Chapter Status Guide

Table of Contents

Overview of Chapter Statuses

Identified as a priority by Fraternity Leadership, Delta Gamma assessed our collegiate chapter status model to gather greater insight into its effectiveness, clarity and ease of use. Throughout this review, Delta Gamma staff and Fraternity Directors engaged with collegiate chapter officers, chapter advisers, Regional team members and other volunteers and peer institutions to gather feedback on their experiences with chapter statuses. After review of the feedback, we identified the opportunity to streamline the status process, better define our statuses and expectations of chapters on status and provide for increased collaboration among the collegiate chapter, Fraternity Leadership and Executive Offices staff.

As a result of this effort, Delta Gamma now utilizes the following four statuses:
- **Support Status: Operations**
- **Support Status: Compliance**
- **Poor Standing: Operations**
- **Poor Standing: Compliance**

In the event of a chapter incident which warrants an immediate pause on operations, Temporary Chapter Restriction Status (TCRS) may be issued until further investigation can be completed and the future status of the chapter can be determined." Questions regarding TCRS should be directed to the Collegiate Development Specialist supporting the chapter.

We believe providing individualized support for chapters on status is essential to the chapter's success. While each chapter's experience on status will be unique and fully customized to the needs of the chapter, it will include the following opportunities:
- **Open discussion** of the challenges, concerning trends and opportunities for improvement that led to the status decision
- Establishing a **status support team** comprised of chapter leadership (including advisers), Regional team members and other Fraternity volunteers
- **Customized status terms** developed among the status support team that are aligned with the goals and needs of the chapter
- **Routine check-ins** with the status support team to celebrate successes and continue to identify opportunities for improvement
- **Flexibility in the duration** of the chapter's status, with no set minimum or maximum length of time, but should include a clear timeline for benchmarking and assessment of growth

The intent of our chapter status model is to intervene on challenges and concerning trends as soon as they are known to the Fraternity to begin the work of creating lasting change. We believe a quick response is necessary to curb these concerns and re-align the chapter's operations and trends to a path that meets the expectations outlined in our **Fraternity Standards**. We also want chapters to have true ownership over the goal setting and progress achievements so that the changes are sustainable within their unique chapter and campus environments. As chapters capitalize on the opportunities for improvement and make sustainable changes, their progress will be continually evaluated and the need for continued time on the status will be reviewed.

To best celebrate their successes, we look forward to the opportunity to de-escalate a chapter's status – whenever that opportunity presents itself!

Definitions

- **Operations:** chapter exhibits challenges in chapter operations functional areas such as finance, recruitment performance, retention, etc. and/or operates in a campus climate that is not suitable for or supportive of fraternity/sorority life
- **Compliance:** chapter demonstrates concerns in the areas of risk management, conduct concerns and/or behavioral concerns, Honor Board functionality, accountability and policy enforcement and/or fosters a sense of sisterhood that is not in alignment with Fraternity expectations
- **Support Status:** focuses on support and is not meant to be punitive; intent is to identify and highlight emerging concerns with a chapter before they become chronic or sustained issues
- **Poor Standing:** renders a chapter in poor standing with the Fraternity; highlights significant concerns with a chapter with the intent to promote extensive, long-term change
- **Decision Group:** group of volunteers and Executive Offices staff responsible for responding to chapter incidents, crisis events and managing the collegiate chapter status process. Utilizes a tiered response format depending on the context:
    - **Tier 1:** comprised of collegiate chapter's Collegiate Development Specialist (CDS), Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC) and Regional Director (RD). Support provided by the Director of Member Services and Director: Chapter Support if outcome is likely to result in Support status. If the CDS and RCS are unsure if the likely outcome is Support Status or Poor Standing, then the Director: Chapter Advancement should also be invited to participate in the conversation. If the RCS and CDS feel Poor Standing is the likely outcome, they can call Tier 2 immediately and do not need to start with a Tier 1 call to escalate.
    - **Collegiate Chapter Support Committee:** Status escalation requests to Poor Standing must first be reviewed and affirmed by this committee comprised of Council Trustee: Collegians, Fraternity Director: Chapter Support, Fraternity Director: Chapter Advancement and the Director of Member Services. All chapter investigations are also reviewed by this team to ensure consistency. Any Poor Standing escalations must also be reviewed and affirmed by Fraternity Council after being reviewed by the Collegiate Chapter Support Committee.
- **Status Support Team:** team of volunteers and staff to support a chapter on status. Comprised of Tier 1 Decision Group (above) and additional subject matter experts as needed based on the chapter's focus areas. Fraternity Director: Chapter Support should be included in the support team for Support Status chapters while Fraternity Director: Chapter Advancement should be included in the support team for Poor Standing chapters.
- **Council Appointed Specialist (CAS):** Appointed by Fraternity Council. This is a temporary assignment to provide intentional support to a collegiate chapter regarding one or a few specific operational needs (i.e. Honor Board education/support, recruitment, retention, etc.). The CAS serves in support of the chapter with the RCS.
- **Council Appointed Coordinator (CAC):** Temporary assignment to provide holistic operational support to a collegiate chapter. The CAC is a volunteer dedicated to the development of the collegiate chapter regarding all operations and chapter expectations. The CAC serves in place of the RCS.

Decision Making & Communication

Every collegiate chapter's status, including our new chapters, is evaluated on an annual basis in January. During this review period, members of the Regional team, Executive Offices staff and Fraternity Leadership gather information about the strengths and opportunities of each chapter through the Patricia Peterson Danielson Award application/Collegiate Chapter Evaluation process. Both the collegiate chapters and Regional team members provide feedback to ensure multiple perspectives are heard. With this information, the Regional team then discusses in-depth the needs and potential of each chapter and ultimately makes a recommendation to our Fraternity Council – either an escalation, de-escalation, lateral shift or no change in status. The Chapter Status Guiding Questions Resource within this document is utilized to assist with consistent status recommendations.

Once Council has reviewed and made a final decision on each chapter's status, an updated status letter will be sent to every collegiate chapter for whom a status letter is warranted. The status notification letter is sent through Anchorbase to the chapter president with appropriate chapter leadership and Regional team members copied.

Outside of the annual review process, a chapter status escalation may be considered at any point during the year if concerning trends emerge and/or incident(s) occur. During this process, the Decision Group will convene to discuss the emerging concerns and utilize the Chapter Status Guiding Questions Resource within this document to make an informed status recommendation. If a Support status is a likely outcome, Tier 1 will convene and come to consensus on how best to proceed, as they have the decision-making authority to place a chapter on Support status. If a Poor Standing status is a likely outcome, the Tier 1 Decision Group will make their recommendation to the Collegiate Chapter Support Committee and a decision will be made to endorse the recommendation to Council. If the recommendation is endorsed, a status notification letter will be sent via the same process outlined previously, and should include the Fraternity Director: Chapter Support and Fraternity Director: Chapter Advancement, to consult on the correct status determination.

In the event of an incident which results in an investigation, the Chapter Incident Procedure for review of chapter support will be followed. As part of the recommendation for support, a status change may be included, but must be affirmed by the necessary parties in that process before notification can be given to the chapter.

Chapter status de-escalation can be considered at any point throughout the year as there are no defined time limit requirements for chapter statuses. While it is most common to see de-escalations in status result from the annual review process in January, the Tier 1 Decision Group can convene to discuss de-escalating a chapter's status at any point. This decision should consider the opinions and reflections of the chapter's status support team and should cite the progress achieved during the chapter's time on the status. If the proposed de-escalation is from Poor Standing to Support status, the Tier 1 group will make their recommendation to the Collegiate Chapter Support Committee and then to Council.

Support for Chapter Statuses

As mentioned previously, a major component of our status model is the individualized support provided by the status support team. Members of the status support team will vary depending on the unique needs of the chapter but will consistently include members of the Regional team, the Collegiate Development Specialist (CDS) and either the Fraternity Director: Chapter Support for Support statuses or Fraternity Director: Chapter Advancement for Poor Standing statuses.

Additional support may be identified on an as-needed basis depending on the scope and variety of the chapter's focus areas. These additional supports may include a CAC to function as the RCS, a CRC who functions as the Regional Collegiate Recruitment Specialist (RCRS), CAS who provides identified specific specific support pertaining to a particular operation of the collegiate chapter and/or support from Fraternity subject matter experts such as the Director: Finance for finance-related concerns or the Director: Standards for Honor Board/accountability-related concerns, for example. These support mechanisms should be utilized for a few months and up to a year, unless otherwise determined by the support team and approved by Council when necessary.

The status support team will work collaboratively with the chapter management team, advisory team chair and advisory board throughout the duration of the chapter's time on a status. This collaboration begins with an action planning call which will be arranged ideally within two weeks of receiving the status notification letter. Under a Poor Standing status, these calls are organized and facilitated by Fraternity Director: Chapter Advancement. For chapters on Support Status, action planning calls are organized and facilitated by the RCS or CAC in collaboration with Fraternity Director: Chapter Support. During this call, the status support team, CMT and the ATC will discuss the concerns and trends that led to the status decision, develop goals and brainstorm realistic strategies to meet those goals, and utilize the Status Term Bank for actionable suggestions for improvement. Additional advisers should be invited to attend if they are available so they can also continue to support the chapter's efforts. After this initial meeting, the status support teams for chapters on Support statuses will continue to meet every two months, and the status support team for chapters on Poor Standing statuses will meet monthly.

These routine check-ins are essential for the chapter to remain on track and for the Fraternity to be aware of a chapter's progress on setting and meeting their goals. It is also through these Status Progress Calls that enough information can be gathered to consider potential de-escalations/escalations in status, as needed.

These meetings should include a review of the action items identified in the action plan, time to modify or adjust specific deadlines, and a progress update to collegiate officers and advisors on outstanding expectations and progress towards de-escalation of status.

Appendices

APPENDIX A: CHAPTER STATUS GUIDING QUESTIONS

Below are a series of questions intended to help the Decision Group navigate conversations around status escalation and de-escalation to ensure consistency in the decision-making process. These questions have been carefully compiled and organized for efficiency, and their primary purpose is to guide the Decision Group's conversation. The careful consideration and discussion of the strengths and opportunities of a chapter is the most important part of this process. No two status decisions are exactly alike, so these questions should be used to help navigate the unique and particular factors of each chapter's concerns to ultimately arrive at the status that is best suited to their needs. Review the chapter status definitions **here**.

Step 1: Determine whether a Compliance or Operations status is appropriate

The two sets of questions below will help determine whether a Compliance or Operations status is appropriate. The Decision Group should consider the questions in both sets, and those to which the Decision Group answers "Yes" are indicative of areas of concern. If the Decision Group answers "Yes" to questions primarily in the Compliance set, a Compliance status is recommended. If the Decision Group answers "Yes" to questions primarily in the Operations set, an Operations status is recommended. If the Decision Group answers "Yes" to a relatively balanced number of questions in each set, Poor Standing: Compliance is recommended given the broad scope of the identified concerns.

Guiding questions for a Compliance status:
- Has the chapter had conversation(s)* with the university related to the chapter's or individual members' conduct/behavior/adherence to policy within the past calendar year? *Conversations may include: meeting with conduct staff, full conduct proceedings, mediation, etc.*
- Has the regional team had a conversation* with the applicable officer(s) and/or chapter and there has been no noticeable change in relation to the chapters compliance, understanding, and commitment to Delta Gamma expectations? *Conversations may include: coaching conversation with a single officer who is not meeting expectations of their role, coaching conversation with JCMT around expectations, a targeted conversation with the entire chapter on membership expectations, etc.*
- Does JCMT lack the support of chapter members (including new members) in their decision making?
- Does the chapter perceive Honor Board as an unsafe space and/or does not trust Honor Board's ability to seek accountability?
- Over the past few years, has the chapter struggled to meet the expectations outlined in **Fraternity Standard 1 (purpose and values)**?
- Over the past few years, has the chapter struggled to meet the expectations outlined in **Fraternity Standard 2 (authentic sisterhood)**?
- Over the past few years, has the chapter struggled to meet the expectations outlined in **Fraternity Standard 12 (risk management/personal safety)**?

Guiding questions for an Operations status:
- Is the chapter struggling with one or more operational functional area?
- Do chapter officers fail to consistently communicate with advisers and the regional team?
- Are there concerns identified in the most recent CDC annual visit report that have not been addressed within the past calendar year?
- Has the chapter been inconsistent in enforcing their bylaws and standing rules within the past calendar year?

- Over the past few years, has the chapter struggled to meet the expectations outlined in **Fraternity Standard 3 (Honor Board functionality)**?
- Over the past few years, has the chapter struggled to meet the expectations outlined in **Fraternity Standard 5 (recruitment functionality)**?
- Over the past few years, has the chapter struggled to meet the expectations outlined in **Fraternity Standard 9 (finances)**?
- Over the past few years, has the chapter struggled to meet the expectations outlined in **Fraternity Standard 10 (operations)**?

Step 2: Determine the severity of the concerns to inform the severity of the status (either Support Status or Poor Standing)
The questions below are to help identify the severity of the areas of concern identified previously. Each question to which the Decision Group answers "Yes" indicates an increase in the severity of the chapter's concerns. If the Decision Group answers "Yes" to at least three of the below questions, a Poor Standing status is strongly recommended.

Guiding questions:
- Is support outside of the Regional team needed? *Additional support may include: CAC, CRC, Fraternity Director, etc.*
- Is Honor Board unable to function (including being unwilling to function and/or adequately address the concerns)?
- Does the chapter have a history of behaviors that are incongruent with Article II and not responding to the Fraternity's previous efforts*? *Fraternity efforts may include: Alcohol Skills Training Program (ASTP), Human Dignity, Chapter Development Experience (CDE), Fraternity Assessment, targeted CDC or volunteer visits*
- Have Decision Group members or chapter leaders received communication* from chapter members and/or community members outlining concerns they have witnessed? *Consider whether the reports were made anonymously*
- Is the chapter experiencing concerns in many operational functional areas?
- Is it necessary to mirror the University's decision making, or has the University requested a status escalation?

Additional Questions to Consider:
- Who will comprise this chapter's status support team?
- Is it recommended that additional support volunteers be appointed?
- Which volunteer(s) are best suited to lead the initial status notification and action planning calls?
- Should alumnae of the chapter be notified of the status escalation?
- Are additional staff support or resources needed to support this chapter? This may include targeted CDS coaching or a request for CDC support.
- Would this chapter benefit from additional Delta Gamma resources such as health and wellness program or an Anchoring Team Visit.

Summary Report for Status Recommendation

Note; This report is to be completed by the RCS and CDS prior to a decision group meeting and shared with potential attendees. The purpose is to guide the conversation.

Chapter:
Chapter's current status with Fraternity and date issued:
Number of Members in the Chapter:
Fraternity Standard Evaluation:

Highlight if the sub-bullet is not consistently fulfilled/met by the chapter in consideration.

1. **Demonstrating an understanding of and respect for Delta Gamma's *larger purpose and values*.**
   - Chapter members honor and align their behaviors with Fraternity values, policies and procedures.
   - Chapter members regularly discuss Delta Gamma's purpose and values.
   - Chapter members are committed to creating an equitable and inclusive chapter culture that values diversity.
   - Chapter members understand that membership in Delta Gamma extends beyond their collegiate years.
   - Chapter members are aware of and respectful of their role within the larger Fraternity.
   - Chapter members honor and respect Fraternity visitors.
   - Chapter members integrate ritual into chapter culture respectfully.
   - Chapter members conduct Inspiration, Initiation and the Initiation Celebration in accordance with the policies and procedures outlined in the Rituals Handbook and Initiation Ceremony.
   - Chapter members participate in informal/ongoing rituals.
   - Chapter members understand and honor their Membership Responsibilities.
   - Chapter members know and uphold the Oath of Friendship and honor the Oath of Secrecy.
   - Chapter officers implement the chapter's approved rituals program.

2. **Championing *authentic sisterhood* that challenges women to become better versions of themselves.**
   - Chapter members care for and respect each other.
   - Chapter members confront each other's concerning behaviors from a place of care.
   - Chapter members understand that authentic sisterhood means holding each other accountable to the standards of Delta Gamma.
   - Chapter members honor and respect each other's differences.
   - Chapter members cultivate sisterhood in a substance-free environment.
   - Chapter members attend sisterhood events, which are offered regularly.

3. **Fostering chapter morale, enforcing policies and procedures and upholding Delta Gamma values through a *functioning Honor Board*.**
   - Honor Board consistently shows care and concern for all members, monitors chapter morale, develops programming and shares chapter culture trends with chapter officers.
   - Honor Board and chapter members maintain confidentiality of all Honor Board proceedings.
   - Chapter members are well-educated on and understand Honor Board purpose and procedures.

- Honor Board works to create personal accountability by enforcing policies and procedures, ensuring members fulfill their Membership Responsibilities and are upholding Delta Gamma values.
- Honor Board is knowledgeable of the various member status options and are advising members appropriately.
- Honor Board is knowledgeable of the various Delta Gamma and campus-specific resources to support members in times of need and are advising members appropriately.
- Honor Board is meeting weekly and is utilizing Anchorbase to submit weekly meeting minutes.
- Honor Board must review, deliberate, and vote on whether the member successfully completed the terms of probation. Honor Board may return the member to good standing or file a Statement of Obligation Review (SOR) for further review.
- Honor Board adheres to Automatic Procedure per the Honor Board Handbook and ensures that Automatic Probation Notifications (APNs) are filed in Anchorbase regularly by the correct officers: financial delinquency handled by vp: finance, scholastic poor standing handled by director of scholarship, and housing standing rules and contractual violations handled by director of house management.
- Honor Board adheres to Standard Procedure per the Honor Board Handbook and ensures that chapter members file Statement of Obligation Reviews (SORs) when they observe other members engaging in behaviors that do not align with Article II.
- Honor Board is thorough and prompt in submitting in Anchorbase Compliance Packets to their RCS/CAC/NCC, and appropriate sanctions are being recommended.
- Chapter members adhere to and chapter officers enforce the RCS/CAC/NCC-approved Chapter Bylaws and Standing Rules (BLSR).
- Events without alcohol are planned throughout the year in accordance with Fraternity policies and procedures. Events with alcohol are planned in accordance with Fraternity policies and procedures, if held.
- Honor Board coordinates chapter awards and recognizes the accomplishments of chapter members both publicly and privately.
- Chapter members are applying for applicable Fraternity and campus awards.

4. **Fostering *positive and collaborative relationships* with their campus, community, alumnae and the larger Fraternity.**
   - Chapter has a strong presence and image reflects Delta Gamma's values within the community.
   - Chapter collaborates with their campus, community, alumnae and the larger Fraternity to solve problems, as needed.
   - Chapter is represented by an active and engaged delegate on the College Panhellenic council, and chapter members are encouraged to pursue other leadership positions with College Panhellenic.
   - Chapter works to collaborate with all fraternity/sorority councils represented on campus.
   - Chapter works to foster a collaborative relationship with the university's fraternity/sorority life support staff.
   - Chapter has positive relations with and shows support for other student organizations.
   - Chapter conducts adviser recognition at least once per year.
   - Chapter has a positive working relationship with advisory team with open and frequent communication.
   - Chapter has a positive working relationship with house corporation.
   - Chapter communicates regularly with regional team and relevant Executive Offices (EO) staff.
   - Chapter has contact with supporting alumnae group.

- Chapter works with local alumnae group (if applicable) to host a Founders Day celebration each year on or around March 15.
- Chapter includes alumnae in one event per year other than the annual house corporation meeting.
- Chapter coordinates the approval of alumna initiate candidates with a local alumnae group and/or Executive Offices (EO) staff and welcomes candidates to attend their Initiation ceremonies, as applicable.
- Chapter members adhere to the Social Media Policy and exhibit an online image that aligns with Article II.
- Chapter's social media accounts adhere to the Social Media Policy and are used appropriately.
- Chapter's website is current.
- Chapter implements a thoughtful and strategic public relations (PR) plan.

5. **Welcoming new members into our Fraternity utilizing *values-based recruitment* and adhering to all membership related policies and procedures.**
   - Chapter is well-prepared for primary recruitment.
   - Chapter meets Quota during primary recruitment.
   - Chapter makes a concerted effort to maintain total throughout the year and utilizes COB to maintain a competitive size on their campus.
   - Chapter plans the six Recruitment Preparation Workshops and Recruitment Preparation Week according to the Recruitment Confidential and are scheduled according to the Calendar Planning Guide.
   - Chapter utilizes qualities of Article II as an evaluation tool for recruiting and evaluating potential new members.
   - Chapter follows all voting-related policies and procedures.
   - Chapter follows the Positional Statement on Inclusivity when making membership related decisions.
   - Chapter is knowledgeable of and adheres to Panhellenic bylaws.
   - Evaluating Committee (EVC) is operating per policies/procedures.
   - EVC implements a Recommendation Form system that is appropriate for the campus culture.
   - EVC uses the Fraternity-approved recruitment software and data is updated throughout recruitment.
   - EVC submits COB-related statistics reports in Anchorbase.

6. **Encouraging members to achieve their potential through participation in *leadership and personal development* opportunities.**
   - Chapter members are involved in at least one other student organization on campus outside of Delta Gamma.
   - Chapter members are encouraged to seek leadership roles in other campus and community activities.
   - Chapter members are encouraged to pursue their cultural interests.
   - Chapter sends at least one chapter member to the Lewis Institute each year to foster their leadership and personal development.
   - Chapter sends the required number of participants to attend any additional leadership and personal development events, if applicable.
   - Chapter president attends Delta Gamma's President's Academy.
   - Chapter officers complete all required training offered, either virtually or in person.

7. **Cultivating an environment that encourages and expects *academic achievement*.**
   - Chapter's grade point average (GPA) is above All Women's Average GPA on their campus.
   - Chapter's GPA is above All Panhellenic Average GPA on their campus.
   - Chapter has less than 10% of chapter members below a 2.0 GPA on a 4.0 scale (or institution equivalent).
   - Chapter submits grades in Anchorbase by the required due dates.
   - Chapter conducts scholarship recognition each academic year.
   - Chapter members are made aware of Foundation scholarships and fellowships.
   - Scholarship Automatic Probation Notifications (APNs) are being filed by director of scholarship for members who have did not meet the Constitutionally-required cumulative 2.0 GPA, or for members who failed to submit their grades by the due date in the event the university/college does not provide them.
   - Statement of Obligation Reviews (SORs) are filed by director of scholarship for members who have not met the Constitutionally-required 2.0 GPA for two or more semesters (not necessarily consecutive).

8. **Supporting the Delta Gamma Foundation and engaging in service to others in the spirit of doing good.**
   - Chapter has outlined the number of Do Good hours per member (per term) in the Chapter Bylaws and Standing Rules.
   - Chapter members are fulfilling Do Good hours, as outlined in the Chapter Bylaws and Standing Rules.
   - Chapter holds fundraising events each term that follow Foundation/Fraternity policies.
   - Chapter officers understand the process to submit fundraising profits to the Foundation and do so in a timely manner.
   - Chapter conducts the Foundation Education for Recruitment workshop during Recruitment Prep Week.
   - Chapter members are aware of our Service for Sight philanthropy and participate in opportunities supporting Service for Sight.

9. **Honoring all fiscal-related responsibilities to be in financial good standing.**
   - Chapter has a budget that has been voted on by the chapter and entered into the Fraternity-approved accounting system before the end of the fiscal year.
   - Chapter is spending within the approved budget and ends the fiscal year with a surplus.
   - Chapter has a signed Annual Agreement for each fiscal year.
   - Contracts are signed only by the collegiate president and vice president: finance, following approval from the advisory team chairman (ATC) and chapter management team (CMT).
   - Chapter officers sign budget contracts each term.
   - Chapter member contracts are uploaded and assigned to members on the Fraternity-approved accounting system in a timely manner.
   - Fines are entered and collected in the Fraternity-approved accounting system in a timely manner.
   - Chapter's financial report is submitted monthly on or before the 10th of the month via the Fraternity-approved accounting system, year-round.
   - Chapter pays all applicable bills and invoices by their due dates.
   - 360G, the individual member purchases account, is well managed and members are billed as items are ordered.
   - 332, the chapter fundraising event account, is being used properly to plan Foundation fundraising events.
   - W9s are collected from vendors prior to any contracts being signed or invoices paid.
   - Member Account Adjustments (MAA) are submitted in a timely manner.

- Unsecured receivables are at 0% within 10 days of Dues and Fees Contracts being generated.
- Finance Automatic Probation Notifications (APNs) are being filed by vice president: finance for members who have been in debt to the chapter for more than 10 days, or who have not signed their Dues and Fees Contract by the due date, or who have failed to pay fines by the due date.
- Statement of Obligation Reviews (SORs) are filed by vice president: finance for members who have not met their financial obligations by day 30.
- Collection letters are sent by the vice president: finance for members who have not met their financial obligations by day 45.
- If housed, chapter house is filled to capacity.
- If housed, Housing APNs are being filed by director of house management for members who have not moved into the house per the chapter's live-in requirements outlined in the Chapter Bylaws and Standing Rules (BLSRs), or who have not signed their housing contract per their BLSRs, or who have failed to complete the terms of their housing contract.

10. Executing all necessary *operations* to have a successfully functioning chapter.
- Chapter meetings are organized, efficient and productive.
- Chapter meetings, new member meetings and Honor Board meetings are scheduled at times that are conducive for the adviser(s) to attend.
- Chapter officers work together and brainstorm solutions.
- Chapter officers set yearly performance goals and a plan to achieve those goals is developed.
- Chapter officers are prompt and thorough when communicating with their regional team.
- Chapter officers read their respective Collegiate Chapter Officer Newsletters and are knowledgeable of the content.
- Chapter updates Bylaws and Standing Rules (BLSRs) each year per the model BLSRs.
- Chapter votes on the BLSRs that were approved by their RCS/CAC/NCC.
- Once approved by chapter vote, the final version of the BLSRs is uploaded in Anchorbase.
- Chapter members are assigned to committees, and committee members are assisting officers.
- Chapter follows all steps in the slating, elections and transitions timeline.
- Chapter holds individual officer transition and a formal transition workshop per the model defined in Changing of the Tides.
- Chapter completes all steps of the Initiation authorization process as outlined in the Initiation Authorization Guide prior to the Initiation date listed on the RCS/CAC/NCC approved Anchorbase calendar and collaborates with their collegiate development specialist (CDS) at Executive Offices to ensure all Initiations are authorized. Chapter understands the chapter's status (if applicable), chapter management team (CMT) is actively working on the action plan and progress is discussed during CMT meetings.
- Chapter management team (CMT) participates in all required action planning and status review calls, if applicable.
- Chapter is using correct terminology per the DG Style Guide.
- Chapter history/archives are organized, current and easily accessible.
- Chapter tasks in Anchorbase are current.
- Chapter roster in Anchorbase is current.

- Chapter calendar in Anchorbase is current.
- Attendance Automatic Probation Notifications (APNs) are being filed by vice president: communications for members who have two or more unexcused absences from anchored events. An officer who has two unexcused absences from team or board meetings (of which she is a member) will be placed on automatic probation and will automatically forfeit her office.

11. **Fulfilling all required *programming* expectations in a thoughtful and intentional way.**
   - Chapter has an RCS/CAC/NCC approved calendar, is adhering to the RCS/CAC/NCC approved calendar and has distributed this calendar to chapter members.
   - Chapter members frequently attend non-anchored chapter events.
   - Chapter officers utilize their chapter goals when developing the chapter calendar.
   - Chapter officers ensure the New Member Pursuit (NMP) is followed in accordance with the NMP Facilitator's Guide.
   - Chapter officers intentionally select DG Dialogue programs and ensure the programs are followed in accordance with the Program Guide.
   - Chapter officers develop senior programming events that are well attended and align with Delta Gamma's values.
   - Chapter officers ensure steps 2, 3, and 4 of Article II Chapter Goal Setting occurs.
   - 80 percent of the chapter attends all rotational programs (ex. Alcohol Skills Training Program) offered by the Fraternity when available to the chapter.

12. **Empowering members to make informed decisions in high-risk situations based on Delta Gamma Fraternity's purpose and organizational values, while *promoting risk management and personal safety*.**
   - Chapter culture centers around Delta Gamma's values and does not promote a culture of alcohol and drug misuse or hazing.
   - Chapter attempts to lead change or model appropriate behavior on campus related to risk management.
   - Chapter responds to campus requests regarding risk and safety as necessary.
   - Chapter thoughtfully participates in all required prevention programming.
   - Chapter officers are aware of and promote optional prevention resources.
   - Chapter completes and distributes the Campus Resource Sheet which includes contact information for important campus resources, such as campus police and counseling services, each academic year.

If chapter incident has occurred, has it been shared with the CDS to follow the Chapter Incident Procedure?

Status Recommendation:

Rationale for Status Recommendation:

Initial Action Items Identified and Those Responsible:
CAC, CAS or CRC recommended?
Alumnae notification recommended?
When will this status change will be reviewed?
What is the timeline goal for de-escalation or removal of status?

APPENDIX C: STATUS NOTIFICATION PROCEDURE

Step 1: Notification Meeting/Call Scheduling
- Director: Chapter Support (for Support statuses) or Director: Chapter Advancement (for Poor Standing statuses) identifies the most appropriate member of the status support team to send an email to president and ATC, letting them know that there's been a decision made regarding chapter status and they'd like to set up a meeting/call to discuss.
  - Do not disclose what status they're on, just coordinate times so the news can be delivered to them personally.

Step 2: Lead Notification Meeting/Call
- Most appropriate member(s) of the status support team leads the notification call with the president and ATC. This call could include:
  - Introductions of everyone on call (if needed)
  - Emphasize that we wanted to notify them as president & ATC of being placed on/ continuing on a chapter status prior to sharing the news more widely.
  - Provide a high-level overview of the chapter status options so they have context as to where their status fits into the overall status hierarchy:
    - Poor Standing: Compliance
    - Poor Standing: Operations
    - Support Status: Compliance
    - Support Status: Operations
- Share which chapter status they've been placed on and a high-level summary as to why.
- Allow the president and ATC the opportunity to ask questions and express emotions freely.
- Ask how they feel this news will be received by CMT and/or the chapter and how we can support them through that.
- Conclude by sharing they'll receive an email through Anchorbase that they've been placed on status and an Action Planning meeting with CMT and additional Fraternity leadership will be scheduled in the coming weeks.

Step 3: Action Items After the Notification Meeting/Call
- Following the Notification Call, alert the chapter's CDS that the call was held and the Anchorbase status notification email can be sent at their earliest convenience or within a mutually agreed upon timeframe, whichever is most appropriate for the circumstances.

APPENDIX D: ACTION PLANNING PROCEDURE

Step 1: Action Planning Scheduling
- Director: Chapter Support (for Support statuses) or Director: Chapter Advancement (for Poor Standing statuses) identifies the most appropriate member of the status support team to send an email to the rest of the status support team, CMT and ATC, to coordinate gathering availability for the Action Planning session.
    - Consider using an online scheduling tool, such as Doodle, to assist with capturing everyone's availability.
    - Anticipate the Action Planning session to last 1-1.5 hrs, so please consider that when scheduling.
- Once a date/time have been identified, submit a request for a **DG Zoom line** if you do not otherwise have access to a virtual meeting software.
- Distribute the Zoom meeting invitation/access link to the rest of the status support team, CMT and ATC.

Step 2: Lead Action Planning Session
- Most appropriate member(s) of the status support team leads the Action Planning with the rest of the status support team, CMT and ATC. This call/meeting could include:
    - Introductions of everyone on call
    - Emphasize that we wanted to bring everyone together for a collaborative discussion about how to support the chapter and move towards improvements.
    - Provide a high-level overview of the chapter status options so they have context as to where their status fits into the overall status hierarchy:
        - Poor Standing: Compliance
        - Poor Standing: Operations
        - Support Status: Compliance
        - Support Status: Operations
    - Share which chapter status they've been placed on and a high-level summary as to why.
    - Share initial action items and those who will be assisting and responsible for monitoring completion within the identified deadlines.
    - Allow the CMT the opportunity to ask questions and express emotions freely.
    - Ask how they feel this news will be received by the chapter and how we can support them through that.
    - Introduce the Status Term Bank and review potential status terms for the Fraternity Standards in which the chapter could improve.
    - Ask CMT and ATC which of those status terms they feel would be most impactful and open discussion about campus resources or other status term suggestions they may have.
        - NOTE: ask for a member of CMT or status support team to take minutes/notes during this portion, as this will serve as the Action Plan the group will refer back to on all upcoming Status Progress Calls.
    - Request that the minute/note-taker reply all to the rest of the status support team, CMT and ATC with the Action Plan developed during today's meeting for future reference.
    - Share that you will reconvene as a group in ~two months (if on a Support status) or ~one month (if in Poor Standing) for a Status Progress Call to revisit the Action Plan.
        - Identify potential date/time for the Status Progress Call prior to ending the Action Planning session. Additional planning meetings should be scheduled for the remainder of the semester.
    - Conclude the call by thanking everyone for their contributions and emphasize that we are here to support the chapter. The goal is not necessarily to be removed from status, but rather to make the changes necessary with our support.

Step 3: Action Items After Action Planning
- Ensure that the minute/note-taker sends to the rest of the status support team, CMT and ATC with the Action Plan developed during today's meeting for future reference.
- Email the rest of the status support team, CMT and ATC to finalize details/dates of when the first Status Progress Check-in will occur.

APPENDIX E: STATUS CHECK-IN PROCEDURE

Step 1: Status Progress Meeting/Call Scheduling
- Most appropriate member of the status support team sends an email to the rest of the status support team, CMT and ATC, to coordinate gathering availability for the Status Progress Call, if not already scheduled.
    - Consider using an online scheduling tool, such as Doodle, to assist with capturing everyone's availability.
    - Anticipate the Status Progress Meeting/call to last ~1 hour, so please consider that when scheduling.
- Once a date and time have been identified, submit a request for a **DG Zoom line** if you do not otherwise have access to a virtual meeting software.
- Distribute the Zoom meeting invitation/access link to the rest of the status support team, CMT and ATC, and attach the Action Plan that was sent out previously.

Step 2: Lead Status Progress Meeting/Call
- Most appropriate member(s) of the status support team leads the Status Progress Meeting/Call with the rest of the status support team, CMT and ATC. This call/meeting could include:
    - Re-introductions of everyone on call, if needed
    - Emphasize that we wanted to bring everyone together for a collaborative discussion about what steps the chapter has taken on their Action Plan since we last met.
    - Ask CMT to share a high/low for their chapter since we last met. Make sure we're creating opportunities for them to share and celebrate their "wins."
    - Allow the CMT the opportunity to ask questions and express emotions freely.
    - Ask how they feel the chapter is responding to being on status and how we can support them through that.
    - Screen share and review all portions of the Action Plan, making notes as to what progress has been made and any commitments prior to the next Status Progress Meeting/Call.
        - NOTE: ask for a member of CMT or status support team to take minutes/notes during this portion, as this will serve as the update to their Action Plan we will refer back to/continue to update on all upcoming Status Progress Calls.
    - Request that the minute/note-taker reply all to the rest of the status support team, CMT and ATC with the progress updates added into Action Plan for future reference.
    - Share that you will reconvene as a group in ~two months (if on a Support status) or ~one month (if in Poor Standing) for another Status Progress Call to revisit the Action Plan progress.
        - If possible, identify potential date/time for the next Status Progress Call prior to ending the call.
    - Conclude the call by thanking everyone for their contributions and re-emphasize that we are here to support the chapter. The goal is not necessarily to be removed from status, but rather to make the changes necessary with our support.
        - Only dismiss the CMT and ATC at this point, ask the status support team members in attendance to remain on the call.
    - Status support team remains on the meeting/call to debrief/discuss the chapter's progress thus far. If the chapter is showing marked improvement or marked decline, discuss whether a chapter status de-escalation or escalation is needed at this time.
        - Use the Chapter Status Guiding Questions to assist with this discussion

Step 3: Action Items After the Status Progress Meeting/Call

- Ensure that the minute/note-taker sends to the rest of the status support team, CMT and ATC the Action Plan updated with the progress notes for future reference.
- If no status change is warranted at this time, email the rest of the status support team, CMT and ATC to finalize details/dates of when the next Status Progress Call will occur.
  - Status Progress Calls should occur ~monthly for chapters in Poor Standing and ~every 2 months for chapters on Support status.
- If a status change is warranted at this time, collaborate with the CDS to use the Summary Report for Status Escalation (if recommending the chapter is removed from or placed on a Poor Standing status). If removing from Support Status, collaborate with the CDS to coordinate sending the de-escalation notification to the chapter.