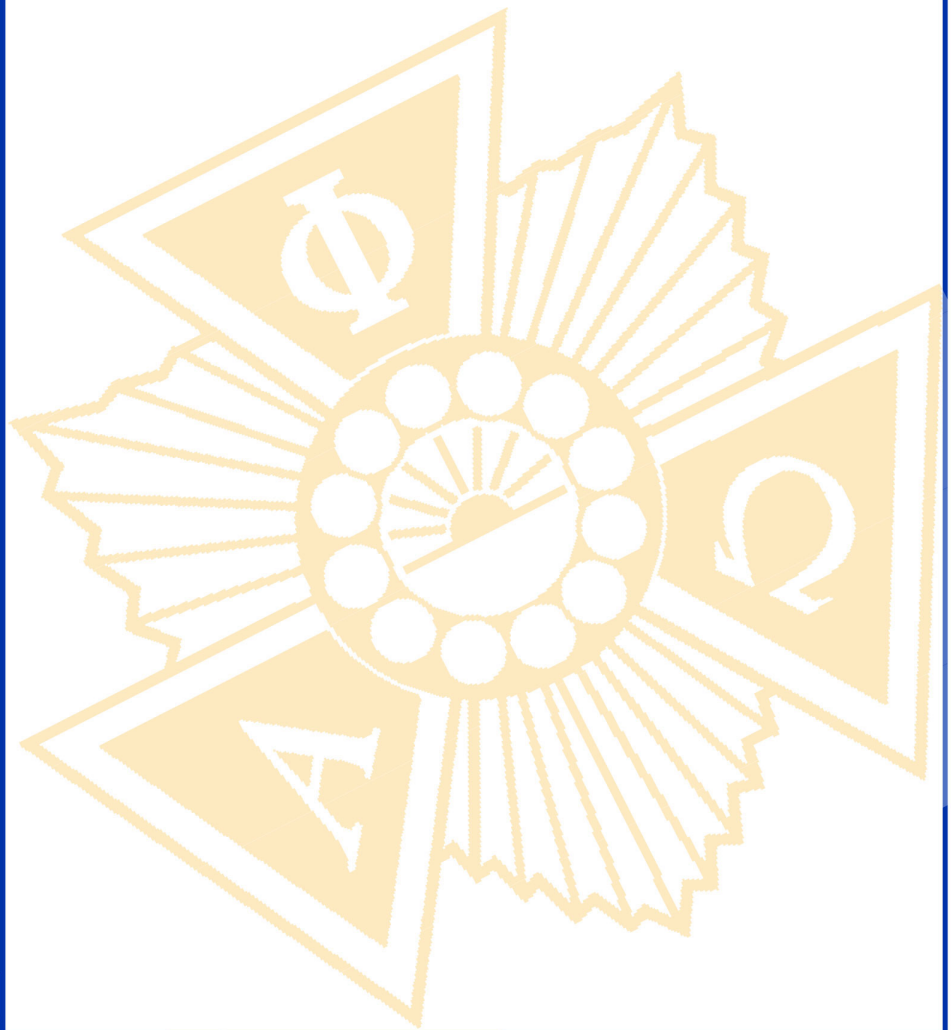




SAME PAGE

a guide to help chapter officers meet fraternity reporting requirements and keep your chapter in good standing



14901 East 42nd Street South
Independence, MO 64055

Phone: 816-373-8667
Fax: 816-373-5975

www.apo.org

CHAPTER CHECKLIST

The Chapter Checklist is used to help chapter officers keep track of what needs to be submitted throughout the year and when they need to be submitted. If you have questions regarding the items outlined below, feel free to contact your sectional chair or the National Office at 816-373-8667.

ARTICLE IX, SECTION 8. CHAPTERS IN GOOD STANDING. *A chapter in good standing is one which yearly meets its financial, administrative, and Annual Charter Reaffirmation obligations to the National Fraternity; is not more than 90 days delinquent in its financial accounts with the National Office; has confirmation of submission of a Spring Youth Service Day report and a National Service Week report; has at least one active member; and which has not been declared inactive or suspended, or had its charter revoked, or has not otherwise been deemed in violation of the policies or National Bylaws of Alpha Phi Omega; or of the rules, regulations, or policies of its school.*

PLEDGES

Submit an Application for Pledge Membership for each new pledge with \$30 (\$25 pledge fee and \$5 insurance fee).

Insure that each pledge has individually validated their information through the Chapter Officer Portal at <http://op.apo.org> to complete their registration.

Submitted through the Chapter Officer Portal within 10 business days of the ceremony

INITIATES

Submit an Application for Active Membership for each new brother with \$35.

Insure that each application is accurately completed, including the exact date of the activation ceremony.

Submitted through the Chapter Officer Portal within 10 business days of the ceremony

CHARTER REAFFIRMATION & AAMD

Each chapter must submit the Annual Charter Reaffirmation and Active Annual Membership Dues (AAMD) by November 15th. This is a two-step process available in the Officer Portal. Officers should ensure their active roster of members is current which should be ongoing and regularly updated via the Officer Portal. Prior to starting the AAMD process, update the roster by removing graduates, inactive and associate members or returning members back to the roster. After the roster is updated, the AAMD process may begin. To do so, log into the Officer Portal and locate the forms titled Charter Reaffirmation and Active Annual Membership Dues (AAMD).

Step 1: The Charter Reaffirmation must be completed by the chapter president and approved by the advisory chair. This is a short form certifying each chapter's compliance.

Step 2: The Active Annual Membership Dues (AAMD) must be confirmed, submitted and paid by November 15th. This form provides a current listing of initiated active members which should be reviewed and modified as needed. Once the roster is up to date and accurate, it should be submitted which will automatically calculate and invoice the chapter for each member listed at \$30.00 each (\$25 AAMD + \$5 Insurance fee). At the time of submission officers may immediately pay the invoice using a credit card or electronic check.

Submitted through Chapter Officer Portal by November 15

NATIONAL SERVICE WEEK REPORT

Submit the report for your National Service Week project(s)

*Submitted through Chapter
Officer Portal by November 15*

SPRING YOUTH SERVICE DAY REPORT

Submit the report for your Spring Youth Service Day project(s)

*Submitted through Chapter
Officer Portal by May 1*

OUTSTANDING DEBTS

Chapter are required to pay any outstanding debts to the National Office. Chapters can determine if they have any debts by contacting the National Office at accountant@apo.org.

*Due to National Office by
November 15 and throughout
the year*

CHAPTER OFFICERS LIST

Submit a list of officers twice a year (or when there is an officer change) through the Chapter Officer Portal

*Submit by October 1 (fall
semester)*

*Submit by January 31 (spring
semester)*

GRADUATING SENIOR LIST

Submit a list of graduating seniors for the fall and spring semesters through the Chapter Officer Portal

Submit by June 1

ANNUAL CHAPTER EVALUATION & H. ROE BARTLE AWARD

Submit completed application to the National Office. This form is available at www.apo.org.

Submit by November 15

CHAPTER ASSESSMENT AND PLANNING SESSION (CAPS)

Complete reporting form online at www.apo.org

*Submit immediately after the
conference*

ANNUAL FINANCIAL REVIEW

Submit verification of review of previous year's financial records with the Chapter Charter Reaffirmation Form through the Chapter Officer Portal

Submit by July 31

CHAPTER BYLAWS

Submit copy of revised chapter bylaws to the National Office

*Submit immediately after
revision*

ARTICLES FOR TORCH & TREFOIL MAGAZINE

Submit information and photograph(s) of chapter projects for publication in Torch & Trefoil through www.apo.org

Submit immediately following completion of activity

CONTACT YOUR SECTIONAL CHAIR & REGIONAL DIRECTOR

Inform your sectional chair and regional director of chapter events

on a regular basis

Grant & Recognition Opportunities

The form below outlines opportunities for chapter members to earn recognition for themselves and their chapters through the Fraternity. For more awards available to members, check out www.apo.org/awards

YOUTH SERVICE GRANT

Youth Service Grants are awarded to qualifying APO chapters to conduct a service project that relates to socially positive programs for pre-college-age youth.

Submit application to the National Office no later than February 1. Selected chapters must submit a Youth Service Grant Report Form within two weeks of the completed project or no later than November 15 - whichever comes first.

Sent to National Office on:

JOHN MACK SCHOLARSHIP

John Mack Scholarships are awarded and paid directly to the school, to enrolled college students who are members of APO who exhibit volunteerism and unselfish service to others, as well as significant participation and leadership in extracurricular activities to benefit individuals in need and/or charitable and/or humanitarian organizations. Application must be submitted to the National Office by May 1.

Sent to National Office on:

FALL PLEDGE CLASS NAMESAKE HONOREE

Chapters have the opportunity to submit nominations for the Fall Pledge Class Namesake Honoree for someone they feel are/ have been special and important to the Fraternity.

Submit nominations to the National Office no later than May 1.

Sent to National Office on:

BUILD A NEW CHAPTER GRANT (BANC)

BANC funds can be used for activities promoting membership development and recruitment for APO extension groups or "at risk" chapters. If you feel your chapter qualifies as an "at risk" chapter, you can contact your regional director and/or sectional chair to see if you are eligible for these funds.

Sent to National Office on:

Submitted on:

Chapter Roster Updates Through OP

In spring 2012, the Fraternity moved from hard copy roster updates to the online Chapter Officer Portal. The Officer Portal is an online membership management system, designed to allow chapter officers the ability to provide ongoing, real time maintenance to their membership rosters (pledge, initiation entry & updates), officer updates, membership billing - invoices & payments and other chapter requirements such as online form submissions by eliminating the need for paper! We do not recommend the use of both paper based forms and online or the chapter will have duplication of members as well as invoices.

HOW TO LOGIN TO THE APO CHAPTER OFFICER PORTAL

Note: The OP is available to all recorded officers of APO and must be on record with the National Office. Chapter officers can only view their chapter members and information.

Step 1: Browse to <https://op.apo.org>

Step 2: Login with Username & Password

Use your National # and Last name to login or the login credentials you created when you established your account. If you are unsure which officers are on record with the National Office, [click here](#). Officers must be on record and will not be able to gain access. If you forgot your password click 'forgot password' link. If you have tried all the steps outlined above and login is still unsuccessful, email opsupport@apo.org.

Step 3: Establish your Username & Password

After verifying that you are listed as an officer on record with the National Office you are ready to establish your account. See instructions above which provide the link to determine who is listed as an officer to obtain access to the Officer Portal.

A. Browse to the Officer Portal via the Website address of <https://op.apo.org> (the link MUST include https but DO NOT include the www).

B. After arriving at the login page, click the link titled "Click here to establish your officer portal account"

a. Enter the following details:

Select your chapter of initiation

Click next.

b. Enter your first name at time of initiation.

Enter your last name at time of initiation.

Enter your initiating chapter roll number.

Click

UPDATING CHAPTER ROSTER THROUGH THE OP

Pledges

Submit pledge applications and a \$30* fee per person to the National Office within 10 business days of the pledge ceremony.

Pledges are to be submitted through the Officer Portal.

*Fall Pledges - submitted to
National Office on:*

*Spring Pledges - submitted to
National Office on:*

INITIATES

Submit active applications and \$35 fee per person to the National Office within 10 business days of the initiation ceremony.

Initiates are to be submitted through the Chapter Officer Portal.

*Fall Initiates - submitted to
National Office on:*

*Spring Initiates - submitted to
National Office on:*

MEMBERSHIP TRANSFER

Submit membership transfer forms as necessary. No fee is required. Transfers can be submitted through the Chapter Officer Portal.

CHAPTER ADVISORS AND HONORARY MEMBERS

Submit chapter advisor registration form as soon as advisor is chosen. Chapter advisors and honorary members can be submitted through the Chapter Officer Portal.

Submit honorary member registration form through the Chapter Officer Portal with a \$25 fee, which can be paid through the OP.

CHARTER REAFFIRMATION

Submit completed signed form to the National Office through the Chapter Officer Portal by November 15. Each chapter must list at least four advisors – two faculty/administration/staff, one scouting/youth services, and one community.

Charter reaffirmations are mailed to chapters the first week of September

Sent to the National Office on:

National Bylaws: *ARTICLE IX, SECTION 6. ANNUAL CHARTER REAFFIRMATION. Each chapter shall annually reaffirm its charter by November 15 by submitting a roster of the active members, a roster of the advisory members, payment of the Annual Active Membership Dues, and certifications that the chapter is in compliance with the Membership and Risk Management Policies of the Fraternity and is in compliance with the Standard Chapter Articles of Association.*

ANNUAL ACTIVE MEMBERSHIP DUES (AAMD)

Submit payment of \$30* for each active member after the roster is updated on the Chapter Officer Portal by November 15. *\$25 AAMD and \$5 insurance fee.

Sent to the National Office on:

National Bylaws: *ARTICLE VIII, SECTION 6. ANNUAL ACTIVE MEMBERSHIP DUES. Annually by November 15, each chapter shall submit to the National Office a roster of active members, together with the Annual Active Membership Dues of twenty-five (\$25) dollars per active member regardless of Society of Life Member status. The minimum annual dues per chapter shall be equal to the sum of the Annual Active Membership Dues for three (3) active members. A chapter, to remain active and in good standing, must meet the above requirements by yearly paying all dues.*

ARTICLE VIII, SECTION 14. ANNUAL INSURANCE FEE. Annually by November 15, each chapter shall submit to the National Office a roster of active members, together with an annual insurance fee not to exceed seven (\$7) dollars per active member. Payment for the annual insurance fee shall be sent for each pledge member not later than ten (10) business days after the Pledge Ritual is conducted. The amount of the annual insurance fee shall be set each year by the National Board of Directors on or before August 1. A chapter, to remain active and in good standing, must meet the above requirements by paying the fee when due.

NATIONAL SERVICE WEEK REPORT

Submit report through the Chapter Officer Portal by November 15. Chapters are required to report in order to remain in "good standing" with the Fraternity, even if they do not conduct a National Service Week project.

Submitted on:

SPRING YOUTH SERVICE DAY REPORT

Submit report through the Chapter Officer Portal by May 1. Chapters are required to report in order to remain in "good standing" with the Fraternity, even if they do not conduct a Spring Youth Service Day project.

Submitted on:

LIST OF CHAPTER OFFICERS

Submit list of chapter officers through the Chapter Officer Portal by October 1 for the fall and by January 31 for the spring.

Submitted fall officers on:

Submitted spring officers on:

LIST OF GRADUATING SENIORS

Submit list of graduating seniors through the Chapter Officer Portal by June 1.

Submitted on:

Chapter of Excellence & Pledge Program of Excellence Awards Checklists

The purpose of the Chapter of Excellence (COE) and Pledge Program of Excellence (PPOE) awards is to recognize those 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 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 director, or other designated alumni volunteer. The chapter president should be in contact regularly with the sectional chair and regional director (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.

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

Chapter of Excellence

College/University:

Chapter (Greek Name):

Region:

Section:

LEVELS OF EXCELLENCE

BLUE Level - must complete all **8** 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 **8** 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 8 numbered items in **Required** category, plus an additional 9 items, three from each of the other three categories (**Development, Reporting, Service**)

ACTIVITIES CONDUCTED

Each numbered item represents one of four categories: **Required, Development, Reporting, Service**

REQUIRED

1. Required annual paperwork submitted, complete, and on time (NO LATER THAN NOVEMBER 15)

a. Submitted Annual Charter Reaffirmation Form (including roster of members and signed compliance of fraternity policies) through the Officer Portal (OP) at <https://op.apo.org>.

Date Completed

AND

b. Submitted payment of Annual Active Membership Dues (AAMD) of \$25 per active member (minimum \$75 per chapter) through the OP at <https://op.apo.org>.

Date Completed

AND

c. Submitted payment of insurance fee of \$5 per active member listed on roster through the OP at <https://op.apo.org>

Date Completed

REQUIRED

2. Annual service projects completed and reports submitted on time

a. Conducted a service project in conjunction with National Service Week and reported by **November 15th** through the OP at <http://op.apo.org>

Date Completed

AND

b. Conducted a service project in conjunction with Spring Youth Service Day 2013 and reported by **May 1, 2013** through the OP at <https://op.apo.org>

Date Completed

REQUIRED

3. Pledge and active applications and fees (WITHIN 10 BUSINESS DAYS OF EACH RESPECTIVE CEREMONY)

a. Submitted pledge applications, pledge fee of \$25 per pledge and insurance fee of \$5 per pledge through the OP at <http://op.apo.org>

Date Completed

AND

b. Submitted active applications and active fee of \$35 for each new member through the OP at <http://op.apo.org>

Date Completed

REQUIRED

4. Officer Transition

a. Held an orientation/training session for all new chapter officers (reported no later than July 31)

Date Completed

AND

b. Held an annual orientation/training for advisors (reported no later than July 31)

Date Completed

(submit a short description of the orientation/training in writing to the sectional chair, regional director or designated alumni volunteer)

REQUIRED

5. Alumni

a. Hosted a chapter alumni event (reported no later than July 31)

Date Completed

OR

b. Published an alumni newsletter (reported no later than July 31)

Date Completed

(submit a short description of the event or a copy of the newsletter to the sectional chair, regional director or designated alumni volunteer)

REQUIRED

6. Conferences

a. Hosted or attended an annual sectional conference by at least one active voting delegate (reported no later than July 31)

Date Completed

AND

b. Hosted or attended a regional conference or National Convention by at least one active voting delegate (reported no later than July 31)

Date Completed

(contact regional director/sectional chair for details)

REQUIRED

7. Chapter Assessment and Planning Session (CAPS) and Annual Chapter Evaluation & H. Roe Bartle Award

a. Conducted a CAPS or other planning activity and reported immediately following conference (accessed through the "Document Library" on the OP at <http://op.apo.org> and submitted electronically)

Date Completed

AND

b. Submitted Annual Chapter Evaluation & H. Roe Bartle Award form (chapter does not have to qualify for H. Roe Bartle Award to submit form) by November 15 (accessed through the "Document Library" on the OP at <http://op.apo.org> and submitted electronically)

Date Completed

(submit a short description of the results of the CAPS in writing to the sectional chair, regional director, or designated alumni volunteer)

REQUIRED

8. Annual Financial Review

a. Verified review of the chapter's previous year's financial records (reported on the Annual Charter Reaffirmation form) or no later than July 31

Date Completed

DEVELOPMENT

9. Leadership Development

a. Attended or hosted at least two leadership development events or activities, at least one of which must be fraternity affiliated such as an APO LEADS course or a chapter or sectional leadership day (reported no later than July 31)

Date Completed

DEVELOPMENT

10. Retention

a. Performed a survey at the start of each semester to determine the needs of the chapter (reported no later than July 31)

Date Completed

OR

b. Developed a plan of action to achieve retention and recruitment goals established during the chapter CAPS (reported no later than July 31)

Date Completed

OR

c. Achieved membership retention rate of at least 75 percent (National Fraternity's goal) for the year (reported no later than July 31)

Date Completed

(submit a short description of the survey/plan in writing to the sectional chair, regional director or designated alumni volunteer)

DEVELOPMENT

11. Pledge Program

a. Conducted a pledge program in which pledges are educated in Fraternity history and functions (reported no later than July 31)

Date Completed

b. Both actives and pledges participated in a pledge-planned project (reported no later than July 31)

Date Completed

DEVELOPMENT

12. Interchapter Relations (Friendship)

a. Attended at least one fellowship activity with another chapter, not to include sectional, regional, or national events (reported no later than July 31)

Date Completed

REPORTING

13. Community Publicity

- a. Maintained chapter website or Facebook page/group (reported no later than July 31)

Date Completed

OR

- b. Obtained local media coverage about a chapter service project or activity (notified sectional chair about local media coverage) (reported no later than July 31)

Date Completed

REPORTING

14. Fraternal Publicity

- a. Submitted an article/photo for Torch & Trefoil (reported no later than July 31)

Date Completed

OR

- b. Submitted an article/photo to national, regional, or sectional conference (reported no later than July 31)

Date Completed

REPORTING

15. Chapter Officer Updates

- a. Submitted officer changes within 10 days of taking office through the OP at <http://op.apo.org>

Date Completed

OR

- b. Submitted twice per year within 10 days of taking office through the OP at <http://op.apo.org>

Date Completed

REPORTING

16. Graduating Seniors

- a. Submitted a list of graduating seniors through the OP at <http://op.apo.org> no later than June 1

Date Completed

SERVICE

17. Youth Service Grant Application*

a. Submitted the Youth Service Grant Application for a pre-college-age based service project no later than the due date set by the Service Committee (accessed through the OP at <http://op.apo.org>)

Date Completed

SERVICE

18. Letter of recommendation from chapter advisory chair

a. Submitted letter from the chair outlining the chapter's service on campus during the year (reported no later than July 31)

Date Completed

SERVICE

19. Alpha Phi Omega's National Partners

a. Involved in a project or program with one of the following (reported no later than July 31)

Select Partner:

America's Promise

Boy Scouts of America

Camp Fire

Girl Scouts of the United States of America

President's Student Service Awards

USA FreedomCorps

Youth Service America

Date Completed

SERVICE

20. Four Fields of Service

a. Conducted at least 4 different projects in each of the four fields of service (reported no later than July 31)

Date Completed

FINAL SUBMISSION INFORMATION AND VERIFICATION

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

All chapters in good standing are eligible for this award. See the Chapter Checklist on www.apo.org for the definition of "good standing".

Chapters will be allowed to miss one of the timed deadlines in Requirements 1,2,3 and 7 and still qualify for the **BLUE** level if they eventually fulfill that requirement prior to July 31.

Chapters must meet all of the timed deadlines in Requirements 1,2,3 and 7 in order to qualify for the **GOLD** and **DIAMOND** levels.

Verified by:

Date:

Pledge Program of Excellence

College/University:

Greek Name:

Region:

Section:

LEVELS OF EXCELLENCE

BLUE Level - must complete all **12** of the **Required** category, plus an additional **2** items, from the **Optional** category

GOLD Level - must complete all **12** of the **Required** category, plus an additional **4** items, from the **Optional** category

DIAMOND Level - must complete all **12** of the **Required** category, plus an additional **6** items, from the **Optional** category

ACTIVITIES CONDUCTED

This award is given annually based on the chapter meeting these requirements for each pledge class within that school year.

Each numbered item fall into one of two categories: **Required** and **Optional**

REQUIRED

1. Pledge and active applications and fees submitted on time

a. Submitted pledge applications, pledge fee of \$25 per pledge and insurance fee of \$5 per pledge through the Officer Portal (OP) at <https://op.apo.org> **within 10 business days of each respective ceremony.**

Date Completed

AND

b. Submitted active applications and active fees of \$35 per new member through the OP at <https://op.apo.org> **within 10 business days of each respective ceremony.**

Date Completed

REQUIRED

2. Instruction in APO Heritage

a. Pledges are educated on...

- Purpose of Alpha Phi Omega
- National History (Bylaws, Articles of Association, National, Regional and Sectional Officers)
- Chapter History (Bylaws, Officers, Advisors, Key Campus Officials)
- Chapter's program of Leadership, Friendship and Service

(reported no later than July 31)

Date Completed

REQUIRED

3. Big Brother/Little Brother

a. Big Brother/Little Brother Program or other mentoring program (reported no later than July 31)

Date Completed

AND

b. Developed requirements for the Big Brother/Mentor to fulfill, including attending pledge meetings/activities (reported no later than July 31)

Date Completed

REQUIRED

4. Development of Leadership

a. Election of pledge officers (reported no later than July 31)

Date Completed

OR

b. Pledges Participate in chapter planning functions (reported no later than July 31)

Date Completed

AND

c. Pledges participate in at least **1** leadership development experience (reported no later than July 31)

Date Completed

REQUIRED

5. Rituals/Wearing of Insignia

a. Pledge Ritual performed for pledges (reported no later than July 31)

Date Completed

AND

b. Initiation Ritual performed for new members (reported no later than July 31)

Date Completed

AND

c. Pledges are encouraged to wear the official pledge pin at all appropriate times (reported no later than July 31)

Date Completed

REQUIRED

6. Pledge Program Length

a. Pledge period lasts between **6** and **10** weeks unless otherwise specified by university/school policy (reported no later than July 31)

Date Completed

REQUIRED

7. Service Requirements

a. Pledge service requirements are equivalent to that of active members (reported no later than July 31)

Date Completed

AND

b. Completion of pledge-planned service project under the leadership of the pledge class (reported no later than July 31)

Date Completed

REQUIRED

8. Pledge Program Review/Evaluation

a. At least **1** opportunity at the conclusion of the pledge program for constructive evaluation of the program (could be done during CAPS) (reported no later than July 31)

Date Completed

REQUIRED

9. Pledges in Chapter Meeting

a. Pledges must attend **1** or more (enough to allow pledges the direct observation of the decision-making process) active chapter meetings (reported no later than July 31)

Date Completed

REQUIRED

10. Pledge Requirements

a. Pledge requirements are developed in advance of each pledge period (reported no later than July 31)

Date Completed

AND

b. Pledge requirements are written and provided to each interested individual at informational meetings

Date Completed

REQUIRED

11. Promote Friendship/Interchapter Relations

- a. Pledges participate in at least one chapter fellowship event (reported no later than July 31)

Date Completed

AND

- b. At least **10 percent** of pledges participate in interchapter relations such as conferences, interchapter APO LEADS courses, visiting other chapter, or similar activities (reported no later than July 31)

Date Completed

REQUIRED

12. Pledge Books

- a. Each pledge maintains a permanent record which documents successful completion of the pledge program requirements (reported no later than July 31)

Date Completed

OPTIONAL

13. Pledge-Planned Events

- a. Completion of pledge-planned fundraising project (reported no later than July 31)

Date Completed

OR

- b. Completion of pledge-planned fellowship event (reported no later than July 31)

Date Completed

OPTIONAL

14. Pledge Trainer/Educator Handbook

- a. Pledge Trainer/Educator creates (updates already existing) supplemental handbook for future pledge trainers/educators that is passed on to successor (reported no later than July 31)

Date Completed

OPTIONAL

15. Retention

- a. At least 85 percent of pledges become active members (reported no later than July 31)

Date Completed

OPTIONAL

16. Four Fields of Service

a. Pledges are required to perform at least **1** hour of service (and/or 1 project) in each of the four fields of service - Fraternity, College, Community, Nation (reported no later than July 31)

Date Completed

OPTIONAL

17. Pledge Handbook

a. Chapter or pledge trainer/educator developed Pledge Handbook to supplement the National Pledge Book to assist pledges in their APO education (reported no later than July 31)

Date Completed

OPTIONAL

18. Diversity

a. Diversity of pledge class is consistent with that of the university (reported no later than July 31)

Date Completed

OR

b. Actively recruiting and working towards obtaining a diverse pledge class consistent with that of the university (reported no later than July 31)

Date Completed

OPTIONAL

19. Recruitment Program

a. Recruitment period includes at least **2** meetings at different times and days (reported no later than July 31)

Date Completed

AND

b. A service project (reported no later than July 31)

Date Completed

AND

c. A fellowship event (reported no later than July 31)

Date Completed

OPTIONAL

20. Publicity for recruitment

a. Chapter uses at least **4** different methods for publicizing recruitment to the campus/community (reported no later than July 31)

Date Completed

FINAL SUBMISSION INFORMATION AND VERIFICATION

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

Chapters will be allowed to miss one of the timed deadlines in Requirement 1 and still qualify for the **BLUE** level if they eventually fulfill that requirement by July 31.

Chapters must meet all of the timed deadlines in Requirement 1 in order to qualify for the **GOLD** and the **DIAMOND** levels

Verified by:

Date:

[Additional Resources](#)

[CHAPTER MEMBER RESOURCE PAGE](#)

[CHAPTER OFFICER PORTAL](#)

[NATIONAL BYLAWS AND STANDARD ARTICLES OF ASSOCIATION](#)

[PLEDGE MANUAL \(LEADERSHIP, FRIENDSHIP, SERVICE\)](#)

[ADVISOR GUIDE](#)

[APO IMPACT GUIDES](#)

NATIONAL OFFICERS & PROGRAM DIRECTORS

NATIONAL OFFICERS

Mark Stratton
National President
Home: 317-773-8223
Cell: 317-979-5631
email: president@apo.org

John Ottenad
National Vice President
Home: 636-227-2247
Cell: 314-609-9002
email: vice.president@apo.org

PROGRAM DIRECTORS

John Strada
Alumni Relations & Internal Volunteer Development
Home: 859-396-3790
email: alumni.director@apo.org

Carla Moran
Finance & Operations
Home: 617-479-5870
Cell: 617-512-0084
email: finance.director@apo.org

Ed Richter
Leadership Director
Cell: 513-594-5546
email: leadership.director@apo.org

Marilyn Mims
Membership & Extension
Home: 603-292-6438
Cell: 508-243-8419
email: membership.director@apo.org

Rob Coop
Risk Management
Home: 317-867-5651
Cell: 317-370-1805
email: risk.management.director@apo.org

Glen Kinder
Service
Cell: 618-521-3988
email: service.director@apo.org

Who to Talk to at the National Office

Administrative Assistant, ext. 10

admin@apo.org

National Office Receptionist, National Committee Updates & Directories, APO LEADS Tracking, Board Minutes, John Mack Scholarships, Supports NED, Supports Alumni & Internal Volunteer Programs, Alumni Associations, Alumni lists

Annual Giving Assistant, ext. 24

development.admin@apo.org

Donation entry & mailings, Torchbearer Certificates & mailings, Tax Letters, Donor support, Annual fund support

Chapter Consultant, ext. 18

alyson.clark@apo.org

Extension, Support, Recruitment Training, Membership Issues, Travels to Work with Chapters

Chapter Consultant, ext. 14

emily@apo.org

Support, Recruitment Training, Membership Issues, Travels to Work with Chapters.

Chapter Consultant, ext. 19

mike@apo.org

Support, Recruitment Training, Membership Issues, Travels to Work with Chapters.

Chapter Services Assistant, ext. 17

chapter.admin@apo.org

Charter Reaffirmations, Good Standing & Chapter requirements, Scanlon awards, Extension, Chapter & Pledge Program of Excellence Awards, Advisor Registration, Service Programs & Reporting, Chapter Officer Updates, Graduating Seniors

Database Administrator, ext. 25

opsupport@apo.org

Chapter Officer Portal Support, membership Database Administrator, Membership Credentials for Pledges, Initiates (actives), Honorary Members, Advisory Members, and Life Members. Also provides support to the National Volunteer Conference & National Convention within the National Office.

Deputy Executive Director and Director of Finance, ext. 12

accountant@apo.org

Finances, Chapter Billing, Chapter Receivables, Chapter Suspense, BANC Program, National Budgets, Chapter and Alumni requests for Federal ID numbers, Convention Support

Director of Chapter Services, ext. 13

chapter.services.dir@apo.org

Chapter Chartering & Extension (new & existing), Membership Issues, Chapter Reporting, BANC Program

Director of Communications, ext. 20

director.communications@apo.org

Torch & Trefoil, Alumni and Chapter e-newsletter, as well as all other national publication maintenance, development & updates, Graphic and Publication Style Standards, Press Releases, Publication Calendar Maintenance, Annual Tribute to Donors, Brand Identity and Trademark Maintenance and Development, and Social Media

Director of Educational Programs, ext. 22

heather@apo.org

Coordinates Chapter Consultant Travel & Training, logistics for APO LEADS, Membership Academies, Summer Leadership Workshops, APO IMPACT program

Director of Technology, ext. 15

webmaster@apo.org

Web site Content and Design Administrator, National Office Technology & Database Administration, Liaison to the Web hosting provider and membership database provider. Web site updates, National Online Calendar, National Convention and National Volunteer Conference Web site & support

Store & Mail Clerk, ext. 16

supplies@apo.org

Chapter Supplies & Merchandise Orders, Shipment Tracking, Workshop Materials, National Online Store, National Office Mail clerk