

CHAPTER EXCELLENCE 2022

This document contains all seven sections of Chapter Excellence which chapters must complete on an annual basis. If there are any questions, please email gr-chex-chairs@wpi.edu (the Chapter Excellence Committee Chairs).

Chapter Excellence Contents

CHAPTER EXCELLENCE 2022	0
Executive Summary	1
Directions and Format	1
Evaluation	1
Documentation	2
Section 1: Executive Summary Report Form	5
Section 2: Chapter Management	6
Section 3: External Partnerships	13
Section 4: Facilities	17
Section 5: Financials	22
Section 6: Health & Safety	26
Section 7: Innovation	31
Section 8: Member Development	34
Sample Feedback Template	41

Executive Summary

Purpose of Chapter Excellence

Chapter Excellence is an annual report which allows fraternities and sororities to highlight areas of strength, opportunities for growth, shared successes and tell their chapter's individual story. Additionally, the report is an opportunity to create a baseline for goal setting, reflection, and continued growth in future years.

Directions and Format

The report has been broken up into seven different sections that align with components of excellent chapters at WPI. The sections were created by students, staff, and alumni/ae within the fraternity and sorority community, in an effort to move our community forward with new questions, challenges, and opportunities. The sections align with the strategic mission of the institution to allow for parallel growth and support.

Please read each section carefully which includes reflective questions, the answers to which are an opportunity to share the energy and resources put into your chapter and the greater community over the past year. Each section has one or more subsections. Each subsection has an evaluation rubric with learning outcomes, and the chapter is responsible for responding by providing the requested documentation, reflection, short answer, and qualitative responses as directed. Note that some items in the rubric are bolded, which indicate aspects that differentiate each of the points categories.

Submissions will be completed through Google Drive. Each chapter president will receive a link to a Google Drive folder, which will contain seven folders (one for each of the seven sections found in the report). The chapter presidents will be asked to confirm that they received access to the folder with crsharry@wpi.edu. Each section folder will contain all Chapter Excellence questions/content which chapters can directly edit to provide responses and documentation. Please keep all information for each section within the appropriate folder and do not change ownership of the folder from WPIChapterExcellence@gmail.com.

A successful report includes collaboration across the chapter, information sharing, and teamwork. **Please ensure all documentation and reports are submitted by December 5, 2022 at 11:59pm.**

Evaluation

For each subsection, reviewers will give chapters a score of 1, 2, 3, or 4 points depending on whether the chapter's responses indicate an unsatisfactory, developing, satisfactory, or exemplary performance for that subsection (as specified by that subsection's rubric). Additionally, reviewers will score chapters on the strength of documentation for questions that require it. Strong evidence and documentation will be given 1 point whereas any incomplete, insufficient, or inaccessible documentation will be given 0 points. The scores from reviewers will be averaged for each subsection, which will then be provided to chapters. The sum of average subsection scores will comprise that section's overall score. In addition to a numeric score, chapters will be provided with a feedback sheet from reviewers with comments about areas of strength and ways to improve in the future (as seen in [sample feedback template](#)).

For reference, the total possible points for each section is provided below. The total possible points for the entire Chapter Excellence Report is 191.

Section	Points for Subsection Content	Points for Documentation	Max Possible Points
Executive Summary	4	0	4
Chapter Management	20	8	28
External Partnerships	20	11	31

Facilities	20	8	28
Financials	16	6	22
Health and Safety	20	9	29
Innovation	8	3	11
Member Development	24	14	38

Documentation

The Chapter Excellence committee wants to emphasize guidelines for answer content. If a question is marked with **(original)**, it must be original content that current chapter members have contributed to. If a question is marked with **(original if new)** then the answer should be updated if different from previous years. If the answer is not different from previous years please explain why and include the answer from previous years. Please do not ask reviewers to reference previous Chapter Excellence reports as reviewers will not have access to those.

Additionally, the committee wants to emphasize the importance of providing required documentation and what type of documentation a successful chapter should submit. Questions that require documentation will be marked with an asterisk (*). Additionally, bolded requests for documentation may be contained within questions for extra clarity.

Documentation must be completely contained (e.g., uploaded) within your chapter's Chapter Excellence folder. Please do NOT link to documentation within your personal drives as access may be restricted, preventing reviewers from thoroughly evaluating your submission.

To use specific documentation to answer a question, the documentation must either be embedded directly or linked to the documentation within that section's folder. Please carefully follow the instructions outlined below about *how* to provide documentation:

- For large documents, please do not embed it directly in the questions/content document. Instead, please link to the uploaded version in the relevant section folder (e.g., a full PowerPoint presentation with multiple slides should be uploaded).
- When uploading documentation to a section folder, please ensure the following information is included in the name of the document:
 - The section name or number
 - The subsection name or number
 - The question number

For example, if you are providing a link for Chapter Management which answers Question 1 of Subsection 1, the file could be named any of the following:

“Chapter Management_Subsection1_Question 1”

“Chapter Management_Goals and Objectives_Question 1”

“Section1_Subsection1_Question1”

Please use the following examples as a guide for what qualifies as sufficient evidence for different types of documentation (not all examples provided are the only ways you can respond to questions). Creativity is encouraged, but please be sure it aligns with the rubric clearly for the ease of those reviewing your report.

Documentation Examples

Quantitative Responses

Type	Note	Example Question	Strong Evidence	Weak Evidence
Yes or No Questions	Yes or no questions appear throughout the report with some requiring documentation. Please be mindful when reviewing.	Is the chapter compliant with City Code as determined by Worcester City Inspectional Services?	Yes, attaching either: <ul style="list-style-type: none"> • A certificate or • Photo of a certificate 	No or Yes, with no certificate
Numerical Responses	When providing numbers, please ensure you provide documentation and information that supports the numbers when asked.	How many hours of philanthropy did each chapter member complete in the past year?	Our chapter completed 950 hours of service in the past calendar year (2020). Attached or listed below is the number of members who participated in the hours and the calculation of total hours per member (total hours/# of members).	Our chapter completed 950 hours of service. No documentation is provided.
Percentages	Please provide documentation and information pertaining to how the chapter came up with the percentage provided in the response, within the specified timeframe.	What percentage of the membership graduated with a balance owed to the chapter?	After graduation, our chapter had 1-3% of graduates with an outstanding balance. In 2020, 1 out of 30 had a balance.	After graduation our chapter had 1-3% of graduates with an outstanding balance including John Boynton. (Please do not provide names or dollar amounts).
Attendance	When asked about providing attendance with documentation, please ensure that the documentation helps confirm that the event did happen.	The chapter provides a program on fire safety.	Our chapter hosted a fire safety talk on 9/5 at our facility. Attached are the following: <ul style="list-style-type: none"> • Attendance sheet with signatures • Copy of the powerpoint presentation • Photo of the program 	Our chapter hosted a fire safety talk on 9/5 at our facility. Attached are the following: <ul style="list-style-type: none"> • An email saying that the event would happen • An attendance sheet with no signatures • No documents at all

Qualitative Responses

Type	Note	Example Question	Strong Evidence	Weak Evidence
Open Responses	As you respond to open ended questions, make sure you answer the question thoroughly to allow those reading the report to understand all the thought and hard work that went into addressing the question at hand. One method to	Describe a risk management situation your chapter experienced. How did your chapter respond? What did your chapter learn from the	In our chapter facility, a horse entered the property and started eating carrots. Our chapter was able to safely have the horse removed, however	In our chapter facility, a horse entered the property and started eating carrots. We got the horse out of the facility.

[Return to first page](#)

	<p>consider using is the STAR Method.</p> <p>Share the following: S (Situation) T (Task/Response) A (Action/Steps) R (Result)</p> <p>Using a method like this ensures the chapter answers the question thoroughly.</p> <p>Note: some open ended responses may be linked with quantitative responses and vice versa.</p>	experience?	<p>moving forward we realized that leaving the facility door open was a large liability. We used our resources by calling the necessary support to address the situation at hand, and later debriefed as a chapter realizing that we needed to enact a house rule that the door would be left closed and locked at all times to reduce the chance for this event to occur in the future.</p>	
Infographics	<p>Infographics are a great way to incorporate creativity along with express highlights in a visually appealing manner. The Academic Technology Center (ATC) is a resource on campus that can be used to help create infographics. Piktographic is just one of many websites that can be helpful in creating an infographic.</p>	<p>Does your chapter provide academic support for its members and new members? If yes, describe two ways in which <i>members and new members</i> are provided academic support and the efficacy of these methods (i.e., only describe methods in which both members and new members are supported).</p>	See Appendix A .	See Appendix B .

Thank you in advance for sharing your chapter's story. If you have any questions or concerns regarding the process, please email gr-chex-chairs@wpi.edu. **All submissions must be submitted no later than December 5, 2022 at 11:59pm.**

Section 1: Executive Summary Report Form

The Student Activities Offices requires the submission of [this form](#) in order to create the Greek Life End of Year Reports for the WPI President. The form submission will be graded according to the following guidelines.

Four points will be awarded to chapters who meet all of the criteria below:

- Complete the form
- Made greater than \$0.00 philanthropic contributions
- Completed greater than 0 hours of community service

Section 2: Chapter Management

There are many aspects of chapter management that directly contribute to the overall success and effectiveness of the organization. This section examines the chapter's performance in each relevant area, ranging from planning and organizing to leadership and execution. Setting goals is an important portion of moving any chapter forward. In this section, goals need to be specific, measurable, and timely, while objectives are the steps taken to achieve group goals.

Chapters that perform at a consistently high level will achieve successful desired outcomes in several areas. Chapter Management performance against desired outcomes is measured in the following key areas:

- Goals and Vision
- Leadership
- Committees
- Recognition
- Mentoring

Subsection 1: Goals and Vision

This subsection demonstrates chapters have the ability to set goals and critically analyze their progress and results throughout the year.

1. **(*, original)** Describe your chapter's progress against the **three** stated goals that you have been focusing on for the past calendar year. For each goal, carefully read the instructions and fill in the table below with relevant, supporting documentation.

Goal Statement <i>This statement should be SMART (please include how the goal is specific, measurable, attainable, relevant, and time-bound)</i>	% Completion <i>For example, if you are halfway towards achieving the goal, this would be 50%.</i>	Progress Description <i>State the responsible parties involved in accomplishing the goal, steps taken to achieve the goal, roadblocks encountered, the effect the goals had on the chapter, and any reasons as to why a goal may not have been fully completed.</i>

2. **(*, original)** Describe your chapter's planning meetings or goal setting sessions to promote/establish your organization's goals and shared vision. How are general members a part of this process, if at all? How does the chapter ensure that all general members support the goals and vision? How are these goals visited throughout the year by the leadership team and chapter through retrospectives or satisfaction surveys?

Goals and Vision Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter evaluates performance goals from the previous year with honest retrospection and quality to help drive continuous performance improvement.	The chapter has not completed previous annual performance goals . There is little to no collaboration with the chapter as a whole and no review of performance goals as part of a standard chapter management process.	Goals are unmet and not fully acknowledged or addressed. There is limited collaboration or poor collaboration with the chapter on goals and a lack of sufficiently serious self-evaluation and honesty.	Previously stated goals have been completed fully or almost fully .. The chapter leadership team understands chapter members must be involved in a shared vision, and thus meets minimally to discuss established goals, but this process could be further improved.	The chapter demonstrated successful completion of goals and positive impact throughout the previous year. The chapter leadership team actively and effectively ensured all members were part of the goal planning and completion through regular meetings and discussions to create a shared vision and organizational alignment.

Subsection 2: Leadership

This subsection shows how chapter leadership is elected and transitioned, as well as how expectations of the chapter leadership team are enforced, and how leadership communicates with each other and with chapter members in an efficient way. It demonstrates how effective a chapter's leadership can delegate to all chapter members. It also shows how a chapter handles judicial processes with members and how efficiently the leadership team operates.

1. **(original if new)** Describe your organization's election and transition timeline for each newly elected officer, including how officer documents are maintained and shared.
2. How does your chapter deal with elected officers who study abroad (IQP, MQP, HUA, etc) or go on co-op?
3. How are expectations of each leadership position communicated to the chapter (i.e., Roles & Responsibilities) during the Election process? How is the leadership team held accountable for the expectations set forth for each position? If a leader is not meeting expectations, how is this resolved?
4. **(original)** Describe a time when conflicts and/or disagreements (outside of judicial action) were handled and resolved when they occurred among the chapter leadership team?
5. **(original if new)** Describe how the chapter leadership prevents division between the officers and members at large, and ensures that every member feels included.
6. **(*, original)** Describe the way your chapter communicates with one another. What is one example of your best communication strategy and what is one that you need to work on? Documentation could include screenshots of Slack, newsletters, etc.)

7. **(original if new)** Does your chapter maintain an active judicial board to field grievances and render remedies? If so, how is it used in general and how many cases have they heard over the last year? Are the range of remedies considered meaningful enough to change behavior where necessary? If your chapter does not have a formal board, is there another judiciary process? If so, please explain. Note: It is not required to share individual private case details, only the process by which cases are heard.

Leadership Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
<p>The chapter leadership makes a strong effort to build a sense of team and common purpose among all members. An independent, objective, and unbiased Judicial Board is commissioned to handle any disciplinary charges and/or remedies. Whole chapter communication channels are well established and used for sufficient purpose and frequency. All members are treated as equal and vital members of the organization.</p>	<p>The chapter leadership team does not fully meet any of the qualities listed in the exemplary column. This may result in no accountability, divisive behavior, lack of conflict resolution, lack of delegation, and irregular communication.</p>	<p>The chapter leadership team fully meets at least 2 of the qualities listed in the exemplary column, or partially meets at least 3 qualities. This may result in a lack of accountability, no conflict resolution, limited delegation or use of ad hoc communication methods.</p>	<p>The chapter leadership team fully meets 4 of the qualities listed in the exemplary column, or partially meets all 5 qualities. This may result in traditional communication, delegation, a lack of conflict resolution processes or limited inclusivity.</p>	<p>The chapter leadership team meets all of the qualities listed below:</p> <ol style="list-style-type: none"> 1) The chapter has an efficient and timely election and transition timeline. 2) The leadership is held accountable to perform their duties in office and have a system for handling issues. 3) The leadership team considers and demonstrates regular communication with each other and strong conflict resolution as vital to the overall health of the chapter. 4) The leadership team values inclusivity and actively demonstrates this to prevent division between officers and members. 5) Communication channels are established for regular official messages from the leadership to the chapter at large (outside of chapter meetings). All members are well informed about chapter news, recent events, and futures, etc.

Subsection 3: Committees

This subsection demonstrates how the chapter utilizes all of its members in committees to help the chapter reach its SMART goals.

1. **(*, original if new)** Briefly describe your chapter's committee system at a high-level, including how members and chairs are selected, how tasks are delegated, and how committees report back to the larger organization. If the chapter does not have official committees, how do you split up the shared chapter work so that all responsibility does not fall to one position or member?
2. For each committee your chapter has, please fill in the table below. Please add or remove additional rows as necessary.

Committee Name	Committee Member Names	When it was formed <i>This could be a date or explain that this is a standing committee.</i>	Purpose / why it was formed <i>Describe why this committee is necessary.</i>	Outcome <i>This should explain the committee's accomplishments and the effect it had on the chapter</i>

3. **(original)** What percentage of the chapter membership currently serves on at least one committee? Describe how low individual participation and low committee membership is managed if at all. Include most recent seniors and incoming new members. Please explain how you calculated the percentage.
4. **(original)** Describe how chapter committees align with and support the chapter's SMART goals.

Committees Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter establishes a highly functional committee system in which all members participate.	The chapter does not consider a committee system vital to the success of the organization. This may result in a disjointed committee structure, lack	The chapter does maintain a committee system for the organization. However, it may not be adequately managed or may not include active	The chapter establishes a committee system with the majority of members participating actively. Standing and ad hoc committees have a purpose and align with	The chapter establishes a vibrant committee system and requires that all members actively serve on one or more committees. Standing and ad hoc committees

Standing and ad hoc committees are formed with meaningful charters that align with the chapter's SMART goals. Regular reviews ensure changes are managed effectively and with purpose. Adequate minutes and other documents are kept for historical and transition purposes.	of participation, lack of alignment with SMART goals, or insufficient responsibility or influence on the chapter's decisions, goals, or operations.	participation by a majority of chapter members. Committees may be more ceremonial than serious, with little influence on the chapter's decisions, goals, or effective operations.	the chapter's SMART goals, but may require stronger leadership or efficacy evaluation. The committee decisions or recommendations have a moderate influence on the chapter.	have a clear purpose and align with the chapter's SMART goals, supported by strong committee chair leadership and continual evaluation of efficacy. Key decision making and responsibilities are delegated to committees, which have extraordinary influence on chapter leadership and operations.
---	---	---	--	--

Subsection 4: Recognition

This subsection demonstrates how the chapter recognizes members and alumni/ae for their excellence and merit.

1. **(*, original if new)** Does your chapter have one or more active and effective recognition programs to inspire and reward collegiate excellence (e.g., awards, acknowledgement programs, etc.)? If so, please describe and provide **documentation of the recognition program(s) in action**, including how recognition or awards are announced/given.
2. **(*, original if new)** Does your chapter recognize alumni/ae? If so, briefly describe the process and provide evidence.
3. **(*, original if new)** List any awards/recognition your undergraduate chapter or undergraduate members have received from your inter/national organization, the alumni chapter, or other external entity.

Recognition Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter establishes a meaningful program to recognize and reward excellence among the undergraduate and alumni/ae members. For additional value, some recognition is shared publicly.	The chapter does not have a recognition program to reward excellence among its members.	The chapter does have a recognition program to reward excellence among its members. However, it is poorly managed or insufficiently exercised . Established awards are seldomly used and may be few and far in between. The chapter may not have recently received awards or recognition from I/HQ,	The chapter establishes a recognition program to reward excellence among its members, and optionally for alumni/ae. Standard or annual awards are delivered regularly and communicated within the chapter. The chapter may not have recently received awards or recognition from I/HQ,	The chapter establishes one or more extraordinary recognition programs to reward excellence and outstanding achievement among its members, as well as alumni/ae excellence. Standard or annual awards are established, well planned, executed promptly, and

All awards are communicated and celebrated broadly within the chapter and among alumni/ae members.		the alumni chapter, or other external entity.	the alumni chapter, or other external entity.	sufficiently publicized. The chapter has also received awards or recognition from I/HQ, the alumni chapter, or external entity.
--	--	---	---	---

Subsection 5: Mentoring

This subsection demonstrates how a chapter develops mentoring programs involving WPI faculty, as well as chapter alumni/ae.

1. **(*, original if new)** Does the chapter maintain a faculty advisor from WPI? If yes, please name your advisor and share their level of involvement. If not please explain why.
2. **(original if new)** How does the chapter maintain a level of advisory support from people who are not undergraduate members of the chapter. Describe how the chapter engages with their advisor(s) and puts their guidance into practice.
(E.g., A board of alumni who advise the chapter)
3. Please include a **letter from one of your most involved advisors** for documentation.
4. **(original if new)** Does the chapter have an established mentoring program in which volunteer alumni/ae serve as mentors to chapter officers and/or individual members? If so, describe how the program works and how it is evaluated for effectiveness.

Mentoring Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter has engaged and instrumental faculty and alumni/ae advisors, as well as a highly effective mentoring program with alumni/ae volunteers.	The chapter does not have an advisory relationship with a WPI faculty member and/or alumni/ae of the organization. In addition, the chapter may not consider a mentoring program as valuable guidance for officers or members.	The chapter has named a faculty advisor and/or alumni/ae advisors for the organization. However, engagement is infrequent and unserious. Similarly, the chapter may maintain a mentoring program but without the serious oversight and management it requires to be successful.	The chapter has named a faculty advisor and/or alumni/ae advisors for the organization. Engagement is occasional as needed and their guidance is taken under advisement. The chapter has also established a functional mentoring program for officers and/or individual members. The program is moderately successful and makes regular adjustments as needed.	The chapter has named a faculty advisor and alumni/ae advisors who are highly engaged and frequently included in key chapter decisions and high-level changes. Their guidance is reflected in the chapter leadership, programming, and operations. The chapter has also established a highly functional mentoring program for officers and/or individual members. The program is extremely successful for both alumni and undergraduates and is

				regularly and proactively evaluated with necessary changes made quickly for an optimal experience for everyone involved.
--	--	--	--	--

Section 3: External Partnerships

Each greek chapter has a variety of important partners upon which they depend. Building strong, effective, and positive relationships with such partners is extremely important to chapter success. Just like a single member can have an impact on the whole chapter, so too can a single chapter have an impact on the entire greek community. Thus, as a community, it's vital that all of our chapters develop a great plan for cultivating strong and lasting relationships with our many external partners (including WPI, other student organizations, general student body, parents, alumni/ae, greater Worcester community, neighbors, city officials), and collaborate where possible on best practices.

This section seeks to measure the degree to which chapters make efforts to build partnerships with the following groups:

- Parents/Family
- Alumni/ae
- WPI Community
- Local Community Engagement
- Inter/national Headquarters

Subsection 1: Parents/Family

This subsection focuses on how chapters make an effort to interface and communicate with parents and families of current members.

1. (*, **original if new**) Has the chapter hosted a parent/family day event (either virtual or in-person)? Please describe and provide **evidence**, including **how many parents or family members attended**?
2. (*, **original if new**) Does the chapter have multiple means of contacting members' parents to inform them about the organization? Documentation could include a **letter to the parent(s) of new members, a newsletter, or a parent's club** as some examples of outreach.

Parents/Family Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter communicates regularly and effectively with parents	The chapter does not have practices in place for parent outreach.	The chapter has some practices in place for communicating with parents, but they are inconsistent and lack an emphasis on parent engagement.	The chapter may have one or two interactions (communication, virtual or in-person) with parents, but there are no practices in place for engaging parents outside of these communications.	The chapter implements several different practices to involve, inform, and engage parents, including, but not limited to a parents' day event and regular communication sent out to families.

Subsection 2: Alumni/ae

This subsection shows how frequently chapters engage with their alumni/ae network and how that engagement has benefitted the chapter.

1. **(*, original)** Does the chapter plan and organize at least **three** events specifically for alumni/ae, either virtually or in-person? Describe the events, provide **evidence of promotion**, and indicate the **level of participation achieved**. For one of these events, describe how the chapter is able to engage with a diverse group of alumni/ae (e.g., variety of ages, classes, interests, etc.).
2. **(*, original)** How does your chapter help the senior class transition to alumni/ae life? (This could be an event your alumni/ae host or an explanation from the chapter regarding how to participate post-graduation).
3. **(original if new)** How does the chapter (and/or your alumni/ae chapter/group) maintain accurate contact information for alumni/ae?
4. **(*, original if new)** Does the chapter establish an annual (or regular) alumni/ae donation program? Describe all ways alumni/ae are encouraged and inspired to donate money, services, materials, and/or time to the chapter or related entities and how donations are recognized. Documentation may include **communication to alumni/ae** or a description of the donation program including what the funds are benefiting.

Alumni/ae Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter effectively utilizes and engages with alumni	The chapter very rarely has practices that leverage alumni/ae, through event participation, and fundraising efforts. Alumni/ae are infrequently included in programming, invited to events, or engaged in career networking opportunities. Additionally, there is an alumni/ae address list that is haphazardly managed or not kept current.	The chapter has minimal practices in place that leverage alumni/ae, through occasional event participation, and through irregular fundraising efforts. The chapter may have methods to communicate with alumni/ae, but they may not be updated or effective.	The chapter has practices in place that somewhat leverage alumni/ae, through somewhat frequent event participation, and through fundraising efforts that support many of the chapter's needs. The chapter has methods to communicate with the majority of alumni/ae, but they could be updated or improved further.	The chapter has regular practices in place that effectively leverage alumni/ae, through frequent event participation, and through fundraising efforts that more than sufficiently support the chapter's needs. The chapter has effective and updated methods to communicate with the majority of alumni/ae.

Subsection 3: WPI Community

This subsection shows how a chapter utilizes events and programming to create strong relationships with people in the WPI community and how the chapter's work aligns with WPI's mission statement, goals, or strategic initiatives.

1. **(*, original)** Does the chapter host at least 3 creative, substantive virtual or in person public relations events or activities per year? These events can serve multiple purposes (e.g., the chapter hosts a leadership development event open to non-members), but **evidence must be shown** (i.e., possible documents include photographs, plans, email announcements, and fliers).
2. **(*, original if new)** Does your chapter host an annual outreach event or activity in person or virtually targeted at faculty and staff? What was the date? How many faculty and staff attended?

3. **(*, original)** Did you partner with a WPI non-fraternal organization (note: this is a non Panhellenic/IFC organization that is a chapter or club on WPI's campus) to host an event or activity either on campus or virtually? If yes, please describe.
4. Describe your relationship with the Student Activities Office. How often and in what situations do you connect with them? Please describe this. How do you set up meetings in advance and provide agendas? Note: For Fraternal Organizations your advisor is Mackenzie Lipman and Sororities your advisor is Chirstine Ziev.

WPI Community Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter is actively engaged in the WPI community through programs, resources, and relationship building.	The chapter does not organize programming for the WPI community. The chapter leadership does not meet with the SAO staff.	The chapter rarely organizes programming for the WPI community. The programming is aimed at only a small portion of students, other organizations, or faculty/staff. The chapter leadership only occasionally meets with the SAO staff or only does so at SAO request.	The chapter offers some programming for and with the WPI community. These programs occur at least three times per year and work to engage students, other organizations on campus, and faculty/staff. The chapter leadership meets with the SAO staff at least once a term but may not be proactive about it or are unclear on topics.	The chapter organizes thoughtful programming for and with the WPI community. These programs occur at least five times per year and work to engage students, other organizations on campus, and faculty/staff. The chapter leadership proactively takes initiative to set up meetings with the SAO staff at least once a term with concrete topics to discuss.

Subsection 4: Local Community Engagement

This subsection shows the ways in which chapters positively affect the Worcester area community, including public relations efforts and establishment of meaningful relationships.

1. **(*, original)** Does the chapter routinely use social media, media, or print outlets as a means of advertising positive aspects of Greek Life to people outside of the organization? What forms of media does your chapter use? Please provide **links, usernames, or handles for each social media source** and provide **screenshots/pictures of the media posts your chapter is most proud of**.
2. **(*, original if new)** Does the chapter have a regular community service partner agency/organization in the Worcester area (that is NOT your national philanthropy or foundation) where members consistently do service on a regular basis? What are the name(s) of the organization(s)?
3. **(*, original)** Above and beyond direct life safety support, there are important benefits to having great relationships with key emergency service providers. Briefly describe any efforts by the chapter to build positive and constructive relationships with each of the following providers, and any other providers not listed.
 - Worcester police

- WPI police
- Fire department
- Medical responders
- WPI EMS

Local Community Engagement Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter maintains and showcases a positive relationship with the surrounding Worcester community and works to be a contributing member.	The chapter rarely uses social media , media, and print outlets nor has any established relationships with a community service partner or emergency service providers.	The chapter minimally uses social media , media and print outlets to positively engage with the local community, and/or has minimal or no relationships with either a community service partner and emergency service providers.	The chapter somewhat regularly uses social media , media and print outlets to positively engage with the local community, as well as at least one relationship with either a community service partner and emergency service providers.	The chapter actively and routinely uses social media , media and print outlets to positively engage with the local community, as well as strong and established relationships with a community service partner and emergency service providers.

Subsection 5: Inter/national Headquarters

This subsection aims to show the strength of a chapter's relationship with its Inter/national headquarters, including any initiatives or programs, as well as communication.

1. How often is your chapter leadership in communication with inter/national Headquarters staff or volunteers?
2. **(original)** Describe a time in the past calendar year when your chapter proactively participated in an inter/national Headquarters program or initiative and the effect it had on your chapter (this could be a consultant visit or optional program/initiative). This does not include large convention events.

Inter/national Headquarters Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter effectively communicates and works with their respective Inter/national Headquarters	The chapter very rarely communicates with their respective Inter/national Headquarters and minimally utilizes or does not utilize the services offered such as programs, initiatives, and consultant visits.	The chapter irregularly communicates with their respective Inter/national Headquarters and may not utilize any of the services offered such as programs, initiatives, and consultant visits.	The chapter strives to communicate with their respective Inter/national Headquarters and utilizes one of the services offered such as programs, initiatives, and consultant visits.	The chapter actively communicates with their respective inter/national Headquarters and proactively utilizes more than one available service offered such as programs, initiatives, and consultant visits.

Section 4: Facilities

Note: Unhoused chapters are not required to fill out this section.

The facilities section is focused on highlighting the strategic plans, actions, and resources the chapter implements for property management and care. This section also seeks to display that the chapter tries to minimize risk through different programs, resources, and goals. The following subsections are included:

- Facility Management
- Facility Safety
- Facility Maintenance
- Chapter Communication and Expectations
- Facility Community Building

Subsection 1: Facility Management

This subsection focuses on learning how facilities are managed and how chapters communicate needs to an alumni/ae board or housing corporation and provide updates.

1. (*) Please describe the following:
 - a. Whether your chapter is supported by an alumni/ae board or housing corporation (local or national) in managing the facility
 - b. What type of roles exist for property management and whether they are held by an undergraduate, graduate, or inter/national staff
 - c. How does the chapter communicate with the above parties regarding the chapter facility and how often?
2. (original if new) Who is involved in developing a strategic plan for the chapter facility? If it is multiple people what are the different roles and responsibilities of the group members?

Facility Management Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter has clear channels of communication for facility repairs, requests, and connection to the alumni/ae or housing corporation.	The chapter has no way of requesting repairs or communicating with the alumni/ae or housing corporation. Chapter members are not aware of any strategic planning for the facility	The chapter, at a minimum, has a member to manage the facility and is infrequently in communication with can request repairs but there is no other regular communication with the alumni/ae or housing corporation. There is little to none strategic planning for the facility.	The chapter has a member to manage the facility and is supported by additional parties (alumni, housing corp, etc.) with which there is sufficient communication . There exists a strategic facility plan that chapter members are aware of..	The chapter has a member to manage the facility and is supported by additional parties (alumni, housing corp, etc.) with which there is frequent communication . There exists a strategic facility plan that chapter members are actively aware of.

Subsection 2: Facility Safety

The following subsection focuses on the plans, resources, and programs chapters provide and utilize that promote facility safety and strategic planning.

1. (*) Is the chapter compliant with City Code as determined by Worcester City Inspectional Services? Attach a certificate for documentation (this must be a **2022 certificate from the City of Worcester please see example below of paperwork header**).

**The Commonwealth of Massachusetts
City of Worcester
2020
New and Renewal Certificate of Inspection**

2. Is your chapter a smoke-free facility?
3. Is there access control for the house (i.e., do all doors lock from the exterior entrances)? Who has access to the house and how is access given? How is access revoked to members who graduate?
4. (*) Does your chapter have functioning exterior cameras in place to monitor safety? Show photo documentation. If the chapter does not have exterior cameras what outdoor safety mechanisms does the chapter have in place?
5. (*, **original**) How does your chapter address the issue of fire safety? In your response, please include the number of fire extinguishers per square foot of your house, number of fire drills, fire exit routes, fire safety communication to the chapter, and processes to reduce the risk of fire.
6. (**original if new**) Does your chapter regularly audit your chapter facility for health or safety issues? If so, please explain. What processes or systems are in place to reduce the risk of injury. Please share information and upload documentation such as manuals, policies, expectations, etc.
7. (*) Please upload a copy of your chapter's general liability insurance certificate. Note this is not the same document as the Worcester City Inspection Certificate listed in Question 1.

Facility Safety Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter provides regular resources and programs to promote facility safety as well as regular inspections, updated equipment and strategic plans for improvements.	The chapter has little to no systems and programs in place for facility safety and could improve in multiple areas significantly. The chapter may not have proper documentation demonstrating their facility is up to code and insured.	The chapter has minimal programming, systems, and processes in place related to facility safety. Improvements could be made in multiple areas but the chapter has plans to do so. The chapter may not have proper documentation demonstrating their facility is up to code and insured.	The chapter has facility safety guidelines in place that are satisfactory and continues to plan for improvements. The chapter must have demonstrated their facility is up to code and insured , which is supported by the proper required documentation for the past year.	The chapter has exceptional facility safety across all areas that goes above basic levels. The chapter must have demonstrated their facility is up to code and insured , which is supported by the proper required documentation for the past year.

Subsection 3: Facility Maintenance

This subsection focuses on exploring how chapters maintain their facility and the policies to ensure upkeep.

1. **(original if new)** What is the current system for making requests for repairs and who is involved? Is there an established budget for regular maintenance? If so, what does it go towards? How could the process for repairs or maintenance be improved?
2. **(original if new)** Does the chapter maintain the exterior of the facility at all times of the year including summer including lawn maintenance, fences, parking lots, and checking the mail?
3. **(*, original if new)** Does your chapter have written procedures in place to ensure the chapter facility is kept clean? These guidelines and regulations should include methods for enforcement, maintenance, and upkeep, and how responsibilities are shared equally between chapter members. Please provide documentation.
4. **(original if new)** How does your chapter manage members who do not fulfill facility/maintenance responsibilities?

Facility Maintenance Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter strives to make the facility an open location for all members and guests.	The chapter may not have a maintenance and repair request system or may struggle to maintain a clean chapter facility, including difficulty with budget allocation.	The chapter has a process for maintenance and repair requests but it may not be effective or fully budgeted. The chapter may have cleanliness guidelines but they are not fully followed.	The chapter has an established process to submit maintenance and repair requests with potentially minimal support from a budget. The chapter also has clear expectations for cleanliness and a somewhat effective process to ensure it is implemented.	The chapter has a clear and transparent process for submitting maintenance and repair requests to the alumni/ae or housing corporation, supported by the budget as necessary. The chapter also has effective policies to ensure the facility is kept clean and a process to ensure it is implemented.

Subsection 4: Chapter Communication and Expectations

This subsection focuses on exploring how chapters communicate resources, procedures, and expectations in a clear and meaningful way among its membership.

1. **(original if new)** Does the chapter require members to sign a formal agreement to reside in the facility (such as a lease)? If so, how far in advance is the agreement signed?
2. **(original if new)** Do you have a member agreement for in-house culture, expectations, and responsibility for members?
3. Does the chapter require members to provide a deposit to live in the facility? If yes, how much and how early is the deposit requested? And what percentage is paid on time?

4. **(*, original if new)** Does your chapter have documented move-in and move-out procedures? If yes, share what these procedures are and include how your chapter enforces these policies. (Please upload documentation as well).
5. **(original if new)** What policies or processes are in place to hold members accountable for damage to the property?

Chapter Communication and Expectations Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
This chapter has clear resources, procedures and communication to members regarding living and visiting the chapter facility.	The chapter has irregular communication and few or no resources provided to members on two or fewer of the qualities in the exemplary column.	The chapter has some communication and resources provided to members on three or more of the qualities in the exemplary column.	The chapter has sufficient communication and resources provided to members on four or more of the qualities in the exemplary column.	The chapter has regular communication and provides resources frequently to members on policies, procedures and expectations that address all of the following facility aspects: 1) Living in the facility (e.g., lease) 2) Culture / member responsibility and expectations agreement 3) Facility deposit collection 4) Move-in / move-out procedures 5) Property damage

Subsection 5: Facility Community Building

This subsection focuses on how chapters utilize their physical space to provide an open and welcoming environment for members and guests.

1. **(original if new)** Is there a space in the facility that can be used for studying or meetings? If yes, describe the space.
2. **(original)** How often do housing corporation representatives (or the equivalent) engage with the house? Please describe the context of their engagement.
3. **(original)** What is the occupancy rate for the facility (residents/capacity)? If there is not full occupancy, name one barrier that exists and the goals or plans to address this? If the occupancy is not full and that is by the choice of the chapter, please explain the reasoning. If there is full occupancy, name one method that has been successful in reaching this state.
4. **(*, original if new)** How does the chapter engage with out-of-house members of the chapter within the chapter facility on a regular basis? For example, an event the chapter hosted to encourage out-of-house chapter members to come to the house.

5. **(original if new)** What are the ways in which the chapter actively works to develop and maintain relationships with immediate neighbors? Describe any outreach activities held specifically for neighbors and whether there is a system in place for communication with neighbors (e.g., annual sharing of chapter contact information, attending neighborhood association meetings, or other efforts).

Facility Community Building Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter strives to make the facility an open location for all members and guests and has a positive relationship with their neighbors.	The chapter is not at full occupancy and does not have a plan to address the issue. The chapter does not meet 2 of the 4 qualities listed in the Exemplary column. The chapter does not have regular events where out-of-house members attend, outside of chapter meetings. No events are hosted for alumni/ae. The chapter may not communicate with neighbors or housing corp reps at all. The chapter does not create a community within the chapter facility.	The chapter may not be at full occupancy. The chapter additionally attempts to build community within the facility by meeting 2 of the 4 qualities listed in the Exemplary column.	The chapter's occupancy rate is at least 80%. The chapter additionally builds community within the facility by meeting 3 of the 4 qualities listed in the Exemplary column.	The chapter is at full occupancy. The chapter accomplishes all of the following to successfully build community within the chapter facility: 1) Maintains a study or meeting space for chapter members 2) Welcomes and engages out-of-house members 3) Frequently welcomes housing corp reps at the facility 4) Maintains an established line of communication and a positive relationship with neighbors

Section 5: Financials

This section is focused on excellence in financial planning, education, organization, health, collection and commitment to ensure chapter success.

- Financial Health
- Transparency and Education
- Organization and Record Keeping
- Collection and Commitment

Subsection 1: Financial Health

This subsection focuses on the policies and procedures a chapter develops and enforces to ensure financial health and longevity.

1. **(original if new)** Describe the responsibilities of your alumni board or housing corporation, and inter/national headquarters in terms of your chapter budget, including dues, post-graduate dues collection, housing payments (rent, utilities, maintenance, etc.), and managing accounts. In other words, what financial aspects is the chapter NOT responsible for? Please list responsibilities thoroughly.
2. **(*)** Upload/link documentation (a **letter or email from your inter/national organization, dated within the last year**) that your chapter is in strong financial health with your inter/national organization.
3. Does the chapter have a savings account or reserve for emergencies? How much money (as a percentage of the overall budget) does the chapter contribute annually to a savings/reserve account?
4. How often does the chapter extract/use money from the reserve account and what is it used for?
5. **(*, original if new)** What parts of the budget does the local chapter have control over? For the parts of the budget the local chapter has control over how are the different categories broken down and how are these allocations determined? Were there areas of the budget where the chapter over budgeted or underbudgeted? How did the chapter adapt to the needs of the chapter or reallocate funds?
6. **(original if new)** What are the checks and balances systems used for approval and obtaining of funds? Who is involved (officers, advisors, etc.), who has access to funds, and what is the process?
7. Does the chapter conduct an annual review of the chapter's finances? If so, how? Are community resources used to complete the annual review (e.g., CPA)?

Financial Health Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter strives for strong financial health through strategically planning both expenditures and	The chapter has no methods for distributing expenditures or savings, does not have a strategic plan and/or funds for emergencies. The	The chapter does not have a responsible approach to financial management with a limited or unclear strategic plan or savings	The chapter is in good financial health with an established strategic financial plan. The chapter has strong savings practices with	The chapter has a well thought out strategic plan for their finances with strong savings practices that would cover emergency costs.

savings with a transparent checks and balances system.	chapter's financial management is not reviewed.	practices. The chapter does not track expenditures or the budget fully and/or does not have sufficient checks and balances. No review of the chapter's financial management is executed regularly.	sufficient processes for budgeting and expenditures. The chapter conducts an annual review of financial management occurs with some use of community financial resources.	A clear process is in place for budgeting and expenditures supported by a strong system of checks and balances. At least an annual review of financial management occurs, facilitated by knowledgeable financial resources.
--	---	---	--	---

Subsection 2: Transparency and Education

The following subsection focuses on the financial transparency and education of all chapter members.

1. **(*, original if new)** How does the chapter communicate to members the financial health of the organization, including how all organization funds are allocated and managed? How often is the information shared? What resources are provided to members to understand this financial health?
2. **(*, original if new)** How does the chapter educate members and new members about the annual financial commitment/obligations in being involved with the chapter? What resources are available to chapter members to understand financial obligations?
3. **(*, original if new)** How does the chapter provide support to their members who are undergoing financial hardship, but are committed to the chapter? Please share any payment plan information, scholarships, grants or other resources/ programs provided. These financial resources should be both within the organization and from external sources.
4. **(*, original if new)** How does the chapter provide personal financial education to its members? This may include programs or resources about budgeting or post-graduation topics, such as salary information, investing, etc.

Transparency and Education Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter strives for all members to be knowledgeable of financial happenings within the organization on a regular basis.	The chapter does not give information on where or how money is spent. Members have no understanding or education surrounding financial obligations nor are resources or information provided to members.	The chapter distributes some information on where and how chapter funds are spent. Members are provided minimal or vague education surrounding financial obligations to the chapter and may have limited access to minimal financial resources.	The chapter educates members on where and how chapter funds are spent. Members are also informed at least once a year of their financial obligations to the chapter and are provided some financial resources (e.g., perhaps only explanatory resources of financial commitment or only scholarship resources).	The chapter regularly educates members on where and how chapter funds are spent, as well as informing members at least twice a year of their financial obligations to the chapter (both explanatory of the commitment as well as useful in providing an abundance of support to ease financial obligations) available at all times .

Subsection 3: Organization and Record Keeping

This subsection focuses on how chapters establish an organized record keeping system to enable long-term financial health.

1. Does the chapter keep financial records for at least seven years?
2. How does your chapter document and organize their expenditures/income (financial ledger)? How does the chapter ensure that all expenditures are accounted for in this documentation process?

Organization and Record Keeping Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter strives to educate its members on their financial obligations and commitments to the chapter	The chapter does not have financial records or less than half for the previous 7 years, and there are no records of reimbursements or sense of organization for financial records. Additionally, the chapter does not have an adequate documentation system of current expenditures.	The chapter has at most half of the financial records for the past 7 years and there are some records of reimbursements. Additionally, the chapter has a somewhat adequate documentation system of current expenditures and process for determining dues.	The chapter has complete records of the past 7 years and there are records of reimbursements. Additionally, the chapter has a complete documentation system for current expenditures and process for determining dues.	The chapter has extensive records of the past 7 years and there are complete records of reimbursements (including all receipts). Additionally, the chapter has an extensive documentation system for current expenditures and process for determining dues.

Subsection 4: Collection and Commitment

This subsection shows how chapters inform chapter members of their financial commitments and how any money owed is collected, including processes for late payments.

1. What percent of the members pay their financial obligations on time (both in-house and out-of-house members)? Do you have a process for how late payments are handled? If yes, how are they handled and how are members held accountable?
2. **(original)** What percentage of the class of 2022 graduated with a balance owed to the chapter?
3. **(original if new)** What happens to above members who have an outstanding bill after graduation? What role do undergraduates have in terms of collection and commitment after graduation?

Collection and Commitment Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter strives to receive payments on time and support members when	The chapter offers no penalties to members who do not pay on time and/or support to members or are	The chapter has a limited or no process to handle late payments and receives payments on time by at least 40% of	The chapter has a process to handle late payments and receives payments on time by at least 80% of members, with no	The chapter has a successful process to handle late payments and receives payments on time by at least 95% of

they are under financial hardship	undergoing financial hardship.	members, with no more than 20% of graduates having an outstanding balance.	more than 10% of graduates having an outstanding balance.	members, with no more than 5% of graduates having an outstanding balance.
--	--------------------------------	---	--	--

Section 6: Health & Safety

This section focuses on excellence in general physical and mental health and safety in a number of important areas, including facilities management, emergency preparedness, programming, member engagement in promoting a healthy and safe environment, social event management, and new member education.

This section seeks to display the chapter's performance in the management of health and safety of members and guests in a variety of circumstances, along with risk reduction efforts, which are captured by the following subsections:

- Culture of Health and Safety
- Social Event Management
- Health and Safety Member Engagement
- New Member Education
- Emergency Management

Subsection 1: Culture of Health and Safety

The following subsection shows how chapters embody a culture which promotes health and safety across all aspects of the chapter, especially in regards to risk management.

1. Describe educational initiatives and procedures to address concerns with members or guests.
2. **(original if new)** Do you encourage and/or reward members for mitigating (or report if they are not able to eliminate the risk) any safety related issues they observe? If so, please describe how.
3. **(original if new)** Describe the procedural documentation for how you report and/or address behavior that is concerning or disruptive to members themselves or others (i.e., mental health concerns, dangerous drinking or drug use, etc) and an example of a time when it was implemented. If one does not exist, why?

Culture of Health and Safety Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter embraces health and safety practices that are not just a function at parties, and instead is part of the chapter culture.	The chapter does not have a culture that prioritizes health and safety in chapter facilities and operations.	The chapter has some practices that support the health and safety of members, new members, and guests and enacts some practices to promote health and safety.	The chapter has many practices that support the health and safety of members, new members, and guests and enacts many practices to promote health and safety.	The chapter demonstrates a culture where the health and safety of members, new members, and guests is regularly considered and an environment is maintained that prioritizes practices to promote health and safety

Subsection 2: Social Event Management

This subsection focuses on the policies and procedures to manage social events, including how risk management situations are handled.

1. **(*, original)** The risk manager should conduct educational sessions on an annual basis for members on responsible social hosting/attending. Show **documentation** that includes what percent attended (an attendance sheet for example) and **evidence of the content and efficacy of the program** based off of the program's learning outcomes. Describe the specific program, learning outcomes, and assessment for each program.
2. **(original)** Has the chapter had any risk management policy violations of university or inter/national policies that were adjudicated by WPI this year? If yes, please explain what was learned from these violations. Describe the situation. The chapter need not provide specific names of individuals involved.
3. **(original)** Describe all major health and safety or risk management challenges your chapter has encountered this year. What steps did you take to resolve or mitigate the issue? If you have not encountered any, please explain why you think this might be?

Social Event Management Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
All social events are conducted in alignment with inter/national, chapter, and university policy, and supported by the risk manager taking a proactive role to support and educate members in the chapter.	Based upon the documentation provided, the chapter does not appear to take steps to address concerns with member or guest safety, follow university and inter/national policies, and/or address and mitigate safety concerns when they do arise.	Based upon the documentation provided, the chapter appears to do most of the following (at least 2) of the Exemplary qualities.	Based upon the documentation provided, the chapter appears to do most of the following (at least 3) of the Exemplary qualities.	Based upon the documentation provided, the chapter appears to do all of the following : - Take steps to address concerns with member or guest safety - Follow university and inter/national policies - Address and mitigate safety concerns when they do arise. - Risk manager hosted a few (2 or more) programs on responsible social hosting/attending and provided documentation and complete answers.

Subsection 3: Health and Safety Member Engagement

This subsection shows how chapters encourage and engage members across a broad array of health and safety topics, as well as organizational involvement outside of the chapter.

1. **(*)** The chapter annually does educational programming on health and safety topics with 80% of members in attendance. Please note, not all programs need to be completed annually. **Show documentation** that includes what percent attended (an attendance sheet for example) and evidence of the content of the program. Please also include the list of programming from the prior year.

- Mental health
- Safe sex
- Sexual assault and harassment elimination education
- Drugs and alcohol
- Conflict resolution

2. (*) What percent of your members participate in one of the organizations listed below? How do the members bring learning from these organizations to the chapter? If it is not listed please discuss what it is in your response.

- Ethos: Fraternity men preventing sexual violence
- SIGMA: Students Impacting Growth in Membership Activities
- SSN: Student Support Network run through the SDCC
- SPARC: Students Preventing Assault and Rape in our Community
- Active Minds: Supporting mental health awareness
- The Body Project: Eating disorder awareness
- SMART: Students Mentoring Active Responsibility Together
- MOSAIC: Men of Color Support Network

Health and Safety Member Engagement Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
Health and safety related programming is conducted regularly	The chapter does not engage in programming or has fewer than 20% of members in attendance annually on the topics of mental health and sexual assault and harassment prevention annually, or biannually on the topics of drugs and alcohol, safe sex, and conflict resolution. Members are not involved in health-promoting clubs, organizations, or trainings.	The chapter annually engages in programming with more than 40% of members in attendance on the topics of mental health and sexual assault and harassment prevention. Biannually the chapter does programming with more than 40% of members in attendance on the topics of drugs and alcohol, safe sex, and conflict resolution. Few members (20% or less) are actively involved in health-promoting clubs, organizations, and trainings, but may not share learnings with the chapter.	The chapter annually engages in programming with more than 60% of members in attendance on the topics of mental health and sexual assault and harassment prevention. Biannually the chapter does programming with more than 60% of members in attendance on the topics of drugs and alcohol, safe sex, and conflict resolution. Some members (40% or less) are actively involved in health-promoting clubs, organizations, and trainings, and occasionally share their learnings with the chapter.	The chapter accomplishes all of the following: - Annually engages in programming with more than 80% of members in attendance on the topics of mental health and sexual assault and harassment prevention. - Biannually (at least once every two years) does programming with more than 80% of members in attendance on the topics of drugs and alcohol, safe sex, and conflict resolution. Many members (41% or more) are actively involved in health-promoting clubs, organizations, and trainings, and regularly share their learnings with the chapter.

Subsection 4: New Member Education

This subsection focuses on the health and safety procedures and awareness through the new member program.

1. **(*, original if new)** Does your chapter have a written new member program with clear learning outcomes and objectives for all new members who joined? Please provide documentation which details all aspects of the new member program.
2. **(original)** The chapter should perform an annual audit of the new member program. Describe the process. What areas of new member education were addressed from last year? What did you identify as areas for improvement with this year's new member experience? How has your new member program been reviewed by inter/national headquarters and advisors? What changes have been implemented (if applicable) from feedback or how will you improve it?
3. **(*, original)** What is the length of the chapter's new member program? How does that compare to what your inter/national organization recommends? (Documentation / evidence should show any difference between your chapter's program length vs. inter/national organization recommendation)
4. **(*)** What percent of new members participate in bystander intervention training presented by a WPI resource (not including New Student Orientation) or their IHQ?

New Member Education Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
New member education policies and practices create a healthy and positive learning environment	The chapter lacks a sufficiently planned new member program that is annually reviewed and updated. Additionally, only a select few chapter members attended a yearly program on anti-hazing and only a few to no new members attended a bystander intervention program.	The chapter utilizes a loosely planned new member program that may be occasionally reviewed and updated. Additionally, some chapter members attend a yearly program on anti-hazing and some new members attend a bystander intervention program.	The chapter utilizes a sufficiently planned new member program that is semi-annually reviewed and updated. Additionally, most chapter members attend a yearly program on anti-hazing and most new members attend a bystander intervention program.	The chapter develops and utilizes a holistic and effectively planned new member program that is annually reviewed and updated based on feedback and outcomes from previous years. Additionally, all new members attend a bystander intervention program.

Subsection 5: Emergency Management

This subsection shows emergency management preparation, including risk management training, plans for different emergencies, and availability of emergency resources for all chapter members.

1. **(*)** Risk Manager (or relevant officer) is trained annually by inter/national headquarters, external trainers, or campus programs. **Provide evidence** showing this training has occurred. This can include an outline of the training, schedule for an inter/national training, or other evidence.

2. (*) Chapter has an emergency management plan that addresses specific types of emergencies that may arise. **Provide a copy of the plan.**
3. Risk Manager (or relevant officer) has knowledge of member allergies and health concerns that members choose to disclose. Describe how you collect and store this information securely.
4. (*) The chapter posts campus resources (Health, SDCC, Title IX, Campus Police, etc) in a conspicuous location that is visible and known to members (physical or virtual). **Show a photograph or screenshot** of where this is posted.

Emergency Management Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter is prepared to implement mitigation plans and strategies in the event of an emergency	The chapter shows no evidence of a plan or set of strategies in the event of an emergency. There is no evidence that the risk manager has received training or shared campus resources with members And/or the risk manager or appropriate officer does not have access to health concerns or allergies of members.	The chapter has some of the following components : - The chapter shows evidence of a plan or set of strategies in the event of an emergency. - Campus resources are shared at least electronically with members. - The risk manager has received limited training annually . - The appropriate officers have access to relevant health information in the event of an emergency. This information is securely stored.	The chapter has most of the following components : - The chapter shows evidence of a plan or set of strategies in the event of an emergency. - Campus resources are shared in a visible location with members as well as electronically. - The risk manager has received training annually . - The appropriate officers have access to relevant health information in the event of an emergency. This information is securely stored.	The chapter shows strong evidence for all of the following components : - The chapter shows evidence of a plan or set of strategies in the event of an emergency. - Campus resources are shared in a visible location with members as well as electronically. - The risk manager has received in-depth training annually . - The appropriate officers have access to relevant health information in the event of an emergency. This information is securely stored.

Section 7: Innovation

Innovation can be defined as the creative process by which a novel or useful idea is transformed into a positive and sustainable solution. The innovation process can be used as a strategy to keep the membership ever vigilant for opportunities for continuous improvement. This section explores how organizations define, promote, and use the innovation process to effectively solicit, evaluate, and deliver great new ideas to improve the chapter on a regular basis.

In this context, chapters will describe how the innovation process is characterized in their organization. They will also highlight the strategic and innovative steps taken to determine root causes, gather new creative ideas to apply, evaluate possible solutions, and make a culture, program, or resource change. The complete lifecycle for innovation in the chapter is captured in the following subsections:

- Defining the Innovation Process
- Practicing Innovation

Subsection 1: Defining the Innovation Process

This subsection focuses on the chapter's unique definition of the innovation process in their organization and how this might compare to any inter/national standards or programs.

1. **(*, original if new)** Please describe your chapter's innovation process for continuous improvement. This may include the general process or structure for how your chapter solicits novel ideas (e.g., a targeted chapter meeting spot, a cross-sectional problem solving task force, an anonymous suggestion box), who is able to contribute ideas, how these ideas are reviewed, how solutions are proposed, and how solutions are implemented. How does your chapter define the innovation process for continuous improvement?
2. **(*, original if new)** How does your chapter ensure that the innovation process described above is prioritized within your organization and who ensures that the innovation process is followed? This may include a schedule to review innovative ideas, a chapter member responsible for this process, a program, etc.

Innovation: A Definition Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter is able to clearly define the innovation process and fully describe why it is important to the organization. The chapter is also able to cite inter/national programs focused on innovation in which the	The chapter has no definition of an innovation process and shows no sign of new creative and innovative solutions to make a positive impact and create changes within the organization or culture. The chapter is not able to effectively describe any programs that might exist at their inter/national organization in the area.	The chapter has a working definition of their organization's innovation process , but is not able to effectively express how it is beneficial to the organization or culture or may not involve all chapter members. The chapter may also not be able to effectively explain how they work with their inter/national	The chapter is able to define their organization's innovation process and articulate or express how it is prioritized to benefit their organization or culture, including how all members have the opportunity to participate. The chapter shows a growing focus on continuous improvement within the	The chapter can articulate a clear and compelling definition of their organization's innovation process and how it is prioritized within the organization, including how all members are key aspects of the process. The chapter shows a strong focus on innovation for continuous improvement and actively partners

organization participates.		organization on shared goals/programs focused on innovation.	chapter through innovation, and can explain any related programming with their inter/national partners.	with their inter/national organization on shared goals or programming in this space.
----------------------------	--	--	---	--

Subsection 2: Practicing Innovation

(*) This subsection focuses on how the innovation process is used in practice within the chapter. ***This subsection will have a different submission format.*** Each chapter is required to create a presentation and present it virtually to a committee of reviewers. Each chapter will have 15 minutes to present and should cover the following topics:

- One example that demonstrates a way your chapter has used the innovation process to solve a specific problem or improve a specific outcome. Please tell a story to describe how issues were identified, how ideas were solicited, evaluated and chosen for deployment in your chapter, how effective or successful the solution was compared to expectations, and how the solution will be sustainable.
 - This could be a new DEI program, mental health awareness initiatives, etc.
- One additional example in which a new member's feedback or creative new idea was implemented
- One additional example in which you have collaborated with your inter/national organization, alumni volunteers, house corporations, or alumni advisors to participate in or implement innovative changes within your chapter or larger organizations. Alternatively, describe how you are challenging them to be innovative?

Presentations for 2022 Chapter Excellence will be held January 12th, 2023 and January 13th, 2023. Please sign up [here](#). Presentations will be 15 minutes with 10 minutes for questions.

Innovative Practices Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter can identify and describe at least 2 innovative ideas that were successfully put into practice in the chapter that either solved a problem or improved an outcome. The chapter can identify at least one innovative idea suggested by a new member that was adopted by the organization. The chapter is able to create a presentation to highlight successful ideas	The chapter is unable to cite at least 1 innovative ideas that were successfully deployed that either solved a problem or improved an outcome. The chapter does not effectively identify innovative ideas submitted by new members and adopted by the organization. The chapter does not provide a presentation highlighting success through innovation or provides one that is ineffective or very low quality.	The chapter is able to minimally cite at least 2 innovative ideas that were put into practice in the chapter that either solved a problem or improved an outcome. The chapter can cite at least one example of an innovative idea suggested by a new member and adopted by the chapter. The chapter provides a minimal quality presentation highlighting success through innovation.	The chapter describes at least two innovative ideas that were put into practice in the chapter that either solved a problem or improved an outcome. The chapter describes at least one example of an innovative idea suggested by a new member and adopted successfully by the organization. The chapter designs and posts a presentation that highlights successes the chapter has achieved through innovation.	The chapter provides a high quality description of at least two innovative ideas that were put into practice in the chapter that either solved a problem or improved an outcome. The chapter fully describes how one or more new members introduced a creative idea, how it was evaluated, and how it was successfully put into practice by the chapter. The chapter designs and posts a high quality presentation that celebrates successes the chapter has achieved through innovation.

cultivated through innovation.				
---------------------------------------	--	--	--	--

Section 8: Member Development

The purpose of Greek organizations is to provide an experience which helps each member develop as an individual. This section takes a holistic approach to examining the chapter's performance in each relevant area of member development:

- General Member Development
- Diversity, Equity, Inclusion and Access
- Academics
- Leadership Development
- Involvement Outside Chapter
- Recruitment

Subsection 1: General Member Development

This subsection focuses on member development applicable to the entire chapter, including philanthropy and community service, ritual/values education, and holistic programming.

1. **(original if new)** Describe how member development is targeted towards each year of membership (i.e., how it changes depending on each year of undergraduate education or time in the chapter) with specific goals.
2. **(*, original)** Provide examples and documentation of internal sisterhood/brotherhood events (that were substance free). Is one of these events a sister/brotherhood retreat? How were these events meaningful to chapter members?
3. **(original if new)** Does your chapter host a ritual, creed, mission, values, and/or symbols education program at least once per year outside of initiation? If so, how does your chapter deliver this information in an effective manner (no details about the contents of the presentation are necessary unless they are publicly-known values/creeds)?
4. **(*, original if new)** Describe how your chapter supports member development in each category below on an annual basis (either through a program, event, activity, etc.). Note that you are **not required** to complete the programs listed, but they are provided as useful examples. Member reflections about the efficacy of how you address each category and how it can be improved in the future is strongly encouraged to support your other evidence.
 - Professional development (e.g., career advice, resume critiques, job searches, campus resources, etc.)
 - Personal development (e.g., conflict resolution, relationship building, mental and social awareness and support, etc.)
 - Campus resources and involvement (i.e., share what resources are available on campus as well as external chapter members can join or benefit from)

General Member Development Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter takes a holistic approach to member development that aims to meet the	The chapter does not focus on each successive level of member development across all four years due to	The chapter focuses on each successive level of member development across all four years through incomplete	The chapter focuses on each successive level of member development across all four years through development	The chapter focuses on each successive level of member development across all four years through development

evolving needs of all members	incomplete/not developed outcomes targeting each consecutive undergraduate year in the chapter while also failing to prioritize more than one or two of the following areas: participation in educational initiatives covering the topics of ritual, as well as personal and professional development.	development and partial achievement of concrete outcomes targeting each consecutive undergraduate year in the chapter while also prioritizing some of the following areas: participation in educational initiatives covering the topics of ritual, as well as personal and professional development.	and partial achievement of concrete outcomes targeting each consecutive undergraduate year in the chapter while also prioritizing almost all of the following areas: participation in educational initiatives covering the topics of ritual, as well as personal and professional development.	and achievement of concrete outcomes targeting each consecutive undergraduate year in the chapter while also prioritizing all of the following areas: participation in educational initiatives/programs covering the topics of ritual, as well as personal and professional development.
--------------------------------------	--	--	--	--

Subsection 2: Diversity, Equity, Inclusion and Access

This subsection focuses on initiatives the chapter participates in to educate members, ensure all members have a voice, promote campus inclusion, and remove barriers to Greek Life.

1. **(*, original)** What DEI programs has your chapter hosted and/or participated in? These may include programs created by IH/Q, your local chapter, WPI Organizations, and/or WPI offices/departments. DEI programs may include, but are not limited to: cultural and religious/spiritual celebrations, affinity month programming, awareness and commemorative days, social justice education/training, implicit bias training, Safe Zone (LGBTQIA+P) training, disability awareness, intergroup dialogues, diversity conferences/seminars, collaborative/co-sponsored program with culturally-based organizations, etc.
 - a. What were the goals/learning outcomes of these programs?
 - b. How did these programs foster a community of inclusion within your chapter and/or at WPI?
 - c. How can these programs be improved in the future (if at all)?
2. **(*, original if new)** What steps has your chapter taken to review/assess your practices to determine any recommended adjustments to ensure equity for all members and to foster a more diverse and inclusive Greek community? This assessment might include: reviewing the chapter's mission, vision, and values, programs/events, service projects/community engagements, philanthropic endeavors, chapter Constitution and Bylaws, chapter positions and chairs, chapter committees, website, social media, group chats, etc.
 - a. What did this review/assessment process look like? How was the overall chapter and/or individual members involved in this process? What were the outcomes?
 - b. If these items are not in control of your local chapter, what steps are you taking as an organization to voice your feedback, suggestions, and/or concerns with your IH/Q?
 - c. If you have not conducted a review/assessment what are your plans to complete one addressing the topics above?
3. **(original if new)** What is the chapter conduct process for a member who has allegedly stated, written, committed, and/or participated in a bias incident; and/or committed other actions/behaviors which fail to promote a sense of belonging within the organization? Per University policy, bias incidents are those where speech or expressive conduct is directed toward an individual or group that is based on or motivated by the individual's or the group's real or perceived race, religion, sexual orientation, ethnicity, national origin, ancestry, sex, age, disability, gender identity and/or expression, or other social identities.

- What steps are taken to address the alleged conduct? Which individuals within the chapter are involved? What are the outcomes for bias incidents/inappropriate member conduct?
- How does the chapter ensure the conduct process is both equitable and educational for all parties involved?
- What action(s) can/does the chapter take to remedy the harm done to the WPI community as a result of a bias incident/inappropriate member conduct?

Diversity, Equity, Inclusion and Access Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter embraces diversity, equity, inclusion, and access and demonstrates inclusive practices that are neither perfunctory nor performative. The chapter aims to foster an equitable environment and change the underlying culture, actions, language, practices, and member conduct which may be discriminatory or offensive to any group.	The chapter has <u>not</u> led or participated in at least two DEI programs with 75% of chapter members participating in each. The chapter may not have performed (or advocated for) a DEI review/assessment revising important chapter aspects, programs, or services. Members may not be held accountable for their actions or the conduct process may be unclear, limited, or insufficient.	The chapter has conducted or participated in at least two DEI programs with at least 75% of chapter members participating in each. The chapter also performed (or advocated for) a DEI review/assessment revising important chapter aspects, programs, or services with some clear outcomes. Members are held accountable for their actions through a conduct process that may be unclear or is limited.	The chapter has conducted or participated in at least three DEI programs with 80-100% of chapter members participating in each. The chapter also performed (or advocated for) a DEI review/assessment revising important chapter aspects, programs, or services with some clear outcomes. Members are held accountable for their actions through a clear and appropriate conduct process which promotes a sense of belonging.	The chapter has conducted or participated in at least five DEI programs with 80-100% of chapter members participating in each. The chapter also performed (or advocated for) a thorough DEI review/assessment revising important chapter aspects, programs, or services with clear outcomes and goals. Members are held accountable for their actions through definition of a clear, fair, educational, and appropriate conduct process which promotes a sense of belonging.

Subsection 3: Academics

This subsection requires chapters to detail how they help members develop academically.

1. Please fill in the table below regarding how many of your members (no names) in the past calendar year (i.e., since the beginning of this Chapter Excellence report) have been on academic warning, probation or suspension.

A	B	C	D	E	F
Number of members on WARNING <i>Total since beginning Chapter Excellence in Jan 2022</i>	Number of members on PROBATION <i>Total since beginning Chapter Excellence in Jan 2022</i>	Number of members on SUSPENDED <i>Total since beginning Chapter Excellence in Jan 2022</i>	Total number of members on academic status <i>A + B + C</i>	Number of members total <i>At time of submitting Chapter Excellence in Dec 2022</i>	Percentage <i>D / E</i>

2. What is your inter/national headquarters minimum GPA requirement? How many members did not meet this requirement in the past calendar year?
3. **(original if new)** Does your chapter provide academic support for its members and new members? If yes, describe two ways in which **members and new members** are provided academic support and the efficacy of these methods (i.e., only describe methods in which both members and new members are supported).
4. **(*, original if new)** Does your chapter have an academic incentive or recognition program? If yes, please describe.

Academics Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter prioritizes academic success for all members.	The chapter has no (or an ineffective) academic support system, as well as no (or an ineffective) academic incentive or recognition program.	The chapter has a simple and minimally effective academic support system benefitting members and new members, as well as a program to recognize outstanding academic achievement.	The chapter has a strong and somewhat effective academic support system benefitting members and new members, as well as a program to recognize outstanding academic achievement.	The chapter has a robust and effective academic support system benefitting members and new members, as well as an incentive or recognition program for outstanding academic achievement.

Subsection 4: Leadership Development

This subsection pertains to how chapters provide leadership opportunities for every member of the chapter to develop leadership, professional, organizational, and interpersonal skills.

1. **(*, original if new)** What leadership development or training is provided by the chapter for its elected/appointed leaders? What inter/national support does your chapter take advantage of for training new officers?

2. **(*)** Did a representative from your chapter attend a leadership training/conference (could be external, such as UIFI, or from WPI)? This does not include training from your inter/national headquarters. If so, how many members attended and how was information from these conferences dispersed to chapter members?
3. **(original if new)** Outside of committee work, how can non-officers grow their leadership skills without holding an official leadership position? What leadership opportunities or resources are available to non-officers?
4. **(*, original)** Describe a time when chapter officers analyzed their leadership skill types and/or personality type and used this to improve leadership skills, collaboration, and interactions with the chapter and community. This can include conversations between officers, between officers and advisors, I/HQ and officers, etc.

Leadership Development Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter builds leadership skills among all members	The chapter very rarely gears leadership development opportunities and training towards all levels of members (including public speaking, planning, organization, delegation, and other professional skill development), and has had a few to no members take advantage of additional opportunities outside of the chapter (i.e., inter/national conferences, UIFI, etc.).	The chapter irregularly attempts to gear leadership development opportunities and training towards all levels of members (including public speaking, planning, organization, delegation, and other professional skill development), and has had members occasionally take advantage of additional opportunities outside of the chapter (i.e., inter/national conferences, UIFI, etc.).	The chapter strives to gear leadership development opportunities and training towards all levels of members (including public speaking, planning, organization, delegation, and other professional skill development), and has had some members take advantage of additional opportunities outside of the chapter (i.e., inter/national conferences, UIFI, etc.).	The chapter fully demonstrates mastery in gearing leadership development opportunities and training towards all levels of members (including public speaking, planning, organization, delegation, and other professional skill development), and has had many members take advantage of additional opportunities outside of the chapter (i.e., inter/national conferences, UIFI, etc.).

Subsection 5: Involvement Outside Chapter

This subsection details how members of your chapter contribute to other organizations and the rest of campus.

1. **(*, original)** How are opportunities outside of the chapter promoted (could be Panhel/IFC, honor societies, sports, extracurriculars, etc.)? How are chapter members' diversity of interests/involvements acknowledged and celebrated throughout the year?
2. How many of your members serve as officers on the Panhellenic Council/Interfraternal Council?
3. How many of your members were Rho Gammas or recruitment leaders?
4. **(*, original)** What percentage of your chapter (current initiated members) is actively involved (i.e., regularly attends organization meetings, actively contributes during meetings, has been actively involved for at least 1 term) in another organization (academic-focused club, volunteer/service club, co-curricular clubs, sports, etc.)? Please describe three examples of how a member's involvement in another organization has impacted the culture, operations, support, or programming of the chapter.

5. (*) What percentage of your chapter (current initiated members) is actively involved in an honor society (academic honor society or Greek honor society)?

Involvement Outside Chapter Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter encourages members to be involved in opportunities outside of the chapter	The chapter very rarely promotes and barely achieves diversity in members' interests by failing to explain or articulate opportunities outside the chapter (including honor societies, Panhel/IFC, sports, co-curriculars) and rarely has members share their learnings nor celebrates achievements of members' work outside of the chapter.	The chapter irregularly promotes and minimally achieves diversity in members' interests by inconsistently explaining or not articulating opportunities outside the chapter (including honor societies, Panhel/IFC, sports, co-curriculars). Members may occasionally share their learnings from involvement outside of the chapter, or members may be occasionally acknowledged for any external achievements.	The chapter strives to promote and somewhat achieves diversity in members' interests by consistently explaining or articulating opportunities outside the chapter (including honor societies, Panhel/IFC, sports, co-curriculars). Members sometimes share their learnings from involvement outside of the chapter, and members are sometimes acknowledged for any external achievements.	The chapter actively promotes and fully achieves diversity in members' interests by consistently explaining and articulating opportunities outside the chapter (including honor societies, Panhel/IFC, sports, co-curriculars). Members regularly share their learnings from involvement outside of the chapter, and members are regularly acknowledged for any external achievements.

Subsection 6: Recruitment and Retention

This subsection focuses on how the chapter's values are portrayed through recruitment efforts and how this may affect member retention.

- (*) Please include documentation for the recruitment-related aspects listed below. Note that documentation required for these is more extensive than an activity or program.
 - Number of recruitment training hours
 - Number of members involved in recruitment planning
 - Recruitment plan/rush calendar
 - Chapter's attrition rate for new members in the past three years (i.e., percentage of new members who became members out of those who were given bids)
 - Quantitative recruitment goal measures (please answer one of the questions below depending on your chapter)
 - If your chapter is an NPC (National Panhellenic Conference) group, what was quota? What percent of quota did you achieve?
 - For all other chapters, what was your recruitment goal? How many did you recruit? What percentage of your goal (number of bids extended) resulted in a new member match?
- (*, original) What core values are portrayed and discussed throughout recruitment? Choose one pre-recruitment (if your chapter is a sorority) or a pre-rush/rush event (if your chapter is a fraternity) that your chapter hosted and describe how your values were promoted to potential new members. Note: A pre-recruitment/pre-rush event

encompasses any public event occurring in the academic year before the official beginning of recruitment/rush. These events would be designed to gain visibility on campus with anybody who is a potential new member.

3. **(*, original)** Describe one recruitment-related activity/process/thing that your chapter is proud of due to its success or its improvement compared to previous years? Identify and describe how feedback from last year was incorporated into changes this year, as well as goals for next year give this year's feedback. Please specify which parties you collected feedback from (members, new members, parents, alumni, SAO, etc.).
4. **(original)** How many initiated members have left the chapter voluntarily in the past calendar year? How many initiated members have had their membership revoked through executive action in the past calendar year? What are the issues that contributed to these members leaving? How does your chapter work to prevent these issues from occurring? For this question, please **provide the total number of members as well as the percentage** (members dropped/current chapter size)

Recruitment Rubric

Outcome	Unsatisfactory (1 point)	Developing (2 points)	Satisfactory (3 points)	Exemplary (4 points)
The chapter implements a values-based recruitment/rush plan	The chapter rarely, if ever, displays core values throughout the entirety of recruitment and/or rarely collects feedback from members or new members to improve their recruitment plan. During formal recruitment/rush, the chapter reached less than 75% of their recruitment goal or quota, and may struggle with member retention.	The chapter inconsistently displays core values throughout recruitment and occasionally collects feedback from some parties (including members and new members) to improve their recruitment plan. During formal recruitment/rush, the chapter reached at least 75% of their recruitment goal or quota, or may have some member retention issues.	The chapter may display core values throughout some of recruitment and collects feedback from various parties (including some outside of members and new members) to improve their recruitment plan. During formal recruitment/rush, the chapter reached at least 85% of their recruitment goal or quota, and has good member retention.	The chapter always displays and discusses core values throughout the entirety of recruitment and consistently collects extensive feedback from various parties (including those outside of members and new members) to improve their recruitment plan. During formal recruitment/rush, the chapter reached 95% or more of their recruitment goal or quota, and has strong member retention.

Sample Feedback Template

This template shows what each chapter should expect from reviewers when receiving their Chapter Excellence reports back. This will be provided for each of the seven sections in Chapter Excellence to further support chapter improvement and development.

Notes on *Insert section*

Indicators of Success <ul style="list-style-type: none">	Areas of Concern <ul style="list-style-type: none">
Comments & Suggestions <ul style="list-style-type: none">	