

Alpha Phi Omega Checklist for Chartering

Prospect Group Phase Task or Requirement	Target Date	Actual Date	Point Person	Alternate Target Date	Comments
Written campus administration permission to organize on campus has been obtained (<i>Form DE-1 - Campus Authorization Form</i>)					
Extension Process Overview presentation occurred					
Fraternity Orientation presentation occurred					
Written Fraternity approval received					
Evidence of student interest provided					
Sponsor is assigned to work with group					
Risk Management and Membership Policies signed by all participants					
Interest Group Checklist completed (<i>Requirements for Achieving Interest Group Status</i>)					
Confirmation of achieving Interest Group status received from the National Office					

Interest Group Phase Task or Requirement	Target Date	Actual Date	Point Person	Alternate Target Date	Comments
At least five (5) students are actively engaged in this effort					
Permanent mailing address has been set up					
Fraternity Orientation presentation has been given to all members					
Extension Process Orientation has been given to all members					
Petitioning Member Fees are paid (\$25) and petitioning forms are filled out					
Risk Management and Membership Policies have been read and signed by all participants					
Petitioning Group Application is filled out completely and submitted to the Region Director (<i>Form DE-11 - Application for Petitioning</i>)					
Region Director approved Petitioning Group status in writing					
First Petitioning Ceremony has occurred and is performed under the direction of Fraternity Officials					

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Petitioning Group Phase Task or Requirement	Target Date	Actual Date	Point Person	Alternate Target Date	Comments
Faculty Advisor 1 recruited					
Faculty Advisor 2 recruited					
Community Advisor recruited					
Scouting or Other Youth Services Advisor recruited					
Additional Petitioning Ceremonies have been held and all student members at the time the chartering application was submitted have gone through the Petitioning Ceremony and the Petitioning Fee for those members have been submitted to the National Office					
At least 25 students are actively engaged in this effort and at least 20 of those are returning the next semester at the time the chartering application was submitted					
Leadership Event 1 held and documented (<i>Form DE-6 - Leadership Event Report</i>)					
Leadership Event 2 held and documented (<i>Form DE-6 - Leadership Event Report</i>)					
(optional) Additional leadership events held and documented (<i>Form DE-6 Leadership Event Report</i> for each event)					
CAPS (Chapter Assessment and Planning Session) held and documented electronically (http://www.apo.org/show/National_Programs/Leadership/CAPS/Report_Form)					
(required at least annually) Additional CAPS held and documented electronically (http://www.apo.org/show/National_Programs/Leadership/CAPS/Report_Form)					
Leadership positions and their responsibilities have been defined and the positions have been filled					
Officers have been reported to the National Office (http://www.apo.org/pages/show/Chapter_Resources/Online_Reporting/New_Officers)					
An officer transition has taken place and been documented (<i>Form DE-9 - Officer Transition Report and</i> http://www.apo.org/pages/show/Chapter_Resources/Online_Reporting/New_Officers)					
(optional, reporting required if it has taken place) Additional officer transitions have taken place and been documented (<i>Form DE-9 - Officer Transition Report and</i> http://www.apo.org/pages/show/Chapter_Resources/Online_Reporting/New_Officers)					
Leadership Development Program Summary form completed (<i>Form DE-7 - Leadership Development Program Summary</i>)					

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Petitioning Group Phase Task or Requirement	Target Date	Actual Date	Point Person	Alternate Target Date	Comments
Service Project 1 held and documented (<i>Form DE-2 - Service Project Report</i>)					
Service Project 2 held and documented (<i>Form DE-2 - Service Project Report</i>)					
Service Project 3 held and documented (<i>Form DE-2 - Service Project Report</i>)					
Service Project 4 held and documented (<i>Form DE-2 - Service Project Report</i>)					
Service Project 5 held and documented (<i>Form DE-2 - Service Project Report</i>)					
Service Project 6 held and documented (<i>Form DE-2 - Service Project Report</i>)					
Service Project 7 held and documented (<i>Form DE-2 - Service Project Report</i>)					
Service Project 8 held and documented (<i>Form DE-2 - Service Project Report</i>)					
Service Project 9 held and documented (<i>Form DE-2 - Service Project Report</i>)					
Service Project 10 held and documented (<i>Form DE-2 - Service Project Report</i>)					
Service Project 11 held and documented (<i>Form DE-2 - Service Project Report</i>)					
Service Project 12 held and documented (<i>Form DE-2 - Service Project Report</i>)					
(optional) Additional service projects held and documented (<i>Form DE-2 - Service Project Report</i> for each project)					
(required for each November 1 that the Petitioning group exists) Reported on National Service Week participation (http://www.apo.org/show/National_Programs/Service/Project_Database/Service_Project_Report_Form)					
(required for each April 1 that the Petitioning Group exists) Reported on National Youth Service Day participation ((http://www.apo.org/show/National_Programs/Service/Project_Database/Service_Project_Report_Form)					
Service Program Summary form completed (<i>Form DE-3 - Service Program Summary</i>)					
Fellowship Activity 1 held and documented (<i>Form DE-4 - Fellowship Project Report</i>)					
Fellowship Activity 2 held and documented (<i>Form DE-4 Fellowship Project Report</i>)					
Fellowship Activity 4 held and documented (<i>Form DE-4 Fellowship Project Report</i>)					
(optional) Additional fellowship activities held and documented (<i>Form DE-4 Fellowship Project Report</i> for each activity)					
Fellowship Program Summary Form completed (<i>Form DE 5 - Fellowship Program Summary</i>)					

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Chapter Bylaws have been written and formally adopted by the group (A copy of the bylaws must be attached to <i>Form DE-8 - Additional Requirements</i>)					
A budget has been formally adopted by either group (A copy of the bylaws must be attached to <i>Form DE-8 - Additional Requirements</i>)					
A system to facilitate communication with and distribute information to all student and advisory committee members outside of official meetings (A copy of the bylaws must be attached to <i>Form DE-8 - Additional Requirements</i>)					
IRS form SS-4, Application for Employer Identification Number has been completed (A copy of form SS-4 must be attached to <i>Form DE-8 - Additional Requirements</i>)					
(If applicable) All registration forms that any level of government requires for financial purposes have been completed (A copy of these forms must be attached to <i>Form DE-8 - Additional Requirements</i>)					
A roster that includes all student and advisory members and their contact information has been created (A copy of this roster must be attached to <i>Form DE-8 - Additional Requirements</i>)					
(If applicable) The group has completed the reporting requirements attached to any grant the group has received from the Fraternity (See grant approval letter for the reporting requirements)					
An on-going leadership development plan has been created, implemented, and documented (A copy of this plan must be attached to <i>Form DE-8 - Additional Requirements</i>)					
An on-going fellowship program has been created, implemented, and documented (A copy of this plan must be attached to <i>Form DE-8 - Additional Requirements</i>)					
An on-going service program has been created, implemented, and documented (A copy of this plan must be attached to <i>Form DE-8 - Additional Requirements</i>)					
An membership education plan was developed, implemented, and documented for all Petitioning Members (A copy of this plan must be attached to <i>Form DE-8 - Additional Requirements</i>)					
An Advisor Orientation has been developed and implemented for new advisors (A copy of this plan must be attached to <i>Form DE-8 - Additional Requirements</i>)					

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Petitioning Group Phase Task or Requirement	Target Date	Actual Date	Point Person	Alternate Target Date	Comments
A plan for the recruitment, education (including pledge requirements), and retention of future members has been developed (A copy of this plan must be attached to <i>Form DE-8 - Additional Requirements</i>)					
The Additional Requirements form has been completed (<i>Form DE-8 - Additional Requirements</i>)					
Written approval from the school administration to operate as a chapter has been obtained. (Documents should be attached to <i>Form DE-12 - Application for Charter</i>)					
Risk Management and Membership Policies has been read and signed by all members					
The group's officers have certified acceptance of the Alpha Phi Omega Standard Chapter Articles of Association (<i>Form DE-10 - Standard Articles of Association Certification</i>)					
A date for the Chartering Ceremony has been selected (pending the approval of the Application for Charter by the Board of Directors)					
The Application for Charter has been completed and all supporting documents have been attached including individual membership applications and fees. (<i>Form DE-12 - Application for Charter</i>)					
The Sponsor has reviewed the Application for Charter and all documentation and confirmed that it is ready to submit.					