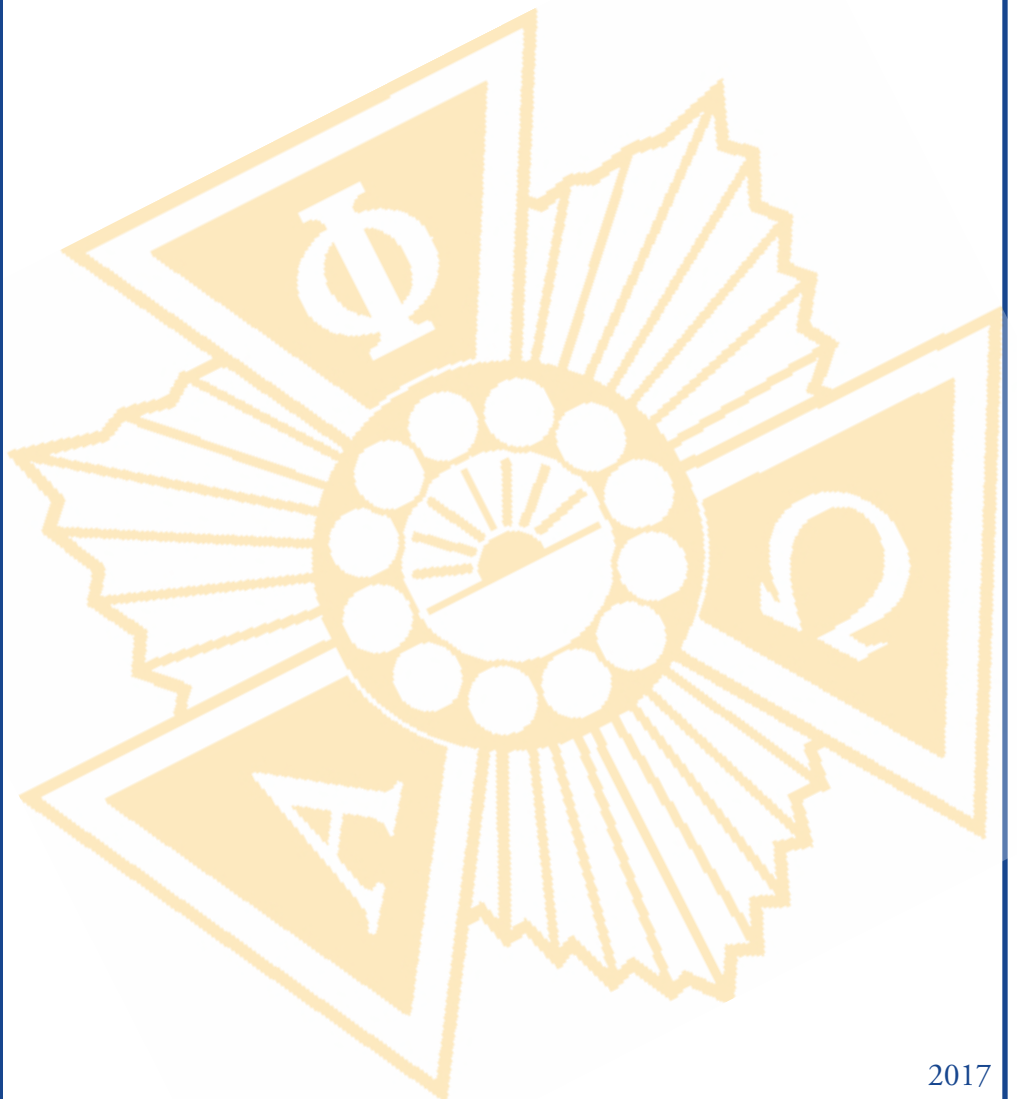


Alpha  
Phi  
Omega



# CHAPTER OF EXCELLENCE & PLEDGE PROGRAM OF EXCELLENCE HANDBOOK



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## **CHAPTER OF EXCELLENCE AWARD (COE) & PLEDGE PROGRAM OF EXCELLENCE AWARD (PPOE)**

These awards for outstanding chapters are available for any chapter in good standing. Applications can be found in the OP, and are due by July 31. All requirements for these awards must be completed prior to submitting the applications for each. Use the checklists on the following pages to determine the criteria for each award.

*Guides and tutorials for Officer Portal activities can be found under the “Library” tab in the Officer Portal.*

The purpose of the Chapter of Excellence (COE) and Pledge Program of Excellence (PPOE) awards is to recognize chapters whose programs of Leadership, Friendship and Service promote growth, retention and stability for the active chapter, while providing a positive, inviting and educational environment for prospective and new members. These awards are also designed to promote better communication between the chapter, sectional, regional and national leadership through regular and timely reporting of chapter activities.

Each award has three levels of achievement (**BLUE**, **GOLD** and **DIAMOND**) which have a corresponding number of requirements that must be met in order to achieve each level of excellence.

In each award, there are a certain number of **required** and **optional** elements that every chapter must meet in order to qualify for a given level of excellence. The purpose of the specific categories in the **COE** is to ensure that a chapter has a well-rounded program that includes not only the required (mostly reporting) elements, but also good chapter programs in the areas of development and service. The purpose of the required elements in the **PPOE** is to ensure chapter compliance and familiarity with the National Pledging Standards.

The requirements for each award must be completed during the annual reporting period of August 1 through July 31, which corresponds to the Fraternity’s fiscal year. A chapter may only achieve one level of excellence in each award per year (the highest level based on the number of requirements completed), but may qualify for both awards in the same fiscal year.

**COE** and **PPOE** recipients will be recognized at the National Convention in even-numbered years and at regional conferences in odd-numbered years.

Requirements need to be signed off by the sectional chair, regional chair or other designated alumni volunteer. The chapter president should be in contact regularly with the section chair and regional chair (and their alumni volunteers) to monitor the progress of the chapter during the reporting period of August 1 through July 31 each year.

All chapters in good standing are eligible for these awards. See the Chapter Good Standing Checklist on page 2 for the definition of “good standing.”

These programs have been created, and will be administered, by the Membership & Extension Committee in partnership with the Board of Directors and sectional chairs.

# ALPHA PHI OMEGA CHAPTER OF EXCELLENCE AWARD (COE)

## LEVELS OF EXCELLENCE

### BLUE Level

must complete all 9 numbered items in **Required** category, plus an additional 3 items, one from each of the other three categories (**Development, Reporting, Service**)

### GOLD Level

must complete all 9 numbered items in **Required** category, plus an additional 6 items, two from each of the other three categories (**Development, Reporting, Service**)

### DIAMOND Level

must complete all 9 numbered items in **Required** category, plus an additional 9 items, three from each of the other three categories (**Development, Reporting, Service**)

	ACTIVITIES CONDUCTED	DATE DUE
	Each numbered item represents one of four categories: Required, Development, Reporting, and Service	
REQ	<b>1. Submit required annual paperwork</b> <ul style="list-style-type: none"> <li>○ Annual Charter Reaffirmation</li> <li>○ Annual Active Membership Dues (AAMD) of \$25 and \$6 insurance fee per active member</li> </ul>	November 15
REQ	<b>2. Complete annual service projects and submit reports</b> <ul style="list-style-type: none"> <li>○ Conducted a service project in conjunction with National Service Week <b>AND</b></li> <li>○ Spring Youth Service Day</li> </ul>	November 15; May 1
REQ	<b>3. Submit pledge and initiate rosters and fees</b> <ul style="list-style-type: none"> <li>○ Submit pledge rosters and fee of \$31 per pledge (\$25 pledge fee, \$6 insurance fee)</li> <li>○ Submit initiate roster and fee of \$35 per initiate</li> </ul>	Submitted within 10 business days of each respective ceremony
REQ	<b>4. Conduct Officer Transition</b> Held an orientation/training session for all chapter officers and advisors	After each election, July 31
REQ	<b>5. Alumni</b> <ul style="list-style-type: none"> <li>○ Hosted a chapter alumni event <b>OR</b></li> <li>○ Published an alumni newsletter</li> </ul>	July 31

REQ	<p><b>6. Attend or host conferences</b></p> <p>Hosted or attended (by at least one active voting delegate):</p> <ul style="list-style-type: none"> <li>○ Annual sectional conference <b>AND</b></li> <li>○ Regional conference or National Convention</li> </ul>	Contact regional chair/section chair for dates
REQ	<p><b>7. Conduct CAPS and submit forms</b></p> <p>Conduct a Chapter Assessment and Planning Session and submit all relevant forms in the Officer Portal</p>	July 31
REQ	<p><b>8. Submit Annual Chapter Evaluation &amp; H. Roe Bartle Award</b></p> <p>Submit evaluation and award application forms in the Officer Portal</p>	November 15
REQ	<p><b>9. Annual Financial Review</b></p> <ul style="list-style-type: none"> <li>○ Verified review of chapter's previous year's financial records (may be done with Charter Reaffirmation)</li> <li>○ Fill out 990-N, if applicable (see guide above)</li> </ul>	July 31
DEV	<p><b>10. Attend or host leadership development activities</b></p> <p>Attend or host at least two leadership development events or activities, at least one of which must be fraternity affiliated (such as an APO LEADS course)</p>	July 31
DEV	<p><b>11. Manage membership retention</b></p> <ul style="list-style-type: none"> <li>○ Perform a survey at start of each semester to determine needs of chapter <b>OR</b></li> <li>○ Develop a plan of action to achieve retention and recruitment goals established during CAPS <b>OR</b></li> <li>○ Achieve membership retention rate of at least 75 percent for the year</li> </ul>	July 31
DEV	<p><b>12. Manage Pledge Program</b></p> <ul style="list-style-type: none"> <li>○ Conduct a pledge program in which pledges are educated in fraternity history and functions <b>AND</b></li> <li>○ Conduct a pledge-planned project where both actives and pledges participate</li> </ul>	July 31
DEV	<p><b>13. Manage interchapter relations (Friendship)</b></p> <p>Attend at least one fellowship activity with another chapter not including sectional, regional or national events</p>	July 31
REP	<p><b>14. Manage community publicity</b></p> <ul style="list-style-type: none"> <li>○ Maintain a chapter website, Facebook, Twitter or Instagram <b>OR</b></li> <li>○ Obtain local media coverage about a chapter service project or activity (notified sectional chair about local media coverage)</li> </ul>	July 31
REP	<p><b>15. Manage fraternal publicity</b></p> <ul style="list-style-type: none"> <li>○ Submit an article or photo for the Torch &amp; Trefoil <b>OR</b></li> <li>○ Submit an article or photo to national, regional or sectional website</li> </ul>	July 31

REP	<p><b>16. Maintain chapter officer list</b> Update officers in the Officer Portal after each officer transition</p>	Updated within 10 days of taking office
REP	<p><b>17. Submit list of graduating seniors</b> Submit a list of graduating seniors in the Officer Portal</p>	June 1
SERV	<p><b>18. Submit a Youth Service Grant application</b> Submit a Youth Service Grant application for a pre-college-age-based service project</p>	February 1
SERV	<p><b>19. Submit a letter of recommendation from chapter advisory chair</b> Submit a letter from the chair outlining the chapter's service on campus during the year (Submit letter to section chair for review)</p>	July 31
SERV	<p><b>20. Engage Alpha Phi Omega's national partners</b> Engage in a project or program with one of the following:</p> <ul style="list-style-type: none"> <li>• America's Promise</li> <li>• Boy Scouts of America</li> <li>• Campfire USA</li> <li>• Girl Scouts of the United States of America</li> <li>• President's Student Service Awards</li> <li>• Relay for Life</li> <li>• Special Olympics</li> <li>• USA FreedomCorps</li> <li>• Youth Service America</li> </ul>	July 31
SERV	<p><b>21. Four Fields of Service</b> Conduct at least four projects in each of the following fields of service:</p> <ul style="list-style-type: none"> <li>• Fraternity</li> <li>• College</li> <li>• Community</li> <li>• Nation</li> </ul>	July 31

Chapters must meet all of the deadlines in Requirements 1-9 to qualify for each level.

Please submit all documentation to your section chair for verification and approval prior to the July 31<sup>st</sup> deadline.

Documents not submitted via the Officer Portal (when applicable) will not be accepted.

# ALPHA PHI OMEGA PLEDGE PROGRAM OF EXCELLENCE (PPOE)

## **LEVELS OF EXCELLENCE**

### BLUE Level

must complete all 12 numbered items in **Required** category, plus an additional 2 items from the **Optional** category.

### GOLD Level

must complete all 12 numbered items in **Required** category, plus an additional 4 items from the **Optional** category.

### DIAMOND Level

must complete all 12 numbered items in **Required** category, plus an additional 6 items from the **Optional** category.

	<b>ACTIVITIES CONDUCTED</b> The award is given annually based on the chapter meeting these requirements for each pledge class within that school year. Each numbered item falls into one of two categories: <b>Required</b> and <b>Optional</b>	<b>DATE DUE</b>
<b>REQ</b>	<b>1. Submit pledge and initiate rosters and fees</b> <ul style="list-style-type: none"> <li>○ Submit pledge rosters and fee of \$31 per pledge (\$25 pledge fee, \$6 insurance fee)</li> <li>○ Submit initiate roster and fee of \$35 per initiate</li> </ul>	Submit within 10 business days of each respective ceremony
<b>REQ</b>	<b>2. Instruct pledges on APO heritage</b> Pledges are educated on... <ul style="list-style-type: none"> <li>• Purpose of Alpha Phi Omega</li> <li>• National history (bylaws; Articles of Association; national, regional and sectional officers)</li> <li>• Chapter history (bylaws, officers, advisors, key campus officials)</li> <li>• Leadership, Friendship and Service</li> </ul>	July 31
<b>REQ</b>	<b>3. Manage a Big Brother program</b> <ul style="list-style-type: none"> <li>○ Big Brother/Little Brother Program or other mentoring program</li> </ul> <b>AND</b> <ul style="list-style-type: none"> <li>○ Develop requirements for the Big Brother/mentor to fulfill including attending pledge meetings and activities</li> </ul>	July 31
<b>REQ</b>	<b>4. Develop leadership among pledges</b> <ul style="list-style-type: none"> <li>○ Elect pledge officers <b>OR</b></li> <li>○ Pledges participate in chapter planning functions <b>AND</b> pledges participate in at least 1 leadership development experience</li> </ul>	July 31

REQ	<p><b>5. Perform rituals and wear insignia</b></p> <ul style="list-style-type: none"> <li>○ Perform Pledge Ritual for pledges <b>AND</b></li> <li>○ Perform Initiation Ritual for new members <b>AND</b></li> <li>○ Encourage pledges to wear the official pledge pin at all appropriate times</li> </ul>	July 31
REQ	<p><b>6. Maintain Pledge Program length</b></p> <p>Pledge period should last between six and 10 weeks (unless otherwise specified by university/school policy)</p>	July 31
REQ	<p><b>7. Manage pledge service requirements</b></p> <ul style="list-style-type: none"> <li>○ Pledge service requirements are to be equal to that of active members <b>AND</b></li> <li>○ Complete a pledge-planned service project under the leadership of the pledge class</li> </ul>	July 31
REQ	<p><b>8. Evaluate/Review the Pledge Program</b></p> <p>At least <b>1</b> opportunity at the conclusion of the pledge program for constructive evaluation of the program (could be done during CAPS)</p>	July 31
REQ	<p><b>9. Pledges attend chapter meeting</b></p> <p>Pledges must attend <b>1</b> or more (enough to allow pledges the direct observation of the decision-making process) active chapter meetings</p>	July 31
REQ	<p><b>10. Manage pledge requirements</b></p> <ul style="list-style-type: none"> <li>○ Develop pledge requirements in advance of each pledge period <b>AND</b></li> <li>○ Write and provide pledge requirements to each interested individual at informational meetings</li> </ul>	July 31
REQ	<p><b>11. Promote friendship and inter-chapter relations</b></p> <ul style="list-style-type: none"> <li>○ Pledges participate in at least one chapter fellowship event <b>AND</b></li> <li>○ At least <b>10 percent</b> of pledges participate in interchapter relations such as conferences, inter-chapter APO LEADS courses, visiting another chapter, or similar activities</li> </ul>	July 31
REQ	<p><b>12. Maintain pledge records</b></p> <p>Each pledge maintains a permanent record which documents successful completion of the pledge program requirements</p>	July 31
OPT	<p><b>13. Complete pledge-planned events</b></p> <ul style="list-style-type: none"> <li>○ Complete pledge-planned fundraising project <b>OR</b></li> <li>○ Complete pledge-planned fellowship event</li> </ul>	July 31
OPT	<p><b>14. Maintain a pledge trainer/educator handbook</b></p> <p>Pledge trainer/educator creates (updates already existing) supplemental handbook for future Pledge Trainers/Educators that is passed on to the successor</p>	July 31

OPT	<p><b>15. Maintain pledge retention</b> At least 85 percent of pledges become active members</p>	July 31
OPT	<p><b>16. Perform service</b> Pledges are required to perform at least <b>1</b> hour of service (and/or 1 project) in each of the four fields of service:</p> <ul style="list-style-type: none"> <li>• Fraternity</li> <li>• College</li> <li>• Community</li> <li>• Nation</li> </ul>	July 31
OPT	<p><b>17. Pledge Handbook</b> Chapter or pledge trainer/educator shall develop a pledge handbook to supplement the National Pledge Book to assist pledges in their APO education</p>	July 31
OPT	<p><b>18. Maintain pledge class diversity</b></p> <ul style="list-style-type: none"> <li>○ Diversity of pledge class is consistent with that of the university <b>OR</b></li> <li>○ Actively recruit and work towards obtaining a diverse pledge class consistent with that of the university</li> </ul>	July 31
OPT	<p><b>19. Manage recruitment program</b></p> <ul style="list-style-type: none"> <li>○ Recruitment period includes at least <b>2</b> meetings at different times and days <b>AND</b></li> <li>○ A service project <b>AND</b></li> <li>○ A fellowship event</li> </ul>	July 31
OPT	<p><b>20. Publicize recruitment</b> Chapter uses at least <b>4</b> different methods for publicizing recruitment to the campus/community</p>	July 31

Chapters must meet all of the deadlines in Requirements 1-12 to qualify for each level. Please submit all documentation to your section chair for verification and approval prior to the July 31<sup>st</sup> deadline.

Documents not submitted via the Officer Portal (when applicable) will not be accepted.