

CHAPTER PERFORMANCE REPORT RUBRIC

The Chapter Performance Report is in mySAM > Checklist App > Form Library > Chapter Performance Report 22-23. There is a separate report for semester schools and quarter schools. Make sure you select the correct one. This Rubric provides details on how your chapter can achieve maximum points in the various operational areas. If you have any questions, please do not hesitate your Chapter Coach.

The Chapter Performance Report will determine the 2023 Awards presented at Convention in Indianapolis, IN. There will be 2 deadlines to help chapters have accurate reporting:

- **January 1 (fall submission)**
- **June 1/July 1 (spring submission)**

At the end of each section, there will be an opportunity for you to apply for the applicable awards in that category and nominate any fraters from your chapter for individual awards.

SECTION 1: GENERAL CHAPTER RELATIONS (6.0%) *Maximum Points Available – 6.0*

Standard	Points	How to achieve maximum points
Chapter Bylaws	0.5	Updated (defined as updated after 2020) versions of Chapter constitution/bylaws have been uploaded in mySAM > HQ Docs
Social Media	0.5	Social media handles are updated in mySAM. At least 2 active (defined as 2 posts a month) social media accounts. 0.25 points per active account/max of 0.5 points.
Recorder Report	0.5	Submitted 85% of Recorder Reports for Fall 2022 and Spring 2023
Exchequer Reports	0.5	Submitted Exchequer Reports for Fall 2022 and Spring 2023 (and Winter 2023 for quarter/term schools)
Webinars	2.0	Chapter attended 85% of webinars offered (full points), Chapter attended 70% of webinars offered (1.5 point), Chapter attended 50% of webinars offered (0.75)
Chapter Leaders Day	2.0	Prior, Vice Prior, Exchequer, Recorder, Candidate Educator and one other Chapter Chairman must attend and participate in CLD for full points.

SECTION 2: RECRUITMENT (8.5%) *Maximum Points Available – 8.5*

Standard	Points	Helpful tips to achieve maximum points
ChapterBuilder Usage (2)		
Team Added	0.5	Council, recruitment chair, and recruitment committee are all on the ChapterBuilder team. Advisors are encouraged.
PNM List	1.0	Chapter stores and manages PNM list on ChapterBuilder and manages PNM lists by updating statuses leading to bid signing.
Leads Generator Form	0.5	Chapter has an active “Leads Generator” form that is shared online (i.e., Instagram, Website, etc.)
Phired Up Certified Recruiter (1)		
Certified Council	1.0	All four council members, Recruitment Chairman, and committee members have completed the Phired Up Virtual Classroom prior to recruitment

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Recruitment Process (3.0)		
Names Generation & Outreach	1.0	PNM list generation and outreach beginnings prior to campus/IFC recruitment and Chapter utilizes 3 or more referral sources on Leads List
Diverse/Accessible Recruitment Engagement Process	1.0	Chapter recruitment process includes a variety of engagement opportunities and sizes of interaction (i.e., 1 on 1, small groups, events)
Standardized Selection Criteria	1.0	Chapter utilizes standardized requirements and selection criteria to determine a PNM's eligibility for a bid. Suggestions would include GPA checks, alignment with Sigma Alpha Mu values (Altars), fit with the chapter, and risk factors.
Recruitment Statistics & Goals (2.5)		
Fall Goal	0.5	Chapter met or exceeded fall recruitment goal based on a 3-year average and the Chapter Coaching meetings
Spring Goal	0.5	Chapter met or exceeded spring recruitment goal based on a 3-year average and the Chapter Coaching meetings
Annual Goal	0.5	Chapter exceeded recruitment goal for the academic year based on a 3-year average and the Chapter Coaching meetings
Larger than IFC Avg. Chapter Size	1.0	Chapter's size exceeds the average IFC average chapter size

Applicable Awards:

- Individual: Recruiter of the Year
- Chapter: Recruitment Excellence Awards: Largest number of initiates, Percentage of initiates, Percent change in chapter size

SECTION 3: CANDIDATE EDUCATION (12%) *Maximum Points Available – 12*

Standard	Points	How to achieve maximum points
Compliance	2.0	Pre-Candidate Education Form was completed each semester/term that the chapter had a candidate class (HQ will verify). This form requires details on how the True MDH Initiative will be facilitated and details about chapter history, calendar of events, etc. <i>(Points will be based on semester/term chapter took a candidate class)</i>
	2.0	Post-Candidate Education Form was completed each semester/term that the chapter had a candidate class (HQ will verify). This form requires details on how the True MDH Initiative was facilitated including details about the guest speakers, activities, and a copy of the email that went to the candidates' guardians. <i>(Points will be based on semester/term chapter took classes)</i>
	1.0	Chapter followed initiation policies and procedures and did not conduct an illegal initiation (Candidate education must be completed in 8 weeks, Initiate Request submitted, Tightrope completed by all candidates, payment submitted to HQ. All these items must happen before initiation occurs).
	1.0	Candidate educator has completed the True MDH training in SAM University. <i>All council members are encouraged. (0.5 per semester/0.67 per quarter)</i>
	2.0	Adequately address what steps the chapter takes to prevent hazing during the

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		candidate process. Provide a clear explanation of how the chapter handles matters of discipline within the candidate class. For full points Chapter provides detailed and concise information that indicate full compliance with fraternity policies with regards to hazing.
University Hazing Policies & Expectations	1.0	Documentation of University Hazing Policy and/or University's expectations for candidates is uploaded. <i>Bonus .25 points for chapters that participate in National Hazing Prevention Week, documentation must be provided.</i>
Candidate Class Retention Data	3.0	Initiated 80% of those who accepted bids in an academic year: <ul style="list-style-type: none"> • For full 3 points – 80% or higher and explanation for those who didn't get initiated • For 2 points – 70% initiated or higher and explanation for those who didn't get initiated • For 1 point, 60% or higher initiated and an explanation for those who didn't get initiated Candidates were initiated, exactly by the Black Book

SECTION 4: FINANCES (11%) *Maximum Points Available – 11*

Standard	Points	How to achieve maximum points
Financial Management	1.0	Complete this section in its entirety and provide explanations where necessary to receive full points. Include all bank accounts owned by the chapter.
	1.5	Strong policies and procedures around financial management (Not using Venmo or P2P apps, multiple signers on checks, chapter debit/credit usage, committee financial requests, reimbursement for members, etc.)
	1.0	Provided a current Form 990
Budgeting and Forecasting	3.0	Provide a detailed chapter budget(s). Filled out all sections requesting information about the provided budget. Points will be assessed based on budget and financial forecasting.
	2.0	Zero Balance with the Fraternity as of May 31, 2023.
Accounts Receivable	1.5	Provide a list of accounts receivable for the chapter for the academic year. Address how delinquent accounts are handled and how members with delinquent accounts are held accountable at the end of each fiscal year. Include any payment plans, promissory notes, or financial contracts that the chapter uses.
Brick Fund	1.0	Per the Blue Book, every chapter is supposed to have a Brick Fund which is a savings account for a house (for unhoued chapters) or house-related items.

Applicable Awards:

- Individual: Exchequer of the Year

SECTION 5: CHAPTER HOUSE (4%) *Maximum Points Available – 4 points*

NOTE: The term "chapter house" does not include "satellite" houses or unofficial houses in which members live in. Chapters without houses only need to complete the first question regarding Brick Fund. Unhoused chapter's final score will be out of 97 points rather than 100 points.

Standard	Points	How to achieve maximum points
Physical Property	0.5	Regular inspections occurred. Chapter provides a detailed explanation of inspection(s) and how the chapter implemented those suggestions or requirements.

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House Management	1.0	Provide a detailed overview of how the house is managed, how members are held accountable for not paying rent or damaging property, and the chapter's process for maximizing rooms filled each year.
Property Management	0.5	Current lease or residency agreement needs included.
	0.5	Chapter has a live-in requirement
	1.0	Chapter filled 90% of beds in 2022-2023
Policy Implementation	0.5	Bylaws or lease showing policy implementation and detailed plan on how to address members who violate the policy.

SECTION 6: PROGRAMMING (7%) *Maximum Points Available – 7.0*

Standard	Points	How to achieve maximum points
General	2.0	Complete the chart to provide the number of events hosted and what type of events (social, philanthropic, etc.). Maximum points are awarded for overall event organization, a diverse calendar of events , overall impact on the chapter and campus community, and how SAM's values were reflected in the events. Provide a copy of the calendar including all events from the academic year and a detailed explanation of how your chapter/committees developed that calendar.
	1.0	Comprehensive event management form used to plan and evaluate events.
Specific Educational Programming	1.0	Chapter hosts a Sexual Violence Prevention Training at least once in the academic year. This program must be facilitated by a trained professional (<i>i.e., Counseling Center, Victim Advocate, Student Conduct, Campus Police, etc.</i>).
	1.0	Chapter hosts a Mental Health Awareness Training at least once in the academic year. This program must be facilitated by a trained professional (<i>i.e., Counseling Center, etc.</i>)
	1.0	Chapter hosts an IDEA (<i>Inclusion, diversity, equity, and access</i>) Training at least once in the academic year. This program must be facilitated by a trained professional (<i>i.e., Office of Diversity & Inclusion, LGBTQ+ Center, Disability Office, Spirituality/Religion Office, Women & Gender Centers, professor, etc.</i>).
Summit Against Hate	1.0	Chapter attends and actively engages during the virtual Summit Against Hate program hosted November 2, 2022. At least one council member is expected to attend.

Applicable Awards:

- Individual: Diversity, Equity, and Inclusion Award
- Chapter: Diversity, Equity, and Inclusion Award, Mental Health Awareness Award

SECTION 7: ACADEMICS (12%) *Maximum Points Available – 12*

NOTE: If the data provided is not consistent with what is reported on mySAM and school documentation then no points will be awarded for the "Ranking" section.

Standard	Points	How to achieve maximum points
Academic Planning	2.0	Attach the chapter's plan that includes academic chair requirements and duties, incentives for brothers, minimum chapter GPA standards, ways to hold members accountable, etc. Attach plan to be eligible for full points.
Programming	2.0	Outline how the chapter promotes academic growth and excellence for its members

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		through programming, tutors, etc.
Ranking (HQ will verify)	2.0	Chapter GPA is > 3.0 (1/per semester;.67/per quarter)
	2.0	Candidate Class GPA is > 3.0 (1/per semester;.67/per quarter)
	2.0	Chapter GPA > All-Men's Average (1/per semester;.67/per quarter)
	2.0	Chapter GPA > All Fraternity Average (1/per semester; .67/per quarter)

Applicable Awards:

- Chapter: Young Guller Scholars Awards, Dr. Alexander Lowy Scholarship Award

SECTION 8: CHAPTER ORGANIZATION & LEADERSHIP (8%) *Maximum Points Available – 8*

Standard	Points	How to achieve maximum points
Chapter Organization	0.5	Chapter attendance, frequency of chapter and overall organization and impact of chapter meetings.
Executive (Council) Board Meetings	0.5	Executive meeting frequency and organization explained.
Chairmen Meetings	2.0	Chair meeting frequency, and organization explained. Provide a detailed overview of the chapter's committee structure and how well the chapter utilizes committees.
Chapter Coaching & Goal Setting	3.0	Points will be awarded based on attendance at Chapter Coaching Calls with HQ staff and % of goal completed.
Chapter Officer Transition	2.0	Chapter has an effective officer transition process in place. Attach documents outlining exactly how transitions for officers occur and training for new officers Documents uploaded must be specific to your chapter's transition, include agenda, documents worked on during transition, etc. <i>Bonus points if the chapter facilitates officer transitions with their Chapter Coach and/or chapter advisor, up to .5 points.</i>

Applicable Awards:

- Individual: Prior of the Year, Vice Prior of the Year, Recorder of the Year

SECTION 9: MEMBER ACHIEVEMENT & CAMPUS ACTIVITY (4%) *Maximum Points Available – 4.0*

Standard	Points	How to achieve maximum points
Individual Involvement on Campus	1.0	Upload spreadsheet of individual member campus involvement. It is highly encouraged that each member is involved in at least 1 other club, activity, or organization outside of Sigma Alpha Mu. <ul style="list-style-type: none"> To receive full credit, at least 75% of your roster must be in at least one other organization. To receive 0.5 pts, 50% of your roster must be in at least one other organization. <i>Up to 2.0 Bonus points if members of the chapter serve as a leader of that organization. This must be noted in the spreadsheet submitted for credit.</i>
Interfraternity Council	1.0	Description of the local IFC and the chapter's role/involvement with IFC is important. Must note who attends the meetings (president or elected delegate) and if the council has any members serving on the IFC board.

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Activities	2.0	Provide an outline of the chapter's participation in campus/community hosted events such as intramurals, homecoming, Dance Marathon, IFC retreat, etc. <i>Bonus points if the chapter "wins" Greek Week/Homecoming/Campus-Based awards, up to 1.0 points and documentation must be provided.</i>
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Applicable Awards:

- Individual: Outstanding Athlete of the Year, Undergraduate Achievement Award

SECTION 10: COMMUNITY SERVICE & PHILANTHROPY (8%) *Maximum Points Available – 8*

Standard	Points	How to achieve maximum points
Community Service		
Feeding America Food Bank or local food bank	1.5	Provide a detailed overview of event(s) hosted by the chapter for the Feeding America or a local food bank or pantry. Must provide as much detail as possible including name of the event, date and time of the event, men who planned the event, money raised/donated or time donated. Helpful to include volunteer time log.
Service event with community partner of chapter's choice	1.0	Hosted a service event of the chapter's choice
Community Service Hours	2.0	Include Community Service Hours Spreadsheet
Philanthropy		
Judy Fund	1.5	Provide a detailed overview of event(s) hosted by the chapter for the Judy Fund. Must provide as much detail as possible including name of the event, date and time of the event, men who planned the event, money raised/ donated or time donated. Must attach copies of the checks/donations to verify that a donation was made. In your documentation, include how the chapter worked to enhance Alzheimer's Awareness (<i>Information must match up with documentation received from The Judy Fund</i>)
Chapter's Choice Philanthropy	1.0	Hosted an event for philanthropy of the chapter's choice
Other philanthropies the chapter supports	1.0	Explain and list all other philanthropic events the chapter participated in. This should include participation in other Greek organization's events, sorority philanthropies, Dance Marathon, etc. (0.5 per event)

Applicable Awards:

- Chapter: Dedication to Philanthropy, Community Service Award, Most Hours of Community Service Award, Philanthropy Award

SECTION 11: RISK REDUCTION (14%) *Maximum Points Available - 14*

Standard	Points	How to achieve maximum points
Prevention	2.0	Describe in detail the steps the Risk Manager/Chapter takes to reduce risks. Describe the procedures regarding risk management at events. Must list policies put in place the academic year (or revisions to previous policies) to address risks within the chapter. Provide details and prevention measures that were put in place on the implementation of the 15%ABV policy.
	1.5	Chapter Risk Management Plan for Events. NOTE: This is different from the SAM Risk

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		management policy. This needs to be specific to your chapter.
	1.5	Chapter Judicial Standards Board. Attach organization of the Judicial Board including, but not limited to, standard operating procedures, selection of members, potential sanctions, etc. This must be specific to your chapter to receive points.
Education	2.0	List when the chapter hosted speakers and/or presentations to help address risk reduction and management. (<i>Speakers can include University Peer Mentors, Student Conduct, Campus Police, attending an all-Greek hazing speaker on campus, etc.</i>). Providing documentation for the programming for points (email from the presenter, PowerPoint, etc.)
	1.0	The council and risk management team have completed the Event Management training in SAM University. (<i>0.5 per semester/33 per term</i>)
RM Policy Review	1.0	Minutes of each seminar or meeting where the SAM Risk Management Policy was Reviewed (must be noted in the minutes how/when this was reviewed). Per the RM Policy, required to be done at the beginning of each semester/term (0.5 per sem., 0.33 per quarter).
Discipline	5.0	Points will be assessed based on violations, frequency of conduct issues, and fulfillment of sanctions. Chapters with no violations (campus or fraternal) will receive max points for this section.

Applicable Awards:

- Chapter: Risk Management Award

SECTION 12: ALUMNI RELATIONS (6%) *Maximum Points Available – 5.5*

Standard	Points	How to achieve maximum points
General	1.5	Provide an overview of the chapter's alumni engagement plan. Including how the chapter has increased alumni outreach over the year and engaged with alumni (in-person or virtually). Providing the chapter's detailed strategy for maintaining communication and facilitating a strong alumni network.
	1.0	Alumni Newsletter - For max points, chapter sends two per academic year. (0.5 for each, max of 1.0)
	1.0	Chapter has at least 1 engaged advisor (defined as, works regularly with the chapter, and meets with council) <i>Bonus points for additional engaged advisors, up to 2.0 points (.25 per advisor)</i>
	1.0	Chapter supplied information to the editor of the Octagonian for "Around the Chapters."
Events	1.0 (0.5 per event)	Outline the number and type of events hosted by the chapter for the purpose of alumni relations. Please include all virtual events as well.

Applicable Awards:

- Individual: Chapter Advisor of the Year
- Chapter: Chapter Publication Award

Total Points Available:
100 points for housed chapters / 96 points for unhoused chapters

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The average score will determine the chapter's standing with the Fraternity:

- **Founders Level (10% RMC Discount) 90-100% of total available points.** Groups attaining this level of excellence are our healthiest. These groups are eligible for the Founder's Cup.
- **Octagon Level 70-89% of total available points.** These groups are at an acceptable level in order to remain an active chapter in Sigma Alpha Mu.
- **Alumni Receivership (10% RMC Surcharge) 69% and below of total available points.** This is a probationary status. Chapters in Alumni Receivership have one academic year to improve their chapter performance score to either Octagon or Founders Level. Alumni Receivership means that the chapter's alumni will receive a specific charter and be expected to work, along with staff, Regional Governor, and the Octagon, with the chapter to increase its standing. If, after a year, the chapter cannot move beyond Alumni Receivership, the Octagon will have the option to reorganize, suspend, or close the chapter.