

Theta Delta Chi Report of Visitation

Charge:

Host Institution:

House Address:

Insurance Status (Housed or Unhoused):

Charge President:

Greek Office Contact (Title):

Number of Active Members:

Number of New Members:

Charge GPA / point scale, all Student Average GPA:

Dates of Visitation:

Date of last ReCharge and/or ChargeUP Workshop:

- ☐ Charge Consultant has reviewed all of Theta Delta Chi's policies with the Charge President and Executive Board.
- ☐ Charge Consultant has met with executive committee and identified areas for improvement in order to be deemed 'Victory Cup worthy'.
- ☐ Charge Consultant has met with Greek Office contact.
- ☐ Charge Consultant has met/spoken with a representative from the Charge's Alumni Association (where applicable).

I hereby certify that I have read and understand all official policies of Theta Delta Chi and understand the repercussions that could come if my Charge or individual members violate them.

Charge President Date

Scholarship		Leadership			Responsible Social Life			Brotherhood		TOTAL SCORE
Academics	NME	Charge Operations	Finances	Recruitment	Risk Management	Philanthropy & Service	Communication & Verification	Ritual	Alumni	

Submitted by: _____ Signature: _____

This page should be submitted in PDF format with State of the Charge and Greek Visit text included.

All ROV scores should be entered into the ROV POINT SUMMARY sheet.

Report of Visitation Scoring Rubric

Note: All Areas that a Charge is meeting will be highlighted, however, a Charge will only receive scores for full sections and partial points above that section. Ex: A Charge that meets all bullet points for a "3," in Academics and one bullet in the "4" section will result in a 3.33 score. Meeting all bullet points in the "2" category and one in the "4" will result in a 2 score.

		4 - Victory Cup Worthy	3 - Meets expectations	2 - Needs improvement (Improvement plan recommended)	1 - Improvement Plan Required
Scholarship	Academics:	<ul style="list-style-type: none"> The Charge's GPA is in top 25% of all fraternities on campus The Charge's GPA is above the all-campus average The Academic Chair's role, responsibilities, and a "Charge Academic Improvement Plan/Policy" is submitted to and on file with the CFO and Greek office twice a year 	<ul style="list-style-type: none"> The Charge meets the 2.7 GPA standard and all brothers meet the 2.5 GPA individual member standard, or members below a 2.5 have individual academic improvement plans Charge has a functional Academic Chair, with clearly defined roles and responsibilities in the Bylaws 	<ul style="list-style-type: none"> The Charge does not meet the 2.7 GPA standard OR Some brothers do not meet the 2.5 GPA standard and do not have an individual academic improvement plan Academic Chair position exists but does not have clearly defined roles and responsibilities and/or does not function well 	<ul style="list-style-type: none"> The Charge does not meet the 2.7 GPA standard AND Some brothers do not meet the 2.5 individual GPA standard
	New Member	<ul style="list-style-type: none"> The NME plan and calendar are reviewed and updated twice a year The NME plan and calendar are approved by and on file with the CFO and the Greek office twice a year 	<ul style="list-style-type: none"> A written NME plan and calendar are created and implemented using the CFO NME format NME activities follow all relevant policies (TDX, School) All new members are registered through MyTDX.org Charge has a functional New Member Educator, with clearly defined roles and responsibilities in the Bylaws 	<ul style="list-style-type: none"> A loose written NME plan exists Charge has trouble retaining new members Possible policy violations exist New Member Educator position exists but does not have clearly defined roles and responsibilities and/or does not function well 	<ul style="list-style-type: none"> The Charge lacks a written NME Plan, or has no NME plan Violates NME policies Evidence that hazing is reported to the CFO, Greek Office, GL, and/or Alumni
Leadership	Charge Operations:	<ul style="list-style-type: none"> Written officer transition manuals with clearly defined roles, responsibilities, and processes are used Clear and defined standards document is signed by all members and adhered to Clear and defined member management process (e.g. J-board, standards board, incentive system, Charge rules) exists in the Bylaws and is adhered to The aforementioned, as well as the Constitution and Bylaws, are submitted to and on file with the CFO and Greek Office twice a year 	<ul style="list-style-type: none"> The roles and responsibilities for all members and officers are defined in a Charge specific Constitution and Bylaws All Officers are assigned through MyTDX.org Charge can provide evidence officers fulfill roles. All active members have registered and activated their MyTDX.org account Weekly Charge and Executive Board meetings are held. All Charge and Executive board meetings are held in an efficient and orderly manner and follow Roberts Rules of Order/Parliamentary Procedure 	<ul style="list-style-type: none"> Infrequent Charge meetings are held to conduct business. Infrequent executive board meetings are held. Meetings are disorganized Officer positions exist, but do not have clearly defined roles and responsibilities and/or do not function well More than 50%, but not all members/officers have registered and activated their MyTDX.org account. 	<ul style="list-style-type: none"> Leadership is not defined and not functional Meetings are rarely held Executive board rarely meets Meetings are not structured and ineffective at getting business done Less than 50% members/officers have registered and activated their MyTDX.org account.
	Finances:	<ul style="list-style-type: none"> Treasurer manages payments, budget and record keeping through MyTDX.org The budget is submitted to the Greek Office twice a year Finances are transparent and are reported to the Charge at weekly meetings Dues are collected in a timely manner, as set forth by the Charge standards document and Constitution/Bylaws 	<ul style="list-style-type: none"> The Exec Board collaborates to create a working budget that is balanced and responsible The Charge verifies and votes to approve the budget at the beginning of every term All financial obligations to the Grand Lodge, which include initiation fees, service fees, Convention and insurance (Holmes Murphy) fees, are met by the due date All local financial obligations are met in a timely manner Charge has a functional Treasurer, with clearly defined roles and responsibilities in the Bylaws 	<ul style="list-style-type: none"> An unclear or non-working budget exists Most financial obligations are met; however, they are often late Treasurer position exists but does not have clearly defined roles and responsibilities and/or does not function well 	<ul style="list-style-type: none"> No budget exists Financial obligations are rarely met in a timely manner. The Charge is in debt to either the Grand Lodge or outside entities

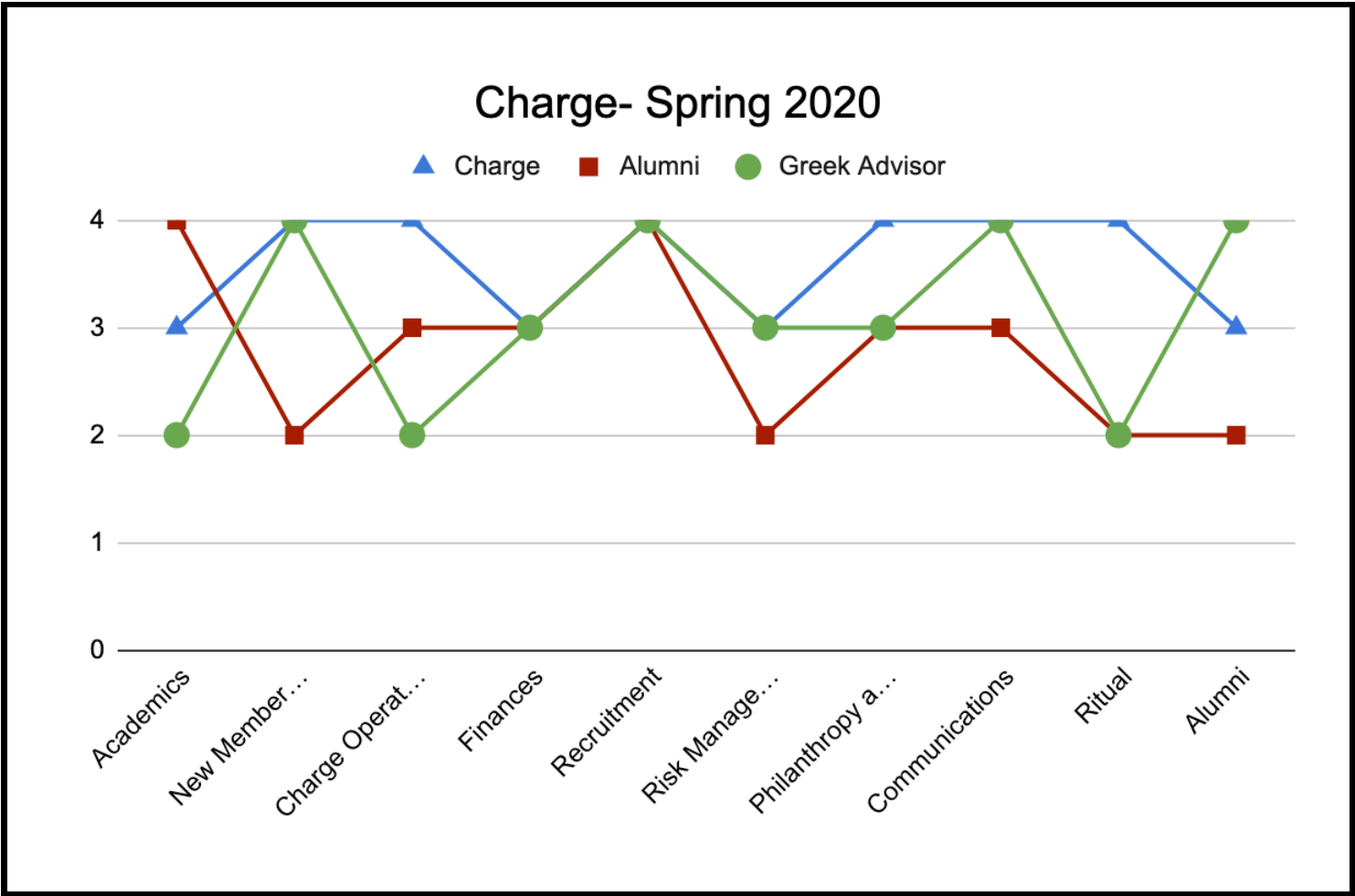
	Recruitment:	<ul style="list-style-type: none"> The recruitment plan, goals, Charge “brand,” and calendar are submitted to the CFO and Greek Office twice a year Sets goals that would meet the Charge’s growth needs for the future Charge recruits exemplary members (has higher than Charge average GPA and/or is involved in another student organization) More than 50% of the Charge is involved in another student org 	<ul style="list-style-type: none"> Charge has a written plan for recruitment, which includes goals for numbers & the type of individuals they want, the Charge’s “brand,” and a calendar of events Recruitment adheres to TDX and host institution policies. Charge is meeting its set goals Charge has a functional Recruitment Chair, with clearly defined roles and responsibilities in the Bylaws 	<ul style="list-style-type: none"> Charge has a loose recruitment process Charge’s goals are not being met The Charge has trouble recruiting new members Recruitment Chair position exists but does not have clearly defined roles and responsibilities and/or does not function well 	<ul style="list-style-type: none"> Theta Delta Chi’s and host institution’s policies are disregarded during recruitment
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Responsible Social Life	Risk Management	<ul style="list-style-type: none"> The Risk Management plans and procedures are approved by and on file with the CFO and Greek Office twice a year More than 50% of the Charge is trained in risk management training (i.e. CPR, ASTP, TIPS, RAMP) The Charge uses the Holmes Murphy Event Planning App to plan out its events (PDF proof required) 	<ul style="list-style-type: none"> Charge has written Risk Management plans and procedures, which are reviewed with the Charge and all new members once per term Follows all Theta Delta Chi’s and host institution’s policies The Charge has a functional Risk Management Chair, with clearly defined roles and responsibilities in the Bylaws No recent policy violations or risk issues 	<ul style="list-style-type: none"> Unclear risk management procedures Inconsistent review of Theta Delta Chi and host institution policies Risk Management Chair position exists but does not have clearly defined roles and responsibilities and/or does not function well Recent risk issues or policy violations 	<ul style="list-style-type: none"> No risk management procedures in place. Does not follow TDX’s and host institution’s policies Evidence of a risk management violations are reported to the CFO, Greek Life Office, GL and/or Alumni
	Philanthropy	<ul style="list-style-type: none"> Each Brother & New Member participates in 10 or more hours of either philanthropy or service per term Charge uses calendar on MyTDX.org to track member participation in philanthropy and service activities. Tracked hours and activities are reported to Greek Office twice a year. Charge has a Bros UnitedD program 	<ul style="list-style-type: none"> Charge plans and implements at least two philanthropy events a year Charge plans and implements at least one service project, e.g. Bros UnitedD, per year. Regularly participate in philanthropy projects throughout the community The Charge has a functional Philanthropy/Service Chair, with clearly defined roles and responsibilities in the Bylaws 	<ul style="list-style-type: none"> Charge hosts only one philanthropy or one service project once per year Philanthropy/Service Chair position exists but does not have clearly defined roles and responsibilities and/or does not function well 	<ul style="list-style-type: none"> Charge does not host any philanthropy or service project of its own
	Communication	<ul style="list-style-type: none"> Charge has regularly scheduled meetings with the Greek Office and/or Greek/faculty advisors Charge regularly and proactively reaches out to CFO and Greek Office for help, assistance, and support Charge has at least one active member apply for a TDX Educational Foundation scholarship, Convention award, or grant Charge attends CFO webinars Charge has verified with the CFO that they are following all TDX and host institution standards and policies 	<ul style="list-style-type: none"> Charge registers all Pi and Convention delegates by the due date Active Brother and New Member rosters are up to date on MyTDX.org Charge responds to CFO and Greek Office in a timely manner Internal Charge communications are clear and effective Charge is meeting TDX Educational Programming requirements and submitting all verification forms to the CFO through MyTDX.org 	<ul style="list-style-type: none"> Communication issues persist throughout the Charge Charge has poor response rates to the CFO and Greek Office to get things done or submitted TDX Educational Programming is being completed, but verification is not submitted 	<ul style="list-style-type: none"> Charge only communicates with CFO during in person Charge visits Communication issues lead to breakdowns in basic Charge functions TDX Educational Programming is not done by the Charge nor its members
	Ritual	<ul style="list-style-type: none"> Daily Charge operations and decisions are discussed in the context of Theta Delta Chi values and rituals The Charge lives its values through its operations and actions, which can be articulated to and recognized by University officials, the CFO, and the general public 	<ul style="list-style-type: none"> All Meetings, officer transitions, and Initiations conducted in accordance with the ‘Book of Rituals’ Ritual and Preamble explained to new members before ‘Second Degree of Initiation’ Ritual and values are regularly reviewed and discussed Charge has a functional position dedicated to Ritual adherence, with clearly defined roles and responsibilities in the Bylaws 	<ul style="list-style-type: none"> Charge conducts some meetings or initiations in accordance with ‘Book of Rituals’ Position dedicated to Ritual exists but does not have clearly defined roles and responsibilities and/or does not function well 	<ul style="list-style-type: none"> Charge does not conduct any meetings or initiations in accordance with ‘Book of Rituals’

	<div>Alumni</div>	<div><u>Scored</u><ul style="list-style-type: none">• Have a distinct Alumni Advisory Board, in which the Charge gives updates on pertinent information, asks for guidance, advice, and best practices• The Charge is in contact with Alumni Advisory Board at least once a month• Charge sends out an alumni newsletter at least annually (if no alumni association, then newsletter sent to CFO and Greek office)<u>Not Scored</u><p>Charge has a Chartered Alumni Association Alumni newsletter is created and sent through MyTDX.org</p></div>	<div><u>Scored</u><ul style="list-style-type: none">• In contact with alumni association and/or housing corporation 2+ times a year• Hold at least one alumni event per year• Charge has a functional Corresponding Secretary/Alumni Relations Chair with clearly defined roles and responsibilities in the Bylaws.<u>Not Scored:</u><p>The Charge’s alumni are organized as Alumni Association and/or Housing Corporation</p></div>	<div><ul style="list-style-type: none">• Sporadic contact with alumni• Do not hold a regular alumni event• Corresponding Secretary/Alumni Relations Chair position exists but does not have clearly defined roles and responsibilities and/or does not function well</div>	<div>No contact with alumni</div>
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Executive Summary (Introductory Paragraph, Three successes, Three areas for improvement, Three agreed upon goals for the future):

Introduction:



	Academics	New Member Education	Charge Ops,	Finances	Recruit.	Risk Mgmt.	Philanthropy and Service	Comms	Ritual	Alum.
Charge	3	4	4	3	4	3	4	4	4	3
Alumni	4	2	3	3	4	2	3	3	2	2
Greek Advisor	2	4	2	3	4	3	3	4	2	4

3 Strengths/ Successes:

3 Challenges/ Areas for improvement:

3 Goals:

Meeting with Host Institution:

Meeting with Alumni:

Conclusion: