

Chapter Standards of Excellence Guide

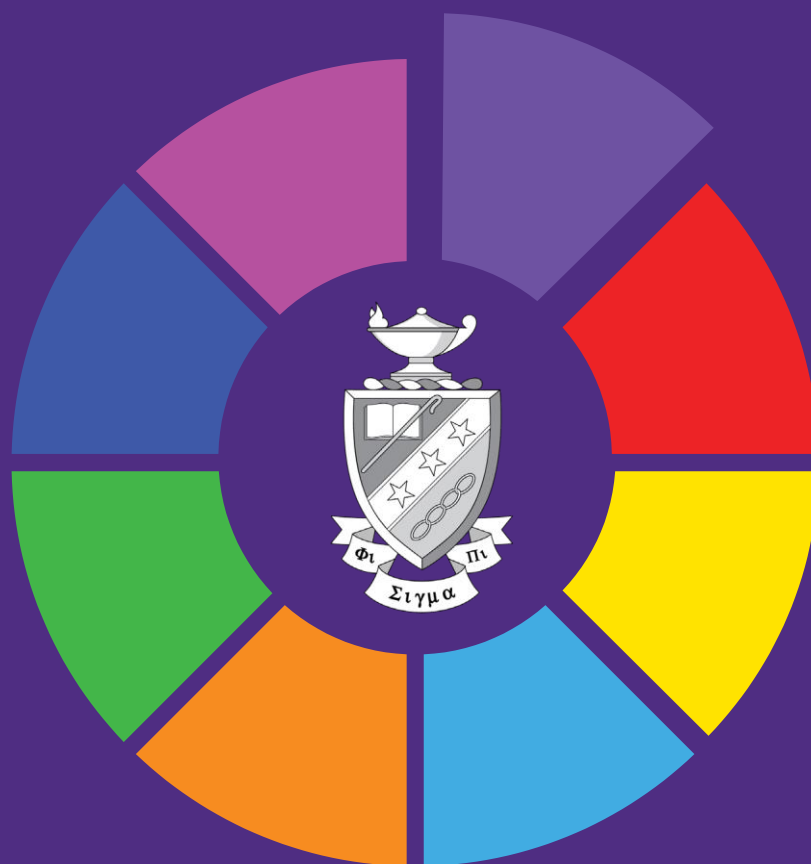


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The Chapter Standards of Excellence

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 eight Guiding Principles encompassing various focus areas and tasks. 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 Eight Guiding Principles





Chapter Development

Focus: Chapter Visits, National Events



Communication

Focus: Chapter Advisor, Alumni Members



Public Awareness & Engagement

Focus: Campus/Community Outreach, Social Media



Chapter Sustainability

Focus: Recruitment, Initiation Program



Strategy & Evaluation

Focus: Mission-Driven Scholarship, Leadership and Fellowship



Chapter Leadership & Governance

Focus: Report Submissions, Officers



Compliance & Ethics

Focus: Chapter Meetings, Sheltering Institution



Finance & Operations

Focus: Budget, Dues and Fees, Member Roster

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 submission of forms and documents outlined 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 Scorecard History Report."

Expectations

The focus areas under each Guiding Principle, represented by pie pieces, serve as the standards for excellence. The expectation is that each Chapter works toward achieving these standards over the coming years. These standards are intentionally challenging yet relevant as a basis for running a strong and effective Chapter. **It is important to 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 focus areas and tasks 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 Chapter Visits and National Events.

**This task is a National Constitution requirement*

- Participate in an annual Chapter Visit by the National Office*
- Send a Delegate to National Convention*

TASK DETAILS

1. Participate in an annual Chapter Visit by the National Office

How does your Chapter complete this task? Your Chapter must participate in the scheduled Chapter Visit from the National Office during the academic year. This visit may be virtual or in-person with any member of the National Staff.

Who completes this task? The National Office will report the completed Chapter Visit, and the CSE Scorecard Report will reflect completion of the task.

2. 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 report if the Chapter registered a Delegate, and that Delegate (or their Alternate) attended all sessions of the Grand Chapter Meeting. The CSE Scorecard Report will reflect completion of the task.



Communications

Focus: To ensure that supportive relationships are developed and maintained with the Chapter Advisor and Alumni Members.

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

- Have a Chapter Advisor*
- Send one (1) published communication to Alumni Members*^

TASK DETAILS

1. Have a Chapter Advisor

How does your Chapter complete this task? Your Chapter must have a Chapter Advisor, who is a faculty or staff member at the sheltering institution, and provide their name and contact information to the National Office.

Who completes this task? The Chapter is responsible for reporting their Chapter Advisor in the Chapter Admin Portal under "Officer Updates" > "Add a Faculty Advisor." The CSE Scorecard Report will reflect completion of the task.

2. Send one (1) published communication to Alumni Members

How does your Chapter complete this task? Your Chapter must send a minimum of one (1) electronic newsletter, or another form of published communication, to the Chapter's Alumni Members on record each academic year.

Who completes this task? The Chapter is responsible for reporting that communications were sent in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "End of Academic Year Submissions" > "Alumni Relations Summary." The CSE Scorecard Report will reflect completion of the task.



Public Awareness & Engagement

Focus: To ensure that the Chapter is furthering the Fraternity's mission through service and that quality social media practices are in place.

^ This form is only available in the spring

- Track number of hours to plan and execute service events
- Maintain active and accurate social media accounts[^]

TASK DETAILS

1. Track number of hours to plan and execute service events

How does your Chapter complete this task? Your Chapter must plan and execute, or participate in, service events and track the number of hours completed by Collegiate Members.

Who completes this task? The Chapter is responsible for reporting their service hours in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "Tripod Event Form" > "# of hours to plan and execute event." The CSE Scorecard Report will reflect completion of the task.

2. Maintain active and accurate social media accounts

How does your Chapter complete this task? Your Chapter must maintain social media accounts by posting regularly and ensuring that all content aligns with National guidelines.

Who completes this task? The Chapter is responsible for reporting that social media accounts are active and accurate in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "End of Academic Year Submissions" > "Administration Summary." The CSE Scorecard Report will reflect completion of the task.



Chapter Sustainability

Focus: To ensure effective and meaningful Member onboarding and Member retention.

** This task is a National Constitution requirement*

- Host Invitational Meetings/Information Sessions (fall and winter/spring)*
- Host Recruitment Events (fall and winter/spring)*
- Fulfill National Initiation Program requirements*

TASK DETAILS

1. Host Invitational Meetings/Information Sessions (fall and winter/spring)

How does your Chapter complete this task? Your Chapter must host at least two (2) Invitational Meetings/Information Sessions during the fall and also the winter/spring academic terms.

Who completes this task? The Chapter is responsible for reporting that at least two (2) Invitational Meetings/Information Sessions were hosted each academic term in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "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. The CSE Scorecard Report will reflect completion of the task.

2. Host Recruitment Events (fall and winter/spring)

How does your Chapter complete this task? Your Chapter must host at least two (2) Recruitment Events during the fall and also the winter/spring academic terms.

Who completes this task? The Chapter is responsible for reporting that at least two (2) Recruitment Events were hosted during each academic term in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "Recruitment/Initiation Planning" > "Recruitment Form" > "Hosted 2 or more Recruitment events." The CSE Scorecard Report will reflect completion of the task.

3. Fulfill National Initiation Program requirements

How does your Chapter complete this task? Your Chapter must provide an Initiation Program that meets all the requirements outlined in the National Constitution.

Who completes this task? The Chapter is responsible for reporting that their Initiation Program met all National requirements in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "Recruitment/Initiation Planning" > "Recruitment Form" > "Initiation Program." The CSE Scorecard Report will reflect completion of the task.



Strategy & Evaluation

Focus: To ensure that mission-driven Scholarship, Leadership and Fellowship Events are held.

** This task is a National Constitution requirement*

- Host two (2) Scholarship Event*
- Host two (2) Leadership Event*
- Host two (2) Fellowship Event*

TASK DETAILS

1. Host two (2) Scholarship Events

How does your Chapter complete this task? Your Chapter must host a minimum of two (2) Scholarship Events during the academic year.

Who completes this task? The Chapter is responsible for reporting that at least two (2) Scholarship Events were hosted in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "Tripod Event Form." The Chapter should select "Yes" in the dropdown menu for "Scholarship" under "Which legs of the Tripod were met?" The CSE Scorecard Report will reflect completion of the task.

2. Host two (2) Leadership Events

How does your Chapter complete this task? Your Chapter must host a minimum of two (2) Leadership (service) Event during the academic year.

Who completes this task? The Chapter is responsible for reporting that at least two (2) Leadership (service) Events were hosted in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "Tripod Event Form." The Chapter should select "Yes" in the dropdown menu for "Leadership" under "Which legs of the Tripod were met?" The CSE Scorecard Report will reflect completion of the task.

3. Host at least one (2) Fellowship Events

How does your Chapter complete this task? Your Chapter must host a minimum of one (2) Fellowship Events during the academic year.

Who completes this task? The Chapter is responsible for reporting that at least two (2) Fellowship Events were hosted in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "Tripod Event Form." The Chapter should select "Yes" in the dropdown menu for "Fellowship" under "Which legs of the Tripod were met?" The CSE Scorecard Report will reflect completion of the task.



Chapter Leadership & Governance

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*

- Submit CSE Reports by due dates
- Hold Officer Transition Program*^
- Host Officer Installation Ceremony^

TASK DETAILS

1. Submit CSE Reports by due dates

How does your Chapter complete this task? Your must submit all forms and documents required by the Chapter Standards of Excellence.

Who completes this task? The National Office will report that all forms were submitted on time, and the CSE Scorecard Report will reflect completion of the task.

2. Hold Officer Transition Program

How does your Chapter complete this task? The Chapter must hold an Officer Transition Program and communicate the length of the program to the National Office.

Who completes this task? The Chapter is responsible for reporting the length of the program in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "End of Academic Year Submissions" > "Administration Summary" > "How long was the Chapter's Officer transition program?" The CSE Scorecard Report will reflect completion of the task.

3. Host Officer Installation Ceremony

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

Who completes this task? The Chapter is responsible for reporting that the Officer Installation Ceremony was hosted in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "End of Academic Year Submissions" > "Administration Summary." The CSE Scorecard Report will reflect completion of the task.



Compliance & Ethics

Focus: To ensure strong Chapter Operations and that good standing is upheld with the Sheltering Institution

** This task is a National Constitution requirement*

^ This form is only available in the spring

- Hold Chapter Meetings with quorum at least once every two (2) weeks*^
- Have no disciplinary concerns with the Sheltering Institution
- Maintain recognition with the Sheltering Institution*^

TASK DETAILS

1. Hold Chapter Meetings with quorum at least once every two (2) weeks

How does your Chapter complete this task? The Chapter must hold at least one (1) meeting with enough Active Collegiate Members in attendance to reach quorum at least once every two (2) weeks during the academic year.

Who completes this task? The Chapter is responsible for reporting that a Chapter Meeting was held with quorum at least every two (2) weeks in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "End of Academic Year Submissions" > "Administration Summary." The CSE Scorecard Report will reflect completion of the task.

2. Have no disciplinary concerns with the Sheltering Institution

How does your Chapter complete this task? Your Chapter must report if the Chapter was disciplined or sanctioned by the Sheltering Institution. If the answer is "Yes," the Chapter must also provide the reason for the discipline or sanction.

Who completes this task? The Chapter is responsible for reporting any disciplinary concerns in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "End of Academic Year Submissions" > "Administration Summary." The CSE Scorecard Report will reflect completion of the task.

3. Maintain recognition with the Sheltering Institution

How does your Chapter complete this task? Your Chapter must complete all requirements to maintain recognition as a student organization on campus.

Who completes this task? The Chapter is responsible for reporting whether they have maintained recognition in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "End of Academic Year Submissions" > "Administration Summary." The CSE Scorecard Report will reflect completion of the task.



Finance & Operations

Focus: To ensure that budgeting, submitting dues and fees on time and managing the Member Roster are part of Chapter Operations

** This task is a National Constitution requirement*

^ This form is only available in the spring

- Submit annual Chapter Budget*^
- Deposit monies in insured accounts*^
- Submit dues and fees by due dates*
- Submit New Member information by due dates*
- Submit Graduating Senior information by due dates*
- Update Member Roster*
- Submit incoming Officer information*

TASK DETAILS

1. Submit annual Chapter Budget

How does your Chapter complete this task? The Chapter must provide the actual budget from the current academic year and a projected budget for the next academic year to the National Office.

Who completes this task? The Chapter is responsible for uploading their annual Chapter Budget in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "End of Academic Year Submissions" > "Budget Form." The CSE Scorecard Report will reflect completion of the task.

2. Deposited monies in insured accounts

How does your Chapter complete this task? The Chapter must share with the National Office into what type of account funds are deposited.

Who completes this task? The Chapter is responsible for reporting the type of account in the Chapter Admin Portal under "Chapter Standards of Excellence (CSE)" > "End of Academic Year Submissions" > "Budget Form." The CSE Scorecard Report will reflect completion of the task.

3. Submit dues by required due dates

How does your Chapter complete this task? The Chapter must have dues and fees paid to the National Office by the due dates. If mailed, the check must be postmarked by the provided due dates.

Who completes this task? The National Office will report if the Chapter paid dues and fees on time, and the CSE Scorecard Report will reflect completion of the task.

4. Submit New Member information by due dates

How does your Chapter complete this task? The Chapter must communicate the names and contact information for all Initiates and have all Initiates complete the Membership Agreement by the provided due dates.

Who completes this task? The National Office will report if the Chapter communicated Initiate names and contact information and if all Initiates completed the Membership Agreement on time, and the CSE Scorecard Report will reflect completion of the task.

5. Submit Graduating Senior information by due dates

How does your Chapter complete this task? The Chapter must communicate with the National Office which Collegiate Members will be graduating by the due dates.

Who completes this task? The National Office will report if the Chapter communicated Graduating Senior information on time, and the CSE Scorecard Report will reflect completion of the task.

6. Update Member Roster

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

Who completes this task? The National Office will report if the Chapter updated the Member Roster on time, and the CSE Scorecard Report will reflect completion of the task.

7. Submit incoming Officer information

How does your Chapter complete this task? Your Chapter must update the Exec Board Roster under “Officer Updates” whenever there is a change to leadership, including when elections are held at the end of an academic term.

Who completes this task? The National Office will report if the Chapter updated the Exec Board Roster on time, and the CSE Scorecard Report will reflect completion of the task.

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
- Risk Management 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

[Update Member Roster](#)

[Finalize Graduating Seniors](#)

Initiate Class

[Add New Initiates](#)

[Convert Initiate to Member](#)

Chapter Standards of Excellence (CSE)

[Tripod Event Form](#)

[Recruitment/Initiation Planning Form](#)

End of Year Submissions

- [Administrative Summary](#)
- [Alumni Summary](#)
- [Budget Form](#) (current year)

Officer Updates

[Officer Information Update](#)

Reports

[CSE Score Card Report](#)