



CHAPTER ASSESSMENT TOOL

Purpose

The Chapter Assessment Tool was created for individual chapters, their AVCs and mentor committees. This resource is used to identify your chapter's current operational level in the areas of recruitment, membership experience, chapter leadership, finances and risk management. Additionally, it creates an opportunity to set goals for each section to increase your operational efficiency, allowing both the undergraduate leaders and their mentors to work from the same "road map".

The Chapter Assessment Tool is intended to be used as a measure of a chapter's own performance and *not* a comparative measure between chapters.

Instructions

This resource is most effective when completing the following steps:

1. At the beginning of each semester, the executive committee meets with the AVC mentor committee to complete the assessment.
2. Each chapter officer meets with their respective mentor to set goals to increase efficiency in their area of operations.
3. The chapter president sends a copy of the completed assessment and corresponding goals to their regional director and district governor so they can help support the chapter in the achievement of their goals.
4. Throughout the semester, chapter officers and mentors discuss progress on each of their goals.
5. At the end of the semester, the assessment should be conducted again to measure chapter success and reevaluate goals for the coming semester.

Your Regional Director can assist your undergraduate executive committee with completing this assessment if needed; however, this resource is most successfully utilized when completed as a group by the undergraduate executive committee and the AVC mentor committee.

	Minimum Standards	Chartering Standards	Great Standards	Ideal Standards
Recruitment				
<i>Manpower</i>	25 men (<8 IFC chapters), or 40 men (8 or more IFC chapters).	Chapter has achieved a competitive manpower level as established with the staff or National Board. Chapter, AVC and HQ have established optimal chapter size.	Within 10% of optimal size.	At optimal size.
<i>Recruitment Standards</i>	Minimum GPA for membership of at least 3.0 (high school) or 2.6 (college) is enforced.	Chapter has established written recruitment standards.	Chapter uses recruitment standards to assess potential new members.	Chapter utilizes a membership application or interview in the recruitment process.
<i>Goals and Structure</i>	Chapter submits PMR by deadline. No unregistered new members.	Written recruitment goal(s) and plan to achieve.	Recruitment committee/teams exist. Chapter attempts year-round recruitment.	New members recruited every quarter (Jul - Sep, Oct - Dec, Jan - Mar, Apr - Jun) and long-term recruitment goals set to achieve optimal size.
<i>BMS</i>	N/A	Implement Balanced Man Scholarship.	75% on BMS Assessment.	90% on BMS Assessment.
Membership Experience				
<i>Development</i>	Written 4 -year continuous development program and no hazing in the development experience.	Operates the Balanced Man Program at a minimum level of proficiency without any elements of tiered membership.	Operates the Balanced Man Program at a moderate (TBD) level of proficiency.	Operates the Balanced Man Program at a maximum (TBD) level of proficiency.
<i>Leadership Events</i>	At least 5 chapter officers attend Carlson. Delegate and alternate attend Conclave.	Members apply to Ruck or Quest to Greece. At least 7 chapter officers attend Carlson.	At least 2 members attend each non-officer track at Carlson. Members attend Life After College if offered.	15% of all members attend Carlson. Additional members outside of delegate and alternate attend Conclave.
<i>Academics</i>	Chapter GPA above a 2.6 on a 4.0 scale. Minimum member semester GPA at or above 2.6.	Chapter GPA above the higher of ACA or 2.8.	Chapter GPA in top quartile of fraternities. Written academic program utilizing campus resources.	Members are recognized with scholarships/awards that promote academic success. Minimum member semester GPA is above 2.75 and enforced. Chapter GPA #1 of all fraternities and top quartile of student orgs.
<i>Ritual</i>	Conduct one formal meeting per month.	Conduct each Rite of Passage at least 3x per year.	Conduct a public ceremony at least 1x per semester.	Renaissance Brother initiated in the past year.
<i>Residential Learning</i>	N/A	Engaged faculty fellow who provides dedicated support to members (in the facility, if housed).	Written plan to implement the RLC program.	Accredited Residential Learning Community.
<i>Programming</i>	N/A	Chapter has an ongoing partnership with a service organization allowing members to contribute to the community.	The chapter collaborates and coordinates its programming with other campus organizations.	At least 50% of chapter social events are alcohol free.
<i>Retention</i>	N/A	Chapter tracks retention of its members against the university retention rate.	Chapter retention rate (based on PMR) is greater than the retention rate of the host institution.	90% new members retained through PMR.
Chapter Leadership				
<i>Standards</i>	Chapter has written bylaws that are reviewed and updated annually.	Chapter utilizes a membership agreement. Active standards board that meets monthly.	Accountability for GPA (suspend/expel under 2.60). Accountability for finances (suspend/expel at 30/60 days).	Accountability for involvement (membership lapsing). Standards board utilizes campus resources to support struggling brothers.
<i>Elections</i>	Officer GPA = 2.8 or .2 higher than chapter minimum.	Officer nominations are held one week before elections. Officers identify potential successors 3 months prior to elections.	Chapter utilizes an officer application process with volunteer input before elections.	Committees for each officer are appointed/elected within two weeks of officer election.
<i>Communication</i>	Share chapter and executive board meeting minutes each week with undergraduate members and volunteers.	Chapter maintains a positive social media presence through official channels on Facebook, Twitter, etc.	Develop and promote chapter events and activities to alumni, parents, and community members.	The parents of each new member receive a welcome packet when their son joins the chapter.
<i>Officer Transition</i>	N/A	Transition meeting held with incoming and outgoing officers.	Full day transition retreat with volunteers in attendance.	Transition retreat facilitated by an external third party within one month of elections.
<i>Goal Setting</i>	N/A	Every chapter officer has written goals.	Chapter officers have semester, year, and 5-year SMART goals with action steps.	Annual chapter goal setting retreat is held. Evidence of implementation of officer goals. Long-term strategic plan exists for the chapter.
Finances				
<i>Budgeting and A/R</i>	No GC balance or current payment plan. Submit copy of IRS Form 990 to HQ.	Semester budget exists and is shared with the chapter.	Finances are reviewed and audited annually by the AVC or an independent third party.	Chapter A/R more than 30 days past due is less than 5% of budget.
Member Safety				
<i>Education and Safety</i>	All members and officers sign and agree to adhere to SigEp's Risk Management Policies and Procedures.	90% of members attend an approved risk management program on: bystander behavior, alcohol, sexual assault, or hazing once per semester.	No risk management incidents or university sanctions in past 12 months and currently in good standing with the university.	Less than 10% of chapter members have had a personal risk management or university conduct sanction in the past 12 months.