Theta Delta Chi International Fraternity

Charge / Alumni Advisors Support Manual

THINKING ABOUT CHARGE ADVISORS:

Positive alumni engagement and, in particular, the role of a Charge Advisor is pivotal in helping a local Charge to remain viable, healthy, and focused on remaining a credit to Theta Delta Chi.

An undergraduate's time in the Fraternity is an opportunity to practice the skills and behaviors necessary to succeed beyond college. The University experience provides a great deal of valuable content; however, the Fraternity provides the opportunity to practice what has been learned in the classroom. Done right, the Fraternity experience adds value to the member's life, the host institution, and the greater community.

Therefore, the role of the advisor is to specifically advise Charge leadership in the operations of the organization and to assist the leadership in thinking through decisions and direction of the organization. While there is an opportunity to provide information when necessary, the primary task is to ask questions of the leadership and the Charge to help them think through their decisions and discussions. The Charge Advisor's role should be to support and advise undergraduates. Additionally, the Charge Advisor has the duty to intervene when those decisions violate the policies of Theta Delta Chi and the safety of the members of the Charge and the greater community.

While the Advisor can be a Brother of the Charge, it can also be a faculty or a staff member. An Advisor is a role model for the undergraduates and needs to understand and model the difference. The role requires a person who is respected by the undergraduates for modeling the values of the Fraternity along with respecting the abilities of the undergraduate members to make their own decisions. The Advisor should be selected because they live the values of scholarship, leadership, and a responsible social life, not just because they are popular. The Advisor needs to be seen as being admired because they live these values.

Executed effectively, the Charge Advisor(s) provide(s) consistency in Charge operations and helps promote the longevity of the Charge.

REQUIREMENTS OF A CHARGE ADVISOR

- Strong interpersonal skills

- The ability to know when to provide information and know when to ask questions
- Model the types of behaviors indicative of the values and policies of Theta Delta Chi
- An understanding of the values of Theta Delta Chi
- Knowledge of the Preamble of Theta Delta Chi
- Knowledge of the Ritual of Theta Delta Chi
- Knowledge of the policies of Theta Delta Chi
- Registered on mytdx.org (GreekTrack)
- A member of, or communciates with, the local Alumni Association
- Willing to attend Central Fraternity Office (CFO) training for advisors

RESPONSIBILITIES OF A CHARGE ADVISOR(S)

- Provide guidance and advice to the Charge
- Attend Executive Board meetings once or twice a month
- Meet with and advise Charge officers regularly
- Attend Charge meetings on a mutually agreed upon basis with a minimum of once a month during the academic year
- Hold the Charge accountable for its decisions and actions
- Communicate regularly with CFO staff and with the alumni association and/or house corporation boards
- Assist with the completion of the Record of Visitation (ROV) and with the Charge Consultant during his visit
- Guide in the development and implementation of goals with the Charge
- Communicate with the host institution at least quarterly
- Assist the Charge in the completion of the school's accreditation/Standards of Excellence program, completion and submission of all required documentation
- Conduct or coordinate workshops for both Charge leadership and for the Charge in general
- Organize and facilitate a transition retreat for Charge Leadership
- Guide and intervene to help undergraduates as appropriate
- Seek out opportunities for other alumni to become involved

CHECKLIST OF DUTIES

- ☐ Annually plan and facilitate a leadership retreat
- ☐ Call/meet with Charge Leadership on a regular basis
- ☐ On a mutually agreed upon schedule, attend the Charge meeting
- ☐ Review policies with undergraduate members
- ☐ Biannually attend a meeting with Greek Director
- ☐ Monthly communication with CFO
- ☐ As scheduled, attend the alumni meeting
- ☐ Complete the alumni perspective portion of the 360 Evaluation
- ☐ Annually meet with Charge Consultant and review the completed ROV
- ☐ Annually attend Convention

- ◻ As scheduled, participate in online training/discussions
- ◻ Review the document, Understanding Your Report of Visitation (MyTDX.org)

CHARGE ADVISOR SUPPORT

The CFO and Grand Lodge will provide ongoing training, support, and networking opportunities for all Charge Advisors. The Annual Convention will provide a Minerva session(s) for Charge Advisors to develop and practice skills of facilitation and for gaining information about Theta Delta Chi, organizational structures, resources for alumni and undergraduates, facilitation skills, along with goal setting and action planning processes.

A series of virtual/online support opportunities will also be provided on a scheduled basis to allow Charge Advisors to communicate and network with each other. These sessions will provide them with the ability to share best practices and successes and to problem-solve issues with each other.

CFO staff will also provide access to the monthly undergraduate newsletters and training opportunities as they arise. We will also create resources as needed in a timely manner.

FACILITATION SKILLS

Clear and effective communication is the primary facilitation skill for a Charge Advisor. While on the surface, this might appear obvious, there are specific communication behaviors a facilitator needs to be effective at this. The basic model for this behavior is called Pause – Paraphrase – Probe

Pause

Pausing before responding or asking a question allows time for thinking and enhances dialogue, discussion, and decision-making.

Paraphrase

When paraphrasing what another has said, it validates the sentiments the speaker has communicated, and it indicates they have been heard accurately. It also allows the speaker to correct any misunderstandings in what they were trying to say. When responding after the speaker, the responder uses a paraphrase starter that is comfortable for them, such as, “So…” or “I heard you say…” or “As you were thinking…”. Then follow the sentence starter with an efficient paraphrase that assists others in hearing and understanding one another as they converse and make decisions.

Probe

Following the paraphrase with an effective question has two purposes, to explore and to specify thinking. Questions may be posed to explore perceptions, assumptions, and interpretations and to invite others to inquire into their thinking. For example, “What might be some conjectures you are exploring?” Use focusing questions such as, “Which students, specifically?” or “What might be an example of that?” to increase the clarity and precision of group members’ thinking. Inquire into others’ ideas before advocating one’s own.

Examples of Probing Questions:

Questions that clarify
- How much time will it take?
- What will it cost?
- When you say everyone, exactly how many are you talking about?

Questions for examples
- Could you give me an example of …?
- Tell me about a time when . . .?

Questions that suppose a future
- What would happen if . . .?
- What would be the result when we . . .?

QUESTIONING TECHNIQUES

Open-ended versus closed-ended questioning
Avoid leading questions that only allow for one acceptable answer (i.e. Don’t you think you should…?)

CHARGE AND EXECUTIVE BOARD MEETINGS

Participating in Charge meetings builds a relationship between you and the Charge leadership and demonstrates your concern for their success. However, it is important to remember this is not the Advisor's meeting, and it is not the place of alumni to make the decisions for the Charge. A successful advisor can challenge decisions. The role of the Advisor is to share and communicate information/questions between stakeholders.

It is important to step in when it is clear that the members are in danger of doing something illegal, immoral, or dangerous by putting themselves or others in jeopardy.

Most of your meetings will be with the Exec Board, and you will need to be more proactive with this group. Your attendance at these meetings needs to be more frequent than Charge meetings; however, you need to come to an agreement with this group about frequency. Again, using good communication skills is important, and remember this is their organization to run and not yours.

They will probably have questions for you and will need assistance in thinking through decisions. It is important to ask their thoughts before providing yours as they likely have been thinking about this for a longer period of time. Our goal is to develop their leadership skills and confidence.

When unsure what to do consider the following questions, "Do you think we might want to involve CFO staff in this decision?" or "Perhaps we may want to involve others in the Charge given that it affects everyone. What are your thoughts?"

When working directly in an advisory capacity with the Executive Board, it might be useful to suggest an agenda. Having a common agenda that is consistent across time allows all members to come prepared with information and questions and ready to move the meeting along.

Sample Agenda for Exec Board / Charge Leadership meetings:

- Preamble
- Review prior meeting decisions and actions
- Review the status of goals and assistance needed
- Share issues of concern with the Charge (List what is going well and what needs work
-)
- Review the status of requests from the CFO or Greek Office
- Review decisions and actions for the next meeting
- Shoutouts (Stating specifically what someone did and why it was helpful)
- Set the next meeting date

TRANSITION RETREAT

Assisting the Charge in developing transition plans is an effective way to assure the longevity of the Charge. All too often, at the end of a term of office, the impulse of the current Charge leadership is to "dump and run." Unfortunately, when this happens, lessons learned are not passed on to the newly elected Charge Leadership.

Many Charges have a transition period when Charge officers, newly elected and current, conduct an orderly hand-off of duties. In some cases, this can be between 1-2 months in length. This is a very effective way to help with the transition of operational functions of the respective positions, but there is more that can be done to move a Charge along effectively.

Many Charges have participated in Transition Retreats. These retreats are often held outside the Charge house and are facilitated by campus staff, CFO staff, the Charge Advisor, or a combination of any of the three. The purpose of these retreats is to allow for the smooth transition of leadership, develop an understanding of the various roles, along with the opportunity to set SMART (Specific, Measurable, Achievable, Reasonable, and Time-Oriented) goals and plan for the coming term of officers.

Sample Agenda for a Transition Retreat:

- Preamble*
- Introductions of new/old officers and alumni
- Current officers present Charge status – Accomplishments and challenges
- Questions for Current officers
- Out-going/in-coming officer pair-ups to review Transition Manuals
- Review the last Report Of Visitation
- New Officers – how will you build off successes and address challenges – vision for where you want to go
- Goal Setting with the entire group
- Developing plans for a presentation to the brotherhood
- Closure – what are your next steps? – Plan to meet with the Fraternity and Sorority Life (FSL) Advisor to share the results of the meeting

*__NOTE:__ FSL staff can hear the Preamble according to a motion of understanding at the 172nd Convention, which allows campus professionals to be exposed to the Preamble on occasions that would be beneficial for the growth or existence of the Charge.

GREEK LIFE OFFICE MEETING

The purpose of meeting with the Greek Life Office on campus is to develop a working relationship with them. Meeting face-to-face, at a minimum of once a semester, and occasional phone calls or emails with updates on the Charge's progress will go a long way in assuring the success of the Charge. It is important to build this relationship BEFORE something goes awry and problems exist. During these biannual meetings, it is important to provide an agenda as a point of discussion before you meet. Remember: whoever controls the agenda sets the tone for the meeting.

Greek administrators on our host campuses are very busy and may be relieved when an agenda is present. It allows for a more focused and productive meeting. It also allows for a feeling of cooperation and collaboration to exist between the

Fraternity and their office. They are often looking for effective engagement on the part of alumni to help steer the Charge in a positive direction.

Be aware the conversation can often be about “problems.” Rather than allowing the issues to dominate the meeting, move to how all parties can work together to move the Charge forward and what specific steps might be necessary. Focusing on “problems” is a deficit model for improvement rather than focusing on where the Charge needs to go is a “growth model” for improvement. Using the Pause-Paraphrase-Probe model can effectively help with making this happen.

A possible agenda might include:

- Introductions
- Discussion of the previous Report of Visitation
    - What the 360 suggested
    - Establish a baseline for Charge expectations
- Recap of leadership transition meeting if applicable
- Review of any current developments at the Charge or new school policies
- Discussion of current goals and how the Charge Advisor is supporting them and how they and the Charge might collaborate with the school
- Discussion about developing a positive partnership to move forward and what can be expected from each party
- Next Steps: How to move forward together and schedule any follow-up appointments needed

CHARGE RESOURCES

Programs and Services

The CFO provides a large assortment of programs and services available to both undergraduates and alumni alike (Appendix A). CFO staff will provide customized programs onsite, virtually, or in a hybrid situation. All of the programs and services provided align with the organization's values, and most of them are free of charge. These services provide value-added opportunities for undergraduates, alumni, and host institutions to, as our Founders’ said, “improve the intellectual, moral, and social being.”

MyTDX.org powered by GreekTrack

MyTDX.org is a membership portal available to all brothers of Theta Delta Chi. This portal is used for communication, storage of important Charge documents, a personal profile, and management of Charge operations. Through this portal, brothers can manage their own membership profile, including updating contact information and paying Charge and Fraternity related bills. Brothers can store and review Charge meeting minutes, By-Laws, and transition manuals. Both a

Charge and Fraternity calendar are available. As undergraduates move into alumni status, they can remain in contact with brothers, both past and present. This portal stores resource materials to assist Charges in creating their own documents to facilitate Charge operations better. A complete index of all resources in MyTDX.org is contained in Appendix B.

REPORT OF VISITATION (ROV) (See the file Understanding Your Report of Visitation)

The ROV, or Report of Visitation (Appendix C), is comprised of three separate portions.

- A rubric that scores the Charge in four specific areas
- A narrative comprised of information from alumni representatives and the local Greek official
- SMART Goals based on the ROV information

The purpose of the ROV is to assist the Charge in identifying areas of strength and areas of growth, to develop a plan for self-improvement. Theta Delta Chi uses a growth model for improvement rather than a deficit model. A deficit model would focus on the problems and try to build from that starting point rather than identifying areas of strength and growth with a vision of success in the forefront. Then identifying the gap between the perceived reality and the vision for success and then developing goals and plans to fill the gap between the two.

The Rubric

A rubric has been developed with the key values of the Fraternity as its focus. This Rubric is designed in four categories; Scholarship; Leadership; Responsible Social Life; and Brotherhood. Each main category is then divided into subcategories. A four-point scale is used in each category with clearly defined behaviors and identifiable evidence in each area. The subcategories are:

- **Scholarship**: Academics, New Member Education
- **Leadership**: Charge Operations, Finances, Recruitment
- **Responsible Social Life**: Risk Management, Philanthropy & Community Service, Communication
- **Brotherhood**: Ritual, Alumni Relations

As our Founders' said, to "endeavor to improve and reform." Therefore, we invite our alumni associations, University Greek Offices, and Charge Presidents to self-assess where they see the Charge on the standards in the Rubric. This 360-degree assessment has allowed Charges to analyze the gaps they see in this data and begin to take action to close these gaps. This rubric is also used by the Charge Consultant in a meeting with the Charge leadership to develop the official ROV score for the Charge.

The Narrative

The Charge Consultant writes a narrative summarizing his meeting with the alumni representative (alumni president and/or Charge Advisor), the representative of the host institution, usually the Director of Greek Life, and Charge leadership.

Additionally, the narrative summarizes both areas of strength/successes of the Charge and challenges/areas for improvement. An analysis of the 360-degree assessment, the narrative data, and the Charge Consultants' perceptions are used to assist the Charge Leadership in developing goals.

Goals

The Charge leadership works with the Charge Consultant to develop three goals based on an analysis of the data collected. They discuss how these goals might be accomplished, and the Consultant offers resources to assist. These goals are then monitored by CFO staff as resources and coaching are provided post-visit. This can include conference calls, examples from other Charges, facilitating networking, and coaching.

It is at this point the Charge Advisor can also assist with monitoring the progress of the Charge in attaining their goals along with providing direct support.

GOALS and ACTION PLANS

The Charge Advisor can help coach the undergraduates through developing Goals and action plans and, in doing so, afford them marketable skills they can take into the world beyond school. Project management and being able to work with others in the execution of team goals are skills employers look for.

Appendix A
Programs and Services

Programs:

- **ChargeUp Workshop**: From time to time, Charges request Grand Lodge Staff to assist in goal setting and general assistance in Charge related matters. The ChargeUp Workshop is an opportunity for Charges to customize workshops to more closely fit their needs and growth issues. The Charge will explore how perceptions shape reality and then self-examine how the Charge is viewed and set goals to change and improve those perceptions.

- **Minerva Sessions**: Minerva Sessions are educational seminars held during our annual Convention. Each Charge selects two delegates for Convention and those delegates participate in these educational and experiential programs. The sessions might consist of participating in a ropes course as a form of team building, presentations on Risk Management, Constitution and By-laws, Crisis Management, or “Your Digital Footprint” and Social Media. The Grand Lodge selects and plans the sessions.

- **Preamble Institute**: The Preamble Institute, Pi, is the premier values-based leadership institute of Theta Delta Chi. The Inception of Pi was 2006. This all expenses paid, program is targeted at aspiring leaders from every Charge and is conducted at varying locations around the country over the MLK Jr. holiday weekend. While every Charge is required to send one delegate while many Charges often send a second, funded by local alumni, the Charge, or scholarships as available. The outcomes for Pi are to:
    - Define, analyze and live the values of Theta Delta Chi
    - Explore and practice the skills for effective leadership
    - Create a personal network for success
    - Explore and discuss the meaning and importance of our Ritual
    - Explain how Theta Delta Chi is more than a single Charge
    - Develop a vision for change utilizing our shared fraternal values

- **ReCharge Workshop**: The ReCharge Workshop offers Charge members the opportunity to do a “deep dive” into the values and Ritual of Theta Delta Chi. The Preamble is discussed and analyzed with a focus on what the values mean and look like in practice. The Ritual is analyzed with a focus on the meaning of the symbols and oaths present in our Ritual. This workshop is offered directly at the Charge location and is scheduled and conducted by Grand Lodge Staff. This workshop is customized to fit the local needs of the Charge. The goal is that every Charge has a ReCharge workshop every other year.

- **Recruitment Workshop**: Recruitment is constant and should run 365 days a year. We use a five-point strategy to help Charges create their own recruitment plan. This workshop is conducted by Grand Lodge Staff at no cost to the Charge.

Services:

- **Alumni Association Organizations**: Grand Lodge Staff assists local area alumni in establishing Alumni Associations. They provide Charge brother contact information, assistance in writing Bylaws, and help in setting goals and timelines for establishing these Associations along with helping them become Chartered Alumni Associations within the International Organization. Alumni Associations also serve as professional networking groups for both alumni and undergraduate members.

- **Doug Fultie Foundation for Autism**: Grand Lodge Staff assists Charges in coordinating fundraising and awareness events for the Flutie Foundation. Staff also serve as a liaison between the Flutie Foundation and Charges. The activities that Charges participate in are partially self-funded and partially funded through Educational Foundation Grants.

- **BrosUniteD**: BrosUniteD is an award-winning service project unique to Theta Delta Chi. Individual Charges plan and execute an 8-week mentorship program for adolescent men on the Autism spectrum. They work with the local Autism community to organize appropriate activities and help the Charge locate participants. Charges that host this program can apply to the Educational Foundation for financial support.

- **Document Guidelines and Sample Documents**: Grand Lodge Staff has undertaken the task of developing guidelines and sample documents for Charges to develop:
    - New Member Education Plan Guidelines and Samples
    - Brotherhood Standards Agreement Guidelines and Samples
    - Officer Transition Manual Guidelines and Samples
    - Recruitment Plan Guidelines
    - Risk Management Plan Guidelines and Samples (in development)
    - Grant Application Guidelines (in development)

  These guidelines have been developed with the cooperation of various Charges, undergraduates, alumni, and our insurance broker. They also reflect best practices and current research in various areas.

  All of these documents can be found at **MyTDX.org**.

- **Grants**: The Educational Foundation provides grants to Charges in accordance with their 501(c)(3) status. Grant applications are considered on a monthly basis and can range from providing improved internet connections within a Charge house to partially funding study areas and materials to help fund charitable and philanthropic projects at the Charge level.

- **Reform Plans**: From time-to-time Charges experience difficulties for a variety of reasons. Rather than moving to suspension of their Charter or Expelling the Charge from the Organization, Reform Plans are often put into place. These plans are customized according to the issues identified and involve the Charge and the host institution's Greek Office in their development. Grand Lodge Staff facilitate the development of these plans and then works on site, when necessary, to assist with the implementation. The Grand Lodge Staff also monitors the implementation of these plans and reports back to the host institutions and the Grand Lodge as they progress.

- **Monthly Newsletters**: Grand Lodge Staff write and disseminate a monthly newsletter to all undergraduates. These newsletters often highlight Alumni of distinction who can serve as role models for our members, news of interest to undergraduates about grants and scholarships, along with information about traditions, stories, and factoids about Theta Delta Chi.

- **MyTDX.org:** In a cooperative venture between the Grand Lodge and the Educational Foundation, a new membership management system has been launched in the Spring of 2020. This system allows individual Charges to more efficiently communicate with all Charge members, alumni, and undergraduates, maintain documents for the continuity and longevity of the Charge, self-manage its membership rosters, and better manage its finances. At the same time, alumni are able to manage their membership profile, connect more easily with other Charge Brothers, communicate with their Charge, be more knowledgeable about alumni activities, and donate to the Educational Foundation more easily.

- **Record of Visitation (ROV)**: The ROV (Record of Visitation), is conducted annually at each Charge. The ROV consists of
  - A rubric that is scored by Grand Lodge Staff and Charge Leadership
  - A summary of a 360-degree assessment conducted by the Charge President, Alumni contact, and University Greek Advisor before the arrival of the staff member
  - A narrative summary of the staff member's conversation with the Charge, alumni, and Greek Advisor
  - Charge identification of their strengths and areas for growth
  - And three SMART goals for improvement.

  This visit is scheduled over a three to four-day time period. See the file, Understanding Your Report of Visitation for a complete explanation and example.

- **Scholarships**: The Educational Foundation, annually, funds a variety of scholarships to both undergraduates and alumni alike. One need not be a member of Theta Delta Chi to be awarded a scholarship. There are three areas within which scholarship applications are evaluated; scholarship, need, and service to the Fraternity. These Scholarships range between $1,000 and $4,000.

- ***Shield* Magazine**: The *Shield* Magazine, the first national fraternal magazine, is published annually and lists Educational Foundation Donors while providing a conduit from the CFO to all members of the organization about current happenings within the Fraternity. This publication also provides information about upcoming events, in particular the annual Convention. The CFO publishes this magazine both in paper and in an online format on the Fraternity's website.

Theta Delta Chi International Fraternity

Appendix B
Index of Support Documents

Index of Support Documents--Theta Delta Chi	
Document	**Location**
Academics	Officer Tag: Academics
Academic Improvement	
Individual Academic Success Plan	
Alumni	Public - Folder: Alumni Resources
Alumni Association By-laws - SAMPLE	
Alumni Structures and Roles	
Application for Charter	
Charge Advisor Support Manual	
Establishing Your Alumni Association	
mytdx.org user guide - Alumni	
Brotherhood Standards	Officer Tag: Standards
Brotherhood Standards Agreement Guidelines	
Brotherhood Agreement with Points - Sample	
Brotherhood Agreement without Points - Sample	
Budgeting	Officer Tag: Finance
Building a Charge Budget	
Budget Template	
Scholarships-Grants and Recognition Programs	Public - Folder: Scholarships-Grants and Recognitions Programs
Andrew H Green Scholar Program	
Grants Application Instructions	
Grants Application	
Scholarship Application & Instructions	

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Essential Forms		Public - Folder: Essential Forms
	Expulsion Form	
	Expulsion Guide and Sample	
	Programming Standards & Documentation	
	Report of Visitation (ROV) Template	
	Report of Visitation Rubric	
	Understanding Your Report of Visitation	Officer Tag: Admin / Public - Folder: Essential Forms
Expansion Materials		Tag: Officers & Advisors Folder: Expansion Materials
	Confirmation of Review and Compliance	
	Expansion Membership Spreadsheet	
	Sample Charge Bylaws	
	Expansion Handbook	Expansion Materials/Public
MyTDX.org: Users Guide		Public / Alumni Resources
	Alumni	
	Undergraduate	
	Transitioning to Alumni Status	
New Member Education		New Member Education
	Membership Handbook	
	New Member Education Guidelines	
	New Member Education Plan - Sample	
	Preamble	Admin/Ritual
Organizational Documents		Public - Organizational Documents
	By-laws of Theta Delta Chi	
	Constitution of Theta Delta Chi	
	Expulsion Guide and Sample	
	Important Dates	
	Membership Handbook	

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Preamble	Admin/Ritual
Programs and Services	Admin
Policies of Theta Delta Chi	Public - Policies
Academic Standards	
Alcohol and Drugs	
Expansion and Recruitment	
Fire, Health and Safety	
Hazing and Pledge Period	
Inclusive Membership and Participation	
Partnership with Host Institutions	
Sexual Assault and Violence	
Women's Auxiliary	
Programs	Public - Plans and Programs
Bros UniteD Startup Manual	
Programs and Services	
Recruitment	Recruitment
Recruitment Planning Manual	
Recruitment Plan - Sample	
Ordering Bid Cards	Shared by international > Art
Risk Management	Risk Management
Event Risk Management Guidelines	
Songs	Public - Songs
Dream Girl of Theta Delta Chi	
Invocation	
Love Cannot Die (Joyful We Greet You)	
Stars Ablaze	
Theta Delt Doxology	

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Transition Manuals	
Transition Manual Guidelines	Admin & Public - Organizational Documents / Sample Transition Manuals
President - Sample	
Treasurer - Sample	
Secretary - Sample	
Recruitment Chair - Sample	
Social Chair - Sample	
Risk Manager - Sample	

Appendix C

		4 - Victory Cup Worthy	3 - Meets expectations	2 - Needs improvement (Improvement plan recommended)	1 - Improvement Plan Required
Scholarship	**Academics:**	• 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	• 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	• 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	• The Charge does not meet the 2.7 GPA standard **AND** Some brothers do not meet the 2.5 individual GPA standard
	New Member	• 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 • The 17th Edition of the Membership Handbook is part of the NME Plan	• 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	• 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	• 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:**	• Shows adequate progress on Improvement Plan and meets regularly with CFO staff • 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	• Has a fully developed Improvement Plan on file with the CFO • 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	• Has not developed an improvement plan, but has demonstrated clear goals • 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.	• Does not have a clear set of goals to obtain • 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.

Appendix C

	Finances:	• 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	• 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 or a payment plan is in place with the CFO. • All local financial obligations are met in a timely manner • Charge has a functional Treasurer, with clearly defined roles and responsibilities in the Bylaws	• 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	• 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:	• 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	• 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	• 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	• Theta Delta Chi's and host institution's policies are disregarded during recruitment

Responsible Social Life	**Risk Management**	• 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)	• 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	• 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	• 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 & Service	• 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 UniteD program	• Charge plans and implements at least two philanthropy events a year, e.g. 5k for Doug Flutie Jr. Foundation for Autism • Charge plans and implements at least one service project, e.g. Bros UniteD, 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	• 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	• Charge does not host any philanthropy or service project of its own

Appendix C

Brotherhood	Communication	• 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	• 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	• 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	• 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	• 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	• 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	• 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	Charge does not conduct any meetings or initiations in accordance with 'Book of Rituals'
	Alumni	<u>Scored</u> • 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> Charge has a Chartered Alumni Association Alumni newsletter is created and sent through MyTDX.org	<u>Scored</u> • 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> The Charge's alumni are organized as Alumni Association and/or Housing Corporation	• 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	No contact with alumni