



Chapter Operating Standards & Awards and Recognition Process Training

Purpose of Training

Provide members of Phi Beta Sigma with the most accurate and up to date information related to:

- Σ Approved practices
- Σ Policies and
- Σ Procedures for

- Σ Chapter Evaluation
- Σ Chapter Assessment
- Σ Chapter Recognition and Awards



Why Do We Serve Humanity?



Building on the Principle of Service

- Σ Personal Mission
- Σ Sense of Civic Responsibility
- Σ Privileged Responsibility
- Σ Cultural Responsibility
- Σ Faith
- Σ Networking and Social Engagement



Community Impact?

Σ How do we know we are making a difference?

Σ How do we sustain our impact?

Σ How do we recognize those making the difference?



Training Objectives

1. To ensure members of Sigma understand approved procedures for chapter self-assessment for implementation of chapter operations standards and expectations
2. To ensure members of Sigma understand the approved awards and recognition process
3. Introduce tools and key terms that increase the understanding of chapters operating standards and awards & recognition process



Classifications of Chapters

Defining chapters by the size of present membership grants the Corporate Headquarters and the individual chapter the unique opportunity to evaluate and compare operations/activities on an equal platform. The realistic view is that the size of the chapter membership can dictate certain functionality and present a set of needs that is consistent with other chapters in the same membership range. Going further, membership challenges follow this trend as well creating a unique void that the global organization and chapter must seek to fill. Classification aids in providing a basis for developing customizable strategies to meet the operation needs for chapters of all sizes.

*Source: Vision 2010 Membership Growth Strategies Document
Adopted By General Board November 2007*



Chapter 3 Levels of Classification

Level I Chapter Classification

Large

Chapters with active membership with 40 or more members

Level II Chapter Classification

Medium

Chapter with active membership between 16 to 39 members

Level III Chapter Classification

Small

Chapters with active membership between 5 to 15 members



Chapter Ranking Categories

Gold Status

Highest ranking of chapters with audit scores above 741-840 plus

Silver Status

Second Highest ranking of chapters with audit scores ranging from 641-740

Bronze Status

Third highest ranking of chapters with audit scores ranging from 540-640

Marginal Status

*Chapter scoring less than 540. Chapters in Marginal Status will be placed on review until
Performance is brought up to a minimum of Bronze Status*



Key Terms and Definitions

International Standard and Awards Committee

- Σ An international standing committee appointed by the Fraternity's President
- Σ Consist of a chairman and 2 members from each region
- Σ Responsible for developing and evaluating Fraternity standards as well as the development of policies around chapter standards and operations
- Σ Responsible for managing the Fraternity's Awards and Recognition Process



Other Key Terms and Definitions

Annual Chapter Report

- Σ Formal report as defined by the Fraternity's Constitution
- Σ Required to be submitted on an annual basis
- Σ Will be used as a resource that **supports** results in the chapter self-assessment tool



Other Key Terms and Definitions

Electronic Program Implementation Assessment (PIA) Form

- Σ Electronic program tool where chapters are expected to report activities after each global, local program initiative is completed
- Σ Serves as a program evaluation tool
- Σ Data and statistics from the PIA is used to prepare the Fraternity's annual accountability report to its members and community



Other Key Terms and Definitions

Electronic Chapter Self Assessment Final Reporting Form (CSAF)

- Σ Used to summarize a chapter results from the self-assessment tool located the Fraternity's Programs Page and Regional Websites
- Σ Information and data gathered from the CSAF are used for all Fraternity's cumulative chapters assessment .
- Σ The cumulative assessments are reviewed annually by the respective Regional Director and by the Regional and International Standard & Awards Committee.



Other Key Terms and Definitions

Chapter's Conclave Display

- Σ The award- winning chapters are invited to display on an 8 Foot table consisting of bound books, unique scrapbooks, plaques, and limited electronics.
- Σ Display must be able to stand-alone.
- Σ Backboards, and/or sideboards, not exceeding the length of the table, may be used.



Other Key Terms and Definitions

Awards and Achievement Criteria Guide

- Σ The Awards and Achievement Criteria Guide will be released on March 1, 2009.
- Σ Contains the criteria for awards and competitions for Phi Beta Sigma Fraternity, Inc.
- Σ Provides information on awards and criteria for competitions in 10 different sections along with an appendix section that consist of forms and applications.



Other Key Terms and Definitions

Formal Interview

- Σ Required for members of chapters competing for Phi Beta Sigma Fraternity's Model Chapter of The Year Award
- Σ Selected members of the Fraternity's Standard and Awards Committee facilitate the interviews



Required Submission Period

- Σ All chapters are required to submit the Chapter Self Assessment and submit through the *Electronic Chapter Self-Assessment Final Reporting Form (CSAF)* by December 1st of each calendar year.
- Σ Each Regional Director is required to review self-assessment results submitted by his respective chapters.



Required Submission Period

- Σ After review, the regional director will approve submitted results, then; electronically submit to the Corporate Headquarters for the International Standards and Awards Committee review by January 9th of each year.
- Σ *During this first year of implementation, the submission date is May 1st.*
- Σ *Each Regional Director is required to review and submit to Corporate Headquarters for committee review by June 1st.*



Accountability

- Σ All Chapters are required to follow established submission period.
- Σ In 2009 the Fraternity will focus on training and Conclave competitions.
- Σ Beginning in January 9, 2010 all chapters will be required to comply with full chapter assessment process an submission period.



Walking through the Assessment Tool



Evaluation Criterion

The Chapter Self Assessment is based on 5 major areas:

- Σ Scholarship and Academic Achievement (100 points)
- Σ Program Implementation and Reporting (275 points)
- Σ Membership Growth and Retention (90 points)
- Σ Chapter Operations (250 points)
- Σ Risk Management (125 points)

- Σ Total Points available - 840



Scholarship and Academic Achievement

Collegiate

	Points	Your Score
The Chapter has written Academic Policy	15	_____
The Chapter Cumulative GPA is above 3.0	25	_____
The Chapter Cumulative MIP Candidates GPA is above 2.7	25	_____
Compared to other fraternities on campus, the Chapter		
– has the highest GPA or	25	_____
– Is at least in the top quartile	10	_____
Bonus Points: Score 3 points for every Chapter member Who has achieved above a 3.0 GPA.	3 each	_____
Total Possible Points <i>Excluding any bonus points</i>	100	_____



Scholarship and Academic Achievement

Alumni

	Points	Your Score
Chapter host learning opportunities, special presentations At least quarterly at during chapter's general meeting	25	_____
The Cumulative GPA of each chapter the alumni chapter sponsors and advise is above a 3.0 GPA	25	_____
75% of chapter membership have earned Undergraduate Degree	25	_____
25% of chapter members have achieved a Graduate level Degree or above.	25	_____
Total Possible Points	100	_____
<i>Excluding any bonus points</i>		



Program Implementation and Reporting

Chapter has implemented 3 Sigma Global Programs during the past year.

Points

Your Score

25

Bonus points

5 additional points for each additional Sigma Global Program implemented.

5 each

Chapter raised/contributed a minimum of \$100 to March For Babies.

25

Chapter raised/contributed a minimum of \$100 to American Cancer Society via Relay for Life.

25

Chapter host and/or participated in Sleep Out For the Homeless Campaign

25



Program Implementation and Reporting

	Points	Your Score
Chapter has an active Sigma Beta Club Program or supports/sponsor an active Sigma Beta Club	50	_____
Chapter has an established Scholarship Fund That provides scholarships annually.	25	_____
Bonus for chapters contributing more than \$1,500 in charitable giving	50	_____
Bonus for chapters participating in pilot test Global Program.	25	_____
Chapter has logged over 1,000 community Service hours.	25	_____
Total Possible Points <i>Excluding any bonus points</i>	275	_____



Membership Growth and Retention

Collegiate & Alumni Chapters

	Points	Your Score
The Chapter has written Retention Policy	15	_____
The Chapter has 100% Retention of eligible members	25	_____
The Chapter has paid all required fees	25	_____
The Chapter has 25 % Growth from last year	25	_____
Bonus Points: Chapter Level movement (50 point for each raised Level)		_____
Total Possible Points <i>Excluding any bonus points</i>	90	_____



Chapter Operations

	Points	Your Score
The Chapter has a written budget along with Business/Financial Plan	25	_____
The Chapter has completed a Chapter Assessment with his Regional Director or appointed representative.	25	_____
The Chapter		
Has current and written Bylaws	10	_____
Conduct weekly meetings (Collegiate) or	20	_____
Conduct monthly meetings (Alumni)	20	_____
Conducts formal business meeting <i>With Sigma Business Formal Attire</i> <i>At least quarterly</i>	15	_____
The Chapter has an annual chapter retreat Prior to the fall.	15	_____
An officers' retreat after the election of new officers	10	_____



Chapter Operations

	Points	Your Score
Chapter assigned alumni advisor who attends Collegiate chapter meetings at least twice a month.	25	_____
Campus Advisor attend chapter meeting at least once a month (Collegiate Chapter)	15	_____
Collegiate officers participate in local alumni Chapter meeting each month.	25	_____
Chapter supports and participates with local NPHC	15	_____
Chapter has a minimum of 20% of its membership registered and actively participate in most recent Regional Conference.	25	_____
Chapter has a minimum of 20% of its membership registered and actively participate in the most recent Conclave.	25	_____
Total Possible Points <i>Excluding any bonus points</i>	250	_____



Risk Management

	Points	Your Score
The Chapter has written Risk Management Guidelines	25	_____
The Chapter reviews the Risk Management Guidelines at the start of fall of each year.	25	_____
Chapter has paid all liability insurance fees to Corporate Headquarters.	25	_____
Advisor participates in each session of the MIP for all chapters	25	_____
Chapter submits Completed Insurance form to Corporate Headquarters according to procedures 100%	25	_____
Total Possible Points <i>Excluding any bonus points</i>	125	_____



Chapter Performance Awards

Outstanding Collegiate/Alumni Chapter – Regional

This chapter will be judged on the following criteria:

- Σ Must be recognized as the Outstanding Regional Chapter
- Σ Final score of Chapter Awards and Recognition Audit Report with Regional Director's recommendation
- Σ **Annual Chapter Report** submitted by required deadline
- Σ Degree of participation in Sigma National Programs
- Σ 21 Awards to be given in this area(includes award for each of the 7 regions and recognition at each of the 3 Chapter Levels)



Chapter Performance Awards

Sigma Model Collegiate/Alumni Chapter

“Most Outstanding Chapter in Fraternity Award”

This chapter will be judged on the following criteria:

- Σ Must be recognized as the Outstanding Regional Chapter
- Σ Highest score of Chapter Awards and recognition Audit Report with Regional Director’s recommendation
- Σ **Annual Chapter Report** submitted by required deadline and procedures
- Σ Degree of participation in Sigma National Programs
- Σ National display (presentation, neat, logical, relevant and attractive)
- Σ Formal Interview with Chapter Leadership by Standard & Awards Committee. Committee will follow established interview protocol with scoring.



Reporting Your Chapter's Work

Important Dates to Remember

Σ *December 1*

- Chapters must complete and submit *CSAF*

Σ *January 9*

- Regional Director approval and submission *CSAF*

Σ *May 1*

- 2009 Chapter Self Assessment Final Reporting

Σ *June 1*

- Regional Director must submit *CSAF* to Corporate Headquarters



Reporting Your Chapter's Work

Program Implementation and Assessment Reporting Periods (The PIA)

Σ January to June 30

- (During Conclave years)

Σ July 1 to December

- (During Conclave years)

Σ January to December

- (During non-Conclave years)

Source: Adopted during the 2006 General Board Meeting





Let's Complete the Mission





Thank You!