

# DELTA SIGMA PI

## *Chapter Management Program (CMP) Guide*

Updated as of  
August 2026

Delta Sigma Pi Fraternity  
Central Office  
330 South Campus Avenue  
Oxford, OH 45056  
513-523-1907  
[www.dsp.org](http://www.dsp.org)  
[centraloffice@dsp.org](mailto:centraloffice@dsp.org)  
[cmp@dsp.org](mailto:cmp@dsp.org)

# CMP Guide Contents

CMP indicators are not listed in order of importance. A chapter's overall health is best understood by looking at all indicators together, rather than relying on any single measure.

| Introduction                               |                  |                                            |                     |                                                                                                            |
|--------------------------------------------|------------------|--------------------------------------------|---------------------|------------------------------------------------------------------------------------------------------------|
| 4                                          |                  | CMP/Chapter Health Philosophy              |                     |                                                                                                            |
| 5                                          |                  | Indicator Evaluation Scale – What it Means |                     |                                                                                                            |
| 6                                          |                  | Chapter Year – at a Glance                 |                     |                                                                                                            |
| 15                                         |                  | Officer Responsibilities                   |                     |                                                                                                            |
| Page                                       | Indicator Number | Indicator Name                             | Officer Responsible | What does Strong Health look like?                                                                         |
| Section A: Officer Management and Training |                  |                                            |                     |                                                                                                            |
| 20                                         | A1               | Officer Roles                              | President<br>VPCO   | Fill every officer role <b>AND</b><br>No more than two (2) members may hold more than one (1) officer role |
| 33                                         | A2               | Officer Verification                       | VPCO                | Update or verify the officer roster within the last 6 months                                               |
| 24                                         | A3               | Officer Training                           | All Officers        | At least eight (8) officers have completed their officer training                                          |
| Section B: Member Management               |                  |                                            |                     |                                                                                                            |
| 26                                         | B1               | Roster Verification                        | VPCO                | Update or verify the member roster within the last 6 months                                                |
| 28                                         | B2               | Ideal Chapter Size                         | VPCO                | Chapter is at least 75% of ideal size                                                                      |
| 30                                         | B3               | Member Retention                           | Chancellor<br>VPCO  | Retain at least 90% of dues paying members                                                                 |
| 32                                         | B4               | Recent Alumni Engagement                   | VPAR                | At least 50% of recent alumni remain engaged with the Fraternity                                           |

| Section C: Recruitment and Pledge Education |    |                                                |                           |                                                                                                                      |
|---------------------------------------------|----|------------------------------------------------|---------------------------|----------------------------------------------------------------------------------------------------------------------|
| 34                                          | C1 | Social Media/Website Verification              | SVP<br>Webmaster          | Reported to have been updated/verified within the last 6 months via form                                             |
| 36                                          | C2 | Recruitment to Pledging                        | SVP<br>VPPE               | All pledge profiles complete before Pledging Ceremony <b>AND</b> Pledging Ceremony reported within 2 days            |
| 39                                          | C3 | Pledging to Initiation                         | VPPE<br>VPF               | Enough new badges in inventory at least 1 day before Initiation Ceremony <b>AND</b> ceremony reported within 14 days |
| 42                                          | C4 | Pledge Retention                               | SVP<br>VPPE               | Initiate at least 80% of the people pledged                                                                          |
| 44                                          | C5 | Ritualistic Ceremonies                         | Chancellor<br>SVP<br>VPPE | Both Initiation Ceremonies (fall & spring) verified, and form, and well performed                                    |
| Section D: Chapter Planning and Governance  |    |                                                |                           |                                                                                                                      |
| 46                                          | D1 | Chapter Bylaws                                 | Chancellor                | Chapter Bylaws submitted and approved within the last 12 months                                                      |
| 48                                          | D2 | Chapter Policies and Procedures                | Chancellor                | Chapter Policies and Procedures submitted and approved within the last 12 months                                     |
| 50                                          | D3 | Officer Operation Plan & Pledge Education Plan | All Officers              | All officers <u>submit their own plan</u> (not necessarily on time), and all are approved by their RVP               |
| 53                                          | D4 | Member Accountability                          | Chancellor                | Chancellor + at least 3 additional members complete Standards Committee Overview Training                            |
| Section E: Fiscal Management                |    |                                                |                           |                                                                                                                      |
| 55                                          | E1 | Financial Responsibility                       | VPF                       | No unpaid invoice currently 30 days old or older                                                                     |
| 57                                          | E2 | Chapter Accounting                             | VPF                       | Independent financial review completed, form submitted and approved, within the last 12 months                       |

## Section F: Events and Member Education

|    |    |                                             |             |                                                                                                            |
|----|----|---------------------------------------------|-------------|------------------------------------------------------------------------------------------------------------|
| 59 | F1 | LEAD Events & Grand Chapter Congress        | VPCO<br>VPF | At least one collegiate attended GCC (in a congress year) and a LEAD event each term in the last 24 months |
| 62 | F2 | National Event Participation                | VPCO<br>VPF | Over last four terms, average chapter attendance at national events is at least 15%                        |
| 65 | F3 | Chapter Education                           | VPCO<br>VPF | 20% or more of chapter members have attended a national event                                              |
| 68 | F4 | Risk Management Education                   | Chancellor  | Risk Management Event held within last 12 months with at least 80% attendance                              |
| 71 | F5 | Campus/Organizational Culture Understanding | VPPA        | Culture understanding event within last 12 months with at least 80% attendance                             |
| 74 | F6 | Professional Event Engagement               | VPPA        | Professional event within the last month with at least 50% of members attending                            |
| 77 | F7 | Service Event Engagement                    | VPCS        | Service event within the last month with at least 50% of members attending                                 |

# Chapter Health Philosophy – What It Means

Think of your chapter's health like a weekly one on one. The Fraternity evaluates at how your chapter success in different areas—like recruitment, finances, service, professional events, and reporting—and gives an overall "health evaluation."

- The scale runs from Unhealthy → Exceptional Health.
- The expectation is that all chapters are at least Marginal Health.
- By consistently submitting your forms, hosting events, and keeping records updated, you make sure your chapter stays strong.

## **The Philosophy of CMP**

If you remember nothing else, remember this:

- **CMP is your roadmap.**
- **Your health evaluation is your compass.**
- **Your members are your legacy.**

Healthy chapters do not just check boxes — they build culture, grow leaders, and leave a legacy that lasts beyond graduation.

Pro tip: Even if something is not perfect, always submit it! Submitting something is better than nothing, and it keeps your chapter moving forward.

## **Why This Matters**

**Delta Sigma Pi is more than just a club.** It is a professionally-run, values-based organization with accountability, tradition, and vision.

When a chapter is in **Strong or Exceptional Health**, it means:

- Students are learning leadership in real time.
- Money is being managed responsibly.
- Events are educational, inclusive, and meaningful.
- Alumni stay involved.
- Risk is managed proactively.
- Members are being developed as ethical business leaders.

And *that is* what sets Delta Sigma Pi apart.

## **Indicator Evaluation – What It Means**

Chapters may move between health levels throughout the academic year as deadlines, events, and other activities occur. Some fluctuation is normal. CMP is a tool that helps chapters recognize areas of success and identify areas that may need attention or support. Each indicator follows the same general logic: higher evaluations reflect stronger performance, while lower evaluations identify opportunities for improvement.

| <b>Evaluation Range</b>  | <b>Health Level</b>       | <b>What It Means</b>                                                                                                                                       |
|--------------------------|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Greater than 3.25</b> | <b>Exceptional Health</b> | <b>The chapter is thriving – going above and beyond, exceeding expectations, and set up for long term success.</b>                                         |
| <b>3.25 – 2.76</b>       | <b>Strong Health</b>      | <b>Chapter is running smoothly, meeting expectations, and aligned with the Fraternity’s direction.</b>                                                     |
| <b>2.75 – 2.26</b>       | <b>Marginal Health</b>    | <b>Chapter is succeeding in some areas, but struggling in others. Operations may need targeted support and better use of resources.</b>                    |
| <b>2.25 – 1.75</b>       | <b>Poor Health</b>        | <b>The chapter operations are struggling, missing important expectations, and may need heavier support to get back on track.</b>                           |
| <b>Less than 1.75</b>    | <b>Unhealthy</b>          | <b>The chapter is not functioning well, not aligned with the Fraternity’s goals, and needs strong intervention from leaders, volunteers, and/or staff.</b> |

## Chapter Year – at a Glance

This is a roadmap to see what may be coming next during the chapter's year. Delta Sigma Pi's fiscal year begins July 1, but your chapter's fall and spring terms begin based on your school calendar. **Some indicators/items use fixed dates, others are based on your term start, ceremonies, invoices, or chapter activity.**

CMP measures your chapter health over time. Use this roadmap to know when to act, not as a checklist for earning Exceptional Health.

**Quarter-system schools:** Winter term is an academic term for chapter operations but not a separate Delta Sigma Pi billing term. Continue normal roster, officer, recruitment, event and CMP activities during winter. Follow the Spring Billing Term sequence when your school's designated spring term begins.

### Quick Key

-  **Fixed Date** — established Fraternity date
-  **Chapter Timing** — based on your chapter's term, election or ceremony
-  **Billing/Payment** — an invoice posts or payment timing matters
-  **Chapter Action** — what to work on next
-  **Watch Health** — results or trends that change over time
-  **Fraternity Event** — LEAD, Presidents' Academy or Grand Chapter Congress
-  **Recognition** — award or recognition opportunity
-  **Programming Idea** — optional opportunity from Fraternity resources
-  **Quarter Schools** — special timing for schools with a winter academic term

### Each Month During the Academic Year

-  **Keep the chapter current** — Review CMP Chapter Health in The Hub • Update officers and members when changes occur • Check outstanding invoices • Report completed activities • Keep website/social media information current
-  **Keep members engaged** — Hold professional and community service events regularly and report attendance promptly
-  **Watch the direction** — Ideal Chapter Size • Member Retention • Pledge Retention • Recent Alumni Engagement • Event Engagement • National Event Participation • Financial Responsibility

# FALL TERM

## JULY - Start the New Fiscal Year

 **July 1** — New Fraternity fiscal year begins

 **Look back, then plan forward** — Review the previous year's CMP health trends • Identify areas to maintain or improve • Review officer/member information • Identify Officer Training completion needs • Review fall recruitment, pledge education, Initiation, and programming plans

 **Build the budget** — Review outstanding invoices • Plan for dues, insurance, badges, and Initiation • Budget for chapter programming and Fraternity events

 **Look ahead to fall** — Review LEAD Summit opportunities • Identify possible attendees • Plan registration, travel, and Chapter Leadership Fund CLF use.

 **Remember** — July 1 starts a new fiscal year, but many CMP indicators continue to reflect recent or rolling chapter performance rather than simply resetting.

## AUGUST - Prepare for Fall

 **August 1** — Fall Officer Verification available

 **When your Fall Billing Term begins**

**Day 1** —  Biannual Regalia Fee invoice posts

**Day 10** —  Collegiate Dues invoice posts

**Within 14 days** — Officer Verification Due

**Day 30** —  Collegiate Dues payment due • Member roster verified

**Day 31** —  Chapter and Individual Liability Insurance Fee invoice posts

**Within 30 days of other invoice postings** — Payment due

*If your fall academic term begins in September, use this sequence **then**, not automatically in August.*

 **Set up the term** — Complete Officer Training • Review the fall chapter calendar • Confirm recruitment, Pledging, and Initiation • Schedule professional and service events • Schedule risk management and campus/organizational culture education

 **Plan for LEAD** — Identify attendees • Review registration deadlines • Budget for travel and participation

 **Possible programming/content** — August 19: World Humanitarian Day • August 26: Women's Equality Day



## **SEPTEMBER - Recruit & Pledge**

 **Recruit toward chapter health** — Work toward Ideal Chapter Size • Enter recruits in The Hub early • Follow up on incomplete profiles • Keep recruitment information current online

 **Before Pledging** — All recruits entered and profiles completed • **Exceptional target:** every recruit profile complete at least 1 day before the Pledging Ceremony

 **After Pledging** — Report the ceremony within 2 days • Begin the approved pledge education program • Check badge inventory • Determine badges needed for Initiation • Order early

 **September 15 — Presidents' Academy Registration Fee invoice posts**

 **Look ahead** — Identify the chapter's Collegian of the Year nominee • **October 15:** chapter nomination due • **November 15:** nominee application due

 **Fall LEAD Summits** — Review the current fall schedule • Register members early • Budget for participation • Encourage participation beyond the same few officers

 **Possible programming/content** — September 15–October 15: National Hispanic Heritage Month • September 21–25: National Hazing Prevention Week

## **OCTOBER - Plan, Govern & Participate**

 **October 1 — Begin annual Bylaws and Policies and Procedures review/submission**

 **October 15 — Fall Officer Operation Plans and next Pledge Education Plan available**

 **Plan ahead** — Each officer begins their own Operation Plan • VPPE begins the next Pledge Education Plan • Review local governing documents • Submit early enough for review, corrections, and approval

 **October 15 — Collegian of the Year chapter nomination due**

 **Possible programming** — National Disability Employment Awareness Month • National Collegiate Alcohol Awareness Week • October 24: Make a Difference Day

## **NOVEMBER - Initiate, Celebrate & Check Your Direction**

🔑 **About 3 weeks before Initiation** — Order needed badges • Confirm the Ritual Team, verifier, location, and materials

🔑 **At least 7 days before Initiation** — **Exceptional target:** enough new badges are in chapter inventory

🔑 **After Initiation** — Report the ceremony promptly • Complete Ritual/Ceremony verification • Review pledge retention • **Exceptional target:** Initiation reported within **7 days**

📄 **Triggered by chapter activity** — Badge orders create the Badge Lease Fee invoice • Reporting Initiation creates the Initiation Fee invoice

📅 **November 7 — Founders' Day**

🎯 **Celebrate the Fraternity** — Recognize Delta Sigma Pi's founding • Consider chapter, alumni, service, professional, or social programming connected to Founders' Day

🏆 **November 15 — Collegian of the Year nominee application due**

🎓 **Fall Fraternity events** — LEAD Summits may continue into November • Plan for Provincial Conference

☑️ **Check your direction** — Ideal Chapter Size • Member Retention • Pledge Retention • Professional/Service Engagement • Financial Responsibility • National Event Participation

📢 **Possible programming/content** — National Scholarship Month • First Generation College Celebration Day • International Students Day

## **DECEMBER - Close Fall & Transition**

 **December 1 — Spring Officer Verification available**

 **December 15 — Fall Officer Operation Plans and next Pledge Education Plan due**

 **Close the term** — Update graduating and other member statuses • Report newly elected officers • Complete Officer Training for incoming leaders • Finish outstanding event reporting • Review outstanding invoices and chapter finances • Schedule recruitment, Pledging, Initiation, and chapter programming

 **Transition leadership** — Transfer records, passwords, calendars, and unfinished work • Review current CMP Chapter Health with incoming officers so they understand what they are inheriting • Register for LEAD Provincial Conferences

 **Spring Fraternity events** — Complete Presidents' Academy registration steps • Plan and Register for Provincial Conference

 **Before break** — Check indicators that change as time passes, especially rosters, event engagement, finances, and other rolling measures

 **Possible content** — Giving Tuesday

# SPRING TERM

## **JANUARY - Return to Campus & Begin the Next Academic Term**

 **Start the academic term** — New officers complete Officer Training • Review CMP Chapter Health trends • Update officer/member information • Build the term calendar • Review recruitment, Pledging, Initiation, and chapter programming

 **Semester schools beginning Spring:** *Follow the Spring Billing Term sequence when the spring term starts.*

 **Quarter schools beginning Winter:** *Continue normal chapter operations, Officer Verification/roster updates, and CMP activity as applicable. Winter term does not trigger a new national billing cycle.*

 **Recruit** — Work toward Ideal Chapter Size • Enter recruits early • Follow up on profiles • Keep recruitment information current

### **Spring Billing Term Sequence**

**Day 1** — Biannual Regalia Fee invoice posts

**Day 10** — Collegiate Dues invoice posts

**Day 30** — Collegiate Dues payment due

**Day 31** — Chapter and Individual Liability Insurance Fee invoice posts

**Within 30 days of other invoice postings** — Payment due

 **January 31** — Fall reporting deadline for applicable Ritual/Ceremony verification, Risk Management events, and Campus/Organizational Culture events

 **Presidents' Academy** — Attend as scheduled and bring learning back to the chapter

 **LEAD Provincial Conference season begins**

## **FEBRUARY - Recruit, Pledge & Participate**

 **February 1** — Presidents' Academy Registration Fee invoice posts

 **Around Pledging** — Complete profiles before the ceremony • Report Pledging within 2 days • Begin pledge education • Check/order badges • Begin Initiation preparation

 **Quarter schools** — Continue winter-term operations. Do not restart the national invoicing sequence simply because winter quarter began.

 **LEAD Provincial Conferences** — Encourage participation by different members and bring learning back to the chapter

 **Watch** — Membership growth • Pledge participation • National event participation • Professional/service engagement • Outstanding invoices

## **MARCH - Check the Trend & Prepare for Initiation**

 **Prepare for Initiation** — Monitor pledge participation and retention • Confirm Initiation timing • Check badge inventory • Confirm Ritual team and verifier

 **Quarter schools beginning Spring:** Start the Spring Billing Term sequence when your designated spring term begins:

**Day 1** — Regalia Fee

**Day 10** — Collegiate Dues

**Day 30** — Dues due

**Day 31** — Liability Insurance

 **Take a deeper CMP look** — Ideal Chapter Size • Member Retention • Pledge Retention • Recent Alumni Engagement • Risk/Culture education • Professional/Service Engagement • National Event Participation • Financial Responsibility

 **Act before year-end** — Address declining areas while there is still time in the academic year

 **Begin awards work** — Identify collegiate awards to pursue • Gather event descriptions, attendance, photos, recruitment/initiation information, alumni activity, and financial records

## **APRIL - Plan Ahead & Connect with Alumni**

 **April 1** — Spring Officer Operation Plans, next Fall Pledge Education Plan, and Summer Officer Verification available

 **Plan forward** — Each officer completes their own Operation Plan • VPPE completes the next Pledge Education Plan • Continue governing-document review • Begin officer transition • Start fall recruitment and programming planning

 **Refresh what ages over time** — Officer/member information • Website/social media • Financial review • Risk Management education • Campus/Organizational Culture education

 **April 25 — Alumni Day**

 **Connect with alumni** — Plan or participate in Alumni Day activities • Engage recent alumni • Build relationships that continue beyond a single event

 **Award connection** — Alumni Day participation may support eligibility for the Outstanding Alumni Relations Award for a Collegiate Chapter

 **Awards** — Continue drafting applications • Gather materials before members leave campus • Consider a Chapter Advisor of the Year nomination

## **MAY - Finish Strong & Transition**

 **Around Initiation** — Confirm badges • Complete Initiation • Report promptly • Complete ceremony verification • Review final pledge retention

 **Prepare the next leaders** — Update graduating/member statuses • Report officer changes • Complete incoming Officer Training • Transfer files, passwords, calendars, and unfinished work

 **Prepare for year-end** — Reconcile financial records • Complete the independent financial review • Resolve outstanding invoices • Avoid allowing any invoice to reach 30 days unpaid

 **Finish items requiring review/approval** — Officer Operation Plans • Pledge Education Plan • Bylaws • Policies and Procedures

 **Finalize collegiate chapter award applications before the June 1 deadline**

## **JUNE - Final Deadlines & Close the Fiscal Year**

 **June 1 — Spring Officer Operation Plans and next Fall Pledge Education Plan due**

 **June 1 — Chapter Bylaws and Policies and Procedures deadline**

 **June 1 — Collegiate chapter award applications due • Some awards may also require a \$0 balance owed to the Fraternity**

 **June 30 — Spring Ritual/Ceremony, Risk Management, and Campus/Organizational Culture reporting deadlines**

 **Close the year** — Review CMP Chapter Health trends • Identify what improved • Identify what declined • Identify trends the next officers should continue watching • Carry priorities into the new fiscal year beginning July 1

 **Looking ahead** — Going into a Grand Chapter Congress year, plan attendance and funding before the next fiscal year gets underway and report the chapter's Delegate and Alternate(s) before July 1.

### **Remember the Difference**

 **Fixed Date** = Delta Sigma Pi sets the date

 **Chapter Timing** = your term or ceremony starts the clock

 **Billing Term** = national billing occurs for **fall and spring only**

 **Winter Quarter** = normal chapter/CMP operations continue, but it does **not** start another national billing cycle

 **Trend** = CMP evaluates chapter results over time

Exceptional Health comes from consistent chapter operations and results—not from completing this roadmap once.

## Officer Responsibilities

While the Chapter President and Vice President-Chapter Operations have the ability and authority to submit items in the Hub for all officers, a healthy chapter has each officer take responsibility for completing the functions and duties of their role individually. Below is a snapshot of what each officer is responsible for within CMP.

### *President*

| Item | Responsibility                                                          | Strong Health Goal                                                 | Availability Date             | Due Date                       | Suggested Submission & Recommendations                  |
|------|-------------------------------------------------------------------------|--------------------------------------------------------------------|-------------------------------|--------------------------------|---------------------------------------------------------|
| A3   | Officer Training                                                        | At least 8 officers completed online officer module at dsp.org/LMS | Always available              | Rolling                        | View and complete the module within 2 days of election. |
| D3   | Officer Operation Plan (strategic plans)<br>Team: leave for 1 more year | All officer plans submitted (by individual in office) & approved   | Fall: OCT 15<br>Spring: APR 1 | Fall: DEC 15<br>Spring: JUNE 1 | Complete at Exec meeting; submit early for approval     |

### *Senior Vice President (SVP)*

| Item     | Responsibility                                                                                                                 | Strong Health Goal                                                      | Availability Date             | Due Date                           | Suggested Submission & Recommendations                             |
|----------|--------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|-------------------------------|------------------------------------|--------------------------------------------------------------------|
| A3       | Officer Training                                                                                                               | At least 8 officers completed online officer module at dsp.org/LMS      | Always available              | Rolling                            | View and complete the module within 2 days of election.            |
| C1       | Social Media/Website Verification                                                                                              | Platforms updated within last 6 months (approximately once per term)    | Always available              | Rolling                            | Update with current information so not to deter potential members. |
| C2<br>C4 | Add recruits to the Hub<br><br>Ensure Recruits have completed verification form/pledge profile<br><br>Report Pledging Ceremony | All recruits reported before pledging ceremony and report within 2 days | Always available              | Within 2 days of Pledging Ceremony | Enter recruits early; report ceremony same day                     |
| D3       | Officer Operation Plan (strategic plans)                                                                                       | All officer plans submitted (by individual in office) & approved        | Fall: OCT 15<br>Spring: APR 1 | Fall: DEC 15<br>Spring: JUNE 1     | Complete at Exec meeting; submit early for approval                |



### ***Vice President-Pledge Education (VPPE)***

| <b>Item</b> | <b>Responsibility</b>                                                 | <b>Strong Health Goal</b>                                                 | <b>Availability Date</b>      | <b>Due Date</b>                 | <b>Suggested Submission &amp; Recommendations</b>         |
|-------------|-----------------------------------------------------------------------|---------------------------------------------------------------------------|-------------------------------|---------------------------------|-----------------------------------------------------------|
| A3          | Officer Training                                                      | At least 8 officers completed online officer module at dsp.org/LMS        | Always available              | Rolling                         | View and complete the module within 2 days of election.   |
| C3<br>C4    | Ensure appropriate number of badges in inventory<br>Report initiation | Badges ordered at least 7 days prior + initiation reported within 14 days | Always available              | Initiation report within 7 days | Order badges 21 days in advance; report immediately       |
| D3          | Pledge Education Plan                                                 | Plan submitted by due date and approved by Staff                          | Fall: OCT 15<br>Spring: APR 1 | Fall: DEC 15<br>Spring: JUNE 1  | Submit when schedule is set to reserve ritual trunk early |

### ***Vice President-Finance (VPF)***

| <b>Item</b>    | <b>Responsibility</b>                                    | <b>Strong Health Goal</b>                                          | <b>Availability Date</b>         | <b>Due Date</b>                | <b>Suggested Submission &amp; Recommendations</b>                                                    |
|----------------|----------------------------------------------------------|--------------------------------------------------------------------|----------------------------------|--------------------------------|------------------------------------------------------------------------------------------------------|
| A3             | Officer Training                                         | At least 8 officers completed online officer module at dsp.org/LMS | Always available                 | Rolling                        | View and complete the module within 2 days of election.                                              |
| D3             | Officer Operation Plan (strategic plans)                 | All officer plans submitted (by individual in office) & approved   | Fall: OCT 15<br>Spring: APR 1    | Fall: DEC 15<br>Spring: JUNE 1 | Complete at Exec meeting; submit early for approval                                                  |
| E1             | Financial Responsibility (dues, invoices)                | No invoices 30+ days past due                                      | Always available                 | Payment deadlines on invoices  | Communicate deadlines; share updates every meeting                                                   |
| E2             | Chapter Accounting                                       | Annual review completed & uploaded                                 | Always available                 | At least once per year         | Schedule reviews near end of each term                                                               |
| F1<br>F2<br>F3 | National Event Attendance (Budgeting/CLF Grant Requests) | At least one member attends national events                        | CLF Requests<br>Always available | Within 30 days of event        | Events, registration costs, and registration deadlines are available at dsp.org/events for planning. |

## ***Vice President-Chapter Operations (VPCO)***

| <b>Item</b> | <b>Responsibility</b>                    | <b>Strong Health Goal</b>                                          | <b>Availability Date</b>                      | <b>Due Date</b>                    | <b>Suggested Submission &amp; Recommendations</b>                                                                   |
|-------------|------------------------------------------|--------------------------------------------------------------------|-----------------------------------------------|------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| A1          | Officer Roster Verification              | Roster updated/verified each term                                  | Fall: AUG 1<br>Spring: DEC 1<br>Summer: APR 1 | 14 days after term start           | Update immediately after elections                                                                                  |
| A3          | Officer Training                         | At least 8 officers completed online officer module at dsp.org/LMS | Always available                              | Rolling                            | View and complete the module within 2 days of election.                                                             |
| B1          | Roster Verification                      | Roster updated each term                                           | Always available                              | Before term start / within 30 days | Email hub@dsp.org if no changes                                                                                     |
| B2<br>B3    | Hub Roster Maintenance                   | See individual indicators                                          | Always available                              | Rolling                            | Make individual member updates as soon as known. Any expulsions are automatically updated upon Chancellor reporting |
| D3          | Officer Operation Plan (strategic plans) | All officer plans submitted (by individual in office) & approved   | Fall: OCT 15<br>Spring: APR 1                 | Fall: DEC 15<br>Spring: JUNE 1     | Complete at Exec meeting; submit early for approval                                                                 |
| B1          | Roster Verification                      | Roster updated each term                                           | Always available                              | Before term start / within 30 days | Email hub@dsp.org if no changes                                                                                     |
| F1          | LEAD Events & Grand Chapter Congress     | At least 1 member per event                                        | Varies by registration                        | Prior to event                     | Budget annually; fundraise via CLF                                                                                  |
| F2          | National Event Participation             | 15%+ members attend per term                                       | Registration varies                           | Prior to event                     | Encourage attendance; provide feedback sessions                                                                     |
| F3          | Chapter Education                        | 20%+ of members have attended at least 1 national event            | Registration varies                           | Rolling                            | Encourage all members (not just officers) to attend                                                                 |

## Chancellor

| Item     | Responsibility                                                      | Strong Health Goal                                                                            | Availability Date             | Due Date                            | Suggested Submission & Recommendations                                                                           |
|----------|---------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|-------------------------------|-------------------------------------|------------------------------------------------------------------------------------------------------------------|
| A3       | Officer Training                                                    | At least 8 officers completed online officer module at dsp.org/LMS                            | Always available              | Rolling                             | View and complete the module within 2 days of election.                                                          |
| C5       | Ritual Team practiced and prepared for ceremonies                   | Initiations Ceremonies verified and well performed                                            | Early in term                 | Fall: JAN 31<br>Spring: JUNE 30     | Practice regularly. Consider a Ritual Team consisting of non-officers.                                           |
| D1<br>D2 | Submit local chapter Bylaws and Policy/Procedures                   | Submitted, reviewed (by a National Bylaw Reviewer), and approved with last twelve (12) months | Always available              | OCT 1 (suggested)<br>JUNE 1 (final) | Reviewed by national volunteers. Submit sooner to have approved sooner. Review templates for standardized items. |
| D3       | Officer Operation Plan (strategic plans)                            | All officer plans submitted (by individual in office) & approved                              | Fall: OCT 15<br>Spring: APR 1 | Fall: DEC 15<br>Spring: JUNE 1      | Complete at Exec meeting; submit early for approval                                                              |
| D4       | Ensure all members of Standards Committee completed online training | Chancellor + 3 trained members completed training                                             | Always available              | Rolling                             | Encourage all members to complete Standards training                                                             |
| F4       | Reporting of Risk Management Events                                 | Event within 12 months w/ 80%+ members in attendance                                          | Always available              | Fall: JAN 31<br>Spring: JUNE 30     | Schedule early; partner with campus speakers and departments                                                     |

## Vice President-Professional Activities (VPPA)

| Item | Responsibility                           | Strong Health Goal                                                 | Availability Date             | Due Date                        | Suggested Submission & Recommendations                             |
|------|------------------------------------------|--------------------------------------------------------------------|-------------------------------|---------------------------------|--------------------------------------------------------------------|
| A3   | Officer Training                         | At least 8 officers completed online officer module at dsp.org/LMS | Always available              | Rolling                         | View and complete the module within 2 days of election.            |
| D3   | Officer Operation Plan (strategic plans) | All officer plans submitted (by individual in office) & approved   | Fall: OCT 15<br>Spring: APR 1 | Fall: DEC 15<br>Spring: JUNE 1  | Complete at Exec meeting; submit early for approval                |
| F5   | Campus/Org Culture Event                 | Event within 12 months w/ 80%+ attendance                          | Always open                   | Fall: JAN 31<br>Spring: JUNE 30 | Schedule during "of the" months; not combined with Risk Management |
| F6   | Professional Events                      | One event per month; 50%+ attendance                               | Always open                   | Rolling                         | Substitute chapter meeting with professional event monthly         |

### ***Vice President-Community Service (VPCS)***

| <b>Item</b> | <b>Responsibility</b>                    | <b>Strong Health Goal</b>                                          | <b>Availability Date</b>      | <b>Due Date</b>                | <b>Suggested Submission &amp; Recommendations</b>          |
|-------------|------------------------------------------|--------------------------------------------------------------------|-------------------------------|--------------------------------|------------------------------------------------------------|
| A3          | Officer Training                         | At least 8 officers completed online officer module at dsp.org/LMS | Always available              | Rolling                        | View and complete the module within 2 days of election.    |
| D3          | Officer Operation Plan (strategic plans) | All officer plans submitted (by individual in office) & approved   | Fall: OCT 15<br>Spring: APR 1 | Fall: DEC 15<br>Spring: JUNE 1 | Complete at Exec meeting; submit early for approval        |
| F7          | Service Events                           | One event per month; 50%+ attendance                               | Always available              | Rolling                        | Survey member interests; rotate campus + community service |

### ***Vice President-Scholarship & Awards (VPSA)***

| <b>Item</b> | <b>Responsibility</b>                    | <b>Strong Health Goal</b>                                          | <b>Availability Date</b>      | <b>Due Date</b>                | <b>Suggested Submission &amp; Recommendations</b>       |
|-------------|------------------------------------------|--------------------------------------------------------------------|-------------------------------|--------------------------------|---------------------------------------------------------|
| A3          | Officer Training                         | At least 8 officers completed online officer module at dsp.org/LMS | Always available              | Rolling                        | View and complete the module within 2 days of election. |
| D3          | Officer Operation Plan (strategic plans) | All officer plans submitted (by individual in office) & approved   | Fall: OCT 15<br>Spring: APR 1 | Fall: DEC 15<br>Spring: JUNE 1 | Complete at Exec meeting; submit early for approval     |

### ***Vice President-Alumni Relations (VPAR)***

| <b>Item</b> | <b>Responsibility</b>                    | <b>Strong Health Goal</b>                                           | <b>Availability Date</b>      | <b>Due Date</b>                | <b>Suggested Submission &amp; Recommendations</b>                        |
|-------------|------------------------------------------|---------------------------------------------------------------------|-------------------------------|--------------------------------|--------------------------------------------------------------------------|
| A3          | Officer Training                         | At least 8 officers completed online officer module at dsp.org/LMS  | Always available              | Rolling                        | View and complete the module within 2 days of election.                  |
| B4          | Alumni Engagement                        | 50% of members that have graduated within last 3 years are engaged. | Always available              | Rolling                        | Maintain communication and invite local alumni to events and gatherings. |
| D3          | Officer Operation Plan (strategic plans) | All officer plans submitted (by individual in office) & approved    | Fall: OCT 15<br>Spring: APR 1 | Fall: DEC 15<br>Spring: JUNE 1 | Complete at Exec meeting; submit early for approval                      |

## Section A: Officer Management and Training

## Indicator 1: Officer Roles

**What is expected:** Every nationally recognized officer position is filled, and members are not taking on too much responsibility.

### Officer(s) Responsible

- President
- VP of Chapter Operations (VPCO)

### Additional Officers with ability to submit

- None

---

### How to Submit

#### Replace Existing Officer

1. In The Hub, click on the **officers** button on the left-hand side
2. Find the Officer **you want change** and under the email click **Replace Office Holder**
3. From the dropdown menu, search for the member who is the **new office holder**
4. **Select that member** and the **date the change is effective**
5. Click **Complete Officer Replacement**

#### Add Officer to Vacant Role

1. In The Hub, click on the **officers** button on the left-hand side
  2. Find and click the **Add New Officer** button above the search bar on the right
  3. From the dropdown menu, search for the member who is the **new office holder**
  4. **Select that member**, the **office they are occupying**, and the **date the change is effective**
  5. Click **Complete Officer Installation**
-

## How Chapter Health Is Determined

➡ If one person is holding 3 roles, only their first counts as unique. The other two count as duplicates and will impact indicator evaluation.

- **Exceptional Health (4):** All nationally recognized officer roles filled by different members
- **Strong Health (3):** All officer roles filled **AND** no more than 2 members holding multiple roles
- **Marginal Health (2):** No more than 3 roles vacant or filled by members holding another officer role
- **Poor Health (1):** No more than 5 roles vacant or filled by members holding another officer role
- **Unhealthy (0):** More than 5 roles vacant or filled by members holding another officer role

| Exceptional Health                                                           | Strong Health                                                                                                 | Marginal Health                                                                                           | Poor Health                                                                                              | Unhealthy                                                                                    |
|------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| Fill every nationally recognized officer role with a unique/different member | Fill every officer role<br><b>AND</b><br>No more than two (2) members may hold more than one (1) officer role | Have no more than three (3) roles either vacant or held by someone who already holds another officer role | Have no more than five (5) roles either vacant or held by someone who already holds another officer role | More than five (5) roles are vacant or held by members who already hold another officer role |

## Why is it important?

Running a chapter is a big job, and no single person can (or should) do it all. That is why we have officer roles. A different person should fill each role, so everyone shares responsibility, and the chapter runs smoothly.

### What Low Health Could Mean

- Current leaders are not mentoring more members into leadership.
- Committees are not being used effectively to develop leaders.
- Candidates were not properly educated about what each office requires.
- Recruitment needs a boost to keep officer roles filled by different people.

### How to Improve Chapter Health

- Have at least as many members as officer positions.
- Give potential candidates clear info about each role before elections.
- Recruit consistently so you always have enough people to spread out leadership.

## Section A: Officer Management and Training

## Indicator 2: Officer Verification

**What is expected:** The chapter should confirm that officer information is correct every time there is a change, and at least once per term (plus going into summer).

### Officer(s) Responsible

- Vice President–Chapter Operations (VPCO)

### Additional Officers with ability to submit

- President
- Chancellor

### How to Submit

- **Update officers** directly in The Hub (as described in A1).  
-OR-
- Complete the **Officer Report** in The Hub to verify officers are current

### How Chapter Health Is Determined

➡ *Indicator evaluation is determined by the last time an update is submitted. Once 3 months have passed, you slide down a level until you update again.*

- **Exceptional Health (4):** Officer roster updated or verified within the last 3 months
- **Strong Health (3):** Officer roster updated or verified within the last 6 months
- **Marginal Health (2):** Officer roster updated or verified within the last 9 months
- **Poor Health (1):** Officer roster updated or verified within the last 12 months
- **Unhealthy (0):** Officer roster update has not been updated or verified in more than 12 months

| Exceptional Health                                           | Strong Health                                                | Marginal Health                                              | Poor Health                                                   | Unhealthy                                                                  |
|--------------------------------------------------------------|--------------------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------------|----------------------------------------------------------------------------|
| Update or verify the officer roster within the last 3 months | Update or verify the officer roster within the last 6 months | Update or verify the officer roster within the last 9 months | Update or verify the officer roster within the last 12 months | The officer roster has not been updated or verified in more than 12 months |

### Deadline(s)

- Officer Form
  - Fall – Available: August 1 | Due: Within fourteen (14) days of fall term start
  - Spring – Available: December 1 | Due: Within fourteen (14) days of spring term start
  - Summer – Available: April 1 | Due: Within fourteen (14) days of spring commencement

**Why is it important?**

Keeping your officer roster up to date is important. It is the primary way Central Office staff and volunteers know who your chapter leaders are. Anytime something changes, like a new officer is elected, or an officer updates their phone or email, it needs to be reported right away in The Hub Officer section.

---

| <b>What Low Health Could Mean</b>                                                                                                                                             | <b>How to Improve Chapter Health</b>                                                                                                                                                    |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• Members do not know how to update officers in The Hub.</li><li>• Members do not know where to find the Officer Report form.</li></ul> | <ul style="list-style-type: none"><li>• Update officer info in The Hub immediately after elections.</li><li>• Complete the Officer Report form before the deadline each term.</li></ul> |

---



## Section A: Officer Management and Training

## Indicator 3: Officer Training

**What is expected:** At least eight officers should complete the training module for their specific role.

### Officer(s) Responsible

*Each officer is expected to complete the training for the office(s) they occupy*

- President
- Senior Vice President
- Vice President-Pledge Education
- Vice President-Finance
- Vice President-Chapter Operations
- Chancellor
- Vice President-Professional Activities
- Vice President-Community Service
- Vice President-Scholarship and Awards
- Vice President-Alumni Relations

### Additional Officers with ability to submit

- None

---

### How to Submit

1. Log into [dsp.org/LMS](https://dsp.org/LMS)
  2. In the **Catalog** section, select **Officer Training** from the drop down menu
  3. Find the **Officer Training for your role** and click **Enroll Now**
  4. **Complete** the training and **exit the module as described**
    - Double check the "Your Enrollments" section to ensure your Officer Training says "complete."
    - If it doesn't, click on the arrow to re-launch the training (you don't need to complete it again) and exit as described in the training.
    - If it continues to not show "Completed" contact [Hub@dsp.org](mailto:Hub@dsp.org) for assistance
-

## How Chapter Health Is Determined

☞ *Training is tracked by officer position. If you completed the module at any point and later get elected to that role, it still counts!*

- **Exceptional Health (4):** All current officers complete training for the role they hold
- **Strong Health (3):** At least 8 officers complete officer training for the role they hold
- **Marginal Health (2):** At least 4 officers complete officer training for the role they hold
- **Poor Health (1):** At least 1 officer completes officer training for the role they hold
- **Unhealthy (0):** No officers complete officer training

| Exceptional Health                                                     | Strong Health                                                     | Marginal Health                                                  | Poor Health                                                   | Unhealthy                                         |
|------------------------------------------------------------------------|-------------------------------------------------------------------|------------------------------------------------------------------|---------------------------------------------------------------|---------------------------------------------------|
| Every officer has completed the training module for the role they hold | At least eight (8) officers have completed their officer training | At least four (4) officers have completed their officer training | At least one (1) officer has completed their officer training | No officers have completed their officer training |

## Why is it important?

When someone is elected to a chapter office, you do not have to figure it all out on your own. Delta Sigma Pi has online training modules that introduce each officer role. These give officers the basics, so they know where to start and how to succeed in your position.

### What Low Health Could Mean

- Officers do not know what is expected of them in their role.
- Members do not know training modules exist or do not know how to access them.

### How to Improve Chapter Health

- Encourage people running for office to complete the module before elections.
- Invite newer initiates to explore modules so they learn about future officer roles.
- Holding current officers accountable by reminding them training is part of their responsibility.

## Section B: Member Management

## Indicator 1: Roster Verification

**What is expected is:** The chapter updates the roster whenever there is a change, but at least once per term.

### Officer(s) Responsible

- Vice President–Chapter Operations (VPCO)

### Additional Officers with ability to submit

- President
- Vice President-Finance (VPF)

---

### How to Submit

- Report member changes (graduated, studying abroad, not enrolled, etc.) through the **People section** in The Hub.
    1. In The Hub, click on the **people** button on the left hand nav bar
    2. Above the names and to the right, click on the **Change Roster** button
    3. Select the **Type of Change** from the dropdown menu, **Enter the date** the change went into effect, click the **Proceed to select eligible members** button
    4. Select the members changing to that status by **clicking the box (showing a checkmark)** to the left of the name
    5. Once all members have been selected click the **Proceed with these \_\_\_\_ changes**
      - The number on the button should match the number of members being changed to that status
  - If you **do not have updates**, email [Central Office staff](mailto:hub@dsp.org) (**hub@dsp.org**) to have this item recognized.
-

## How Chapter Health Is Determined

➤ *Indicator evaluation is determined by the last time a change is submitted. The longer the chapter waits beyond 3 months, they slide down a level until the next update (or report no changes).*

- **Exceptional Health (4):** Member roster has not been updated or verified within last 3 months
- **Strong Health (3):** Member roster updated or verified within the last 6 months
- **Marginal Health (2):** Member roster updated or verified within the last 9 months
- **Poor Health (1):** Member roster updated or verified within the last 12 months
- **Unhealthy (0):** No member roster update or verification in more than 12 months

| Exceptional Health                                          | Strong Health                                               | Marginal Health                                             | Poor Health                                                  | Unhealthy                                                                 |
|-------------------------------------------------------------|-------------------------------------------------------------|-------------------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------------------------|
| Update or verify the member roster within the last 3 months | Update or verify the member roster within the last 6 months | Update or verify the member roster within the last 9 months | Update or verify the member roster within the last 12 months | The member roster has not been updated or verified in more than 12 months |

---

## Why is it important?

Your chapter's roster in The Hub is like the official "attendance sheet" for who is in the chapter. It is super important to keep it update whenever someone graduates, studies abroad, or even just changes their phone number or email. An up-to-date roster also makes sure your chapter's invoices (based on how many members you have) are correct.

---

## What Low Health Could Mean

- Some members may have been reported as graduated by mistake (email [hub@dsp.org](mailto:hub@dsp.org) if that happens to correct).
- The chapter may not know how to submit roster changes in The Hub.

## How to Improve Chapter Health

- Update member statuses before or at the end of a term (like graduates, internships, or students studying abroad).
- Check in with members near the end of the term so you know who might not be on campus the next semester.

## Section B: Member Management

## Indicator 2: Ideal Chapter Size

**What is expected is:** The chapter should be within 75% of its ideal size.

### Officer(s) Responsible

- Vice President–Chapter Operations (VPCO)
  - Roster Updates
- Chancellor
  - IDP Reporting

### Additional Officers with ability to submit

- President
- Vice President-Finance (VPF)

### How to Submit

- ☞ *CMP automatically compares a chapter's current roster to their ideal chapter size, no additional submissions needed.*
- **Maintain an accurate roster** in The Hub and adjust when members have a change in status as described in B1).

### How Chapter Health Is Determined

- ☞ *Chapters can see this information on their Hub dashboard in the "ChptSize Vs Ideal" information block.*
- **Exceptional Health (4):** Chapter has met or exceeded (100% or more) ideal size
- **Strong Health (3):** Chapter is at least 75% of ideal size
- **Marginal Health (2):** Chapter is at least 50% of ideal size
- **Poor Health (1):** Chapter is at least 25% of ideal size
- **Unhealthy (0):** Chapter is less than 25% of ideal size

| Exceptional Health                              | Strong Health                                  | Marginal Health                                | Poor Health                                    | Unhealthy                                  |
|-------------------------------------------------|------------------------------------------------|------------------------------------------------|------------------------------------------------|--------------------------------------------|
| Meet or exceed 100% of the chapter's ideal size | Reach at least 75% of the chapter's ideal size | Reach at least 50% of the chapter's ideal size | Reach at least 25% of the chapter's ideal size | The chapter is below 25% of its ideal size |

### Why is it important?

For a chapter to stay strong and last long-term, it needs enough members to represent the business school well. Delta Sigma Pi expects chapters to recruit new members and run a pledge education program every term. A healthy chapter usually has at least 20 members or about 2% of the business school's enrollment, whichever is bigger.

### What Low Health Could Mean

- The chapter is not connected with the full potential pool within the business school.
  - Recruitment is limited and does not reach all possible audiences.
  - Too many members are clustered in only one or two majors.
  - The chapter is not visible at business school events and programs.
  - The chapter does not host engaging or valuable events for its members.
- 

### How to Improve Chapter Health

- Review recruitment strategies so you are reaching all possible candidates.
- Meet or exceed annual new member goals.
- Make sure the chapter's programs and events give members real value, so they stay engaged.
- Look at new or combined majors that could expand your pool of potential pledges.

## Section B: Member Management

## Indicator 3: Member Retention

**What is expected is:** Chapters should retain at least 90% of their dues paying members each term.

### Officer(s) Responsible

- Vice President–Chapter Operations (VPCO)
    - Roster Updates
  - Chancellor
    - IDP Reporting
  - President
    - Voluntary Withdrawal Approval
- All officers are expected to review voluntary withdrawal applications as a group*

### Additional Officers with ability to submit

- President

### How to Submit

- Report **Individual Discipline Policy (IDP) Resolutions** on time per [the IDP Guide](#)
- Review and act on **[Voluntary Withdrawal](#) applications** within 14 days of the submission

### How Chapter Health Is Determined

- *Dues paying members are listed as Collegiate (In Good Standing) on a chapter's roster in the Hub on day 30 of a term.*
- *Only individuals who have been expelled or have their voluntary withdrawal approved are not considered retained.*
- *Graduates, students abroad, or interns do not "count against" retention since they are still considered retained members.*
- **Exceptional Health (4):** Retain at least 95% of dues paying members
- **Strong Health (3):** Retain at least 90% of dues paying members
- **Marginal Health (2):** Retain at least 85% of dues paying members
- **Poor Health (1):** Retain less than 85% of dues paying members
- **Unhealthy (0):** Roster not updated or verified in more than 12 months

| Exceptional Health                         | Strong Health                              | Marginal Health                            | Poor Health                                  | Unhealthy                                                          |
|--------------------------------------------|--------------------------------------------|--------------------------------------------|----------------------------------------------|--------------------------------------------------------------------|
| Retain at least 95% of dues paying members | Retain at least 90% of dues paying members | Retain at least 85% of dues paying members | Retain fewer than 85% of dues paying members | The roster has not been updated or verified in more than 12 months |

**Why is it important?**

A strong chapter is not just about recruiting new members, it is about keeping the ones you already have. When members stay involved, they bring knowledge, experience, and energy to help the chapter grow. While members should be accountable for their actions, sometimes challenges can be solved so they can continue benefiting from everything DSP offers.

---

| <b>What Low Health Could Mean</b>                                                                                                                                                                                                                                        | <b>How to Improve Chapter Health</b>                                                                                                                                                                                                                                                                                                                          |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• Members are leaving because they do not feel connected.</li><li>• The chapter does not address concerns before members withdraw.</li><li>• The roster is not being updated correctly, which hurts retention reporting.</li></ul> | <ul style="list-style-type: none"><li>• Before a member withdraws or the individual discipline process is enacted, talk with them to see if their concerns can be solved.</li><li>• Plan professional, service, and social events that make members feel valued.</li><li>• Make sure members know how much DSP benefits them now and in the future.</li></ul> |

---



## Section B: Member Management

## Indicator 4: Recent Alumni Engagement

**What is expected is:** At least half of your chapter's alumni from the past 3 years should still be engaged with DSP (based on the Fraternity's definition of "engagement").

### Officer(s) Responsible

- Vice President–Alumni Relations (VPAR)  
*All officers have access to the "Lost Alumni Report" in The Hub*

### Additional Officers with ability to submit

- President
- Vice President–Chapter Operations (VPCO)

### How to Submit

➡ *CMP will update through other reporting and individual actions no additional submissions needed.*

- **Maintain an accurate roster** in The Hub and adjust when members have a change in status as described in B1).

### Updating Lost Alumni

1. In The Hub, click on the **reports** button on the left hand nav bar
2. Find the **Lost Alumni Report** and click the **Run** button to the right
3. If the chapter has **more accurate contact information**:
  - a. Copy the **Person ID**
  - b. Click on the **forms** button on the left hand nav bar
  - c. Click the **Submit as Needed** tab and find the **Update Alumni Contact Information** form
  - d. **Complete** with as much with accurate information as possible and click **Submit Form**

### Examples of Alumni Engaging (not exhaustive)

- Collegiate chapters updating lost alumni
- Attending and/or presenting at a collegiate or national event
- [Donating](#) through the [Delta Sigma Pi Leadership Foundation](#)
  - This includes [CLF donations](#)
- Updating contact information with the Fraternity
- Opening emails sent from Delta Sigma Pi and clicking on an item in the message
- Serving on a [Fraternity Advisory Panel, Work Group/Subgroup, or Task Force](#)

## How Chapter Health Is Determined

- **Exceptional Health (4):** At least 60% of alumni from the last 3 years engaged with the Fraternity
- **Strong Health (3):** At least 50% of alumni from the last 3 years engaged with the Fraternity
- **Marginal Health (2):** At least 40% of alumni from the last 3 years engaged with the Fraternity
- **Poor Health (1):** At least 30% of alumni from the last 3 years engaged with the Fraternity
- **Unhealthy (0):** Less than 30% of alumni from the last 3 years engaged with the Fraternity

| Exceptional Health                                               | Strong Health                                                    | Marginal Health                                                  | Poor Health                                                      | Unhealthy                                                          |
|------------------------------------------------------------------|------------------------------------------------------------------|------------------------------------------------------------------|------------------------------------------------------------------|--------------------------------------------------------------------|
| At least 60% of recent alumni remain engaged with the Fraternity | At least 50% of recent alumni remain engaged with the Fraternity | At least 40% of recent alumni remain engaged with the Fraternity | At least 30% of recent alumni remain engaged with the Fraternity | Fewer than 30% of recent alumni remain engaged with the Fraternity |

## Why is it important?

Staying connected to DSP after graduation is important. When alumni stay engaged within the first 3 years, it shows they had a good chapter experience, and it helps them (and the chapter) with networking, professional growth, and supporting the Fraternity in the future.

### What Low Health Could Mean

- A positive collegiate experience may not have been connected to clear ways to remain involved after graduation, such as attending events, presenting, serving on Fraternity groups, or donating.
- Recent graduates may miss opportunities because their contact information is outdated or they do not regularly read Fraternity communications.
- Members may have had limited exposure to alumni involvement during college, making continued engagement less familiar after graduation.

### How to Improve Chapter Health

- Encourage alumni to donate to their [Chapter Leadership Fund \(CLF\)](#).
- Invite alumni to present at professional events.
- Encourage alumni to attend [national DSP events](#).
- Build the habit of opening DSP emails/communications as a collegiate member and maintain that as an alum.

## Section C: Recruitment and Pledge Education

## Indicator 1: Social Media/Website Verification

**What is expected:** Chapters should keep online info updated so anyone who looks up DSP sees accurate details about events and officer contacts.

### Officer(s) Responsible

- Senior Vice President (SVP)
- Chapter Webmaster

### Additional Officers with ability to submit

- President
- Vice President-Chapter Operations (VPCO)

### How to Submit

1. In The Hub, click on the **forms** button on the left hand nav bar
2. At the top of the screen, click on the **Submit as Needed** tab
3. Locate the **Social Media/Website Update** form
4. Fill out the information and click **Submit Form** at the bottom
  - Once submitted, the form must be approved by your [District Director \(DD\) or Regional Vice President \(RVP\)](#).

### How Chapter Health Is Determined

➡ *Indicator evaluation is determined by the last time submitted. Once 3 months have passed, an evaluation will slide down a level until they update again.*

- **Exceptional Health (4):** Reported to have been updated/verified within the last 3 months via form
- **Strong Health (3):** Reported to have been updated/verified within the last 6 months via form
- **Marginal Health (2):** Reported to have been updated/verified within the last 9 months via form
- **Poor Health (1):** Reported to have been updated/verified within the last 12 months via form
- **Unhealthy (0):** NOT reported to have been updated/verified within the last 12 months via form

| Exceptional Health                                                                                    | Strong Health                                                                                         | Marginal Health                                                                                       | Poor Health                                                                                            | Unhealthy                                                                                                         |
|-------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| Chapter's social media/website information reported (via form) to be updated within the last 3 months | Chapter's social media/website information reported (via form) to be updated within the last 6 months | Chapter's social media/website information reported (via form) to be updated within the last 9 months | Chapter's social media/website information reported (via form) to be updated within the last 12 months | Chapter's social media/website information NOT reported (via form) to have been updated within the last 12 months |

## Why is it important?

Your chapter's social media and website are like its public face. They show the campus, alumni, and potential members that your chapter is active and engaged. If the info is old or incorrect, it can discourage people from joining or make the chapter look inactive.

---

### What Low Health Could Mean

- The chapter lost access to its accounts.
- Old officer info or outdated events are still posted, making the chapter look inactive.

### How to Improve Chapter Health

- Create a calendar to plan regular social media posts and website updates.
  - Save and pass along login info during officer transitions so nothing gets lost.
  - Utilize the annual [Social Media Content Calendar](#) from dsp.org.
-

## Section C: Recruitment and Pledge Education

## Indicator 2: Recruitment to Pledging

**What is expected is:** Recruits complete and submit their profiles in the Hub before the Pledging Ceremony and the Pledging Ceremony is reported within two (2) days.

### Officer(s) Responsible

- Senior Vice President (SVP)
- Vice President–Pledge Education (VPPE)

### Additional Officers with ability to submit

- President
- Vice President-Chapter Operations (VPCO)

### How to Submit

#### Reporting New Recruits (Potential Pledges)

1. In The Hub, click on the **people** button on the left hand nav bar
2. At the top of the screen, click on the **Report New Recruits** button
3. **Enter the date** the individual(s) was recruited and click the **Proceed to adding recruits** button
4. At the top right of the screen click the **Add a new recruit** button
5. **Complete the required information** and click the **Save** button
  - Use the dropdown menu to select Collegiate, Faculty, or Honorary
  - Use the individual's preferred email, don't assume their campus email is preferred
6. **Repeat** until all new recruits are entered
7. Once all have been entered, click the **Submit These Recruits** button in the top right of the screen

#### Reporting a Pledging Ceremony

1. In The Hub, click on the **people** button on the left hand nav bar
2. At the top of the screen, click on the **Report Pledging Ceremony** button
3. **Enter the date** of the Pledging Ceremony being reported
  - If multiple Pledging Ceremonies are needed due to Recruit/Pledge time conflicts contact [Central Office staff](mailto:Hub@dsp.org) (Hub@dsp.org) with additional Pledging Ceremony dates to be added
  - Each Pledging Ceremony is expected to be reported separately
4. **Select the status** of each Recruit
  - Do not report a Recruit having participated if they are participating in a later ceremony
  - If a Recruit is not going to continue with the pledge education program, a reason must be provided
5. Click the **Submit Pledge Report** button at the top right part of the screen

## How Chapter Health Is Determined

- *If the reported date of the Pledging Ceremony is different from the approved Pledging Ceremony date, from the Pledge Education Form, the indicator evaluation will be negatively impacted.*
- *Changes to the approved Pledging Ceremony date should be communicated to [Central Office staff](mailto:CentralOffice@dsp.org) by emailing [Hub@dsp.org](mailto:Hub@dsp.org).*
- **Exceptional Health (4):** All pledge profiles complete at least 1 day before Pledging Ceremony **AND** Pledging Ceremony reported within 2 days
- **Strong Health (3):** All pledge profiles complete before Pledging Ceremony **AND** Pledging Ceremony reported within 2 days
- **Marginal Health (2):** Either some pledge profiles incomplete before Pledging Ceremony **OR** Pledging Ceremony reported more than 2 days later
- **Poor Health (1):** Some pledge profiles incomplete before Pledging Ceremony **AND** Pledging Ceremony reported more than 2 days later
- **Unhealthy (0):** No Pledging Ceremony reported

| Exceptional Health                                                                                                                                | Strong Health                                                                                                                      | Marginal Health                                                                                                                                                 | Poor Health                                                                                                                                     | Unhealthy                        |
|---------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|
| Every recruit completes their profile at least 1 day before the Pledging Ceremony<br><b>AND</b><br>The chapter reports the ceremony within 2 days | Every recruit completes their profile before the Pledging Ceremony<br><b>AND</b><br>The chapter reports the ceremony within 2 days | <b>Either</b><br>Some recruit profiles were not complete before the Pledging Ceremony<br><b>OR</b><br>The Pledging Ceremony was reported more than 2 days later | Some recruit profiles were not complete before the Pledging Ceremony<br><b>AND</b><br>The Pledging Ceremony was reported more than 2 days later | No Pledging Ceremony is reported |

## Why is it important?

Before someone officially becomes a pledge, your chapter needs to submit some basic info (name, preferred email, and phone number) for each recruit in The Hub. Once that is entered, the recruit gets an email with a membership application they must complete (including their major) before the pledging ceremony. After the ceremony, the chapter must report who participated in a pledging ceremony within 2 days, for pledges to gain access to [pledge education curriculum materials](#).

### What Low Health Could Mean

- Pledging Ceremony details in The Hub are wrong (email [hub@dsp.org](mailto:hub@dsp.org) to correct it).
- A membership application (especially for faculty/honorary initiates) was not submitted before the ceremony.
- The chapter did not communicate clearly with recruits about what they needed to do.

### How to Improve Chapter Health

- Double-check the ceremony date, time, and location are correct.
  - Add recruits to the Hub as soon as you collect their information (name, phone, and preferred email is enough to start).
    - Do not assume their campus email is their preferred email.
  - Remind recruits to finish their profile. Until it is completed, they cannot pledge/participate in the Pledging Ceremony or pledge education.
  - Report the Pledging Ceremony right after it happens (like after Big Brother Introductions or immediately following the first pledge education meeting).
-

## Section C: Recruitment and Pledge Education

## Indicator 3: Pledging to Initiation

**What is expected is:** Badges are ordered so they are ready for the ceremony, and the Initiation Ceremony is reported in The Hub within 14 days.

### Officer(s) Responsible

- Vice President–Finance (VPF)
  - Badge orders
- Vice President–Pledge Education (VPPE)
  - Reporting Initiation Ceremony

### Additional Officers with ability to submit

- All officers (Badge Ordering)

### How to Submit

#### Ordering Badges

1. From The Hub **dashboard** click on the **Badge Inventory** square toward the bottom of the screen, this will take you to the Pledge Pin/Badge Order Form
2. Enter the **number of Badges** you would like to order and click **Continue to Payment**
  - A new Badge is expected to be ordered for each new initiation (collegiate and/or faculty)
  - The chapter's "Badge Inventory" should be at or above the number of new initiates prior to the Initiation Ceremony date for better health
3. **Complete Payment and Shipping Information** and click **Place Order**
  - Chapters can choose to be invoiced by clicking the "Bill Chapter" switch

#### Reporting an Initiation Ceremony

1. In The Hub, click on the **people** button on the left hand nav bar
2. At the top of the screen, click on the **Report an Initiation Ceremony** button
3. **Confirm the date** of the Initiation Ceremony being reported
  - If multiple Initiation Ceremonies are needed due to Pledge/Initiate time conflicts, contact [Central Office staff](mailto:Hub@dsp.org) (Hub@dsp.org) for assistance
  - Each Initiation Ceremony is expected to be reported separately
4. **Select the status** of each Pledge
  - Do not report a Pledge having participated if they are participating in a later ceremony
  - If a Pledge is not going to be initiated, a reason must be provided
5. Click the **Submit Initiation Report** button at the top right part of the screen



## How Chapter Health Is Determined

➤ *Badges returned to the chapter from expelled, withdrawn, or graduated members are not part of the chapter inventory and may not be presented to a new initiate.*

- **Exceptional Health (4):** Enough new badges in inventory at least 7 days before Initiation Ceremony **AND** Initiation Ceremony reported within 7 days
- **Strong Health (3):** Enough new badges in inventory at least 1 day before Initiation Ceremony **AND** ceremony reported within 14 days
- **Marginal Health (2):** Either not enough badges in inventory at time of Initiation Ceremony **OR** Initiation Ceremony reported more than 14 days later
- **Poor Health (1):** Not enough badges in inventory at time of Initiation Ceremony **AND** Initiation Ceremony reported more than 14 days later
- **Unhealthy (0):** No Initiation Ceremony reported

| Exceptional Health                                                                                                                                  | Strong Health                                                                                                                                       | Marginal Health                                                                                                                                                                | Poor Health                                                                                                                                             | Unhealthy                          |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|
| Enough new badges in chapter inventory at least 7 days before the Initiation Ceremony<br><b>AND</b><br>Report the Initiation Ceremony within 7 days | Enough new badges in chapter inventory at least 1 day before the Initiation Ceremony<br><b>AND</b><br>Report the Initiation Ceremony within 14 days | <b><u>Either</u></b><br>Chapter did not have enough badges at the time of the Initiation Ceremony<br><b>OR</b><br>The Initiation Ceremony was reported more than 14 days later | Chapter did not have enough badges at the time of the Initiation Ceremony<br><b>AND</b><br>The Initiation Ceremony was reported more than 14 days later | No Initiation Ceremony is reported |

## Why is it important?

When pledges are initiated, they must receive an official Badge from the National Fraternity. To make that happen, chapters must (1) order enough badges ahead of time and (2) report the Initiation Ceremony in The Hub. Until it is reported, those initiates are not officially recognized as DSP members.

### What Low Health Could Mean

- Returned badges were mistakenly counted as chapter inventory.
  - Badges returned to the chapter from expelled or withdrawn members are not part of the chapter inventory and may not be presented to a new initiate.
  - If the chapter has additional badges in their possession, contact [Central Office staff](mailto:Hub@dsp.org) (Hub@dsp.org)
- Officers do not know how to order Badges or report ceremonies.
- Pledge fees were not collected early, delaying Badge orders.

### How to Improve Chapter Health

- Check Badge inventory right after the Pledging Ceremony to determine how many you will need to order.
- Order Badges at least 3 weeks before initiation.
- Make sure pledge fees are collected early enough to cover the Badge order.
- Report Initiation Ceremonies as soon as they happen.

## Section C: Recruitment and Pledge Education

## Indicator 4: Pledge Retention

**What is expected:** Chapters should retain at least 80% of their pledges through initiation.

### Officer(s) Responsible

- Senior Vice President (SVP)
- Vice President–Pledge Education (VPPE)

### Additional Officers with ability to submit

- President
- Vice President-Chapter Operations (VPCO)

### How to Submit

- SVP submits the **Pledging Ceremony Report(s)**.
  - Process described in C2: Recruitment to Pledging
- VPPE submits the **Initiation Ceremony Report(s)**.
  - Process described in C3: Pledging to Initiation

### How Chapter Health Is Determined

➡ *Pledge retention is calculated by comparing how many people pledged vs. how many were initiated over a 24-month period.*

- **Exceptional Health (4):** Chapter initiates at least 90% of pledges
- **Strong Health (3):** Chapter initiates at least 80% of pledges
- **Marginal Health (2):** Chapter initiates at least 70% of pledges
- **Poor Health (1):** Chapter initiates at least 1 pledge less than 70% of pledges
- **Unhealthy (0):** Chapter initiates no pledges

| Exceptional Health                          | Strong Health                               | Marginal Health                             | Poor Health                                                            | Unhealthy                           |
|---------------------------------------------|---------------------------------------------|---------------------------------------------|------------------------------------------------------------------------|-------------------------------------|
| Initiate at least 90% of the people pledged | Initiate at least 80% of the people pledged | Initiate at least 70% of the people pledged | Initiate at least one pledge, but fewer than 70% of the people pledged | Initiate none of the people pledged |

### Why is it important?

New members keep the chapter strong. DSP expects chapters to initiate at least 70% of the individuals they pledge. That means most of the students who start the pledge process should be initiated.

### What Low Health Could Mean

- Recruitment practices may not be setting the right expectations.
  - Pledges are not seeing the value of joining DSP.
  - The time or financial commitments feel out of sync with campus culture.
  - The chapter may not be following the national [pledge education program curriculum](#) as written.
- 

### How to Improve Chapter Health

- Be clear and transparent about the pledge program and initiated member time commitment and expectations during recruitment.
- Stick to the approved pledge education program and common [pledge education curriculum](#).
- Involve pledges in chapter meetings and activities so they feel included early.
- Recruit people who are ready and able to meet DSP's expectations.

## Section C: Recruitment and Pledge Education

## Indicator 5: Ritualistic Ceremonies

**What is expected:** At minimum, the chapter should perform the Initiation Ceremony with all required materials and do it well.

### Officer(s) Responsible

- Chancellor

### Additional Officers with ability to submit

- President
- Vice President-Pledge Education (VPPE)
- Vice President-Chapter Operations (VPCO)
- Senior Vice President (SVP)  
(Pledging Ceremony Only)

---

### How to Submit

➡ *The Ritual Well Performed/Memorized forms become available after a ceremony is reported.*

1. In The Hub, click on the **forms** button on the left hand nav bar
2. At the top of the screen, click on the **Due Forms** tab
3. Locate the **Pledging Ceremony Ritual Well Performed or Initiation Ceremony Well Performed** (whichever is available and/or appropriate) form
4. Fill out the information and click **Submit Form** at the bottom
  - You must list a **Verifier** (a District Director, Chapter Advisor, or alumni agreed upon by local leaders). The chapter's DD will follow up with them if needed.
5. Once submitted, the form must be approved by your **District Director (DD) or Regional Vice President (RVP)**
  - If a submitted form is denied, they will explain why, and the chapter will need to resubmit (if applicable).

### Deadlines

- Fall ceremonies: Due **January 31**
  - Spring ceremonies: Due **June 30**
-

## How Chapter Health Is Determined

*This indicator is considering the current term as well as the previous two terms to determine an evaluation.*

- **Exceptional Health (4):** All Pledging and Initiation Ceremonies (fall & spring) verified, and form, and well performed
- **Strong Health (3):** Both Initiation Ceremonies (fall & spring) verified, and form, and well performed
- **Marginal Health (2):** At least 2 ceremonies (Pledging or Initiation) verified, via form, and well performed
- **Poor Health (1):** At least 1 ceremony verified, via form, and well performed
- **Unhealthy (0):** No ceremonies verified, via form, considered well performed OR no forms approved

| Exceptional Health                                                                                            | Strong Health                                                                                     | Marginal Health                                                                                     | Poor Health                                                                                       | Unhealthy                                                                                                                                 |
|---------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| Have all fall and spring Pledging and Initiation Ceremonies verified, via form, and considered well performed | Have both fall and spring Initiation Ceremonies verified, via form, and considered well performed | Have at least 2 Pledging or Initiation Ceremonies verified, via form, and considered well performed | Have at least 1 Pledging or Initiation Ceremony verified, via form, and considered well performed | No Pledging or Initiation Ceremonies are verified, via form, and considered well performed<br><b>OR</b><br>No verification forms approved |

## Why is it important?

DSP has two main rituals: the Pledging Ceremony (to start the pledge education program) and the Initiation Ceremony (to officially welcome new members). These ceremonies are more than just tradition, they make a lasting impression and show the true meaning of our fraternity's values.

### What Low Health Could Mean

- The chapter and verifier did not talk through expectations before the ceremony.
- The chapter did not clearly share dates, times, or locations with the verifier.

### How to Improve Chapter Health

- Plan dates, times, and locations of ceremonies with your verifier in advance.
- Discuss expectations with your verifier for what a "well performed" ceremony means.
- Use the [Initiation Ceremony Rubric](#) as a guide.
- Consider creating a Ritual Team, who are not officers, to focus just on ceremonies.
  - Remember: officers are not locked into ritual roles, any member can serve.

## Section D: Chapter Planning and Governance

## Indicator 1: Chapter Local Bylaws

**What is expected:** Chapters are updating and submitting local bylaws at least annually and are compliant with [national governing documents](#). Chapters should resubmit until approved. Don't forget to utilize [the template on dsp.org](#) to get started.

### Officer(s) Responsible

- Chancellor

### Additional Officers with ability to submit

- President
- Vice President-Chapter Operations (VPCO)

---

### How to Submit

🔗 *Forms to submit become available October 1*

1. In The Hub, click on the **forms** button on the left hand nav bar
2. At the top of the screen, click on the **Due Forms** tab
3. Locate the **Chapter Bylaws** form
4. Complete the information and **upload a Word doc or PDF version** of the chapter's document
  - Apple based files, like Pages, are not accessible to all reviewers
5. Click the **Submit Form** button

### Deadline(s)

- It is encouraged chapters **submit their documents by October 15**
  - Chapters may need to resubmit their documents multiple times before they are approved
    - To resubmit, follow the instructions above
    - Chapters should read the comments left by the reviewer and make the updates required
  - Chapters are expected to have an **approved set of documents by June 30**
-

## How Chapter Health Is Determined

- **Exceptional Health (4):** Chapter Bylaws submitted and approved within the last 6 months
- **Strong Health (3):** Chapter Bylaws submitted and approved within the last 12 months
- **Marginal Health (2):** Chapter Bylaws submitted and approved within the last 18 months
- **Poor Health (1):** Chapter Bylaws submitted and approved within the last 24 months
- **Unhealthy (0):** Chapter Bylaws NOT submitted and approved within the last 24 months

| Exceptional Health                                                        | Strong Health                                                              | Marginal Health                                                            | Poor Health                                                                | Unhealthy                                                                     |
|---------------------------------------------------------------------------|----------------------------------------------------------------------------|----------------------------------------------------------------------------|----------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| Submit the chapter Bylaws and have them approved within the last 6 months | Submit the chapter Bylaws and have them approved within the last 12 months | Submit the chapter Bylaws and have them approved within the last 18 months | Submit the chapter Bylaws and have them approved within the last 24 months | Chapter Bylaws have not been submitted and approved within the last 24 months |

## Why is it important?

Your Chapter Bylaws are like your chapter's playbook. They explain how your chapter runs—things like elections, officer responsibilities, and how decisions are made. Every chapter is expected to keep Bylaws updated and submit them to the [Central Office staff](#) (via The Hub form).

### What Low Health Could Mean

- The chapter has not yet submitted its local Bylaws.
- Reviewer comments were not fully addressed before resubmission.
- A review has not completed the most recent review.

### How to Improve Chapter Health

- Use the [Colligate Chapter Bylaws Template \(Word\)](#) as the base for the chapter's document
  - The template is updated annually with any changes to [national governing documents](#) impacting collegiate chapters
- Review Bylaws annually during an Executive Committee meeting.
- If you do not receive feedback from a reviewer within 4 weeks, email [Central Office staff](#) at (Hub@dsp.org).
- Do not worry if the first submission is denied, that is normal! Read the reviewer's comments, make edits, and resubmit.



## Section D: Chapter Planning and Governance

## Indicator 2: Chapter Local Policies and Procedures

**What is expected:** Chapters are updating and submitting local Policies and Procedures at least annually and are compliant with [national governing documents](#). Chapters should resubmit until approved. Don't forget to utilize [the template on dsp.org](#) to get started.

### Officer(s) Responsible

- Chancellor

### Additional Officers with ability to submit

- President
- Vice President-Chapter Operations

---

### How to Submit

➡ *Forms to submit become available October 1*

1. In The Hub, click on the **forms** button on the left hand nav bar
2. At the top of the screen, click on the **Due Forms** tab
3. Locate the **Chapter Policies and Procedures** form
4. Complete the information and **upload a Word doc or PDF version** of the chapter's document
  - Apple based files, like Pages, are not accessible to all reviewers
5. Click the **Submit Form button**

### Deadline(s)

- It is encouraged chapters **submit their documents by October 15**
  - Chapters may need to resubmit their documents multiple times before they are approved
    - To resubmit, follow the instructions above
    - Chapters should read the comments left by the reviewer and make the updates required
  - Chapters are expected to have an **approved set of documents by June 30**
-

## How Chapter Health Is Determined

- **Exceptional Health (4):** Chapter Policies and Procedures submitted and approved within the last 6 months
- **Strong Health (3):** Chapter Policies and Procedures submitted and approved within the last 12 months
- **Marginal Health (2):** Chapter Policies and Procedures submitted and approved within the last 18 months
- **Poor Health (1):** Chapter Policies and Procedures submitted and approved within the last 24 months
- **Unhealthy (0):** Chapter Policies and Procedures NOT submitted and approved within the last 24 months

| Exceptional Health                                                                         | Strong Health                                                                               | Marginal Health                                                                             | Poor Health                                                                                 | Unhealthy                                                                                      |
|--------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| Submit the chapter Policies and Procedures and have them approved within the last 6 months | Submit the chapter Policies and Procedures and have them approved within the last 12 months | Submit the chapter Policies and Procedures and have them approved within the last 18 months | Submit the chapter Policies and Procedures and have them approved within the last 24 months | Chapter Policies and Procedures have not been submitted and approved within the last 24 months |

## Why is it important?

Your Chapter Policies and Procedures Manual is like the “how-to guide” for your chapter. While Bylaws are the rules, the policies and procedures explain the day-to-day details of how operations are executed (like officer transitions, meeting practices, or event planning steps). Every chapter must have a copy on file with the Central Office and keep it updated.

## What Low Health Could Mean

- The chapter has not yet submitted its local Policies and Procedures.
- Reviewer comments were not fully addressed before resubmission.
- A reviewer has not completed the most recent review.

## How to Improve Chapter Health

- Use the [Collegiate Chapter Policies Sample](#) as the base for the chapter’s document
  - The template is updated annually with any changes to [national governing documents](#) impacting collegiate chapters
- Review and update Policies and Procedures annually during an Executive Committee meeting and share updates with chapter.
- If you do not receive feedback from a reviewer within 4 weeks, email [Central Office staff](#) (Hub@dsp.org).
- Do not worry if the first submission is denied-that is normal! Read the reviewer’s comments, make edits, and resubmit.

## Section D: Chapter Planning and Governance

## Indicator 3: Officer Operation Plans & Pledge Education Plan

**What is expected:** Each officer submits their own plan or form on time and has it approved.

### **Officer(s) Responsible**

#### *Officer Operation Plan*

- President
- Senior Vice President (SVP)
- Vice President-Finance (VPF)
- Vice President-Chapter Operations (VPCO)
- Chancellor
- Vice President-Professional Activities (VPPA)
- Vice President-Community Service (VPCS)
- Vice President-Scholarship and Awards (VPSA)
- Vice President-Alumni Relations (VPAR)

#### *Pledge Education Form*

- Vice President-Pledge Education (VPPE)

### **Additional Officers with ability to submit**

*These officers can submit on behalf of any officer*

- President
- Vice President-Chapter Operations (VPCO)

## How to Submit

### Officer Operation Plan

*All officers except VPPE*

1. In The Hub, click on the **forms** button on the left hand nav bar
2. At the top of the screen, click on the **Due Forms** tab
3. Locate the **Operational Plan – OFFICE NAME** form
4. Complete the information
5. Click the **Submit Form** button
6. Once submitted, the form must be approved first by the **President**
7. Following President approval, the form must be approved by your [Regional Vice President \(RVP\)](#)
  - If a submitted form is denied, they will explain why, and the chapter will need to resubmit (if applicable).

### Fall/Spring Pledge Education Program Form

*VPPE only*

*(Complete in fall for spring and in spring for following fall)*

1. In The Hub, click on the **forms** button on the left hand nav bar
2. At the top of the screen, click on the **Due Forms** tab
3. Locate the **Pledge Education Form** form
4. Complete the information
5. Click the **Submit Form** button
6. Once submitted, the form must be approved by [Central Office staff](#)
  - If a submitted form is denied, they will explain why, and the chapter will need to resubmit (if applicable).

## Deadlines

- **Fall:** Forms available October 15 | **Forms due December 15** | Forms no longer available February 1
- **Spring:** Forms available April 1 | **Forms due June 1** | Forms no longer available June 30
- Chapters may need to resubmit their documents multiple times before they are approved
  - To resubmit, follow the instructions above
  - Chapters should read the comments left by the reviewer and make the updates required

## Additional Things to Remember

### Officer Operation Plan

- Chapter Presidents must approve all Officer Operational Plans, except their own, before they are reviewed by the Regional Vice President.

### Fall/Spring Pledge Education Program Form

- Chapters may not conduct recruitment/pledge education/Initiation without an approved Pledge Education Program.
- The Pledge Education Form is always reviewed by Central Office staff to ensure compliance with the Pledging and Initiations Policy (found in the [National Policies and Procedures Manual](#)) and regalia trunks are available on requested date(s).
- If a regalia trunk is not available on your submitted date, the chapter may be asked to adjust and resubmit the form.

## How Chapter Health Is Determined

➤ *The most recent term's submissions are calculated. Chapters start at "Unhealthy" until at least one form is submitted, then move up as forms are approved.*

- **Exceptional Health (4):** All officers submit their own plan on time, and all are approved by their RVP
- **Strong Health (3):** All officers submit their own plan (not necessarily on time), and all are approved by their RVP
- **Marginal Health (2):** One or more plans are submitted by any officer, and approved by their RVP
- **Poor Health (1):** One or more plans submitted by any officer, but not yet approved by their RVP
- **Unhealthy (0):** No officer plans/forms submitted

| Exceptional Health                                                                                                           | Strong Health                                                                                                                                       | Marginal Health                                                                           | Poor Health                                                                                                                   | Unhealthy                                        |
|------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|
| Every officer submits the plan/form assigned to their role on time<br><b>AND</b><br>Every plan/form is approved by their RVP | Every officer submits the plan/form assigned to their role<br><b>AND</b><br>Every plan/form is approved by their RVP, even if one or more were late | At least one required plan/form has been submitted<br><b>AND</b><br>approved by their RVP | At least one required plan/form has been submitted<br><b>AND</b><br>No submitted plan/form has been approved by their RVP yet | No required officer plan/form has been submitted |

## Why is it important?

Each officer is expected to submit a plan for their role every term (fall and spring). These plans outline goals and a calendar of events, like recruitment, pledge education, initiation, professional, service, fundraising, and chapter meetings.

The Pledge Education Plan (completed by the Vice President–Pledge Education) works like an Officer Operation Plan but focuses only on pledge education. It includes dates, times, and locations of pledge meetings and Initiation. Submitting this plan also reserves the regalia trunk (the official ritual materials) for Initiation. Central Office staff review it for policy compliance and to confirm trunk availability.

## What Low Health Could Mean

- Officers are not submitting their own forms.
- Some forms are submitted but not approved yet.
- RVPs have not reviewed submissions.
- Staff is waiting for more details (like pledge program dates) before approving.

## How to Improve Chapter Health

- Have each officer submit their own form, do not let the President or VPCO do them all.
- Schedule an Executive Committee meeting just to complete forms together.
- Submit early, sometimes forms need revisions before approval.
- Follow up with your RVP to make sure Operation Plans are reviewed and approved.

## Section D: Chapter Planning and Governance

## Indicator 4: Member Accountability

**What is expected:** Your chapter should have at least four trained people (the Chancellor + 3 members) eligible to serve on the Standards Committee.

### Officer(s) Responsible

- Chancellor

### Additional Officers with ability to submit

- None

---

### How to Submit

➞ *Each member of the chapter's Standards Committee must complete the training before participating in a hearing process.*

1. Log into [dsp.org/LMS](https://dsp.org/LMS)
  2. In the **Catalog** section, select **Officer Training** from the dropdown menu
  3. Find the **Standards Committee IDP** course and click **Enroll Now**
  4. **Complete** the training and **exit the module as described**
    - Double check the "Your Enrollments" section to ensure your Officer Training says "Completed."
    - If it doesn't, click on the arrow to re-launch the training (you don't need to complete it again) and exit as described in the training.
    - If it continues to not show "Completed" contact [Central Office staff](mailto:Hub@dsp.org) (Hub@dsp.org) for assistance
-

## How Chapter Health Is Determined

- **Exceptional Health (4):** Chancellor + at least 4 additional members complete Standards Committee Overview Training
- **Strong Health (3):** Chancellor + at least 3 additional members complete Standards Committee Overview Training
- **Marginal Health (2):** Chancellor + at least 1 additional member complete Standards Committee Overview Training
- **Poor Health (1):** Only the Chancellor has completed Standards Committee Overview Training
- **Unhealthy (0):** No members complete training **AND** Chancellor position vacant or they have not yet completed the Standards Committee Overview Training

| Exceptional Health                                                                           | Strong Health                                                                                | Marginal Health                                                                             | Poor Health                                                    | Unhealthy                                                                                                                   |
|----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|----------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| The Chancellor and at least 4 additional members have completed Standards Committee Training | The Chancellor and at least 3 additional members have completed Standards Committee Training | The Chancellor and at least 1 additional member have completed Standards Committee Training | Only the Chancellor has completed Standards Committee Training | No members have completed the training<br><b>AND</b><br>Current Chancellor has not completed training or position is vacant |

## Why is it important?

Being a part of DSP means living up to the oath you took and supporting your chapter. To help make sure members hold each other accountable, every chapter must have a Standards Committee. The Standards Committee is chaired by the Chancellor and must have at least three (3) additional trained members serving. It is advised, if possible, members that are not officers fill the additional roles.

### What Low Health Could Mean

- Members may not know where to find the training.
- The chapter may not have enough people ready to serve on the Standards Committee.

### How to Improve Chapter Health

- Encourage all members to complete the Standards Committee training, it helps everyone understand the [Individual Discipline Policy \(IDP\) and process](#), even if they do not serve.
- Remind members the training is online, quick, and useful for understanding accountability.

## Section E: Fiscal Management

## Indicator 1: Financial Responsibility

**What is expected:** The chapter should pay all invoices within 30 days and carry no debt to the Fraternity.

### Officer(s) Responsible

- Vice President–Finance (VPF)

### Additional Officers with ability to submit

*All officers have the ability to pay invoices*

- President
- Senior Vice President (SVP)
- Vice President-Pledge Education (VPPE)
- Vice President-Chapter Operations (VPCO)
- Chancellor
- Vice President-Professional Activities (VPPA)
- Vice President-Community Service (VPCS)
- Vice President-Scholarship and Awards (VPSA)
- Vice President-Alumni Relations (VPAR)

---

### How to Submit

☞ *No additional forms are required—your health evaluation is based on whether invoices are paid on time.*

- Through The Hub **dashboard** click on the **Chapter Balance** square
    - The chapters Accounts Receivable will appear with all invoices
    - Invoices highlighted red are unpaid
  - **Payments** can be made:
    - Directly through **The Hub**
    - By contacting the [Central Office Accounting Department](#) ([accounting@dsp.org](mailto:accounting@dsp.org) or (513) 523-1907).
-



## How Chapter Health Is Determined

☞ *Late fees and/or interest invoices are not considered in chapter health evaluation.*

- **Exceptional Health (4):** No unpaid invoice reaches 30 days old during the last 12 months
- **Strong Health (3):** No unpaid invoice currently 30 days old or older
- **Marginal Health (2):** 1 or more unpaid invoices at least 30 days old
- **Poor Health (1):** 1 or more unpaid invoices at least 60 days old
- **Unhealthy (0):** 1 or more unpaid invoices at least 90 days old

| Exceptional Health                                                | Strong Health                                        | Marginal Health                                      | Poor Health                                          | Unhealthy                                            |
|-------------------------------------------------------------------|------------------------------------------------------|------------------------------------------------------|------------------------------------------------------|------------------------------------------------------|
| For the last 12 months, no unpaid invoice has reached 30 days old | Right now, no unpaid invoice is 30 days old or older | One or more unpaid invoices are at least 30 days old | One or more unpaid invoices are at least 60 days old | One or more unpaid invoices are at least 90 days old |

## Why is it important?

Every chapter must pay the National Fraternity on time for things like dues, initiation fees, and other invoices. Staying on top of payment shows responsibility and keeps the chapter in good standing.

### What Low Health Could Mean

- The chapter roster is not updated correctly (causing invoicing issues).
- Local dues are not set high enough to cover expenses.
- Members are not given clear deadlines or enough transparency on financial expectations.
- The chapter is not budgeting properly to manage payment delays.
- Members may need support, like payment plans, to meet obligations.

### How to Improve Chapter Health

- Clearly communicate payment deadlines to members.
- Set local chapter dues at a level that covers both [national invoices](#) and chapter activities.
- Have the VPF give regular updates at chapter meetings about finances and upcoming payments.
- Build a reserve fund to cover costs if members are late on payments.
- Utilize tools on the [Vice President-Finance](#) website, such as the Budget and Financial Statement Template and [Chapter Finances Tips](#), to review the chapter's current financial status and plan for the financial future.

## Section E: Fiscal Management

## Indicator 2: Chapter Accounting

**What is expected:** The chapter should have its finances reviewed at least once per year by an independent reviewer.

### Officer(s) Responsible

- Vice President–Finance (VPF)

### Additional Officers with ability to submit

- President
- Vice President-Chapter Operations (VPCO)

---

### How to Submit

1. Download the [Annual Financial Review Form](#)
    - Linked above
    - In the Chapter Financial Review form within The Hub
    - On the [Vice President-Finance resource page](#)
  2. Identify an **external financial reviewer**, an accounting professor or similar professional (who is not a collegiate member) to review the chapter's finances and, through the Annual Financial Review Form, **attest to completing** the review.
  3. In The Hub, click on the **forms** button on the left hand nav bar
  4. At the top of the screen, click on the **Submit as Needed** tab
  5. Locate the **Chapter Financial Review** form
  6. Fill out the information, including **uploading the Annual Financial Review Form** from the reviewer and click **Submit Form** at the bottom
  7. Once submitted, the form must be approved by your [District Director \(DD\) or Regional Vice President \(RVP\)](#)
    - If a submitted form is denied, they will explain why, and the chapter will need to resubmit (if applicable).
-

## How Chapter Health Is Determined

➤ This is a "point in time" item, a chapter's evaluation slides over time if they go too long without a review. Submitting a new review moves the chapter to healthier evaluation.

- **Exceptional Health (4):** Independent financial review completed, form submitted and approved, within the last 6 months
- **Strong Health (3):** Independent financial review completed, form submitted and approved, within the last 12 months
- **Marginal Health (2):** Independent financial review completed, form submitted and approved, within the last 18 months
- **Poor Health (1):** Independent financial review completed, form submitted and approved, within the last 24 months
- **Unhealthy (0):** No independent financial review reported within the last 24 months

| Exceptional Health                                                                | Strong Health                                                                      | Marginal Health                                                                    | Poor Health                                                                        | Unhealthy                                                                                        |
|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| Chapter's finances reported to be independently reviewed within the last 6 months | Chapter's finances reported to be independently reviewed within the last 12 months | Chapter's finances reported to be independently reviewed within the last 18 months | Chapter's finances reported to be independently reviewed within the last 24 months | Chapter's finances have NOT been reported to be independently reviewed within the last 24 months |

## Why is it important?

Every chapter's finances should be reviewed and evaluated by someone outside the chapter (like a faculty member or professional accountant) to make sure money is managed appropriately. This should happen at least once per year, however the best practice is toward the end of each term.

### What Low Health Could Mean

- The chapter may not have identified a qualified, independent person to review its finances.
- Financial records may be incomplete or disorganized, delaying the review or submission.
- Going too long without a review may allow unreconciled accounts or budget discrepancies to go unnoticed.

### How to Improve Chapter Health

- Keep organized financial records so reviews are easy to complete.
- Plan ahead, schedule a faculty member or professional each term to review finances.
- Use the review process as a chance to check your budget and make sure dues, travel, insurance, and other expenses are accounted for.

## Section F: Events and Member Education

## Indicator 1: LEAD Events & Grand Chapter Congress

**What is expected:** At least one collegiate member in good standing attends a LEAD event each term and Grand Chapter Congress (in congress years).

### Officer(s) Responsible

- Vice President–Chapter Operations (VPCO)
  - Tracks and reviews registrations
- Vice President-Finance (VFP)
  - Develops a budget that incorporates funds for attendance

### Additional Officers with ability to submit

- Any member or pledge may register themselves for an event

---

### How to Submit

- Chapters **register members** for [events \(LEAD or GCC\)](#)
  - Members must **attend** the events they are registered for (and seated as delegates during business meetings when required)
  - **Central Office tracks attendance** automatically through registration and check-ins
-

## How Chapter Health Is Determined

➤ *Only collegiate members in good standing are considered in this evaluation (pledges attending will be considered once initiated).*

- **Exceptional Health (4):** Within the last 24 months at least one collegiate attended GCC (in a congress year) a LEAD event each term **AND** more than one collegiate attended a national event in the last 24 months
- **Strong Health (3):** At least one collegiate attended GCC (in a congress year) and a LEAD event each term in the last 24 months
- **Marginal Health (2):** At least one collegiate attended 3 or more national events (GCC and/or LEAD) in the last 24 months (not necessarily the same collegiate to all 3 events)
- **Poor Health (1):** At least one collegiate attended at least 1 national event (GCC and/or LEAD) in the last 24 months
- **Unhealthy (0):** No collegiate members attended a national event in the last 24 months

| Exceptional Health                                                                                                                                                                                                            | Strong Health                                                                                                                         | Marginal Health                                                                                                                               | Poor Health                                                                                     | Unhealthy                                                                   |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|
| Within the last 24 months<br>At least one initiated collegiate attend GCC (in a Congress year) and a LEAD event each term<br><b>AND</b><br>Have at least 2 initiated collegiates attend at least one of those national events | Within the last 24 months<br>At least one initiated collegiate attend every event GCC (in a Congress year) and a LEAD event each term | Within the last 24 months<br>At least one initiated collegiate attend 3 or more national events (This can be different members at each event) | Within the last 24 months<br>At least one initiated collegiate attend at least 1 national event | No initiated member has attended a national event within the last 24 months |

## Why is it important?

DSP hosts LEAD events every [fall](#) and [spring](#) and Grand Chapter Congress ([GCC](#)) in odd year Summers. [These events](#) are chances to learn, network, and take part in the governance of the Fraternity. Your chapter should always have at least one member attend to represent the chapter

### What Low Health Could Mean

- Chapter dues do not account for national event attendance.
  - The chapter did not take advantage of early bird rates or CLF funding.
  - Membership numbers are low, making it harder to send members.
  - The chapter did not plan their event calendar around DSP events.
- 

### How to Improve Chapter Health

- Plan your budget and dues to cover event costs (registration, travel, lodging).
- Use Chapter Leadership Funds ([CLF](#)) or fundraise to help offset costs.
- Take advantage of early bird registration to save money.
- Coordinate calendars to make sure members can attend even during breaks or busy times.

## Section F: Events and Member Education

## Indicator 2: National Event Participation

**What is expected:** At least 15% of your chapter should attend LEAD events each fall and spring as well as Grand Chapter Congress in a congress year.

### Officer(s) Responsible

- Vice President–Chapter Operations (VPCO)
  - Tracks and reviews registrations
- Vice President-Finance (VFP)
  - Develops a budget that incorporates funds for attendance

### Additional Officers with ability to submit

- Any member or pledge may register themselves for an event

---

### How to Submit

- Chapters **register members** for [events \(LEAD or GCC\)](#)
  - Members must **attend** the events they are registered for (and seated as delegates during business meetings when required)
  - **Central Office tracks attendance** automatically through registration and check-ins
-

## How Chapter Health Is Determined

- *The percentage is calculated over four terms. If members attend multiple events in one term, it can count as more than 100% attendance.*
- *The chapter average attendance each term is averaged to determine the percentage.*
- *Only collegiate members in good standing are considered in this evaluation (pledges attending will be considered once initiated).*
- **Exceptional Health (4):** Over last four terms, average chapter attendance at national events is at least 25%
- **Strong Health (3):** Over last four terms, average chapter attendance at national events is at least 15%
- **Marginal Health (2):** Over last four terms, average chapter attendance at national events is at least 5%
- **Poor Health (1):** Over last four terms, at least 1 member attends, but average chapter attendance below 5%
- **Unhealthy (0):** No chapter members attend a national event in last four terms

| Exceptional Health                                                                    | Strong Health                                                                         | Marginal Health                                                                      | Poor Health                                                                                                                   | Unhealthy                                                         |
|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|
| Over the last four terms average chapter attendance at national events is 25% or more | Over the last four terms average chapter attendance at national events is 15% or more | Over the last four terms average chapter attendance at national events is 5% or more | Over the last four terms at least one member attends a national event<br><b>AND</b><br>Average chapter attendance is below 5% | No chapter members attend a national event in the last four terms |

## Why is it important?

DSP wants members (and pledges) to be active beyond just the chapter. Attending national events like [Grand Chapter Congress](#), [LEAD Summits](#), and [LEAD Provincial Conferences](#) helps members learn, network, and grow. Your chapter's health in this area is based on how many members attend these events compared to the chapter's total size.



### What Low Health Could Mean

- Chapter has not appropriately budgeted to send members.
- Members who went before did not share what they learned, so others do not see the value.
- Chapter needs help budgeting or fundraising to afford event participation.

### How to Improve Chapter Health

- Encourage members to go by explaining the value of events (professional development, networking, leadership).
  - Cover costs fully for required attendees and partially for others.
  - Look for both local events (less travel) and bigger national ones (more networking).
  - Explore funding options:
    - Student Government or Dean's office support
    - [Chapter Leadership Funds \(CLF\)](#)
    - [Sponsorships](#)
    - [Fundraising](#)
-

## Section F: Events and Member Education

## Indicator 3: Chapter Education

**What is expected:** At least 20% of chapter members should have attended a national or region sponsored educational event at some point as a Deltasig.

### Officer(s) Responsible

- Vice President–Chapter Operations (VPCO)
  - Tracks and reviews registrations
- Vice President-Finance (VFP)
  - Develops a budget that incorporates funds for attendance

### Additional Officers with ability to submit

- Any member or pledge may register themselves for an event

---

### How to Submit

- Chapters **register members** for [events](#) ([LEAD](#), [GCC](#), or [Presidents' Academy](#))
  - Members must **attend** the events they are registered for (and seated as delegates during business meetings when required)
  - **Central Office tracks attendance** automatically through registration and check-ins
-

## How Chapter Health Is Determined

- ☞ *Each member only counts once, no matter how many events they attend. As long as the member remains on the roster they are considered as having attended an event.*
- ☞ *Only collegiate members in good standing are considered in this evaluation (pledges attending will be considered once initiated).*
- **Exceptional Health (4):** 30% or more of members have attended a national event
- **Strong Health (3):** 20% or more have attended a national event
- **Marginal Health (2):** 10% or more have attended a national event
- **Poor Health (1):** Less than 10% have attended a national event
- **Unhealthy (0):** No members have attended a national event

| Exceptional Health                                                                                                                                                                     | Strong Health                                                                                                                                                                          | Marginal Health                                                                                                                                                                        | Poor Health                                                                                                                                                                                                                              | Unhealthy                                                                                      |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| At least 30% of current members have attended at least one national or regionally sponsored Fraternity education event<br>Such as LEAD, Presidents' Academy, or Grand Chapter Congress | At least 20% of current members have attended at least one national or regionally sponsored Fraternity education event<br>Such as LEAD, Presidents' Academy, or Grand Chapter Congress | At least 10% of current members have attended at least one national or regionally sponsored Fraternity education event<br>Such as LEAD, Presidents' Academy, or Grand Chapter Congress | At least one member has attended<br><b>AND</b><br>Fewer than 10% of current members have attended at least 1 national or regionally sponsored fraternity education event<br>Such as LEAD, Presidents' Academy, or Grand Chapter Congress | No current members have attended a national or regionally sponsored fraternity education event |

---

## Why is it important?

DSP offers a member of [educational programs](#)—like [LEAD events](#), [President's Academy](#), and [Grand Chapter Congress](#). The goal is that every member has the chance to attend at least one national program during their time in the chapter. These experiences help members grow, connect, and strengthen their commitment to DSP.

---

### What Low Health Could Mean

- Members do not know about educational opportunities.
- The chapter has not budgeted enough for members to attend.
- The chapter has not promoted or used its CLF dollars to make events affordable.

### How to Improve Chapter Health

- Encourage different members to attend—not just officers.
  - Remind everyone that national events have sessions for all members, not just officers.
  - Budget for members to attend and use your [Chapter Leadership Fund \(CLF\)](#) or [fundraising](#) to cover costs.
-

## Section F: Events and Member Education

## Indicator 4: Risk Management Education

**What is expected:** The chapter should hold one risk management event each year with at least 80% of members present. Presentations must come from qualified presenters (like a police officer, lawyer, university staff, District Director, or national leader)—not another collegiate member.

### Officer(s) Responsible

- Chancellor

### Additional Officers with ability to submit

- President
- Vice President-Chapter Operations (VPCO)
- Vice President-Professional Activities (VPPA)

---

### How to Submit

1. On The Hub **dashboard**, click on the **Dates tab** at the top of the screen
  2. Click on the **Add New Event** button to add a **Risk Management Event** as the Event Type
    - This will create an event form to be completed following the event
  3. **After the event**, in The Hub, click on the **forms** button on the left hand nav bar
  4. At the top of the screen, click on the **Due Forms** tab
  5. Locate the form with the **name and date of the event added**
  6. Complete the form with all information and click **Submit Form**
  7. Once submitted, the form is reviewed by [Central Office staff](#)
    - If a submitted form is denied, the reason will appear at the top of the form, and the chapter will need to resubmit (if applicable).
-

## How Chapter Health Is Determined

- ☞ Attendance is calculated by comparing the number of members at the event to dues-paying members (Collegiates (In Good Standing))\* on the chapter on the date of the event.
  - ☞ Pledges are not included in attendance, however, should still participate in this event with the chapter.
  - ☞ The indicator evaluation is based on the most recent event reported. If there is a gap without events, or attendance is low, the indicator evaluation will slide down. One event can move the chapter evaluation "Unhealthy" to "Exceptional Health."
- **Exceptional Health (4):** Risk Management Event within last 6 months with at least 80% attendance
  - **Strong Health (3):** Risk Management Event within last 12 months with at least 80% attendance
  - **Marginal Health (2):** Risk Management Event within last 12 months with at least 40% attendance
  - **Poor Health (1):** Risk Management Event within last 12 months with less than 40% attendance
  - **Unhealthy (0):** No Risk Management Event within last 12 months

| Exceptional Health                                                                                                              | Strong Health                                                                                                                    | Marginal Health                                                                                                                  | Poor Health                                                                                                                       | Unhealthy                                                                                                                      |
|---------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| Hold a Risk Management Event within the last 6 months<br><b>AND</b><br>At least 80% of Collegiates (In Good Standing) attending | Hold a Risk Management Event within the last 12 months<br><b>AND</b><br>At least 80% of Collegiates (In Good Standing) attending | Hold a Risk Management Event within the last 12 months<br><b>AND</b><br>At least 40% of Collegiates (In Good Standing) attending | Hold a Risk Management Event within the last 12 months<br><b>AND</b><br>Less than 40% of Collegiates (In Good Standing) attending | No Risk Management Event has been held within the last 12 months with at least 40% of Collegiates (In Good Standing) attending |

## Local Risk Management Event Resources

- ⇒ Wellness Centers
- ⇒ Counseling Centers
- ⇒ Title IX Offices
- ⇒ Campus or Local Police
- ⇒ Student Rights and Responsibilities Offices (May also be called: Community Standards or Conduct Offices)

## Why is it important?

Keeping yourself, your brothers, and guests safe is a top priority. Every chapter must host a risk management event at least once per year to educate members about topics like alcohol, hazing, discrimination, harassment, or DSP's official Risk Management Policy.

### **What Low Health Could Mean**

- The chapter did not plan the event far enough in advance.
  - The chapter has not emphasized why risk management is important.
  - The chapter may face increased risk for violations or allegations if members are not educated in various areas of risk.
- 

### **How to Improve Chapter Health**

- Consider using a standing chapter meeting time to guarantee members can attend.

## Section F: Events and Member Education

## Indicator 5: Campus/Organizational Culture Understanding

**What is expected:** The chapter should host one cultural understanding event each year with at least 80% of members present. A qualified speaker (like a school official, HR professional, lawyer, local non-profit, or campus resource) must lead presentations.

### Officer(s) Responsible

- Vice President-Professional Activities (VPPA)

### Additional Officers with ability to submit

- President
- Senior Vice President (SVP)
- Vice President-Chapter Operations (VPCO)
- Vice President-Professional Activities (VPPA)

---

### How to Submit

1. On **The Hub dashboard**, click on the **Dates tab** at the top of the screen
  2. Click on the **Add New Event** button to add a **Campus/Org. Culture Understanding Event** as the Event Type
    - This will create an event form to be completed following the event
  3. **After the event**, in The Hub, click on the **forms** button on the left hand nav bar
  4. At the top of the screen, click on the **Due Forms** tab
  5. Locate the form with the **name and date of the event added**
  6. Complete the form with all information and click **Submit Form**
  7. Once submitted, the form is reviewed by the chapters **District Director** (DD) or Regional Vice President (RVP)
    - If a submitted form is denied, the reason will appear at the top of the form, and the chapter will need to resubmit (if applicable).
-



## How Chapter Health Is Determined

- Attendance is calculated by comparing the number of members at the event to dues-paying members (Collegiates (In Good Standing) on the chapter on the date of the event.
  - Pledges are not included in attendance, however, should still participate in this event with the chapter.
  - The indicator evaluation is based on the most recent event reported. If there is a gap without events, or attendance is low, the indicator evaluation will slide down. One event can move your chapter from "Unhealthy" to "Exceptional Health."
- **Exceptional Health (4):** Culture understanding event within last 6 months with at least 80% attendance
  - **Strong Health (3):** Culture understanding event within last 12 months with at least 80% attendance
  - **Marginal Health (2):** Culture understanding event within last 12 months with at least 40% attendance
  - **Poor Health (1):** Culture understanding event within last 12 months with less than 40% attendance
  - **Unhealthy (0):** No culture understanding event within last 12 month with at least 40% attendance

| Exceptional Health                                                                                                                                | Strong Health                                                                                                                                      | Marginal Health                                                                                                                                    | Poor Health                                                                                                                                         | Unhealthy                                                                                                                            |
|---------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| Hold a qualifying culture understanding event within the last 6 months<br><b>AND</b><br>At least 80% of Collegiates (In Good Standing) attending. | Hold a qualifying culture understanding event within the last 12 months<br><b>AND</b><br>At least 80% of Collegiates (In Good Standing) attending. | Hold a qualifying culture understanding event within the last 12 months<br><b>AND</b><br>At least 40% of Collegiates (In Good Standing) attending. | Hold a qualifying culture understanding event within the last 12 months<br><b>AND</b><br>Less than 40% of Collegiates (In Good Standing) attending. | No culture understanding event has been held within the last 12 months with at least 40% of Collegiates (In Good Standing) attending |

## Local Cultural Understanding Event Resources

- ⇒ Campus Multicultural Centers
- ⇒ Campus Counseling Centers
- ⇒ Campus Disability Support Services
- ⇒ Campus Human Resources Office
- ⇒ Culture or faith-based student organizations
- ⇒ Cultural history museums
- ⇒ Association(s) of Cultural Professionals
- ⇒ "Of the month" programming (many will be held during spring terms)

## Why is it important?

DSP welcomes people of all backgrounds and identities. Every member has a responsibility to celebrate culture and make the chapter a place where everyone feels valued. To support this, each chapter must hold an understanding event at least once per year.

### **What Low Health Could Mean**

- The chapter did not plan far enough ahead to secure speakers or attendance.
- The chapter has not emphasized the importance of cultural understanding to its members.

### **How to Improve Chapter Health**

- Schedule well in advance so most members can attend.
  - Consider using a standing chapter meeting time for higher turnout.
-

## Section F: Events and Member Education

## Indicator 6: Professional Event Engagement

**What is expected:** The chapter should hold about one professional event each month that is valuable to at least half the members. Presentations must be conducted by a qualified speaker (like a school official or professional in the field), not another collegiate member.

### Officer(s) Responsible

- Vice President –Professional Activities (VPPA)

### Additional Officers with ability to submit

- President
- Vice President-Chapter Operations (VPCO)

---

### How to Submit

1. On The Hub **dashboard**, click on the **Dates tab** at the top of the screen
  2. Click on the **Add New Event** button to add a **Professional Event** as the Event Type
    - This will create an event form to be completed following the event
  3. **After the event**, in The Hub, click on the **forms** button on the left hand nav bar
  4. At the top of the screen, click on the **Due Forms** tab
  5. Locate the form with the **name and date of the event added**
  6. Complete the form with all information and click **Submit Form**
  7. Once submitted, the form is reviewed by [Central Office staff](#)
    - If a submitted form is denied, the reason will appear at the top of the form, and the chapter will need to resubmit (if applicable).
-

## How Chapter Health Is Determined

- ⇒ Attendance is calculated by comparing the number of members at the event to dues-paying members (Collegiates (In Good Standing) on the chapter on the date of the event.
  - ⇒ Pledges are not included in attendance, however, should still participate in this event with the chapter.
  - ⇒ The indicator evaluation is based on the most recent event reported. If there is a gap without events, or attendance is low, the indicator evaluation will slide down. One event can move your chapter from "Unhealthy" to "Exceptional Health."
- **Exceptional Health (4):** Professional event within the last month with at least 70% of members attending
  - **Strong Health (3):** Professional event within the last month with at least 50% of members attending
  - **Marginal Health (2):** Professional event within last three (3) months with at least 70% of members attending
  - **Poor Health (1):** Professional event within last three (3) months with less than 50% of members attending
  - **Unhealthy (0):** No professional event within last three (3) months with at least 50% of members attending

| Exceptional Health                                                                                                        | Strong Health                                                                                                             | Marginal Health                                                                                                              | Poor Health                                                                                                                  | Unhealthy                                                                                                            |
|---------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|
| Hold a professional event within the last month<br><b>AND</b><br>At least 70% of Collegiates (In Good Standing) attending | Hold a professional event within the last month<br><b>AND</b><br>At least 50% of Collegiates (In Good Standing) attending | Hold a professional event within the last 3 months<br><b>AND</b><br>At least 70% of Collegiates (In Good Standing) attending | Hold a professional event within the last 3 months<br><b>AND</b><br>At least 50% of Collegiates (In Good Standing) attending | No professional has been held within the last 3 months with at least 50% of Collegiates (In Good Standing) attending |

## Local Professional Events Resources

The following are not considered as Professional Events:

- Presentations by current collegiate members
- Presentations only about DSP or its policies (such as risk management)
- Tours of landmarks, museums, or recreation facilities (unless they include genuine business insights)
- Entertainment movies, films, or videos (unless accompanied with a facilitated discussion with a professional)

⇒ Campus Comptroller's Office

⇒ Career Services Offices

⇒ Local Business Owners or Franchisees

⇒ Campus Foundation/Alumni Affairs Office

**Why is it important?**

Professional events are one of the best ways DSP helps you grow. Each chapter is expected to plan and host professional activities regularly like guest speakers, company tours, or skill-building workshops. These events should be organized or co-sponsored by the chapter.

---

| <b>What Low Health Could Mean</b>                                                                                                                                                                                                                                                                                                                                                                                  | <b>How to Improve Chapter Health</b>                                                                                                                                                                                                                                                        |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• Event topics or formats may not match members’ interests and professional goals, reducing engagement.</li><li>• Events may be planned or announced too late or scheduled at times that limit attendance.</li><li>• Activities may not include a qualified speaker or clear professional learning, so they do not meet the requirements for a professional event.</li></ul> | <ul style="list-style-type: none"><li>• Plan one event each month in advance.</li><li>• Consider replacing a regular chapter meeting with a professional event to guarantee attendance.</li><li>• Survey members to find out what topics or speakers they are most interested in.</li></ul> |

---

## Section F: Events and Member Education

## Indicator 7: Service Event Engagement

**What is expected:** The chapter should hold about one service event per month that at least half of the chapter attends.

### Officer(s) Responsible

- Vice President –Community Service (VPCS)

### Additional Officers with ability to submit

- President
- Vice President-Chapter Operations (VPCO)

---

### How to Submit

1. On **The Hub dashboard**, click on the **Dates tab** at the top of the screen
  2. Click on the **Add New Event** button to add a **Community Service Event** as the Event Type
    - This will create an event form to be completed following the event
  3. **After the event**, in The Hub, click on the **forms** button on the left hand nav bar
  4. At the top of the screen, click on the **Due Forms** tab
  5. Locate the form with the **name and date of the event added**
  6. Complete the form with all information and click **Submit Form**
  7. Once submitted, the form is reviewed by [Central Office staff](#)
    - If a submitted form is denied, the reason will appear at the top of the form, and the chapter will need to resubmit (if applicable).
-

## How Chapter Health Is Determined

- ⇒ Attendance is calculated by comparing the number of members at the event to dues-paying members (Collegiates (In Good Standing) on the chapter on the date of the event.
  - ⇒ Pledges are not included in attendance, however, should still participate in this event with the chapter.
  - ⇒ The indicator evaluation is based on the most recent event reported. If there is a gap without events, or attendance is low, the indicator evaluation will slide down. One event can move your chapter from "Unhealthy" to "Exceptional Health."
- **Exceptional Health (4):** Service event within the last month with at least 70% of members attending
  - **Strong Health (3):** Service event within the last month with at least 50% of members attending
  - **Marginal Health (2):** Service event within last three (3) months with at least 70% of members attending
  - **Poor Health (1):** Service event within last three (3) months with less than 50% of members attending
  - **Unhealthy (0):** No service event within last three (3) months with at least 50% of members attending

| Exceptional Health                                                                                                   | Strong Health                                                                                                        | Marginal Health                                                                                                         | Poor Health                                                                                                             | Unhealthy                                                                                               |
|----------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| Hold a service event within the last month<br><b>AND</b><br>At least 70% of Collegiates (In Good Standing) attending | Hold a service event within the last month<br><b>AND</b><br>At least 50% of Collegiates (In Good Standing) attending | Hold a service event within the last 3 months<br><b>AND</b><br>At least 70% of Collegiates (In Good Standing) attending | Hold a service event within the last 3 months<br><b>AND</b><br>At least 50% of Collegiates (In Good Standing) attending | No service event within the last 3 months with at least 50% of Collegiates (In Good Standing) attending |

## Local Service Event Resources

Don't forget to consider different types of **literacy activities** (financial, reading, computer, etc.) or participating in annual **Make a Difference Day** activities as Delta Sigma Pi national service initiatives

- |                                               |                                      |
|-----------------------------------------------|--------------------------------------|
| ⇒ Campus Facilities Management/Beautification | ⇒ Campus Volunteer Center/Office     |
| ⇒ Campus/Local Food Pantries                  | ⇒ Local Parks and Recreation         |
| ⇒ Local schools and libraries                 | ⇒ Local non-profit centers           |
| ⇒ Retirement Communities                      | ⇒ Local Hospitals or Medical Centers |

## Why is it important?

Community and university service is a huge part of what makes DSP special. Chapters are expected to regularly host service events that give back to the school or local community. These events should be planned or co-sponsored by the chapter (not just attending something another group is running).

### **What Low Health Could Mean**

- Service projects may not reflect causes members care about or current campus and community needs, limiting engagement.
- Events may be planned or announced too late or scheduled at times that limit participation.

### **How to Improve Chapter Health**

- Plan one service event each month in advance.
  - Survey members to see what service projects they care about. Members are more likely to attend if the event matters to them.
  - Try variety: some events on campus, some in the local community, and some with other chapters.
-