least two (2) Scholarship events***

☐ **Hosted at least two (2) Leadership events***

☐ **Hosted at least two (2) Fellowship events***

☐ **Evaluation of events**

TASK DETAILS

1. Academic year goals submitted

How does your Chapter complete this task? The Chapter must submit their academic year goals in the Chapter Admin Portal. In the spring, you will list your goals for the upcoming year. For example, in the spring of 2019, you will submit your goals for the fall 2019-spring 2020 academic year.

Who completes this task? The Chapter is responsible for reporting their goals in the Chapter Admin Portal under "Chapter Standards of Excellence"> "End of Year Submissions" > "Upcoming Academic Year Goals."

2. Hosted at least two (2) Scholarship events

How does your Chapter complete this task? Your Chapter must report at least two (2) Scholarship events in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting at least two (2) Scholarship events in the Chapter Admin Portal under "Chapter Standards of Excellence" > "Tripod Event Form." The Chapter should then select "Yes" in the "Select a value" drop down menu for "Scholarship" under "Which legs of the Tripod were met." Chapters can do this for the scholarship event(s) that your Chapter held or participated in throughout the year.

3. Hosted at least two (2) Leadership events

How does your Chapter complete this task? Your Chapter must report at least two (2) Leadership (service) events in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting at least two (2) Leadership (service) events in the Chapter Admin Portal under "Chapter Standards of Excellence" > "Tripod Event Form." The Chapter should then select "Yes" in the "Select a value" drop down menu for "Leadership" under "Which legs of the Tripod were met." Chapters can do this for the Leadership (service) event(s) that your Chapter held or participated in throughout the year.

4. Hosted at least two (2) Fellowship events

How does your Chapter complete this task? Your Chapter must report at least two (2) Fellowship events in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting at least two (2) Fellowship events in the Chapter Admin Portal under "Chapter Standards of Excellence" > "Tripod Event Form." The Chapter should then select "Yes" in the "Select a value" drop down menu for "Fellowship" under "Which legs of the Tripod were met." Chapters can do this for the fellowship event(s) that your Chapter held or participated in throughout the year.

5. Evaluation of events

How does your Chapter complete this task? Your Chapter must evaluate submitted events in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting evaluation of events as part of the Tripod Event Form in the Chapter Admin Portal under "Chapter Standards of Excellence" > "Tripod Event Form." The Chapter should then select either "All," "Attendees," "Coordinator" or "Other" in the "Select a value" drop down menu for "Who evaluated the event?" under "Evaluation." Chapters can do this for any event(s) that your Chapter held or participated in throughout the year.

Chapter Leadership

Focus: To ensure that best practices are properly implemented for Executive Board Operations, Officers, Committee Chairs and Chapter Communication.

* This task is a National Constitution requirement
^ This form is only available in the spring

☐ **Executive Board reports submitted***

☐ **Held Officer transition program*^**

☐ **Held weekly Executive Board meetings^**

☐ **Host Ritual Review two (2) times**

☐ **Officer Installation Ceremony performed^**

TASK DETAILS

1. Executive Board reports submitted

How does your Chapter complete this task? Your Chapter (via the Chapter Officers and Chairs) must submit all Chapter forms in the Chapter Admin Portal as well as all dues and fees in order complete this task.

Who completes this task? The National Office will submit the report and the Chapter Standards of Excellence Report will reflect the completion of the task.

2. Held Officer transition program

How does your Chapter complete this task? The Chapter must have an Officer Transition Program and report the length of the program in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "End of Year Submissions" > "Administration Summary" > "How long was the Chapter's Officer transition program?"

3. Held weekly Executive Board meetings

How does your Chapter complete this task? The Chapter must hold weekly Executive Board meetings while their host institution is in session.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "End of Year Submissions" > "Administration Summary."

4. Host the Ritual Review two (2) times

How does your Chapter complete this task? The Chapter must hold the Ritual Review at least two (2) times a year.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "Recruitment/Initiation Planning" > "Recruitment Form" > "Initiation Program" > "Chapter hosted Ritual Review this term."

5. Officer Installation Ceremony performed

How does your Chapter complete this task? The Chapter must perform the Officer Installation Ceremony.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "End of Year Submissions" > "Administration Summary."

Compliance & Ethics

Focus: To ensure that a Chapter has National Convention representation and adheres to National and Chapter Policies

* This task is a National Constitution requirement
^ This form is only available in the spring

☐ **Chapter Bylaws submitted*^**

☐ **Chapter Operating Policies submitted*^**

☐ **Provided reasonable accommodations for attendees with disabilities*^**

☐ **Risk Management Policy submitted*^**

☐ **Meetings were held with quorum at least every two (2) weeks*^**

☐ **No disciplinary concerns with the National Office**

☐ **Maintained University recognition*^**

TASK DETAILS

1. Chapter Bylaws submitted

How does your Chapter complete this task? The Chapter must upload their Chapter Bylaws into the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for uploading their Chapter Bylaws in the Chapter Admin Portal under "Chapter Standards of Excellence"> "End of Year Submissions" > "Upload Bylaws."

2. Chapter Operating Policies submitted

How does your Chapter complete this task? The Chapter must upload their Chapter Operating Policies into the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for uploading their Chapter Operating Policies in the Chapter Admin Portal under "Chapter Standards of Excellence"> "End of Year Submissions" > "Upload Operating Policies."

3. Provide reasonable accommodations for attendees with disabilities

How does your Chapter complete this task? The Chapter must report that they provided reasonable accommodations for all attendees with disabilities per their school policy in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "End of Year Submissions" > "Administration Summary."

4. Risk Management Policy submitted

How does your Chapter complete this task? The Chapter must upload their Risk Management Policy into the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "End of Year Submissions" > "Upload Risk Management Policy."

5. Meetings were held with quorum at least every two (2) weeks

How does your Chapter complete this task? The Chapter must report that they held at least one (1) meeting with the majority of active Members at quorum at least every two (2) weeks during the academic year (while their host institution is in session) in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "End of Year Submissions" > "Administration Summary."

6. No disciplinary concerns with the National Office

How does your Chapter complete this task? Your Chapter must report if the Chapter was disciplined or sanctioned by the Chartering school. If the answer is "yes," the Chapter should also provide what the discipline or sanction was for.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "End of Year Submissions" > "Administration Summary."

7. Maintained University recognition

How does your Chapter complete this task? Your Chapter must report that the Chapter is recognized as a student organization on campus in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "End of Year Submissions" > "Administration Summary."

Finance & Operations

Focus: To ensure that budgeting, proper fundraising and submitting dues and fees on time are a part of a Chapter's practices.

* This task is a National Constitution requirement
^ This form is only available in the spring

- ☐ **Annual budget submitted*^**
- ☐ **Deposited monies in insured accounts*^**
- ☐ **Weekly financial reports^**
- ☐ **Applied for school funding for National events^**
- ☐ **Submitted dues by required due dates***
- ☐ **Submit new Member information by due dates***
- ☐ **Submit Graduating Senior information by due dates***
- ☐ **Update Member Roster***
- ☐ **Submit incoming Officer information***
- ☐ **Chapter budgets for National Convention Delegate*^**

TASK DETAILS

1. Annual budget submitted

How does your Chapter complete this task? The Chapter must upload their annual budgets into the Chapter Admin Portal. The Chapter must upload an actual budget from the current academic year and a projected budget for the next Academic year.

Who completes this task? The Chapter is responsible for uploading their annual budget in the Chapter Admin Portal under "Chapter Standards of Excellence"> "End of Year Submissions" > "Budget Form."

2. Deposited monies in insured accounts

How does your Chapter complete this task? The Chapter must report what type of account your Chapter deposits its funds into.

Who completes this task? The Chapter is responsible for reporting the type of account in the Chapter Admin Portal under "Chapter Standards of Excellence"> "End of Year Submissions" > "Budget Form."

3. Weekly financial reports

How does your Chapter complete this task? The Chapter must report if the Treasurer provided weekly financial reports to the Chapter in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence"> "End of Year Submissions" > "Budget Form."

4. Applied for school funding for National events

How does your Chapter complete this task? The Chapter must report if the Chapter applied for school funding for regional and/or National events in the Chapter Admin Portal.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence"> "End of Year Submissions" > "Budget Form."

5. Submitted dues by required due dates

How does your Chapter complete this task? The Chapter must mail and have postmarked the monetary dues billed to the Chapter by the provided due dates.

Who completes this task? The National Office will report if the Chapter provided the information by the due date(s) and the Chapter Standards of Excellence Report will reflect the completion of the task.

6. Submit new Member information by due dates

How does your Chapter complete this task? The Chapter must submit new Member information (Initiates) by the due dates provided by the National Office.

Who completes this task? The National Office will report if the Chapter provided the information by the due date(s) and the Chapter Standards of Excellence Report will reflect the completion of the task.

7. Submit Graduating Senior information by due dates

How does your Chapter complete this task? The Chapter must submit graduating Senior information by the due dates provided by the National Office.

Who completes this task? The National Office will report if the Chapter provided the information by the due date(s) and the Chapter Standards of Excellence Report will reflect the completion of the task.

8. Update Member Roster

How does your Chapter complete this task? The Chapter must update the Chapter's Membership Roster by the due dates provided by the National Office. The Chapter can update the Membership Roster in the Chapter Admin Portal under "Member Roster."

Who completes this task? The Chapter is responsible for reporting their Officer information in the Chapter Admin Portal under "Member Roster."

9. Submit incoming Officer information

How does your Chapter complete this task? Your Chapter must update and report their Chapter Officer information whenever there is a change to leadership.

Who completes this task? The Chapter is responsible for reporting their Officer information in the Chapter Admin Portal under "Officer Updates."

10. Chapter budgets for National Convention Delegate

How does your Chapter complete this task? Your Chapter must budget for sending a National Convention Delegate to attend the Grand Chapter Meeting.

Who completes this task? The Chapter is responsible for reporting this information in the Chapter Admin Portal under "Chapter Standards of Excellence" > "End of Year Submissions" > "Budget Form."

Chapter Officer and Chair Accessibility

In the Chapter Admin Portal, forms have different accessibility levels depending on a Member's leadership position in the Chapter. Chapter Officers and Chairs have access to the following forms and reports.

President
- Add New Initiates
- Admin Forms
- Admin Reports
- Alumni Relations Forms
- Alumni Relations Reports
- Chapter Edit Profile
- Fellowship Reports
- Financial Forms
- Fundraising Reports
- Goal Forms
- Goal Reports
- Leadership Reports
- Manage Members
- Manage New Members
- Manage Officers
- Manage Profile
- Membership Reports
- Recruitment Forms
- Recruitment Reports
- Risk Management Forms
- Risk Management Reports
- Scholarship Reports
- Tripod Forms
- Tripod Reports
- Unclaimed New Member Report

Vice President
- Admin Reports
- Alumni Relations Reports
- Chapter Edit Profile
- Fellowship Reports
- Fundraising Reports
- Goal Reports
- Leadership Reports
- Membership Reports
- Recruitment Reports
- Risk Management Reports
- Scholarship Reports
- Tripod Forms
- Tripod Reports
- Unclaimed New Member Report

Corresponding Secretary
- Add New Initiates
- Admin Forms
- Admin Reports
- Alumni Relations Forms
- Alumni Relations Reports
- Chapter Edit Profile
- Fellowship Reports
- Financial Forms
- Fundraising Reports
- Goal Forms
- Goal Reports
- Leadership Reports
- Manage Members
- Manage New Members
- Manage Officers
- Manage Profile
- Membership Reports
- Recruitment Forms
- Recruitment Reports
- Risk Management Forms
- Risk Management Reports
- Scholarship Reports
- Tripod Forms
- Tripod Reports
- Unclaimed New Member Report

Treasurer
- Admin Forms
- Admin Reports
- Alumni Relations Reports
- Chapter Edit Profile
- Fellowship Reports
- Financial Forms
- Fundraising Reports
- Goal Reports
- Leadership Reports
- Manage Profile
- Membership Reports
- Recruitment Forms
- Recruitment Reports
- Risk Management Forms
- Risk Management Reports
- Scholarship Reports
- Tripod Forms
- Tripod Reports
- Unclaimed New Member Report

Parliamentarian
- Admin Reports
- Alumni Relations Reports
- Chapter Edit Profile
- Fellowship Reports
- Fundraising Reports
- Goal Reports
- Leadership Reports
- Membership Reports
- Recruitment Reports
- Risk Management Forms
- Risk Management Reports
- Scholarship Reports
- Tripod Reports
- Unclaimed New Member Report

Historian
- Admin Reports
- Alumni Relations Reports
- Chapter Edit Profile
- Fellowship Reports
- Fundraising Reports
- Goal Reports
- Leadership Reports
- Membership Reports
- Recruitment Reports
- Risk Management Reports
- Scholarship Reports
- Tripod Forms
- Tripod Reports
- Unclaimed New Member Report

Initiate Advisor
- Add New Initiates
- Admin Reports
- Alumni Relations Reports
- Chapter Edit Profile
- Fellowship Reports
- Fundraising Reports
- Goal Reports
- Leadership Reports
- Manage New Members
- Membership Reports
- Recruitment Forms
- Recruitment Reports
- Risk Management Reports
- Scholarship Reports
- Tripod Forms
- Tripod Reports
- Unclaimed New Member Report

Recruitment Advisor

- Add New Initiates
- Admin Reports
- Alumni Relations Reports
- Chapter Edit Profile
- Fellowship Reports
- Fundraising Reports
- Goal Reports
- Leadership Reports
- Manage New Members
- Membership Reports
- Recruitment Forms
- Recruitment Reports
- RiskManagement Reports
- Scholarship Reports
- Tripod Forms
- Tripod Reports
- Unclaimed New Member Report

Alumni Chair

- Admin Reports
- Alumni Relations Forms
- Alumni Relations Reports
- Chapter Edit Profile
- Fellowship Reports
- Fundraising Reports
- Goal Reports
- Leadership Reports
- Membership Reports
- Recruitment Reports
- Risk Management Reports
- Scholarship Reports
- Tripod Reports

Fundraising Chair

- Admin Reports
- Alumni Relations Reports
- Chapter Edit Profile
- Fellowship Reports
- Fundraising Forms
- Fundraising Reports
- Goal Reports
- Leadership Reports
- Membership Reports
- Recruitment Reports
- Risk Management Reports
- Scholarship Reports
- Tripod Forms
- Tripod Reports

Scholarship Chair
- Admin Reports
- Alumni Relations Reports
- Chapter Edit Profile
- Fellowship Reports
- Fundraising Reports
- Goal Reports
- Leadership Reports
- Membership Reports
- Recruitment Reports
- Risk Management Reports
- Scholarship Reports
- Tripod Forms
- Tripod Reports

Service Chair
- Admin Reports
- Alumni Relations Reports
- Chapter Edit Profile
- Fellowship Reports
- Fundraising Reports
- Goal Reports
- Leadership Reports
- Membership Reports
- Recruitment Reports
- Risk Management Reports
- Scholarship Reports
- Tripod Forms
- Tripod Reports

Social Chair
- Admin Reports
- Alumni Relations Reports
- Chapter Edit Profile
- Fellowship Reports
- Fundraising Reports
- Goal Reports
- Leadership Reports
- Membership Reports
- Recruitment Reports
- Risk Management Reports
- Scholarship Reports
- Tripod Forms
- Tripod Reports

Chapter Advisor

- Admin Reports
- Alumni Relations Reports
- Fellowship Reports
- Fundraising Reports
- Goal Reports
- Leadership Reports
- Membership Reports
- Recruitment Reports
- Risk Management Reports
- Scholarship Reports
- Tripod Reports

Form Locations

Click on the form you wish to complete in the Chapter Admin Portal.

Member Roster
Collegiate Member Roster
Finalize Graduating Seniors

Chapter Profile
Review/Edit Chapter Profile

Initiate Class
Add New Initiates
Convert Initiate to Member

Chapter Standards of Excellence (CSE)
Tripod Event Form
Risk Management Policy and Summary
Recruitment/Initiation Planning Form
- Upload Recruitment and Initiation Calendar
- Upload Initiation Handbook and Manual
End of Year Submissions
- Administrative Summary
- Alumni Relations Summary
- Upcoming Academic Year Goals
- Budget Form (Upload current year and proposed budget)
- Upload Bylaws
- Upload Operation Policies Upload

Officer Updates
Officer Information Update

Reports
CSE Score Card Report