

This is the **PREPARATION WORKBOOK** for the
2009-2010 Annual Report to the Fraternity
Online Submission Form

The following pages are exact replicas of the online submission form you will be completing.

Review the questions carefully and prepare any information or additional submissions requested.

After you have collected and prepared all materials, visit www.thetaxi.org to access the online submission form.

NOTE:

It will be best to complete the online submission at one time.

However, if you need to leave the process we encourage you to use the same computer when you return.

This will increase the possibility of picking up where you left off (depending on your system, recent updates, etc.)

Introduction

Welcome to the **2009-2010 Annual Report to the Fraternity** Online Submission Form

This online submission form will enable you to answer questions about your chapter or colony and its performance and operation during the 2009-2010 school year and must be completed
NO LATER THAN TUESDAY, JUNE 1, 2010.

The process is divided into two parts beginning with the ACCREDITATION portion of the Annual Report. When you finish the ACCREDITATION portion, you will have the option of providing submissions for the AWARDS portion of the Annual Report.

As you proceed through the questions, there will be additional documentation you are REQUIRED to submit via email or standard mail to support your answers. These items will be indicated with >>>**SUBMISSION REQUIRED**<<<. A checklist of these items is available on the Accreditation page of www.thetaxi.org.

IMPORTANT NOTE: A copy of **your chapter's** current By-Laws (not the National Fraternity's By-Laws) must be submitted as part of the Accreditation portion of the report. You will be asked to highlight and label certain passages as submission requirements.

ALL TRUE MEN CHAPTERS are REQUIRED to complete the entire submission including the Awards Section. Specific questions have been designated to be used in the "All True Men Annual Accreditation" process and are indicated with **(ATM)**.

Additionally, a select number of submissions are mandatory for ATM chapters (indicated with >>>**SUBMISSION REQUIRED for ATM Chapters**<<<). Other chapters may submit these items as supplemental information but are not required to do so; however, submission will increase the likelihood of achieving national awards.

NOTE: It will be best to complete the online submission at one time. However, if you need to leave the process we encourage you to use the same computer when you return. This will increase the possibility of picking up where you left off (depending on your system, recent updates, etc.)

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1. Have you collected all materials and information necessary to submit the Accreditation portion of the Annual Report? *(The list of required materials and information is available by visiting the Annual Report page at www.thetaxi.org)*

Yes

No

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Chapter Information

Please provide the following information concerning your Chapter:

1. Chapter Name:

2. Your Contact information

Name and Roll #:

Title:

Address:

Address 2:

City/Town:

State:

ZIP/Postal Code:

Email Address:

Phone Number:

3. Provide the names of the member who held each office Fall 2009:

President

Vice President

Treasurer

Secretary

Senior Steward

Junior Steward

Scholarship Chair

Member Ed Chair

Recruitment Chair

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4. Provide the names of the member who held each office Spring 2010:

President	<input type="text"/>
Vice President	<input type="text"/>
Treasurer	<input type="text"/>
Secretary	<input type="text"/>
Senior Steward	<input type="text"/>
Junior Steward	<input type="text"/>
Scholarship Chair	<input type="text"/>
Member Ed Chair	<input type="text"/>
Recruitment Chair	<input type="text"/>

As part of the Accreditation portion of this year's **Annual Report To The Fraternity**, you are required to submit the *Acknowledgment Page* **signed by EVERY officer holding a position as of April 1, 2010.**

This Acknowledgement Page is included in the with the Additional Submissions Checklist available on the Annual Report page of www.thetaxi.org.

As part of the Accreditation portion of this year's **Annual Report To The Fraternity**, you will be required to submit a copy of your current chapter By-Laws.

In the following questions, there are several "Additional Submissions" relating to your By-Laws. Please remember to label the copies of the By-Laws you are submitting with the appropriate information as indicated on the following pages.

You will now begin the Accreditation Portion of your submission...

Accreditation Submission - RITUAL

Standard #1 - Ritual

Each chapter shall conduct Ritual meetings on a regular basis and demonstrate its respect for The Ritual by performing ceremonies properly and encouraging members' respect for its founding principles throughout their undergraduate years. Members should strive to live up to the lofty ideals of Founders Fox, Packard, Waite, Brainerd, Buel, Farnum, Raymond, and Starbuck as presented in The Ritual of Theta Xi.

1. The chapter conducts at least two Ritual meetings per month. (*The Ritual*)

Yes

No

2. Chapter business (actions that require a vote or a ceremony) is conducted only at Ritual meetings. (*The Ritual*)

Yes

No

3. What is the "Copy Number" (located on the front page) of your chapter's copy of *The Ritual*

4. From the Cover Page of your chapter's copy of *The Ritual*, indicate the last year in which *The Ritual* was amended.

5. Submit a copy of the chapter's roll book for the month of October 2009 (*labeled as "AC1"*) with notations as to which meetings were Ritual and which were non-Ritual.

>>>**SUBMISSION REQUIRED**<<< - I acknowledge that, as a requirement for accreditation, my chapter must submit a copy of the October 2009 Roll Book (*labeled as "AC1"*) with notations indicating whether each meeting was Ritual or non-Ritual.

Accreditation Submission - RECRUITMENT

Standard #2 - Recruitment

Each chapter shall strive to maintain a minimum number of 30 members and to exceed the average size of other men's fraternities on campus when that average exceeds 30 members. Setting and achieving membership goals shall be considered one of the highest priorities of the chapter. The goal shall be established to maintain a membership level that provides a meaningful Fraternity experience to every undergraduate brother.

1. The chapter has at least 30 undergraduate members at the end of the school year, including graduating members.

Yes

No

2. What is the chapter's highest assigned roll number?

3. In the space below, list the name and roll number of each member you know is not returning to the chapter Fall Term 2010.

For each name, indicate if the member is "G" (Graduating) or "LS" (Leaving School).

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Accreditation Submission - MEMBERSHIP EDUCATION

Standard #3 - Membership Education

Each chapter shall conduct an ongoing education program (for both Associate Members and Initiated Brothers) that stresses mutual respect of all associates and initiates.

The chapter shall utilize Theta Xi's Alpha Nine Core Associate Member Education Program as revised in Fall 2008 and shall obtain Grand Lodge permission to perform any ceremonies not included in The Ritual or the core program that do not include the equal participation of the Associate Members and Initiated Brothers. (By-Law 25.2)

Ongoing membership education programs should be scheduled regularly and offered to all members. These programs can address current issues affecting the chapter such as: effective study skills to improve academic standing; dressing for a job interview; or a guest speaker from your alumni ranks, the college faculty or administration, an area business person; or a leadership skills training session.

The maximum length of the Associate Member period is 63 days.

SPECIAL NOTE: The *Alpha Nine Core Associate Member (AM) Education Program* divides the AM education period into eight parts, starting with the AM Ceremony (pinning) and concluding with the The Ritual Initiation Ceremony.

In between are six education sessions and a retreat that provide new members with a solid foundation in the Fraternity's history, its values, the responsibilities of membership, leadership and service opportunities, and national and local chapter operations.

Please answer the following questions about your chapter's use of *Alpha Nine*...

1. The chapter conducts the formal *Associate Member Ceremony* as outlined in the Alpha Nine Core Program.

Yes

No

Other than chapter members, list other individuals by title or group (i.e. Chapter Advisors, parents, etc.) who normally attend the ceremony.

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2. The chapter conducts an Orientation Meeting with Big Brothers.

Yes

No

Provide a short summary of the process:

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3. **Core Education Program One:** *Fraternity history, including viewing the Theta Xi – Making History DVD, followed by discussion of Inter-fraternity history, the history of Theta Xi, and chapter history.*

The chapter incorporates the topics of *Core Education Program One* into AM Education?

Yes

No

Provide a short summary of the process:

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4. **Core Education Program Two:** *Introduction of the Fraternity's Leadership Initiative to AMs. Also includes the following: Review and explanation of individual financial obligations to the chapter, an examination of the chapter/colony by-laws.*

The chapter incorporates the topics of *Core Education Program Two* into AM Education?

Yes

No

Provide a short summary of the process:

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5. **Core Education Program Three:** *Review and discuss the Fraternity Statements of Position and Risk Management Policy, introduction to GreekLifeEdu (which each AM must complete), review the duties of elected and appointed Chapter Officers and the Chapter Committee Structure.*

The chapter incorporates the topics of *Core Education Program Three* into AM Education?

Yes

No

Provide a short summary of the process:

6. What percentage of your chapter's Associate Members completed the **GreekLifeEdu** online, risk management education program as required by *Theta Xi's Alpha Nine Core Associate Member Education Program? (Alpha Nine)*

7. **"Building The Bonds" Camping Trip or Retreat:** *An alcohol-free, overnight trip (away from the chapter house) attended by all AMs and their big brothers (other brothers are also welcome) focusing on building friendships through communication and discussion of Theta Xi values.*

The chapter conducts a *"Building The Bonds" Camping Trip or Retreat* as explained in *Alpha Nine*?

Yes

No

Provide a short summary of the process:

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8. **Core Education Program Four:** *Review and discuss chapter programs/activities, the Fraternity's District and Regional Plan, your Greek Community and the alumni aspect of the Fraternity.*

The chapter incorporates the topics of *Core Education Program Four* into AM Education?

Yes

No

Provide a short summary of the process:

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Community Service Project: *Service project(s) that bring all brothers and AMs together for the purpose of helping the community are among the most valuable bonding and learning experiences for Fraternity members.*

This portion of *Alpha Nine* will be addressed in the **Campus and Community Relations** section of this Annual Report.

9. **Core Education Program Five:** *Review of Fraternity Ritual (with big brothers participating) utilizing The Secret Thoughts of a Ritual *handout* and the Sharing My Ritual DVD.*

The chapter incorporates the topics of *Core Education Program Five* into AM Education?

Yes

No

Provide a short summary of the process:

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10. Does the chapter include any activities with AM's that are not specifically outlined in *Alpha Nine Core Program*?

Yes

No

Provide a short description of each activity:

If you would prefer to submit this information as a prepared statement, enter "Submitting via mail" below and label the printed submission as "AC2".

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11. What is the average length (# of days) of your chapter's Associate Member Program? (How many days between AM Ceremony and Initiation?)

12. Does the chapter sponsor any activity with Associate Members that includes alcohol?

Yes

No

List any AM event(s) where alcohol was available:

	5
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Accreditation Submission - SCHOLARSHIP

Standard #4 - Scholarship

Each chapter shall maintain a collective, cumulative grade point average (GPA) of at least 2.5 on a 4.0 scale and strive to maintain a collective grade point average of 0.2 above the all-men's average on its campus. Further, academic standards for the affiliation of Associate Members must be in accordance with or exceed Fraternity policy of 2.3 on a 4.0 scale. By chapter policy, each chapter officer shall maintain a GPA of 2.5 on a 4.0 scale to mirror the chapter standard.

1. The chapter maintains a chapter grade point average of at least 2.5 on a 4.0 scale. (By-Law 23.3.5.1)

Yes

No

2. Including Theta Xi, how many fraternities are on campus?

3. **REQUIRED** - Provide the following GPA information for **Spring 2009**:

- Chapter Cumulative GPA:

- Campus All-Male GPA:

- Theta Xi Ranked:

4. **REQUIRED** - Provide the following GPA information for **Fall 2009**:

- Chapter Cumulative GPA:

- Campus All-Male GPA:

- Theta Xi Ranked:

5. Provide the following GPA information for **Winter 2009**:

- Chapter Cumulative GPA:

- Campus All-Male GPA:

- Theta Xi Ranked:

6. Provide the following GPA information for **Spring 2010**:

- Chapter Cumulative GPA:

- Campus All-Male GPA:

- Theta Xi Ranked:

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7. Provide a copy of each of the most recent chapter cumulative grade reports (including chapter GPA and ranking among all IFC/IGC groups on campus) as issued by the school (labeled "AC3-Fall09", "AC3-Spring10", etc.)

Indicate which semesters/terms will be included:

- € Spring 2009 GPA and Ranking Report (labeled "AC3-Spring09")
- € >>>**SUBMISSION REQUIRED**<<< - Fall 2009 GPA and Ranking Report (labeled "AC3-Fall09")
- € Winter 2009 GPA and Ranking Report (labeled "AC3-Winter09")
- € Spring 2010 GPA and Ranking Report (labeled "AC3-Spring10")

8. On the copy of your chapter By-Laws submitted as part of the Accreditation portion of this submission, highlight the text regarding academic requirements for the qualification of members and any other By-Laws that address academic requirements to hold office, maintain good standing, be placed on academic probation/suspension, etc. (Label all appropriate areas with "AC4")

jn >>>**SUBMISSION REQUIRED**<<< - I acknowledge that, as a requirement for accreditation, all areas regarding academic requirements will be highlighted (*and labeled as "AC4"*) on the copy of the chapter's By-Laws being submitted.

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Accreditation Submission - FINANCES

Standard #5 - Finances

Each chapter shall maintain a sound financial position that enables them to meet all financial obligations and maintain an emergency reserve fund.

1. The chapter is current with all fees due to Fraternity Headquarters, to the chapter's alumni association/housing corporation, and to their campus IFC/IGC. (*By-Law 23.3.12 and The Ritual*)

Yes

No

2. Did the chapter file the required 2009 Internal Revenue Service Form 990 no later than the due date?

Yes

No

3. If the chapter filed the 2009 IRS Form 990 as required, provide a copy of the return (*labeled as "AC5"*).

>>>SUBMISSION REQUIRED<<< - I acknowledge that, as a requirement for accreditation, my chapter must submit a copy of our 2009 IRS Form 990 (*labeled as "AC5"*)

The chapter filed the 2009 IRS Form 990 but did not keep a copy of the form

The chapter did not file the required 2009 IRS Form 990

4. What is the chapter's EIN (Tax ID number) issued by the Internal Revenue Service?

5. Provide headquarters with a copy of the chapter's annual financial report prepared by the treasurer (*labeled as "AC6"*).

This report will include:

- total income received over the school year **by income type**
- total expenses over the school year **by expense type**
- total balances of all checking and savings accounts (including any set-aside or reserve accounts)

>>>SUBMISSION REQUIRED<<< - I acknowledge that, as a requirement for accreditation, my chapter must submit a copy of our 2009-2010 Annual Financial Report (*labeled as "AC6"*)

Using the information from the chapter's Financial Report for 2009-2010 (see above), provide the following information:

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6. Provide the following information about the chapter's **INCOME** in 2009-2010:

- TOTAL income received for the year:
- Total dues charged to members for the year:
- Total rent charged to members for the year:
- Total all other income:
- How much did **each member** pay for Fall 2009 Member Dues (not including rent)?
- How much did **each member** pay for Spring 2010 Member Dues (not including rent)?

7. Provide the following information about the chapter's **EXPENSES** in 2009-2010:

- TOTAL expenses paid by the chapter for the year:
- Total amount spent on Recruitment:
- Total amount spent on Educational Programming:
- Total amount spent on Social Activities:
- Total amount paid to Fraternity HQ for initiations:
- Total amount paid to Fraternity HQ for annual fees:
- Total all other expenses paid:

8. Provide the following information about the chapter's **OUTSTANDING RECEIVABLES**:
(All amounts **CURRENTLY** owed **TO THE CHAPTER** by any undergraduate, alumni, etc.):

- How much TOTAL is owed to the chapter?
- How much is owed by current members?
- How many members owe?
- How much is owed by alumni?
- How many alumni owe?

9. Provide the following information about the chapter's **OUTSTANDING BILLS**:

(All amounts **CURRENTLY** owed **BY THE CHAPTER** to any individual, company, campus organization, Fraternity Headquarters, Alumni Association, etc.)

- What is the total amount owed:
- How many people or organizations are owed:
- What is the oldest amount owed?
- Who is the oldest amount owed to?

10. Provide the following information about the chapter checking account:

On the date of:

The checking account balance was:

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11. Provide the following information about the chapter savings account (if applicable):

On the date of:

The savings account balance was:

Accreditation Submission - CHAPTER OPERATIONS

Standard #6 - Chapter Operations

Each chapter shall strive to exemplify the best traditions of Theta Xi. To accomplish this, each chapter shall strive to maintain effective administrative operations; promote and enforce positive behavior on the part of all members; and encourage active member participation within the chapter and at Fraternity district and national events.

1. The chapter and its members:

- submit all forms to Fraternity Headquarters on a timely basis
- maintain accurate membership records with Fraternity Headquarters
- place priority on attending chapter meetings

(By-Laws, 23.3.6, 23.3.7, 23.3.10 & 24.10)

NOTE: *There is no submission for this criteria. Fulfillment will be based on previously submitted materials, HQ records and campus Greek Advisor statements.*

Submit any comments you would like considered in reference to this criteria, in the box below:

2. The chapter and its members had no violations of campus or Fraternity policy in 2009-2010.

True

False

If "False", briefly summarize violation(s):

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3. The chapter was represented at ALL national events including (check all that apply):

- 145th Anniversary Convention - undergraduate delegate(s)
- 2010 Presidents Academy
- 2010 Rising Stars Academy
- 2010 District Leadership Academy

Accreditation Submission - CAMPUS & COMMUNITY RELATIONS

Standard #7 - Campus & Community Relations

Each chapter shall strive to maintain a strong positive presence and reputation on campus, in the community, and throughout Theta Xi. The chapter endeavors to stress personal commitment and leadership to the campus, surrounding communities, and Theta Xi nationally through its programs.

1. The chapter and its members:

- conduct **at least** two service projects per year to support Multiple Sclerosis, and/or Habitat for Humanity and/or a community group
- have a positive reputation on their campus and in their community
- ensure that at least 50% of the chapter members provide leadership on their campus by actively participating in campus clubs and organizations.

(By-Law 24.6 and Chartering Standards)

Yes

No

2. List at least two service projects that meet the criteria, including the event, the organization supported, percentage of members participating, and funds raised, if applicable.

If you would prefer to submit this information as a prepared statement, enter "Submitting via mail" in EACH of the spaces below and label the printed submissions as "AC7-A", "AC7-B", etc.

Project #1:

	5
	6

3. Project #2:

	5
	6

4. Project #3:

	5
	6

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5. Project #4:

	5
	6

6. Each member of the chapter should be involved with at least one organization on campus or in the community other than the Fraternity (and not including IFC/IGC representatives or intramurals). On a roster of members (*labeled as "AC8"*), identify which organization(s) each member actively participates in and indicate any officer/leadership positions held.

jn >>>SUBMISSION REQUIRED<<< - I acknowledge that, as a requirement for accreditation, my chapter must submit a roster of members indicating campus organizations (not including IFC/IGC and intramurals) they participated in and officers/leadership positions held (*labeled as "AC8"*)

7. On the roster used in the question above, also indicate any member who holds or held an IFC/IGC office during the academic year. Include the title of the office held.

jn >>>SUBMISSION REQUIRED<<< - I acknowledge that, as a requirement for accreditation, my chapter must also indicate on "AC7" which members hold or held an IFC/IGC office during the academic year including the title of office held.

Your Greek Advisor's submission will provide information to support the chapter's campus reputation.

Accreditation Submission - Does Your Chapter Have A House?

1. Does the chapter have a chapter house (owned by an alumni association or housing corporation)?

Yes

No

THIS PAGE IS ONLY FOR CHAPTERS WITH HOUSES.

Chapters without houses will NOT see this page on the submission form.

Standard #8 - Housing

Theta Xi strives to provide each member a home away from home. Each chapter shall work to maintain adequate and competitive housing relative to its campus. Regardless of housing status, each chapter shall have a legal alumni corporation in place to provide (or seeking to provide) housing for the chapter.

1. The chapter has a house where all residents have executed a lease. *(The Purpose, Guide for Chapter Treasurers & Guide for Alumni Corporations)*

Yes

No

2. Submit a **COPY** of one completed and signed lease from the 2009-2010 school year *(labeled as "AC9")*.

>>>**SUBMISSION REQUIRED**<<< - I acknowledge that, as a requirement for accreditation, my chapter must submit a **COPY** of a completed and signed lease *(labeled as "AC9")*

3. The house is operating at or above break-even which includes a reserve fund for major repairs and emergencies. *(The Purpose, Guide for Chapter Treasurers & Guide for Alumni Corporations)*

Yes

No

Submissions from the chapter advisor and alumni association will provide information to further determine fulfillment of standard.

THIS PAGE IS ONLY FOR CHAPTERS WITHOUT HOUSES.

Chapters with houses will NOT see this page on the submission form.

Standard #8 - Housing

Theta Xi strives to provide each member a home away from home. Each chapter shall work to maintain adequate and competitive housing relative to its campus. Regardless of housing status, each chapter shall have a legal alumni corporation in place to provide (or seeking to provide) housing for the chapter.

1. To prepare for future needs and/or emergencies... *(The Purpose and Guide for Alumni Corporations)*

The alumni association maintains a Housing/Emergency Fund.

The chapter maintains a Housing/Emergency Fund requiring at least 75% of the members' approval to spend the funds as stated in the Chapter By-Laws.

There is no Housing/Emergency Fund.

2. The chapter made contributions to the Housing/Emergency Fund each semester this school year. *(The Purpose and Guide for Alumni Corporations)*

Yes

No

3. How much did the chapter contribute to the Housing/Emergency Fund:

Fall Semester:

Spring Semester:

Submissions from the chapter advisor and alumni association will provide information to further determine fulfillment of standard.

Accreditation Submission - ALUMNI RELATIONS

Standard #9 - Alumni Relations

Each chapter shall maintain a chapter advisor, faculty advisor and have a functioning alumni association board. Chapters shall seek to involve as many local alumni as are willing to lend assistance. Maintaining regular contact with its alumni shall be chapter priority.

1. The chapter has a Chapter Advisor that has been appointed by the National President. (A Chapter Advisor **MUST** be an initiated brother and may or may not be a faculty member.)

Yes

No

2. The Chapter Advisor is:

Name:

Chapter and Roll Number:

3. The chapter has a Faculty Advisor. (A Faculty Advisor must be a faculty or staff member and may or may not be an initiated brother.)

Yes

No

4. The Faculty Advisor is:

Name:

Chapter and Roll Number: (if applicable)

5. The chapter has a functioning alumni association board.

Yes

No

6. A newsletter is written and sent BY THE CHAPTER/COLONY (or in cooperation with the Alumni Association) to all alumni at least twice a year.

Yes

No

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7. Submit copies of each newsletter distributed during the 2009-2010 school year (*label each one as "AC10" along with noting each edition as "1 of 2", "2 of 2", etc.*).

jn >>>**SUBMISSION REQUIRED**<<< - I acknowledge that, as a requirement for accreditation, my chapter must submit copies of newsletters (*with each one labeled as "AC10" along with noting each edition as "1 of 2", "2 of 2", etc.*)

Accreditation Submission - Conclusion

This concludes the Accreditation Submission portion of the process.

The remainder of the process will be for submitting information to be evaluated and considered for Theta Xi's Annual Awards and Honors.

IMPORTANT NOTE: All True Men Chapters are required to complete the Awards section of the Annual Report to the Fraternity.

1. Is the chapter submitting information to be considered for National Awards and Honors?

Yes

No

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Awards Submission - RITUAL

Standard #1 - Ritual

Each chapter shall conduct Ritual meetings on a regular basis and demonstrate its respect for The Ritual by performing ceremonies properly and encouraging members' respect for its founding principles throughout their undergraduate years. Members should strive to live up to the lofty ideals of Founders Fox, Packard, Waite, Brainerd, Buel, Farnum, Raymond, and Starbuck as presented in The Ritual of Theta Xi.

1. The chapter performs the public Associate Member Ceremony, The Ritual Initiation Ceremony, **AND** the Graduating Member Ceremony for all members.

Yes

No

2. Submit a copy of the chapter minutes (*labeled as "AW1"*) that document initiation ceremonies and use of the Graduating Member Ceremony.

>>>SUBMISSION REQUIRED<<< - I acknowledge that, for full award consideration, my chapter must submit a copy of chapter minutes that document initiation ceremonies and use of the Graduating Member Ceremony (*labeled as "AW1"*)

3. The chapter keeps accurate minutes in the bound "Minutes" book provided by Fraternity Headquarters as explained in the Vice President's section of *The Guide for Officers* (not electronically, on notebook paper, etc.)

Yes

No

4. **ALL** Initiation Ceremony roles are memorized by chapter members.

Yes

No

5. The chapter holds a rehearsal or conducts a walk-through of the initiation ceremony before it is performed.

Yes

No

6. The chapter reviews *The Ritual* in-depth with all new brothers within two weeks of their initiation.

Yes

No

7. What percentage of the chapter has recited their secrets successfully?

8. Additional Comments Concerning the Ritual Standard: (optional)

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Awards Submission - RECRUITMENT

Standard #2 - Recruitment

Each chapter shall strive to maintain a minimum number of 30 members and to exceed the average size of other men's fraternities on campus when that average exceeds 30 members. Setting and achieving membership goals shall be considered one of the highest priorities of the chapter. The goal shall be established to maintain a membership level that provides a meaningful Fraternity experience to every undergraduate brother.

1. The chapter established a recruitment goal for this school year. *(Goal should be at least 1/3 of desired membership size.)*

Yes

No

2. What was the goal? *(Enter "NA" if the goal was not established)*

3. Number of Associate Members affiliated this school year?

4. How many of the Associate Members reported in question #3 were initiated this school year?

5. The chapter has adopted and utilizes a year-round recruitment program?

Yes

No

6. What theme or niche' does the chapter promote in its recruitment efforts?

7. Submit copies of recruitment brochures, postcards, letters, posters, website link, newspaper ads or any other materials used to market the chapter to prospective undergraduates and their parents *(labeled as "AW2")*

>>>**SUBMISSION REQUIRED**<<< - I acknowledge that, for full award consideration, my chapter must submit a copy of brochures and other materials that illustrate the chapter's recruitment efforts. *(labeled as "AW2")*

8. The chapter conducts a Recruitment Training Event (retreat/workshop) at least once during the year. **(ATM)**

Yes

No

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9. Check all that apply concerning the recruitment retreat/workshop referenced in Question #8:

- Facilitated/presented by chapter members
- Facilitated/presented by chapter alumni
- Facilitated/presented by university/college staff or faculty
- Facilitated/presented by HQ staff or national volunteer(s)
- Produced/presented by outside professional company not associated with any school or Greek organization
- Based SOLELY on Theta Xi's *More Good Men*

10. In the spaces below, provide information about your chapter's Recruitment Training Event. (*REQUIRED for ATM Chapters and optional for other chapters*)

Title of event:	<input type="text"/>
Date of event:	<input type="text"/>
Location:	<input type="text"/>
Number of chapter members who participated:	<input type="text"/>
Number of non-chapter members who participated:	<input type="text"/>
Presenter/Facilitator:	<input type="text"/>

11. Provide a short description of the Recruitment Training Event listed above:

Complete an end-of-school-year chapter membership profile below for your chapter, including graduating members and any other known departing members in the totals. (*Enter "0" if applicable*)

12. Freshman

13. Sophomores

14. Juniors

15. Seniors

16. Others

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17. For a TOTAL of

18. How many of the members listed above will graduate?

19. How many will depart for other reasons?

20. Additional Comments Concerning the Recruitment Standard: (optional)

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Awards Submission - MEMBERSHIP EDUCATION

Standard #3 - Membership Education

Each chapter shall conduct an ongoing education program (for both Associate Members and Initiated Brothers) that stresses mutual respect of all associates and initiates.

The chapter shall utilize Theta Xi's Alpha Nine Core Associate Member Education Program as revised in fall 2007 and shall obtain Grand Lodge permission to perform any ceremonies not included in The Ritual or the core program.

Ongoing membership education programs should be scheduled regularly and offered to all members. These programs can address current issues affecting the chapter such as: effective study skills to improve academic standing; dressing for a job interview; or a guest speaker from your alumni ranks, the college faculty or administration, an area business person; or a leadership skills training session.

1. The chapter CONSISTENTLY utilizes the title "Associate Member" (and not "pledge") in all communications within the chapter (including verbally among members) and with outside entities.

Yes

No

2. What percentage of **all brothers who were active** in 2009-2010 have completed the GreekLifeEdu online, risk management education course?

3. The maximum length of the Associate Member period (between the AM Ceremony and the date of initiation) is:

49 Days (maximum allowed for **ATM** Chapters)

63 Days (maximum allowed for non-ATM chapters)

Longer than 63 Days

4. The chapter/colony provides Associate Members with a printed schedule of AM Education activities at (or near) the beginning of their AM period.

Yes

No

5. Submit a copy of the printed schedule (from each semester) of AM Education activities referenced above (*labeled as "AW3"*).

>>>**SUBMISSION REQUIRED**<<< - I acknowledge that, for full award consideration, my chapter must submit a copy of the printed schedule (from each semester) of AM Education activities referenced above (*labeled as "AW3"*)

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6. Associate Members share all duties equally with initiated members.

Yes

No

7. The chapter maintains an active Big Brother program consistent with its presentation in *The Alpha Nine Core Associate Member Education Program*.

Yes

No

8. The chapter provides ongoing membership education programming (such as Risk Management, Ritual education, sexual harassment and assault, house safety, etc.) for ALL members INCLUDING UPPERCLASSMEN.

Yes

No

9. Summarize each ongoing education program the chapter conducted for all members in the academic year (labeled as "AW5").

>>>SUBMISSION REQUIRED<<< - I acknowledge that, for full award consideration, my chapter must submit a list summarizing all ongoing education programs from the academic year (labeled as "AW5")

10. In the spaces below, provide information about your chapter's health/wellness workshop for chapter members and guests (e.g., men's health issues, stress management, physical fitness, exercise safety, nutrition, attributes of successful relationships, etc.). (REQUIRED for *ATM Chapters* and optional for other chapters)

Title of event:	<input type="text"/>
Date of event:	<input type="text"/>
Location:	<input type="text"/>
Number of chapter members who participated:	<input type="text"/>
Number of non-chapter members who participated:	<input type="text"/>
Presenter/Facilitator:	<input type="text"/>

11. Provide a short description of the health/wellness workshop listed above:

12. Additional Comments Concerning the Membership Education Standard: (optional)

	5
	6

Award Submission - SCHOLARSHIP

Standard #4 - Scholarship

Each chapter shall maintain a collective grade point average (GPA) of at least 2.5 on a 4.0 scale and strive to maintain a collective grade point average of 0.2 above the all-men's average on its campus. Further, academic standards for the affiliation of Associate Members must be in accordance with or exceed Fraternity policy. By chapter policy, each chapter officer shall maintain a GPA of 2.5 on a 4.0 scale to mirror the chapter standard.

1. The chapter provides academic achievement awards (monetary or other) to members.

Yes

No

2. Provide a list of chapter academic awards, scholarships, or incentives provided to members this most recent school year including member names and roll numbers (*labeled as "AW4"*).

>>>**SUBMISSION REQUIRED**<<< - I acknowledge that, for full award consideration, my chapter must submit a list of chapter academic awards, scholarships, or incentives provided to members including member names and roll numbers (*labeled as "AW4"*)

3. The chapter provides academic scholarships, awards or other incentives as a method of identifying, recruiting, and associating good scholars.

Yes

No

4. The chapter enforces grade requirements of...

- at least a 2.3 high school average on a 4.0 scale for incoming, first-semester freshmen to be affiliated
- at least a 2.3 cumulative GPA on a 4.0 scale for other undergraduate men to be associated

Yes

No

5. The chapter requires officers to maintain a 2.5 cumulative GPA on a 4.0 scale to hold/remain in office.

Yes

No

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6. On the copy of your chapter By-Laws submitted as part of the Accreditation portion of this submission, highlight the text requiring minimum grade point standards for affiliation, initiation, and holding chapter officer positions **and label each corresponding area as "AW5"**.

>>>SUBMISSION REQUIRED<<< - I acknowledge that, for full award consideration, the submitted chapter by-laws must be highlighted to indicate with GPA requirements **and labeled "AW5"**.

7. The chapter has a written Academic Performance policy for addressing sub-standard academic performance by members which may include such items as "class checks", required study hours, tutoring, etc.

Yes

No

8. Provide a copy of the Academic Performance policy referenced in Question #5 (labeled as "AW6").

>>>SUBMISSION REQUIRED<<< - I acknowledge that, for full award consideration, my chapter must submit a copy of the Academic Performance Program (labeled as "AW6")

9. In the spaces below, provide information about your chapter's academic success workshop for chapter members and guests (e.g. time management, study skills, note-taking skills, overcoming test anxiety, etc.).

(REQUIRED for ATM Chapters and optional for other chapters)

Title of event:	<input type="text"/>
Date of event:	<input type="text"/>
Location:	<input type="text"/>
Number of chapter members who participated:	<input type="text"/>
Number of non-chapter members who participated:	<input type="text"/>
Presenter/Facilitator:	<input type="text"/>

10. Provide a short description of the academic success workshop listed above:

11. The chapter consistently maintains an average chapter GPA of .2 above the campus all-men's average. **(ATM)**

Yes

No

12. Additional Comments Concerning the Scholarship Standard: (optional)

	5
	6

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Award Submission - FINANCES

Standard #5 - Finances

Each chapter shall maintain a sound financial position that enables them to meet all financial obligations and maintain an emergency reserve fund.

1. The chapter creates a budget for the entire school year **within 30 days of the opening of classes** showing the forecasted income and expenses broken down by type/account and shares it with its advisor(s), alumni association and Fraternity HQ.

Yes

No

2. Provide a copy of the Chapter's annual budget for this **entire school year** that was prepared within the first 30 days of classes (not the financial reports compiled at the end of the year) (*labeled as "AW7"*) showing the forecasted income and expenses broken down by type/account.

>>>**SUBMISSION REQUIRED**<<< - I acknowledge that, for full award consideration, my chapter must submit a copy of the Chapter's annual budget for this school year (*labeled as "AW7"*) separately

3. Chapter committees submit written budget requests to the treasurer as part of the chapter budgeting process.

Yes

No

4. The chapter is current with all vendors and suppliers.

Yes

No

5. The chapter utilizes an assistant treasurer position to train potential treasurers.

Yes

No

6. Name the members who held the positions of:

Treasurer Fall 2009

Assistant Treasurer Fall 2009

Treasurer Spring 2010

Assistant Treasurer Spring 2010

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7. The chapter has a written policy for collections and bad debt.

Yes

No

8. Provide a copy of the chapter's collection and bad debt policies (*labeled as "AW8"*) (*referenced in Question 7 above*).

>>>**SUBMISSION REQUIRED**<<< - I acknowledge that, for full award consideration, my chapter must submit a copy of the chapter's collection and bad debt policies (*labeled as "AW8"*)

9. The chapter uses two-signature checks for all its checking accounts.

Yes

No

10. Contracts are reviewed by the chapter advisor and/or an alumni association officer prior to execution.

Yes

No

11. The chapter provides each member with a printed bill for chapter dues along with a statement showing any payments made or outstanding balance at least once per academic term.

Yes

No

12. Additional Comments Concerning the Finances Standard: (optional)

	5
	6

Award Submission - CHAPTER OPERATIONS

Standard #6 - Chapter Operations

Each chapter shall strive to exemplify the best traditions of Theta Xi. To accomplish this, each chapter shall strive to maintain effective administrative operations; promote and enforce positive behavior on the part of all members; and encourage active member participation within the chapter and at Fraternity district and national events.

1. Every member of the chapter serves on at least one committee.

Yes

No

2. Provide a copy of the chapter committees and member assignments (*labeled as "AW9"*).

>>>**SUBMISSION REQUIRED**<<< - I acknowledge that, for full award consideration, my chapter must submit a list of chapter committees and member assignments (*labeled as "AW9"*)

3. Committees meet regularly.

Yes

No

4. The chapter elects key officers (President and Treasurer) for terms of one full year, preferably holding elections at the end of Fall Term. **(ATM)**

Yes

No

5. In what month(s) is/are election(s) held for the key officers? **(ATM)**

6. Newly elected/appointed chapter officers and committee chairmen meet with predecessors shortly after elections/appointments to discuss the responsibilities of their office, exchange important information, and develop goals for improvement.

Yes

No

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7. The chapter actively educates all members, including Associate Members, on state, campus, and Fraternity hazing policies and responds quickly and decisively to allegations of violations.

Yes

No

8. Annually, the chapter reviews its risk management program — especially with regard to chapter housing and social events where alcohol is present — and identifies areas for improvement.

Yes

No

9. The chapter hosts risk management speakers at least once each term on topics such as substance abuse prevention, sexual assault, fire safety, etc.

Yes

No

10. Submit a summary report listing this year's guest speaker(s) on risk management (*labeled as "AW10"*) with date(s) of presentation and program(s) presented.

>>>**SUBMISSION REQUIRED**<<< - I acknowledge that, for full award consideration, my chapter must submit a list of this year's risk management speaker(s) date(s) of presentation and program(s) presented (*labeled as "AW10"*)

11. The chapter has established in its By-Laws a judicial review board that meets as necessary and holds members accountable for violations of chapter, campus, and/or Fraternity policies.

Yes

No

12. On the copy of your chapter By-Laws submitted as part of the Accreditation portion of this submission, highlight the text regarding a judicial board and its responsibilities / authority (*referenced in Question 11 above*) **and label it "AW11"**

>>>**SUBMISSION REQUIRED**<<< - I acknowledge that, for full award consideration, all areas in the submitted chapter's By-Laws regarding the judicial board provisions must be highlighted **and labeled as "AW11"**

13. Member information (home address, class year, and initiation date) is accurate and up-to-date with Fraternity Headquarters (including having ALL Form A's submitted for initiated members.)

Yes

No

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14. The chapter has reviewed, updated, and approved a written set of By-Laws in the last two years.

Yes

No

15. The chapter maintains an up-to-date website.

Yes

No

Have site, but it's not up-to-date

16. If so, enter your website address below:

17. Would your chapter like to have its website entered for awards consideration?

Yes

No

Award Submission - CAMPUS & COMMUNITY RELATIONS

Standard #7 - Campus & Community Relations

Each chapter shall strive to maintain a strong positive presence and reputation on campus, in the community, and throughout Theta Xi. The chapter endeavors to stress personal commitment and leadership to the campus, surrounding communities, and Theta Xi nationally through its programs.

1. The chapter consistently and actively participates in IFC/IGC meetings and events.

Yes

No

2. The chapter has one or more members in leadership roles with IFC/IGC. (Be sure to indicate members and roles on Accreditation Submission "AC7".)

Yes

No

3. At least 50% of chapter members provided **leadership** in campus or community organizations during the school year. **(ATM)**

Yes

No

4. The chapter hosted or attended at least one leadership training session (other than Theta Xi national programs such as Presidents Academy, Rising Stars Academy and District Leadership Academy.) **(ATM)**

Yes

No

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5. Provide a list of leadership training sessions attended or hosted this school year with date(s) of presentation, program(s) presented, number of members attending and number of guests (*labeled as "AW12"*). (**REQUIRED for ATM Chapters and optional for other chapters**)

ATM Chapters - SUBMISSION REQUIRED - I acknowledge that, for ATM accreditation, my chapter must submit a list of leadership training sessions attended or hosted this school year with date(s) of presentation, program(s) presented, number of members attending and number of guests (*labeled as "AW12"*)

Non ATM Chapters - The chapter will submit this as optional documentation (*labeled as "AW17"*) which will increase the likelihood of national awards

Non ATM Chapters - The chapter chooses not to submit this item

6. The chapter recognizes members who attend leadership and educational workshops and/or hold positions of leadership in the chapter, community and/or campus. (**ATM**)

Yes

No

7. How many intramural teams did the chapter sponsor this school year?

8. List each intramural team the chapter sponsored this school year?

	5
	6

9. How many of those chapter-sponsored intramural teams placed in the top 20% of all teams participating this school year?

10. The chapter sponsored an event to promote good relations with campus faculty.

Yes

No

Briefly describe the event:

	5
	6

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11. The chapter has a Parents organization and/or provides programming for parent involvement with the actives at least once per academic term. **(ATM)**

Yes

No

12. Provide a summary of all programming for parent involvement referenced in Question 11 (*labeled as "AW13"*). Be sure to include the date, location, number of members attending and number of guests. (**REQUIRED for ATM Chapters and optional for other chapters**)

ATM Chapters - SUBMISSION REQUIRED - I acknowledge that, for ATM accreditation, my chapter must submit a summary of all programming for parent involvement referenced in Question 11 (*labeled as "AW13"*)

Non ATM Chapters - The chapter will submit this as optional documentation (*labeled as "AW18"*) which will increase the likelihood of national awards

Non ATM Chapters - The chapter chooses not to submit this item

13. Additional Comments Concerning the Campus & Community Relations Standard: (optional)

	5
	6

Award Submission - Does Your Chapter Have A House?

1. Does the chapter have a chapter house (owned by an alumni association or housing corporation)?

Yes

No

THIS PAGE IS ONLY FOR CHAPTERS WITH HOUSES.

Chapters without houses will NOT see this page on the submission form.

Standard #8 - Housing

Theta Xi strives to provide each member a home away from home. Each chapter shall work to maintain adequate and competitive housing relative to its campus. Regardless of housing status, each chapter shall have a legal alumni corporation in place to provide (or seeking to provide) housing for the chapter.

1. The chapter house has provisions for computer and internet access.

Yes

No

2. The chapter maintains good relations with its neighbors.

Yes

No

3. The chapter meets with alumni corporation officers at least semi-annually.

Yes

No

4. Tenants are informed in writing that the chapter's property insurance policy does not cover personal property.

Yes

No


5. The chapter has By-Laws which help ensure the property is filled each term to the capacity needed to cover costs associated with housing or mandate rent adjustments to cover the difference.

Yes

No

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6. On the copy of your chapter By-Laws submitted as part of the Accreditation portion of this submission, highlight the provision requiring occupancy to meet budget requirements **and label it as "AW14"**.

 >>>**SUBMISSION REQUIRED**<<< - I acknowledge that, for full award consideration, the provision requiring occupancy to meet budget requirements must be highlighted **and labeled as "AW14"** on the chapter By-Laws.

7. What is the capacity of the chapter house?

8. How many men lived in the house Fall Term?

9. How many men lived in the house Winter Term (if applicable)?

10. How many men lived in the house Spring Term?

11. A fee is charged to members who do not live in the house to help support the cost of maintaining the house since they also use the property. (*Sometimes called a "parlor fee", "social fee" or "out-of-house fee"*)

 Yes

 No

12. As reported on the financial report submitted as part of the Accreditation portion of this report, what was the total income for this year from "parlor fees", "out-of-house fees", etc?

Submissions from the chapter advisor and alumni association will provide additional information.

13. Additional Comments Concerning the Housing Standard: (optional)

Award Submission - UNHOUSED CHAPTERS

THIS PAGE IS ONLY FOR CHAPTERS WITHOUT HOUSES.

Chapters with houses will NOT see this page on the submission form.

Standard #8 - Housing

Theta Xi strives to provide each member a home away from home. Each chapter shall work to maintain adequate and competitive housing relative to its campus. Regardless of housing status, each chapter shall have a legal alumni corporation in place to provide (or seeking to provide) housing for the chapter.

1. The chapter meets with alumni corporation officers at least semi-annually.

Yes

No

2. In preparation for future housing or emergency needs, the chapter contributes at least \$20 per man per year to the Alumni controlled housing fund (or chapter controlled emergency fund as explained in the Accreditation Portion of this submission)?

Yes

No

3. As indicated on the Financial Statement (provided as part of the *Finance* section in the Accreditation portion of this submission), how much was contributed to the housing/emergency fund during the academic year?

Submissions from the chapter advisor and alumni association will provide additional information.

4. Additional Comments Concerning the Housing Standard: (optional)

Award Submission - ALUMNI RELATIONS

Standard #9 - Alumni Relations

Each chapter shall maintain a chapter advisor, faculty advisor and have a functioning alumni association board. Chapters shall seek to involve as many local alumni as are willing to lend assistance. Maintaining regular contact with its alumni shall be chapter priority.

1. The chapter hosts at least one alumni event each fall (such as a Homecoming event).

Yes

No

2. Submit a list of all alumni events held in **FALL 2009** (labeled as "AW15") including the dates, locations, number of members in attendance and number of alumni in attendance.

>>>SUBMISSION REQUIRED<<< - I acknowledge that, for full award consideration, the chapter must submit a list of all alumni events held in **FALL 2009** (labeled as "AW15") including the dates, locations, number of members in attendance and number of alumni in attendance

3. The chapter hosts at least one alumni event each spring (such as a Founder's Day or "6294" event).

Yes

No

4. Submit a list of all alumni events held in **SPRING 2010** (labeled as "AW16") including the dates, locations, number of members in attendance and number of alumni in attendance.

>>>SUBMISSION REQUIRED<<< - I acknowledge that, for full award consideration, the chapter must submit a list of all alumni events held in **SPRING 2010** (labeled as "AW16") including the dates, locations, number of members in attendance and number of alumni in attendance

5. The chapter participates and/or has members in attendance at Alumni Association or Alumni Club meeting(s) or event(s) in the area. (ATM)

Yes

No

Indicate the date(s), time(s) and location(s) of the Alumni Association or Alumni Club meetings attended along with the name(s) of chapter member(s) present:

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6. The chapter has an alumni mentor program that provides advice, counsel, and leadership training to key chapter officers.

Yes

No

Please provide the following information for the five most involved alumni with your chapter. *(If there are fewer than five alumni, enter "N/A".)*

- Name & Roll Number
- Position (if applicable)
- Contact information (including phone and email address)
- Brief Description Of Effort

7. Alumni #1

	5
	6

8. Alumni #2

	5
	6

9. Alumni #3

	5
	6

10. Alumni #4

	5
	6

11. Alumni #5

	5
	6

12. INCLUDING the brothers listed above, how many alumni do you consider to be **actively involved** with chapter operations?

0 - 5

6 - 10

11 or more

13. Additional Comments Concerning the Alumni Relations Standard: (optional)

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ADDITIONAL SUBMISSIONS AND EXPLANATIONS

1. Will the chapter be submitting any "Additional Submissions" to document any outstanding accomplishments not requested elsewhere in this submission?

If so, this submission must be typed, may not exceed two pages in length and must be labeled as "AS1".

jñ >>>**ADDITIONAL SUBMISSIONS will be submitted separately and labeled as "AS1"**<<<

jñ No additional submissions will be submitted

THIS PAGE WILL APPEAR AT THE END OF THE PROCESS.

*It will be the last opportunity to
make changes before submitting the report.*

You have completed all questions on
the online submission form for the
2009-2010 Annual Report To The Fraternity

Your submission is **NOT COMPLETE** until Fraternity Headquarters receives
your **additional documents** that must be mailed or emailed.

**These additional documents must be postmarked
no later than Tuesday, June 1, 2010.**

The required coverage/checklist of these items is available
on the Accreditation page of www.thetaxi.org

Pressing the "Submit" button below will send all answers to Theta Xi Fraternity
Headquarters.

(If you have not received a confirmation email within 3 business days, contact Amy Collins at txhq@thetaxi.org.)