



## *Colony Retreat*

Immediately following the installation of the colony, the National Office staff will facilitate a colony retreat designed to provide colony members with the basic knowledge of Phi Mu Delta, chapter operations, finances, and then set goals and elect officers.

### **LEARNING OUTCOMES**

- Understand group development
- Understand operations, such as running an effective meeting, committees and the National Accreditation and Standards program
- Define officer roles and responsibilities
- Create a chapter budget through understanding chapter finances
- Set goals for the semester and year
- Determine who will hold officer positions through elections

## *Coaching Calls*

The colony will be expected to have regular coaching calls with the Director of Chapter Services and Growth. Coaching calls are virtual meetings between the staff and the colony executive board via video conference to assess the chartering benchmarks and assist in the development and growth of the colony.

## *Peer Mentoring Program*

Each new colony will be paired with an existing, high performing chapter. The existing chapter will provide mentorship, peer to peer advice and fellowship among the brothers in both chapters. The purpose is to allow the colony to learn techniques and processes from the existing, high performing chapter to assist in the development of common practices.

## *National Standards and Accreditation Program*

The National Office will use the National Standards and Accreditation Program to assess the colony's progress. While the colony will not receive a score for the submissions, the documentation provided will help the National Office determine where the colony can improve on and what the group is excelling at. In addition, it provides the opportunity for colony members to learn how to properly submit documentation for this report prior to becoming a chapter.

# *Chartering Benchmarks*

The assess the success of the colony and ultimately if the group will be chartered, the National Fraternity uses benchmarks. These benchmarks mirror the content in the petition and help provide the foundation for a successful chapter post-chartering.

## **SCHOLARSHIP**

- All colony members must meet University/College standards for participation in a fraternal organization. Phi Mu Delta requires that all members have at least a 2.7 high school GPA (if new member is in their first term of college), or, a minimum college GPA at or above the All-Men's average (once the first term of college has been completed) and thereafter.
- At the time of petitioning, the colony must have a cumulative GPA at or above the all-male average for the last completed academic term.

## **RECRUITMENT AND MEMBERSHIP**

- The colony shall have initiated, at least 35 men and have no fewer than 25 men returning the following academic year.
- All members must complete the New Member Orientation period (in less than six weeks) with all Founders passing the National Exam on history and operations.
- Successfully meeting, or exceeding, the colony's recruitment goals determined by the National Fraternity.

## **CHAPTER OPERATIONS AND MANAGEMENT**

- The colony must become a member of the local Interfraternity Council or Greek Council.
- The colony must complete all required paperwork and submit to the National Office in a timely manner.
- The colony shall be properly represented by sending the required number of official delegates to the Conclave and/or other national meetings or educational academies, as requested.

## **CHAPTER WELLNESS**

- The colony must create a local risk management policy that mirrors the national risk management policy and goes into greater detail to address fire safety and the prevention of: alcohol mis-use/abuse; hazing; and, sexual assault/abuse at the local level.
- The colony must develop a Chapter Wellness Plan addressing the areas that may negatively impact the success of the group, including: Alcohol/Drugs, Hazing, Scholarship, Accountability, Apathy, Membership, Finances, and Sexual Assault.

A close-up photograph of a Phi Mu Delta flag. The flag is black with a red vertical stripe on the right side. On the black background, there is a yellow crest featuring a lion and a shield with red and white stripes. On the red stripe, the Greek letters Phi (Φ), Mu (Μ), and Delta (Δ) are written in black. The background of the image is a blurred outdoor scene with trees.

# Becoming a Chartered Chapter of Phi Mu Delta

## *What Does it Mean to be a Chartered Chapter?*

From the time a group is colonized, the colony is in a provisional state in order to set up the foundation of the chapter for years to come. The members will manage group dynamics, establish chapter operations, procedures, and recruit more men into the organization during that time.

During this period, the colony will develop a petition to charter. This petition will encompass and highlight the processes, plans, and events that the members have worked on over the previous nine to eighteen months to demonstrate that the colony is ready to be a fully chartered chapter of Phi Mu Delta.

The charter is a physical representation that the chapter is officially installed at the university/college. It lists the chartering members names, chartering date, and National Council members.

## *Colonization to Chartering Timeline*

The total time period from colonization to chartering should take no longer than 18 months. Colonies may petition for their charter at any point after the first term of operations. Throughout the process, the colony is supported by the Director of Chapters Services and Growth, District Governors, and their Chapter Advisory Board.

### **PRE-COLONIZATION**

- Recruit, establish, and train Chapter Advisory Board
- Engage on-campus constituencies to begin relationship building (i.e. Greek governing councils, faculty, staff, etc.)
- Identify potential members with high scholastics through a scholarship drive
- Begin social media and marketing program
- Reserve needed spaces on campus

## WEEKS ONE - THREE

- Establish wish list of potential Founding Fathers through references and one-on-one meetings
- Interview potential Founding Fathers
- Extend bids to Founding Fathers
- Hold regular interest group meetings on campus

## WEEK FOUR

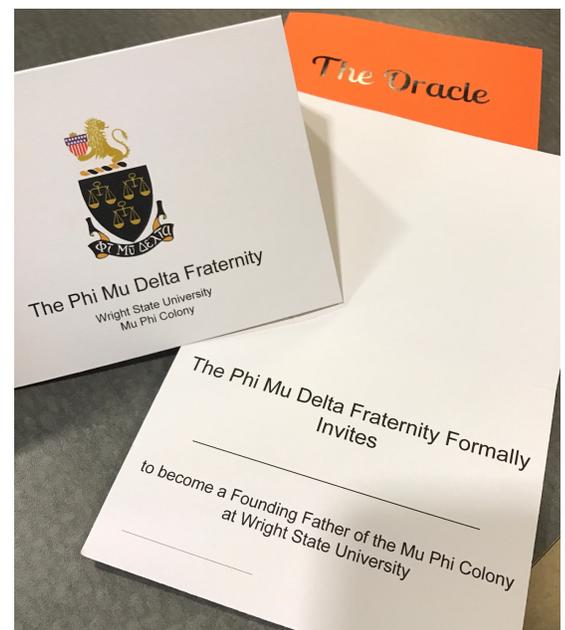
- Hold Colonization Ceremony and induct first group of Founding Fathers
- Dynamic recruitment training
- Draft colony Constitution and By-laws
- Establish financial policies and banking needs
- Continued recruitment of Founding Fathers and Induction Ceremonies, as needed

## WEEK FIVE

- Colony Retreat
  - Brotherhood building exercises
  - Election of colony officers
  - Chapter operations
  - Goal setting and visioning
  - Start the ENGAGE Program with New Member Orientation: Leading the Lion Pride

## POST COLONIZATION PERIOD (9 - 18 MONTHS)

- Complete and implement New Member Orientation program: Leading the Lion Pride
- Develop colony committee structures based on the colony's goals and vision
- Engage Chapter Advisory Board
- Attend all events for the National Fraternity, including: Officers' Academy, Regional Recruitment Academies, Sapphire Leadership Institute, National Conclave, and the Regional Leadership Summit
- Continue to recruit with dynamic recruitment techniques
- Regular visitation and support from Director of Chapter Services and Growth
- Petition for Chartering



## FINANCES

- The colony shall have, at least. \$2,000 in savings.
- All colony members must show proof that they have met all financial obligations to the National Fraternity and the local organization.

## RITUAL

- The colony shall have its members communicate its values through its ritual at least annually. The initiated colony members have experienced the complete rites and ritual of Phi Mu Delta, as contained in the initiation ceremony and The Leading the Lion Pride new member education program. The colony then needs to define and develop the best method for conducting the ritual at the local level. The new chapter will perform its own initiation ceremony for members of the National Council and local alumni brothers, to be held as a private event either before or after the ceremony which formally installs the chapter. The National Council or local alumni liaison shall also work with the colony to provide substantial and meaningful activities along these lines, as needed.

## CIVIC ENGAGEMENT

- The colony shall organize and execute at least two major civic engagement projects. One project should benefit the National Philanthropy and the other should be an active participation of all colony members, rather than simply fundraising activities.



# *What is Included in the Petition?*

The chartering petition is the formal request from the colony to the National Fraternity requesting to be a chartered chapter of Phi Mu Delta. This petition highlights and describes the benchmarks of the colony and demonstrates that the colony has built the foundation for a successful chapter post-chartering.

## **SCHOLARSHIP**

- Documentation that all colony members meet University/College standards for participation in a fraternal organization and meets Phi Mu Delta standards.
- Documentation that the colony has a cumulative GPA at or above the All-Men's average for the last completed academic term.
- A scholarship plan addressing how the group assists members at risk and recognizes members excelling academically.

## **RECRUITMENT AND MEMBERSHIP**

- A recruitment plan
- Documentation that all members have successfully completed the Leading the Lion Pride new member education program.
- The scores from each member's national exam.

## **CHAPTER OPERATIONS AND MANAGEMENT**

- A copy of the colony's Constitution and By-laws that are approved by the National Council
- Copies of all colony meeting minutes
- A letter from the IFC President indicating Phi Mu Delta's membership and involvement in the IFC
- A strategic plan detailing the next two years after chartering. This plan should identify potential issues that the new chapter will face and a plan to overcome those issues.



## CHAPTER WELLNESS

- Documentation that the colony membership has been properly trained in all risk management policies and understand how to implement such policies.
- A Chapter Wellness Plan addressing the eight areas of potential risk.

## CIVIC ENGAGEMENT

- Documentation detailing the various civic engagement projects completed during the colony period.
- Documentation of the event(s) hosted to benefit the National Philanthropy

## FINANCES

- A yearly budget for the next academic year shall be submitted to the National VP of Finance each spring.
- Copies of all yearly budgets from the colony period

## OTHER ITEMS

- A formal letter from the colony requesting to be chartered
- A history of the host institution
- Letter of support from faculty, staff, and administration
- A short biography of each of the charter members



Consideration of the petition for chapter status will be given at the next Conclave or regular meeting of the National Council. A charter will be granted with an affirmative vote of 3/4 of the undergraduate chapters and alumni associations during Conclave years. If the colony is ready to be chartered and it is not practical to wait for the next biennial Conclave, admission to the fraternity may be approved by the affirmative vote of 3/4 of the undergraduate chapters or chapter alumni association conducted by a certified mailing. If a chapter or chapter alumni association fails to take action within thirty (30) days of the proposal, said request shall be considered as ratified by that undergraduate chapter or chapter alumni association.



# Colony to Chapter Timeline

## *Months 1-3*

- Use dynamic recruitment techniques to grow the colony
- Complete and implement the National New Member Orientation Program: Leading the Lion Pride to educate Founding Fathers
- Develop a draft of the colony's Constitution and By-laws to be approved by the National Council
- Develop committee structures based on the colony's goals
- Create a budget for the following semester/year
- Host brotherhood activities to build fellowship amongst members

## *Months 3-6*

- Use dynamic recruitment techniques to grow the colony
- Complete and implement the National New Member Orientation Program: Leading the Lion Pride to educate new members
- Develop committee structures based on the colony's goals
- Host civic engagement project(s)

## *Months 6-12*

- Use dynamic recruitment techniques to grow the colony
- Complete and implement the National New Member Orientation Program: Leading the Lion Pride to educate new members
- Develop systems and processes to aid in chapter operations (judicial board, scholarship program, recruitment plan, etc.)
- Create a strategic plan to address potential issues post-chartering

## *Continuously*

- Conduct regular chapter meetings
- Participate in coaching calls with the National Office
- Engage Chapter Advisory Board and recruit more members, if needed
- Attend Nationally sponsored programs and events