

Associate Chapter Chartering Benchmarks 2018-2019 Academic Year

ACADEMICS

Chapter Exceeds 2.75 Cumulative GPA

- Chapter maintains above a 2.75 GPA and exceeds 2.75 cumulative GPA in the semester prior to chartering.

Chapter Develops a Scholarship Plan

- Chapter builds off the Academic Success Program provided by Headquarters. The chapter can raise GPA requirements (but not lower) and utilize other study methods/tips unique to themselves.

BONUS

Chapter Exceeds 3.00 Cumulative GPA

- Chapter maintains above a 3.00 GPA and exceeds 3.00 cumulative GPA in the semester prior to chartering.

FINANCE & OPERATIONS

Director of Finance has Introduction with OmegaFi Chapter Services Representative

- Schedule an hour phone call with your CSR to introduce yourself and discuss how to establish billing cycles, assess fees to members, understand fee schedules and purchasing cards, and other essential functions of OmegaFi.

Budget Created for the Academic Year Including All Necessary National Dues and Fees

- Following the initial semester, the chapter should create a comprehensive budget that includes a breakdown of how all national and local dues and fees will be allocated.

File Taxes with BDO by October Each Year

- Chapter should maintain records of income and expenses each year. Beginning in July, BDO and Steve Lenivy will contact the chapter to file their return. Chapter must work with Steve to file by October.

Maintain a \$0 Outstanding Balance with National Headquarters

- Chapter should show a \$0 balance in National Dues and Fees in OmegaFi.

Maintain a total Outstanding Balance of Less than \$1,000 in Local Dues and Fees

- Chapter should have less than \$1,000 owed to the local chapter by its members.

Member Safety Fees Paid

- Chapter pays Member Safety Fees in full by October 1 each year.
 - Associate Chapters pay 25% of their total Member Safety Fee in their first year, 50% in their second year, 75% in their third year, and the full amount in their fourth year.

All Chapter Members Pay Association Fee Prior to Participating in Association Ceremony

All Chapter Members Pay Initiation Fee Prior to Participating in Initiation Ceremony

Chapter Hosts a Fundraising Event

- Chapter hosts a fundraising event at least once a year to generate funds for the chapter.

Chapter has a Constitution and By-Laws

- The Chapter has an approved Constitution and By-Laws which uses the Headquarter's provided template as an outline.

Chapter Understands Emergency Procedure Protocols

- Chapter should review emergency procedure and protocols from Headquarters and from the Fraternity/Sorority Life Office on their campus.

Chapter President Participates in Weekly Coaching Call with Staff Liaison

- The Chapter President will have weekly coaching calls with their Headquarter's staff liaison. Meetings can move to biweekly no sooner than three (3) months after the staff member leaves campus.

Chapter Submits Association Report

- Chapter should submit Association Reports by October 1 and March 1.

Chapter Submits Initiation Report

- Chapter should submit Initiation Reports by November 1 and April 1.

Chapter Completes Roster Updates

- Chapter should complete Member AND Billing roster updates by November 15 (for spring) and April 15 (for fall).
- Chapter should complete campus roster updates when required – this roster should always match your Membership Roster on Vault.

Chapter Submits McCune Annual Report by April 15

- Chapter should compile and submit the McCune Annual Report by April 15 each year.

Chapter Maintains Contact Information with Headquarters

- Chapter President in President's GroupMe.
- Executive Cabinet receives SAGA Weekly Emails.
- Chapter officers provide current contact information for each position in Vault.
 - Each semester, chapter officers should review their email address, permanent address, and phone number in Vault to assure its accuracy.

Chapter Holds Weekly Executive Cabinet Meetings

- Chapter has a weekly Executive Cabinet Meeting with minutes taken by the Secretary.

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- Chapter sends minutes to HQ Staff Liaison and Lead Advisor.

RECRUITMENT

Chapter Creates a Recruitment Plan Each Semester

- Chapter develops a comprehensive recruitment plan with recruitment goals for each semester.

Chapter has Access to ChapterBuilder

- Chapter provides access to ChapterBuilder to all its members. Chapter utilizes ChapterBuilder during Recruitment.

Chapter Maintains Ideal Size

- Chapter has reached and maintains membership numbers at or above the campus average for IFC groups.

Chapter Maintains 80% Retention Rate

- Chapter should retain 80% of its members between Association and Initiation each semester.

Review Sigma Tau Gamma's Diversity and Inclusion Policy

- Chapter reviews Diversity and Inclusion Policy before each Recruitment cycle.

BONUS

Chapter Maintains 100% Retention Rate

- Chapter should retain 100% of its members between Association and Initiation each semester.

EDUCATION AND WELLNESS

(Initial Semester) All Members Complete the “Path of Principles” Program

- During the chapter’s initial semester, HQ Staff will train the chapter’s Director of Education and Wellness on the Path of Principles. The Director of Education and Wellness should continue any additional Path of Principles education as needed.

(Each Semester Following the First) All New Members Complete the “Path of Principles” Program

- Director of Education and Wellness facilitates Path of Principles Program for all new members. Path of Principles weeks 1-4 should be completed before Initiation. Path of Principles weeks 5-8 should be completed following Initiation. No Path of Principles program will extend beyond eight (8) weeks. Consult with a Collegiate Services staff member if adjustments to this timeline need to be made according to your campus’s recruitment and semester schedule.

Chapter Has an Operational Standards Board

- Chapter has a functioning Standards Board with Chairman and members.
- Standards Board Chairman reviews Standards Board Manual and operations with Standards Board members annually.

Host Academic Advising/Tutoring Center/Study Skills (or Similar Office) at Chapter Meeting

- Associate Chapter will host a college/university employee from an academic advising office to provide an overview of the office, resources, tutoring, and support provided to students.

Host Service and Engagement/Volunteering (or Similar Office) at Chapter Meeting

- Associate Chapter will host a college/university employee from the Service and Engagement/Volunteer Center (or similar office if available) to provide overview of office resources, events, and opportunities to give back to the campus and community.

Host Diversity/Equity/Inclusion (or Similar Office) at Chapter Meeting

- Associate Chapter will host a college/university employee from the Diversity/Equity/Inclusion Office (or similar office if available) to provide information on cultural events on campus, or workshops on topics like inclusive language, gender and sexual orientation, racial and ethnic identities, disabilities, equity vs. equality, SAFE zone training, Social Justice Institute, etc.

Host Wellness Services (or Similar Office) at Chapter Meeting

- Associate Chapter will host a college/university employee from the Wellness Services (or campus equivalent) Office to provide an overview of office and resources, or workshop over topics like mental health and wellness, stress management, sexual wellness, diet and

exercise/healthy living, violence prevention, bystander intervention, alcohol management, etc.

- The chapter **MUST** host an office to present on Sexual Assault and Alcohol Management each semester.
- The chapter **MUST** host an office to present on Bystander intervention each year.

Host Campus Police at Chapter Meeting

- Associate Chapter will host a college/university employee from University Police to provide an overview of office and resources, or workshop over topics like emergency operations, self-defense, sexual assault prevention, personal safety, hostile intruder response, theft and crime prevention, hosting safe socials, etc.

Host Three (3) or More Brotherhood Building Events Each Semester

- Chapter will host events to promote brotherhood among members. These events could include dinners, team-building retreats and events, trips, etc.

Chapter Members Trained on Headquarters and Campus Member Safety and Wellness Policies

- President, Director of Member and Community Engagement, Social Coordinator, White Rose Coordinator, Member Safety & Wellness Coordinator, and Standards Board Chairman should attend training from Headquarters.
- At least 85% of the chapter should participate in campus risk management policy and protocol training. Consult with your campus Fraternity and Sorority Life Advisor to do this.

LEADERSHIP PROGRAMMING

It is an expectation that Associate Chapters have representation at all leadership programming events through their chartering

Webb Academy Attendance

- President, Director of Recruitment, Director of Finance and Operations, and Director of Member and Community Engagement Attend Webb Academy in January on behalf of the Associate Chapter. ONLY ELECTED OFFICERS SHOULD ATTEND – please ensure officers in these roles are aware of Webb Academy dates and confirm they can attend prior to their election into the position.

Summer Leadership Program Attendance

- At least four (4) members attend either Grand Conclave or Endeavor on behalf of the Associate Chapter.

Noble Man Institute

- At least three (3) new members attend Noble Man Institute in November on behalf of the Associate Chapter.

CAMPUS ENGAGEMENT

Executive Cabinet to Meet with Fraternity/Sorority Advisor and HQ Staff Following Installation

- Meeting should take place during HQ Staff training visit.

Chapter President to Meet regularly with Fraternity/Sorority Advisor Following Installation

- Consult with Fraternity/Sorority Advisor to schedule touch-point meetings as required or requested. The purpose of these meetings should be to review campus deadlines and requirements, discuss chartering benchmarks, etc.

Obtain Recognition as a Campus Organization (Annually)

- Chapter should complete all requirements to be a recognized student organization on campus.

Attend Scheduled IFC Meetings

- Chapter should send representatives to scheduled Interfraternity Council (IFC) meetings.

Chapter Co-Hosts a Social Event

- Chapter has hosted or co-hosted a social event with another sorority or fraternity and has followed the Fraternity's Member Safety and Wellness Policy. Chapter must host FSL Office to present on Campus Risk Management Policy prior to first social function.

Chapter Requires 50% of Members to Engage in Other Student Organizations

- Chapter requires members to be involved in at least one other student organization or club. Members should aim to become leaders of other organizations on campus.

BONUS

Chapter Competes in Intramural Sports

- Chapter is competitive in at least one intramural sport per academic year.

Chapter Participates in an MGC or NPHC Social Event

- Chapter has hosted or co-hosted a social event with a culturally based sorority or fraternity and has followed the Fraternity's Member Safety and Wellness Policy.

Chapter recognizes a White Rose Sweetheart

- Chapter identifies a White Rose Sweetheart during a White Rose Formal, social media campaign, interview process, other event, etc. This individual should show support for the fraternity and demonstrate the Principles of Sigma Tau Gamma in their daily life.

Chapter hosts a Parent's Event Each Semester

- Chapter hosts a Mom or Dad's Day event, during which members can engage with parents at events of the chapter's choosing (i.e. bowling, cook out, etc.).

Greek Week and Homecoming Participation

- Chapter participates in Greek Week and/or Homecoming events either on their own or partnered with another on-campus group.

COMMUNITY ENGAGEMENT

ADVISORS

Identify a Lead Advisor

- A Lead Advisor will be appointed by HQ staff – any alumnus interested in being an advisor should be properly vetted by Headquarters Staff. Please send the name and contact information of any interested potential advisors to Adam Kowalski, Director of Fraternity Operations, at akowalski@sigtau.org.

Identify a Faculty Advisor

- Locate a member of the faculty and staff to serve as a faculty advisor for the chapter. A faculty advisor is responsible for connecting the chapter to resources and other offices on campus that can help the chapter excel in academics, programming, community outreach, etc. This advisor may have campus-specific duties from your local Fraternity & Sorority Life Office.

BONUS

Identify a Parent Advisor

- Recruit a parent/family member to serve as the chapter's parent advisor. A parent advisor acts as a resource when members feel as though they need advice regarding Parents' Weekend, the Parents' newsletter, etc. A parent advisor could be a good tie to the community or local resources.

COMMUNICATIONS

Maintain Chapter Facebook Page According to Branding Standards

- Manage the Facebook Page that was created for you and post bi-monthly updates. The Associate Chapter will use this platform as a primary tool for communicating with members, the community, and eventually alumni.

Provide Social Media Log-In Information to HQ

- Log in information for Facebook and other social media platforms should be provided to Greg Ward, Director of Communications, at gward@sigtau.org.

Gain Access to Branding Guide

- Chapter should access branded materials by contacting Greg Ward, Director of Communications, at gward@sigtau.org.

Create a Semester Newsletter and Submit to HQ for Distribution

- Create a semester newsletter that is electronically distributed. Please email the completed newsletter in PDF format to Adam Kowalski at akowalski@sigtau.org **NO LATER THAN** one week after the conclusion of the semester. Include your Fraternity/Sorority Life Advisor's email, parents' emails, and email addresses for other student organizations on campus. The newsletter will also be distributed electronically to alumni within a 60-mile radius of the chapter.

HQ Staff will distribute the newsletter while you are an Associate Chapter. After chartering, the chapter will be responsible for distributing the newsletter themselves.

BONUS

Maintain a Chapter Instagram Account According to Branding Standards

- Manage the Instagram Account and post bi-monthly updates. The Associate Chapter will use this platform as a primary tool for communicating with members and the community. Log in information for this and any other social media accounts should be provided to Greg Ward, Director of Communications, at gward@sigtau.org.

Maintain a Chapter Twitter Account According to Branding Standards

- Manage the Twitter Account that was created for you and post bi-monthly updates. The Associate Chapter will use this platform as a primary tool for communicating with members and the community. Log in information for this and any other social media accounts should be provided to Greg Ward, Director of Communications, at gward@sigtau.org.

Maintain a Professional Chapter GroupMe Account

- GroupMe accounts should include HQ Staff Liaison. Chapter should manage the GroupMe Account and provide members with pertinent updates. The Associate Chapter will use this platform as a primary tool for communicating with members.

SERVICE AND PHILANTHROPY

Chapter Participates in or Hosts a Service/Philanthropy Event for a Local Cause

- The chapter should identify a local/regional charity or cause to support. The chapter will coordinate an event, awareness campaign, or fundraiser to support the cause with at least 75% of members in attendance.

Chapter Participates or Hosts a Service/Philanthropy Event for Special Olympics

- The chapter should participate in at least one event that raises money and/or awareness for Special Olympics. The chapter should utilize the local or regional Special Olympics Office for more information on events and opportunities. All proceeds should be donated through the Sigma Tau Gamma Foundation.

Chapter Members Complete Ten (10) Service Hours (On Average, Per Semester)

- Chapter tracks service hours for each member, each semester. Chapter submits service hours to campus (if applicable or requested by campus).

Chapter Participates in an IFC Fraternity or Panhellenic Sorority Philanthropy or Service Event

- The chapter (75% of members or more) should attend at least one other sorority or fraternity's philanthropy or service event together each year.

Chapter Participates in an MGC or NPHC Fraternity or Sorority Philanthropy or Service Event

- The chapter (75% of members or more) should attend at least one other sorority or fraternity's philanthropy or service event together each year.

Chapter Participates in Azure and White Club

- At least ten percent (10%) of the chapter are members of the Azure and White Giving Club for the Sigma Tau Gamma Foundation.

BONUS

Chapter Participates in a non-Greek Service or Philanthropy Event

- The chapter (75% of members or more) should attend at least one other student organization's philanthropy or service event together.

CHARTERING PETITION

Chapter Submits Finalized Chartering Petition to Kassi Ward, Associate Director of Collegiate Services at knward@sigttau.org by March 1 (for fall chartering) or October 1 (for spring chartering)

- The Chapter President with assistance from the Executive Cabinet, completes the Chartering Petition and submits it to the Headquarters Staff Liaison for review. Once approved by their liaison, the Petition will be sent to the Associate Director of Collegiate Services for approval and submission to the Board of Directors for approval at their next meeting.

CHARTERING PETITION PAGES

Cover Page

- This page should include the name of the College/University as well as the logo of the College/University. Please also include the date the petition was submitted.

Table of Contents

- This should include a list of each section with corresponding page numbers. All the pages of the petition should have a page number for quick reference.

Submission Page *(optional)*

- This should include the following lines:
Submitted to: Chief Executive Officer [NAME HERE]
Sigma Tau Gamma Board of Directors

Drafted by: [NAMES OF CHARTER AUTHORS]

Formal Petition Statement

- Please begin the document with the following formal petition statement and a signature from each member to be recognized as a charter member at the time of installation:

We, the undersigned members of the (Greek Designation) Associate Chapter, students of the (Official College/University Name), located in (City of), (County of), (State of), having investigated the merits and objectives of the Sigma Tau Gamma Fraternity, and aspiring to become members thereof, respectfully petition the National Board of Directors for a charter to organize an undergraduate chapter of said Fraternity.

We each represent that we are of good moral character and are bona fide students of the institution stated in this application; and we severally are not members of another general national college social fraternity, and we severally are not members of any college society or organization, membership in which shall be inconsistent with the principles of Sigma Tau Gamma.

We each agree to conform to the Constitution and Bylaws of Sigma Tau Gamma Fraternity and also agree to pay our pro rata share of the amount it shall necessarily cost, including all specified fees, to install an undergraduate chapter of Sigma Tau Gamma, should a charter be granted as requested in this petition. We each concur that should any petitioner herein for any cause fail to fulfill his financial obligation, said deficiency shall be met by an assessment upon us as charter members of said undergraduate chapter which shall have been installed as a result of this petition.

Respectfully Submitted,

(Each man from the Associate Chapter signs hereunder)

Presidential Address (optional)

- Many Chapter Presidents choose to write a one-page personal letter to the Board about the chapter's experiences, growth, and endeavors for the future.

History of University

- This should be a *maximum* of one (1) page. This can detail specific information about the university including its history, location, values, notable alumni, athletics, academics, student services offices, student demographics, etc.

University Fraternity & Sorority Life

- This section should be a *maximum* of one to two (1-2) pages of information on the Fraternity and Sorority Life community on your campus.

This section should also include a brief history of Sigma Tau Gamma on campus. You can take this opportunity to talk about the first men who joined, why they joined, and the historic moments of those first few months. This document will be kept for posterity sake, so future generations of Sigma Tau's will appreciate having this information.

Restarted Chapters (if possible), please include a copy of your chapter's history prior to the chapter being restarted by your group.

Chapter History (optional)

- This section should include a semester-by-semester overview or timeline of landmark/significant events up until the chapter's chartering and brief descriptions of each event.

Meet the Chapter

- This section should include a photo of each founding member of the chapter, along with information on the individual (why they joined, what they've learned from the experience, what the fraternity means to them, etc.) You should also include their officer position (if applicable), major and/or minor, activities and honors, other student organizations, home town, graduation year, etc.

Advisors

- This section should include information on your Lead Advisor, Faculty Advisor, Fraternity and Sorority Life Advisor, Parent Advisor, etc. This should include the first and last name, title, email, phone number, and brief biography of each.

Communications

- This section should include explanations and pictures from social media accounts: Facebook, Twitter, Instagram, etc. following the Branding Guide Usage.
- This section should also include a chapter newsletter example.

Finance

- This section should include photos of the chapter's budget for the upcoming semester and an explanation of the budget.
- This section should also include elaboration on the chapter's success in filing taxes, maintaining a \$0 outstanding balance at a national and local level (OR how the chapter has planned to pay off the outstanding balance owed by members), if the chapter has held members accountable for paying association and initiation fees before respective ceremonies, etc.

Operations

- This section should include the chapter's Constitution and By-Laws.
- This section should include the chapter's Emergency Procedure Protocols and demonstrate understanding of emergency procedures.
- This section should include an overview of the chapter's weekly Executive Cabinet and Chapter meetings, with one example of minutes taken at a meeting.

Leadership Programming

- This section should include an overview of attendees' time at Webb Academy, Grand Conclave/Endeavor, and Noble Man Institute. Please include details of the members' experiences, photos, etc.

Membership Enrichment

- This section should include information on and photos from each of the following:
 - Academic Advising/Services (or Similar) Office Presentation
 - Service/Engagement/Volunteering (or Similar) Office Presentation at Chapter
 - Diversity/Equity/Inclusion (or Similar) Office Presentation at Chapter
 - Wellness/Health Services (or Similar) Office Presentation at Chapter
 - Campus Police Presentation at Chapter
 - Brotherhood Building Events

Philanthropy and Service

- This section should include information on and photos from each of the following:
 - Local/Regional Philanthropy or Service Event
 - Special Olympics Event
 - IFC or Panhellenic Philanthropy or Service Event
 - MGC or NPHC Philanthropy or Service Event

Recruitment

- This section should discuss the chapter's Recruitment philosophy. It should show that the chapter has developed a comprehensive recruitment plan with recruitment goals for each semester. The section should also show proof of ChapterBuilder use.

Academics

- This section should include an overview of the chapter's current academic standing on campus. Include recent grade reports snapshots if possible.
- This section should also include an overview of the chapter's Academic Success plan, including incentives and punitive measures for chapter members.

Social

- This section should include information on social events and functions the chapter has hosted or participated in, including formals and semi-formals, White Rose Events, socials, intramural events, Homecoming, Greek Week, Parent's Weekend, etc. Please include pictures where possible.

Future Goals

- This section should include SMART Goals for at least three (3) areas where the chapter needs improvement. Think about areas like Academics, Philanthropy and Service, Brotherhood, Membership Enrichment, Finance and Operations, Recruitment, Communications, etc. What are some areas that the chapter could improve in, and how do you plan to accomplish these goals in the year(s) to come?

Letters of Recommendation

- This section should include three (3) letters of recommendation to charter. These letters should not be more than one page in length and should address why the authors would support your desire to petition as well as offer insight into how you live the Fraternity's Principles. Please do not include more than six (6) letters total.

One letter must be from the Fraternity & Sorority Life advisor on campus.

Additional letters can be obtained from any two of the following:

- Alumni Association President



8741 Founders Road
Indianapolis, IN 46268-1338
Phone: (317) 644-1920

- Notable Chapter Alumni
- IFC President
- Panhellenic, MGC, or NPHC President
- Student Body President
- Faculty Advisor
- Parent Advisor

Chapter Gallery

- Please include at least one group photo of the petitioners.
- This section is also your chance to include other photos of chapter brothers at events, socials, etc. Please include photos and a brief description of each photo.