GUIDE TO COLONY ORGANIZATION

PHI DELTA THETA
Become the greatest version of yourself
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* Individualized breakdown for each officer position available within the full Written Officer Program Development Guide
LETTER FROM DIRECTOR OF EXPANSION

To whom it may concern,

On behalf of Phi Delta Theta Fraternity, I would like to thank you for your interest in our Fraternity, and I hope that our Guide to Colony Organization proves to be a valuable resource for you. Ever since its creation, the Guide to Colony Organization has served as a roadmap for the Fraternity’s interest groups and colonies. It provides expectations, guidance, and instructions in a workbook-like manner for each Founding Father on his way to becoming an initiated brother of Phi Delta Theta. It also serves as a guide for volunteers, campus officials, fraternity and sorority communities, and other individuals who are interested in bringing Phi Delta Theta to their campus. From interest group to colony and on to chapter status, the Guide has become a great tool for everyone involved in this exciting process.

Phi Delta Theta believes that college men should be recognized for their initiative and for their desire to achieve. In fact, for nearly two centuries, we have asked many students the question, “Are You a Leader?” At each campus Phi Delta Theta expands to, we take great pride in establishing strong relationships and offering leadership opportunities to our undergraduate members. For many of our members, these experiences have transferred into a successful professional life. You have probably heard of some of them: Former President of the United States Benjamin Harrison, first man on the moon Neil Armstrong, Major League Baseball Hall of Famer Lou Gehrig, founder of Marriott Hotels J. Willard Marriott, and world-renowned architect Frank Lloyd Wright, just to name a few.

The General Council of Phi Delta Theta continues to add resources to our expansion program that in turn, are creating many successful new chapters. The Fraternity is in the middle of its second largest period of growth since our Founding. The launch of Phi Delta Theta’s alcohol-free housing initiative has fueled our success. Our chapters have become stronger, are attracting the right type of student, are improving academically, are living in cleaner and safer environments, are realizing greater alumni support, and are having just as much fun!

A young man’s college experience is one that will prepare him for life. Phi Delta Theta Fraternity continues to build a strong foundation of success for our members and gives each member a values-based environment to develop the many skills and characteristics necessary for life after college. For many men, the Phi Delta Theta experience has been a catalyst for success. We hope you enjoy our Guide to Colony Organization!

Proud to be a Phi!

Alex Atkinson, Missouri Western State University ’16
Director of Expansion
Phi Delta Theta Fraternity
futurephidelt.org

Alex Atkinson, Missouri Western State University ’16
Director of Expansion
Phi Delta Theta Fraternity
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WELCOME TO PHI DELTA THETA

THE PHI DELTA THETA MISSION STATEMENT
Phi Delta Theta was organized with three principle objectives: The cultivation of friendship among its members; the acquirement individually of a degree of mental culture, and the attainment personally of a high standard of morality.

THE THREE CARDINAL PRINCIPLES OF PHI DELTA THETA

FRIENDSHIP
When forming Phi Delta Theta, the founders saw inspiration in the friendship enjoyed by the ancient Greeks. They characterized friendship as a unity of skills, tastes and thoughts; not as a loss of personal identity, but rather a search for truth and a desire to be united with others who sought the same. To put it simply, friendship is being there for each other through life’s trials and to offer sound advice.

SOUND LEARNING
Sound learning means more than getting good grades; it’s about having intellectual curiosity. The founders saw learning as a search for the truth; truth that is found through intellectual quests. A good student isn’t necessarily the one who receives straight A’s; a good student is one who is excited about learning and is driven by knowledge. His drive of continual learning continues after graduation and throughout life.

RECTITUDE
The six original founders were men of strong Christian faith. Several went on to pursue occupations as ordained ministers. It’s unfortunate that the word ‘rectitude’ brings to mind simply going to church or abstaining from alcohol. The men of Phi Delta Theta know that rectitude has more to do with the way a man approaches living. It revolves around doing what should be done because it’s the right thing to do. In these three ways, a man can live a life of integrity and the men of Phi Delta Theta have counted on the Cardinal Principles to see them through their lives during college and beyond.
WHAT IS EXPANSION?

Fraternity expansion revolves around the growth of the organization and is generally categorized into two broad situations:

1. The development of a chapter at a campus new to Phi Delta Theta
2. The re-establishment of a chapter at a campus where Phi Delta Theta has previously been

In either case, the formation of a group of students emerges in one of two ways:

1. Phi Delta Theta’s staff spends time at the campus recruiting students to start the chapter
2. An interested group of students comes to the Fraternity looking to start a chapter

Phi Delta Theta’s approach with expansion is methodical and careful. The Fraternity will expand to a campus with the approval of the host institution, and to no more than a handful of campuses at a time. This policy is designed to ensure the formation of strong and outstanding new chapters, while guaranteeing longevity.

EXPANSION PROCEDURES:

When an interested party regarding expansion approaches Phi Delta Theta, the following procedure is generally followed:

1. All inquiries about expansion are directed to the director of expansion at the General Headquarters (GHQ) in Oxford, Ohio. They are acknowledged and sent on to the Survey Commission for evaluation and further review.
2. The Survey Commission approves an institution after a full investigation determines the institution meets a predetermined set of requirements.
3. The province president is advised of the inquiry. He, or a GHQ staff member, may be requested by the Survey Commission to make an “exploratory visit.”
4. An aggressive recruitment effort is implemented by the Fraternity. The goal is to form an interest group of men, based on campus data, who desire to form a chapter of Phi Delta Theta. If an interest group is already in place, each man will go through an interview with members of the GHQ and, if applicable, available alumni.
5. The Survey Commission recommends to the General Council the organization of a colony when all local conditions seem favorable and when the interest group has met the prerequisites for colony recognition.
6. The General Council recognizes the group as a colony, which may then be developed and inducted through the help of alumni, the Chapter Advisory Board, the colony development specialist, GHQ staff, officers of the college or university, the province president, and the Survey Commission.
7. Initiation and installation is accomplished when the colony is declared ready by fulfilling each chartering prerequisite, and by vote of the chapters in its province (if applicable), the province president, the Survey Commission, and the General Council.
8. This process generally takes nine to twelve months or as long as eighteen months.
FROM INTEREST GROUP TO CHAPTER

THE EXPANSION PROCESS

INTEREST GROUP

Φ Call to Phi Delta Theta General Headquarters
Φ Phi Delt staff arrives on campus
Φ Meet with fraternity/sorority life advisor
Φ Build twenty-five-man roster (minimum)
Φ Define officer positions and committees
Φ Create vision statement, goals, and objectives
Φ Create bylaws
Φ Create a colony advisory board
Φ Create colonization petition

COLONIZATION CEREMONY

COLONY

Φ Provide detailed action plan with SMART goals
Φ Provide list of priorities and goals for each officer
Φ Meet specified membership growth goal
Φ Calendar and event planning
Φ Academics: ranked in top third
Φ Submit six yearly Colony Greatness Checklist reports
Φ Phikeia (new member) education program
Φ Create budget
Φ Community service/philanthropy
Φ Create formal petition
Φ Attend leadership conferences

INITIATION AND INSTALLATION

CHAPTER

Φ Ritual performed at meetings
Φ Awards program
Φ Continued use of Phi Delta Theta resources
Φ Ongoing operations and events
Φ Possible chapter house living
Φ Vote at General Convention
Φ Attend leadership conferences
Φ Minimum standards program
Φ Chapter operations assessment
Φ Continuous recruitment for long-term growth
Φ Online education for officers and new members
COLONIZATION PREREQUISITES

Colony status will be considered for a petitioning interest group when the following prerequisites have been completed and submitted as a petition to the General Headquarters.

1. A complete roster of the interest group membership (at least 25 men who must be in good academic standing and enrolled at the host institution), including:
   - Full name
   - Home and school addresses, including telephone numbers and e-mail addresses
   - Parents’ names and contact information
   - Major field of study
   - Expected year of graduation
   - Previous term GPA and cumulative GPA
   - Involvement in campus organization (Each member must be involved in at least one other organization)

2. A copy of the interest group’s bylaws, which mirror the policies and procedures of The Code.

3. A complete list of chapter officers.

4. A vision statement, which includes the interest group’s goals and objectives.

5. A Chapter Advisory Board (CAB) consisting of no less than three members (alumni and/or local volunteer faculty).

6. Letter of recommendation from the fraternity and sorority life office, or other appropriate administration officials, the CAB Chairman and the province president, pledging support for the interest group to be named as an official colony of Phi Delta Theta.

7. The financial commitment by the members of the group. A check from the interest group for $235.00 (colony fee and insurance assessment) from each member should be mailed into the General Headquarters before colony recognition.

8. A budget for the current semester/term including a detailed accounts receivable, accounts payable, and projected monetary allocations for general and committee expenses.

9. All members of the interest group must sign the Risk Management Affidavit acknowledging the understanding of Phi Delta Theta’s Risk Management Policies.

Upon receipt of the above items, the province president and the Survey Commission will consider the eligibility of the interest group’s petition. With the unanimous approval of the General Council, colony status will be granted.

COLONIZATION CHECKLIST

In order for the colonization ceremony to occur, the following things need to be up to date and presented to the General Headquarters staff:

1. All colonization dues for every member of the colony.
   - $\text{founding members x }$235.00 = $\text{total}
   - Unless colonization ceremony is to take place after April 1, at which point you should refer to the instruction on the budgeting cheat sheet on page page 14 or the Colony Greatness Checklist on page 18 for further instructions.

2. Biographical data filled out for every founding member.

3. $\text{founding members data sent to GHQ}$

4. Have every founding member sign the Risk Management Affidavit.

5. Have a complete and up-to-date roster of every man who is going to be a member of the colony.

6. Have enough colony pins and Phikeia Manuals for every founding member.
THE CHAPTER ADVISORY BOARD AND EXECUTIVE BOARD STRUCTURE

PROVINCE PRESIDENT

CHAPTER ADVISORY BOARD CHAIRMAN

RECRUITMENT ADVISOR

WORKS WITH RECRUITMENT CHAIR AND COMMITTEE

CAMPUSS MENTOR

WORKS WITH TREASURER AND COMMITTEE

RISK MANAGEMENT ADVISOR

WORKS WITH RM AND SOCIAL CHAIR (AND COMMITTEE)

PHIKEIA ED ADVISOR

WORKS WITH PHIKEIA EDUCATOR AND PALLAS COMMITTEE

ACADEMIC ADVISOR

WORKS WITH SCHOLARSHIP CHAIR AND COMMITTEE

FACULTY ADVISOR

WORKS WITH PRESIDENT

HOUSE MANAGER AND PARENTS CLUB

PRESIDENT

FUNDRAISING AND INTRAMURALS

TREASURER

ALUMNI SECRETARY, HISTORIAN

SECRETARY

COMMITTEE AND PUBLIC RELATIONS

RECRUITMENT

SOCIAL AND BROTHERHOOD CHAIRS

RISK MANAGEMENT

AWARDS, PHILANTHROPY, AND COMMUNITY SERVICE

SCHOLARSHIP

BYLAWS, CHAPLAIN, AND CHORISTER

PHIKEIA EDUCATION

WARDEN

VICE PRESIDENT
COLONY COMMITTEE STRUCTURE

EXECUTIVE BOARD
- SCHOLARSHIP CHAIRMAN
- RISK MANAGEMENT, Phikeia
  Education, and Scholarship
- RECRUITMENT CHAIRMAN
- TREATUR, Fundraising
  2 Members-at-Large
- PHIKEIA EDUCATION, Risk Management, 3 Members-at-Large
- WARDEN, 4 Members-at-Large
- PRESIDENT, Vice President, Treasurer, Secretary, Recruitment
- FINANCE COMMITTEE
- JUDICIAL BOARD
- PALLAS COMMITTEE
  - RECRUITMENT CHAIRMAN, Everyone Else
  - SOCIAL, Risk Management, 3 Members-at-Large
  - RISK MANAGEMENT, Phikeia Educator, Social, President
  - SCHOLARSHIP CHAIRMAN, 4 Members-at-Large
- SOCIAL COMMITTEE
- RISK MANAGEMENT COMMITTEE
- RECRUITMENT COMMITTEE
### GOALS

<table>
<thead>
<tr>
<th>GOAL</th>
<th>ACTION STEPS</th>
<th>ACTIVITIES</th>
<th>TIMELINE</th>
<th>ASSESSMENT AND/OR OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>The desired result you envision and commit to achieve. Specific, Measurable, Attainable, Realistic and Time-bounded (S.M.A.R.T.). <strong>Owner:</strong> person responsible for completing activity</td>
<td>What you need to do in order to make it happen.</td>
<td>Identify what needs to be done to complete the action step.</td>
<td>When must the goal/activity be completed? What is the deadline? How will you measure progress and success (completion)?</td>
<td></td>
</tr>
</tbody>
</table>

1. a. 
   b. 
   c. 
   d. 

2. a. 
   b. 
   c. 
   d. 

3. a. 
   b. 
   c. 
   d. 

4. a. 
   b. 
   c. 
   d. 

5. a. 
   b. 
   c. 
   d. 

6. a. 
   b. 
   c. 
   d. 

*Officers, committees, and any members who may need it can use this format to lay out weekly, monthly, semester, and yearly goals for themselves, their position, committees, and the group as a whole. This template mirrors the template used within the Colony to Chapter Action Plan which is given to all colonies to assist them in development of key fraternal areas.*
ChapterBuilder is a customer relationship management software that was created specifically for fraternity and sorority recruitment. Take your names list from an excel spreadsheet to a live platform for all your members to access and utilize. Communicate with, organize, and track all the relationships and potential new members your chapter is recruiting.

chapterbuilder.com
STEPS TO SUCCESSFUL RECRUITMENT

1. **One person to lead:** Elect one person to be in charge of recruitment. It must be an executive level position with a year-long term of office.

2. **Values-based recruitment:** Create a list of requirements the group wants each Potential New Member (PNM) to have before receiving a bid. Names should be added regularly. List should be three to four times the size of the current chapter membership.

3. **Bid discussions every meeting:** Every single meeting, one or two PNMs should be discussed. It is a reminder to keep recruiting throughout the entire year, not just at the beginning of each semester.

4. **Posted goals:** Goals for the semester and year must be visible each meeting or they are forgotten. The reminder will continue to spur enthusiasm.

5. **Skills training:** Train your members in recruitment and social excellence. Develop their communication skills regularly. They should all know the answers to basic questions and how to handle common concerns with joining.

6. **Include recruitment in what we already do:** Recruitment shouldn’t be more work. It is simply doing what you normally do, and inviting people to join you. At least two chapter events per month should be able to include recruitment.

7. **Written expectations for all members:** Just as everyone is expected to pay dues and go to meetings, each member must spend “quality time” with one person on the names list each and every week. To achieve this, create a recruitment expectation.

8. **Positive incentives:** If members are going above and beyond the basic expectations, recognize and reward their efforts.

9. **Pyramiding resources:** Team-based recruitment structure—use a recruitment committee with everyone in the colony. The colony is broken up into small teams of about four to five members in each.
RISK MANAGEMENT POLICIES

The Risk Management Policies of Phi Delta Theta are intended to provide education and guidance to chapter officers in performing their responsibilities. Individual chapter members and officers are responsible for being familiar with these policies.

*Warning: Failure to abide by the Fraternity’s Risk Management. Policies will result in the loss of any insurance coverage that may otherwise be available under the Fraternity’s insurance. It may also result in the loss of your chapter’s charter and/or individual membership.

Abusive Behavior
Phi Delta Theta has high expectations for the conduct of its members. It is not in conformity with Phi Delta Theta expectations that any member or Phikeia would engage in abusive behavior against anyone. Similarly, it is beneath the dignity and standards of Phi Delta Theta for any member or Phikeia to engage in fighting.

One example of unacceptable, abusive behavior is sexual harassment. Sexual harassment may be directed against a member of either the opposite sex or same sex. It may occur as part of hazing in a group or in a social one-on-one situation. Sexual harassment may include intimidation, bullying or coercion of a sexual nature or the unwelcome and inappropriate promise of rewards such as membership, offices or assignments, in exchange for sexual favors.

Alcohol-Free Housing, Misuse of Alcohol and Drugs
All chapter facilities and properties in Phi Delta Theta Fraternity shall be alcohol-free at all times and under all circumstances. The implementation of these procedures is a continuation of the ongoing educational efforts of the General Fraternity.

1. The possession, use and/or consumption of any alcoholic beverages by any Fraternity member, Phikeia, or guest, during chapter activities, or in any situation sponsored or endorsed by the chapter, must be in compliance with the laws and ordinances of the state, province, city, county, and university/college.
2. The presence of alcohol products above 15% ABV is banned from any and all Phi Delta Theta chapter sponsored or co-sponsored events; except when served by a third-party licensed vendor.
3. No chapter of Phi Delta Theta may purchase alcoholic beverages with Fraternity funds, nor may any member or Phikeia in the name of or on behalf of the chapter coordinate the collections of any funds for such a purchase. This includes, but is not limited to, the following: the purchase of kegs, party balls, and other bulk quantities of alcoholic beverages.
4. No chapter of Phi Delta Theta may co-sponsor or co-finance a function where alcohol is purchased by any of the host chapters, groups or organizations.
5. The use or distribution of kegs or party balls by the chapter at chapter events is strictly forbidden.
6. The sale of alcoholic beverages by any chapter of Phi Delta Theta is strictly forbidden. No chapter of Phi Delta Theta shall participate in any activity or action which creates the impression that the chapter is selling alcohol. Examples include, but are not limited to: charging admission to parties, passing the hat, selling empty cups, selling drink tickets, or having vending machines which dispense alcoholic beverages.
7. The use or possession of any unlawful drug in any form is not permitted at any Phi Delta Theta function or in any Phi Delta Theta chapter facility.
8. Parties and social activities should be open to members, Phikeia, and invited guests only. Open parties, meaning those with unrestricted access by nonmembers of the Fraternity, without specific invitation, are prohibited.
9. All undergraduate recruitment functions and recruitment activities associated with or sponsored by any club/association of Phi Delta Theta will be alcohol-free.
10. Alcoholic beverages are prohibited at any Phikeia program or initiation ceremony of the chapter.
11. Chapters are strongly encouraged to conduct alcohol and drug awareness programs for members and Phikeia.

Hazing
No chapter or member of Phi Delta Theta shall indulge in any physical abuse or undignified treatment (hazing). Hazing is defined as: “any action taken or situation created, intentionally or unintentionally, whether on or off Fraternity premises, and whether with or without the consent of the persons subjected to the action, which produces mental or physical discomfort, embarrassment, harassment, or ridicule.” Such activities and situations include: paddling in any form, creation of excessive fatigue, physical and psychological shocks, quests, treasure hunts, scavenger hunts, road trips, or any other such activities carried on outside the confines of the chapter facility, wearing apparel in public which is conspicuous and not normally in good taste, engaging in any public stunts and buffoonery, morally degrading or humiliating games and activities, late work sessions which interfere with scholastic activity, and any other activities which are not consistent with fraternal law, ritual, or policy with the regulations and policies of the educational institution.

High-Risk Events
Experience indicates that certain events are of such high risk and the consequences of injuries from engaging in them so devastating that such events are prohibited on Phi Delta Theta property or at Phi Delta Theta-sponsored events. These events can include mud bowls, boxing, wrestling, temporary pools, slip-n-slides, or any water related activities. Additionally, Phi Delta Theta chapters shall not sponsor high-risk events with mechanical bulls, bungee jumping, sky diving, parachute jumping, bouncy houses or similar activities.
The possession and/or use of firearms or explosive devices of any kind are expressly forbidden within the confines and premises of the chapter house or at any Phi Delta Theta events. Any projectile propulsion devices, even apparently safe things like water balloon launchers, can be dangerous if misused. Three-person slingshots, crossbows, and potato guns are expressly forbidden within the confines and premises of the chapter house or at Phi Delta Theta events. The negligent use of other forms of projectile propulsion devices, particularly any such use that causes damage or injury, shall be treated as a violation of this risk management policy.

Any temporary structures, including stages, bridges or similar structures, at any Phi Delta Theta events whether on Phi Delta Theta property or located elsewhere, must be constructed by licensed professional contractors with proof of acceptable general liability coverage and the work must be performed pursuant to a written contract. Chapter leaders must recognize that these prohibited events do not constitute an exhaustive list of activities to be avoided.

Chapters must take a common sense approach to evaluating the risk of any events or activities. Should there be any doubt about a particular activity or event, chapter leaders should contact the insurance and safety coordinator at Phi Delta Theta General Headquarters.

**Property Management**

The chapter facility, along with its furnishings and landscape, should provide for each member an environment for study, clean and safe living conditions, and recreational facilities. A sound program focused on proper maintenance of the property, along with due regard for university/college, health, or fire department regulations, where applicable, shall be followed in each chapter.

**Members Personal Property**

Use of personal property in Fraternity activities shall be strictly voluntary and the sole responsibility of the owner. The Fraternity assumes no liability or responsibility for any loss or damage to any personal property of members even if used in conjunction with Fraternity activities.

**Automobiles and Transportation**

Phi Delta Theta chapters are encouraged to establish a transportation policy for chapter events which are not held at or within walking distance from the chapter facility. It is strongly recommended that the policy include the use of a form of mass transportation, such as charter buses, professional drivers, limousine services, taxis, etc. to transport members for such events, and particularly for events where alcohol may be consumed. Any individual who provides transportation in conjunction with Fraternity activities does so at their own risk. They are responsible for their own conduct. No member or Phikeia shall be required to provide transportation and any member or Phikeia who provides transportation shall do so only if it is voluntary. Members or Phikeia shall obey all applicable motor vehicle laws, including, but not limited to, those concerning vehicle safety, vehicle operation, financial responsibility and/or insurance, and the transportation and consumption of alcoholic beverages. Operators shall ensure that vehicles are properly maintained, not overloaded, and are operated in a safe manner. Rental vehicles shall be operated in accordance with rental contracts. Use of personal vehicles shall be strictly voluntary and the sole responsibility of the vehicle owner/operator. Financial Responsibility laws generally impose responsibility for accidents on the driver or owner of vehicles. The Fraternity assumes no responsibility or liability and provides no insurance to Drivers or Owners of vehicles for accidents or injuries, or for any damages to vehicles not owned by the Fraternity that may be used in conjunction with Fraternity activities.

**Contractual Agreements and Additional Insured**

No chapter, member, or housing organization may enter into any written or oral contract or financial agreement using the name of the Fraternity. This includes without limitation such agreements as leases, contracts, hold harmless agreements, liability releases, account statements, purchase orders, and hotel or banquet contracts. As the Fraternity’s insurance does not afford protections to outside individuals or entities, no chapter, member, or housing organization may enter into any written or oral agreement under which the responsibility or liability of some party other than the Fraternity is assumed. Additional Insured status under the Fraternity’s insurance requires the prior agreement of both the Fraternity and its insurers.

Issued by the General Council September 2018

To review all risk management member resources, go to [phide.lt/RiskManagementResources](http://phide.lt/RiskManagementResources)
# FINANCIAL EXPECTATIONS

Below are the financial expectations of all colony members of Phi Delta Theta Fraternity.

## COLONIZATION FEE
The colonization fee is a set fee that each colony member of Phi Delta Theta pays when the petition for colonization is sent to the General Headquarters. The $150.00 colony fee: (1) covers the cost of the *Manual of Phi Delta Theta* and the colony pin; (2) is used to support the colony by building a fund for the purchase of ritual equipment; (3) covers the $60 pledging fee that all new members of the Fraternity pay; and (4) $25 goes into the colony bank account for colony use.

$150.00  Colonization Fee

## COLONY MEMBER INSURANCE PREMIUM
Phi Delta Theta Fraternity’s insurance broker is James R. Favor Co. This insurance is provided to colony members of the Fraternity for a fraction of the cost of a fully chartered chapter. This assessment gives the colony the ability to host Phi Delta Theta events and covers colony members if they are ever named in a liability suit, provided they were not in violation of Phi Delta Theta’s Risk Management Policies during the alleged incident.

$85.00  Colony Member Insurance Premium

## INITIAL LOCAL COLONY DUES:
This $25.00 amount is assessed in order to provide an initial deposit into the local colony’s established banking account in order to provide them with a monetary foundation from which to start.

$25.00  Initial Local Dues

**Total Colony Fees/Member:**

<table>
<thead>
<tr>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$150.00</td>
<td>Colonization Fee</td>
</tr>
<tr>
<td>$85.00</td>
<td>Colony Member Insurance Premium</td>
</tr>
<tr>
<td>$235.00</td>
<td>Total Colony Fees/Member</td>
</tr>
</tbody>
</table>

## COLONY MEMBERSHIP DUES
Each colony and chapter of Phi Delta Theta charges its own local dues. These dues provide the funds that will be used for brotherhood events, socials, recruitment, fraternity supplies, philanthropy, community service, IFC, and any other expenses that the colony will need to pay. This includes paying for the costs associated with the colonization and installation ceremony. Colony Membership Dues are always determined by the local colony.

$ Variable  Colony Membership Dues

“To do what ought to be done, but would not have been done, unless I did it, I thought to be my duty.”
—Robert Morrison, Miami 1849
INITIATION FEE AND MEMBER BADGE
Every member of Phi Delta Theta is charged an initiation fee at the time they are fully received into the Fraternity as an initiated member. This fee provides the undergraduate with all the “rights and privileges of a member of Phi Delta Theta.”

- $255.00 Initiative Fee
- $30.00 Member Badge
- $285.00 Total Cost of Initiation

QUICK BUDGETING CHEAT SHEET

<table>
<thead>
<tr>
<th></th>
<th>COLONY</th>
<th>CHAPTER</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Phikeia Dues</strong></td>
<td>How much should we budget?</td>
<td>$125 per new Phikeia</td>
</tr>
<tr>
<td></td>
<td>$85 Phikeia dues + $25 colony ritual fund + $15 colony pin and Phikeia Manual*</td>
<td>Paid to GHQ (Phikeia pin and Manual bought separately on PhiDelt Store)</td>
</tr>
<tr>
<td></td>
<td>$125 per new Phikeia</td>
<td>$85 per new Phikeia</td>
</tr>
<tr>
<td></td>
<td>$85 Phikeia dues + $25 colony ritual fund + $15 colony pin and Phikeia Manual*</td>
<td>Paid to GHQ (Phikeia pin and Manual bought separately on PhiDelt Store)</td>
</tr>
<tr>
<td>When is it billed?</td>
<td>Within 10 days of data submission</td>
<td>Within 10 days of data submission</td>
</tr>
<tr>
<td><strong>Liability Insurance</strong></td>
<td>How much should we budget?</td>
<td>$85†</td>
</tr>
<tr>
<td></td>
<td>$85† per new member</td>
<td>$120‡</td>
</tr>
<tr>
<td></td>
<td>$85† per new member</td>
<td>$120‡</td>
</tr>
<tr>
<td>When is it billed?</td>
<td>Within 10 days of data submission‡</td>
<td>Due by Oct. 1</td>
</tr>
<tr>
<td></td>
<td>All fall semesters following colonization</td>
<td>Within 10 days of data submission‡</td>
</tr>
<tr>
<td><strong>Membership Dues</strong></td>
<td>How much should we budget?</td>
<td>$0**</td>
</tr>
<tr>
<td></td>
<td>$0**</td>
<td>$145 per active member</td>
</tr>
<tr>
<td>When is it billed?</td>
<td></td>
<td>Billed in January/Due in February</td>
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<tr>
<td><strong>Initiation</strong></td>
<td>How much should we budget?</td>
<td>$285</td>
</tr>
<tr>
<td></td>
<td>$285 per initiating member</td>
<td>$255</td>
</tr>
<tr>
<td></td>
<td>$255 initiation fee + $30 member badge*</td>
<td>$255 initiation fee (Member Badges purchased separately from PhiDelt Store)</td>
</tr>
<tr>
<td>When is it billed?</td>
<td>10 days prior to installation</td>
<td>Within 10 days of initiation</td>
</tr>
<tr>
<td><strong>Conference/Education</strong></td>
<td>How much should we budget?</td>
<td>$350</td>
</tr>
<tr>
<td></td>
<td>$350</td>
<td>$350</td>
</tr>
<tr>
<td>When is it billed?</td>
<td>Each semester</td>
<td>Each semester</td>
</tr>
</tbody>
</table>

* Must be purchased separately on the Phi Delt Store

** Colonies who install this academic year will not be billed membership dues until the following academic year

† If a group is colonized after March 30 of the academic year, liability insurance for the initial colony members is billed the proceeding fall

‡ Actual insurance rates vary from group to group based on liability allocation

Last Updated: August 14, 2019
LEADERSHIP DEVELOPMENT
PROGRAMMING AND RESOURCES

KLEBERG EMERGING LEADERS INSTITUTE
The Kleberg Emerging Leaders Institute takes place at Miami University in Oxford, Ohio each summer. The conference brings anywhere from 900–1,000 Phi Delts to Oxford for a three-day leadership conference. Important fraternity topics are discussed and these emerging leaders are taught how to improve their chapter’s operations and Phikeia education program. The conference also provides the attendees with the courage to bring change to their chapter.

SHAFFER HONORS COLLEGE OF LEADERSHIP
The Shaffer Honors College of Leadership is designed to offer an in-depth exploration into an individual’s leadership style, valuable lessons in constructive disruption and innovation, and an intense focus on effective teams and ethical leadership. This stand-alone experience is hosted in conjunction with the Kleberg Emerging Leaders Institute. The Honors College takes everything you’ve ever learned about leadership to the next level.

PHIKEIA EDUCATORS COLLEGE
The goal of the Phikeia Educators College is to increase the level of learning that occurs during Phikeia Education, and to connect them with engaging content focused on mastery and performance that will form the foundation for all chapter Phikeia programs. The Phikeia Educators College creates a Phi Delt workshop environment, where one is able to obtain resources and best practices, as well as develop skills from his peers and distinguished alumni.

PRESIDENTS LEADERSHIP CONFERENCE
The Presidents Leadership Conference is held in early January in St. Louis, Missouri. Its focus is to provide each of our undergraduate presidents the training they will need to run their particular chapter/colony. Again, great speakers are brought in from across the country to speak about everything from personal values and leadership to risk management and chapter operations.

PHI DELTA THETA’S BIENNIAL CONVENTION
Every two years, Phi Delta Theta’s undergraduates and alumni convene for the General Convention. Like most fraternity conventions, business is conducted, elections are held for the General Council, and important topics are discussed. During the “brother-only” meetings at the Convention, Phi Delta Theta’s colony delegates receive additional educational programming. The Convention serves to open their eyes to Phi Delta Theta on an international level, but also to learn more about building a chapter. The 53rd Biennial General Convention will be held in Pittsburgh, Pennsylvania in the summer of 2020.
PDT U: ONLINE EDUCATION
PDT U, also known as the Ihlenfeld University for Online Education, is an online training platform for all members of Phi Delta Theta. The technology offers on-demand educational presentations that cover a wide-variety of topics such as officer and volunteer responsibilities, accountability and bystander behavior, new member education, and much more.

RESOURCES
Many resources are located under the Members tab on the Fraternity's website. Here, members can find the following resources: officer manuals, guides, volunteer resources, important publications, anti-hazing resources, e-news, housing resources, insurance resources, recruitment resources, risk management resources, and much more. For the most part, all resources in the Member portion of the website are static materials that can be read and printed out. Resources catered to colonies can be found within the Expansion link on the Resources webpage (see the appendix for more).

PROVINCE RETREATS
With the help of the Fraternity’s regional volunteers (province presidents), Phi Delta Theta International Fraternity hosts 22 province retreats throughout North America in the early months of each year. Province Retreats allow the Fraternity's chapters and colonies to receive further education alongside their peers at a regional level.

OMEGA FINANCIAL, INC. (OMEGAFI)
Phi Delta Theta has partnered with Omega Financial, Inc. (Omegafi) to provide billing and collection services to local chapters. Over 40 chapters of Phi Delta Theta are already taking advantage of Vault by utilizing the improved financial tools and IRS reporting services, as well as an average member collection rate of 96 percent. Best of all, with the implementation of the Compass database in early 2012, Vault seamlessly reports new members to General Headquarters.
One of the most ambitious goals set in Phi Delt 2020 was to design and implement a first of its kind, standardized Phikeia (new member) program for use by all undergraduate chapters. After years of development, all chapters are now eligible to use it. This new program not only decreases the burden of Phikeia education on the chapter, but it allows the chapters to focus more on chapter history, relationship building, chapter operations and chapter/campus involvement.

The program is comprised of three modules that include online and in-person content: Friendship, Sound Learning, and Rectitude. This new resource not only increases the level of education and appreciation for Phi Delta Theta for Phikeias, but it also provides chapters with a competitive edge on their campus. New members are able to complete online modules on computers, tablets, and even phones. The online content features training videos, activities, and supplemental information to learn more about our great organization.

To see all Phikeia program resources, visit: https://phide.lt/PhikeiaEducation

“I believe in the college fraternity, creator of friendships. I believe in its quick sympathies, and its helping hand. I believe in its brave idealism, stirring every valiant emotion, rousing every potential talent. I believe in its compelling drive for scholarship, for genuine culture, for clear-eyed honesty, for business integrity. I believe in the college fraternity, maker of men.”

—Arthur R. Priest, DePauw 1891
COLONY GREATNESS CHECKLIST

General Headquarters has simplified the Colony reporting process to consist of six reports for the colony to complete during the year. Each report contains a number of items, and the link and deadline for each report can be found below. The Guide to Completing the Chapter Greatness Checklist explains how the Colony president can best prepare for each report and identifies which officers can assist.

The expectations of chapters and colonies are to complete the following items on time: 1) all six reports, 2) conference registrations, 3) insurance bill paid, 4) $0 GHQ balance, 5) up-to-date membership roster, 6) risk management affidavits, and 7) six event planning forms.”

BEGINNING OF SCHOOL REPORT
DUE: AUG 31
phide.lt/beginningofschoolreport

- Colony Strategic Plan
- Upcoming Social Events
- Recruitment Goals
- New Phikeia Reporting
- New Initiates Reporting
- Membership Roster Update
- Colony Mailing Address
- Province President Support

FALL REPORT
DUE: OCT 1
phide.lt/fallpdtreport

- Biggest Successes
- Biggest Challenges
- Upcoming Social Events
- Philanthropy Dollars Raised
- Officer Election Date
- New Phikeia Reporting
- New Initiates Reporting
- Membership Roster Update
- New Initiates Reporting
- Insurance Payment
- Risk Management Affidavit
- House Corporation Support
- Top Seniors

HOLIDAY REPORT
DUE: DEC 1
phide.lt/holidaypdtreport

- Biggest Successes
- Biggest Challenges
- Upcoming Social Events
- Philanthropy Dollars Raised
- PLC Registration
- New Phikeia Reporting
- New Initiates Reporting
- Membership Roster Update
- Top Sophomores
- Recruitment Goals
- New Member Retention
- Chapter Advisory Board Support

WINTER REPORT
DUE: JAN 25
phide.lt/winterpdtreport

- Biggest Successes
- Biggest Challenges
- Upcoming Social Events
- Philanthropy Dollars Raised
- Risk Management Affidavit
- New Phikeia Reporting
- New Initiates Reporting
- Membership Roster Update
- Insurance Payment
- Risk Management Affidavit
- House Corporation Support
- Top Juniors
- Leadership Consultant Support

SPRING REPORT
DUE: MAR 1
phide.lt/springpdtreport

- Biggest Successes
- Biggest Challenges
- Upcoming Social Events
- Philanthropy Dollars Raised
- New Phikeia Reporting
- New Initiates Reporting
- Membership Roster Update
- Top Freshman

SUMMER REPORT
DUE: APR 30
phide.lt/summerpdtreport

- Biggest Successes
- Biggest Challenges
- Upcoming Social Events
- Philanthropy Dollars Raised
- New Phikeia Reporting
- New Initiates Reporting
- Membership Roster Update
- Zero Balance with GHQ
- Awards Packet Submission
- Kleberg Registration
- New Member Retention
- General Convention Registration

Guide to Colony Organization  |  Colony Greatness Checklist
COLONY DEVELOPMENT SPECIALIST FOCUS

QUARTER 1:
Φ Colony Budget
Φ Colony Bylaws
Φ Phikeia Online Modules
Φ Officer Resource Files
Φ Phikeia Program
Φ Detailed action plan with SMART goals and list of priorities and goals for each officer
Φ Alumni/Scholarship/Recruitment/Service/Philanthropy/Risk Management
Φ Submit six required reports from Colony Greatness Checklist on time
Φ Event Planning Forms (two per quarter)
Φ Letters of Recommendation/Support

QUARTER 2:
Φ Phikeia Online Modules
Φ Submit six required reports from Colony Greatness Checklist on time
Φ Academic Standards
Φ Event Planning Forms (two per quarter)

QUARTER 3:
Φ Phikeia Online Modules
Φ Submit six required reports from Colony Greatness Checklist on time
Φ Event Planning Forms (two per quarter)

QUARTER 4:
Φ Chapters, Survey Commission, and General Council votes on petition
Φ Phikeia Online Modules
Φ Submit six required reports from Colony Greatness Checklist on time
Φ Academic Standards
Φ Event Planning Forms (two per quarter)
Φ Colony Membership

INSTALLATION: 60 DAYS OUT
Φ Venue options for initiation ceremony and installation ceremony have been identified
Φ Confirm songs have been learned for installation
Φ Petition submission sent to Survey Commission and General Council
Φ Approval letter sent to all invested parties

INSTALLATION: 45 DAYS OUT
Φ Order gavel for installation weekend
Φ Colony begins sending invitations to relevant parties
Φ Official invitations sent to speakers
Φ Order ritual equipment and have shipped to alumni or appropriate receiver
Φ Finalize venues for installation and initiation ceremonies
Φ Send FINAL weekend schedule with times/locations/attendees/etc to GC member and invested parties

INSTALLATION: 30 DAYS OUT
Φ Confirm travel and lodging plans for installation weekend
Φ Collect FULL Bond list with Bond numbers and FULL LEGAL NAMES
Φ Send FINAL weekend schedule with times/locations/attendees/etc to GC member and invested parties
Φ Ensure HQ Vault materials have been collected
Φ Payment is sent to GHQ for ALL initiates at $285/person

INSTALLATION: 14 DAYS OUT
Φ Ensure gavel has been made and ready to be picked up
Φ Confirm Bond Book, Pins, Charter have been shipped or will be packed with installation bag
Φ Ensure venues, catering, schedule, speakers are all confirmed
Φ Confirm shipment and receipt of all ritual equipment

INSTALLATION: 75 DAYS OUT
Φ Final draft of petition uploaded to SmarterSelect
Φ Confirm colony is aware of installation dates/fee collection
Φ Check Vault that every member on petition has been added to OmegaFi
Φ Ensure colony is learning Opening Ceremony, Eternal Praise, and one other song (member’s choice)
CONNECTING TO THE PHI DELT NATION

With modern technology we are all more connected with what is happening in our world and demand more information at a faster pace. Phi Delta Theta is offering its members online resources to keep better informed with what is happening within the Fraternity. Below are the resources that will be the most beneficial:

SOCIAL MEDIA
Each new colony of Phi Delta Theta is given a Facebook page, Twitter handle, and Instagram account, created specifically for the colony by a GHQ staff member. These pages are then given to the colony members upon the leadership consultant’s departure. It is important to remain up to date and active on these platforms for both social and recruitment purposes.

MYPDT (VAULT)
Vault answers the request for quick access to colony information, new member reporting, and updating member information online. This area is also for members-only and the password that you create for MyPDT will work for Vault as well. There are several areas of Vault and different Colony officers will have different levels of access to make chapter updates. As a general undergraduate, you can change and update your personal information, view the last leadership consultant report, and access the chapter discipline report. You are also able to view the GHQ balance for your colony, colony officers, GHQ points, and contact information for your province president.

PHI DELT NETWORK APP
Once the colony has installed, members will have access to the Phi Delt Network App. The app provides you the ability to:
Φ Locate and connect with Phis nearby
Φ Connect with Phis in an industry
Φ Identify Phis at specific companies
Φ Find Phis who are hiring or are looking for work
Φ Promote Phi Delt events to the network
INSTALLATION PREREQUISITES

A colony of Phi Delta Theta will be awarded a charter upon the receipt and acceptance of a formal petition, which addresses the following prerequisites. The petition must include accurate documentation, which lends evidence that the noted prerequisite has been fulfilled. Each section of the petition should be uploaded via the online petition building portal and submitted upon completion.

1. **A membership roster must be included in the petition and shall identify the following:** full name, home and school addresses (including telephone numbers and email addresses), major field of study, expected year of graduation, previous term GPA and cumulative GPA, and involvement in campus organization (each member must be involved in at least one other organization).
   a. **CAB Biographies:** Include a bio of each CAB member and quotes from each about the colony

2. **Recommendation:** The colony must provide a letter of support from the Greek advisor, dean of students or other equivalent campus professional.

3. **House Accommodations and EPFs:** The colony must provide information about housing accommodations for its members, meeting facilities used on campus, and sites for social functions. Along with this information, a calendar of events should be submitted along with three completed and accepted event-planning forms for each of the past two semesters as a colony (a minimum of six total). Screenshots of confirmation will suffice.

4. **Academic Report:** The colony must achieve an overall academic standard, which places them in the top third of all fraternities. Include an academic report that includes academic statistics on the campus and fraternity community.

5. **Fraternity Reports:** The colony must submit all fraternity reports (following the date of colony induction) required of colony officers. Refer to the Chapter Greatness Checklist for specific report information.

6. **SMART Goals:** The colony must provide a list of priorities and goals for each officer. Additionally, the colony must develop a detailed action plan with SMART goals in the following areas: recruitment, scholarship, alumni relations, risk management, and community service and philanthropy.
   a. Submit document explaining end result of SMART goals

7. **Phikeia Program:** The colony must implement The Phikeia Program for its colony Phikeias and submit a copy in the petition.

8. **Colony Officer Guide:** The colony must develop and utilize resource files for each officer. An outline and sample resource file for at least one colony officer shall be included in the petition.

9. **PDT U Completion:** Each colony member must complete every online education module within PDT U.
10. **Colony Bylaws:** The colony must operate under a set of bylaws which are consistent with *The Code of Phi Delta Theta*. A copy of these bylaws must be included in the petition.

11. **Colony Budget:** The colony must have sufficient funds to underwrite all expenses associated with the initiation and installation ceremonies. Copies of the colony’s budget, current balance, accounts receivables, and accounts payable must be included.

12. **Approval Required:** The colony must receive a favorable vote from the chapters in the province, the province president, the Survey Commission, and the General Council.

13. **Risk Management:** All members of the colony must sign the *Risk Management Affidavit* acknowledging the understanding of Phi Delta Theta’s Risk Management Policies.

* Use Written Officer Program Development Guide as a tool for development of these programs.

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**CREATING THE PETITION**

The development of a petition to become a chapter of Phi Delta Theta should be a process that is continuous throughout the colony period. The petition is your colony’s resume that is shown to the Survey Commission, General Council, province president, Chapter Advisory Board, Greek advisor, and the General Headquarters staff prior to the installation of the chapter. The petition should encompass the colony’s successes during this period as well as written proof that the prerequisites for installation have been completed. Once the interest group becomes a colony, all documentation should be kept to add to the petition. A great petition will capture the colony’s desire to become a chapter and prove to the decision makers that the colony is ready to become a chapter of Phi Delta Theta. All petition materials should be uploaded via the Fraternity’s online petition building portal.

**PETITION SUBMISSION**

Petition is to be submitted through the SmarterSelect platform. Follow the link below to access the petition for installation and begin your submission.

**TIPS FOR CREATING A SUCCESSFUL PETITION**

1. Start a Google Drive or Dropbox shared folder/file for each component to promote collaboration.
2. Review the prerequisites for becoming a chapter and petition progress at every executive board meeting.
3. Split up the task of creating the petition. **Delegate** different sections to specific officers.
4. Be creative! Add pictures of events, provide additional accomplishments, and personalize it.
5. Ask for additional letters of recommendations from people who have seen the colony succeed.
6. Be complete! Double check to see that documentation has been submitted for all prerequisites.
7. **Ensure that the petition arrives in a timely manner.** The petition is due to the colony development specialist no later than 75 days before the preferred Friday of installation.
8. **Hard facts:** number of members, GPA ranking, number of community service projects, accounts receivable, Colony Greatness Checklist items, number of event planning forms sent in, six yearly Colony Greatness Checklist reports are submitted, leadership positions held on campus, community service hours, philanthropy dollars raised through own events and attending events, etc.
INSTALLATION

GENERAL INSTRUCTIONS

IMPORTANT NOTICE: This outline is designed to be of assistance in planning for the installation of the chapter. A representative of the Fraternity will help coordinate all arrangements and assist with the miscellaneous details. Friday’s Initiation and Saturday’s Banquet both require separate Event Planning Forms for each event.

The ceremonies in connection with the initiation and installation should take first priority in arrangements and the social functions should be made secondary.

Three days will be required for the installation (Friday, Saturday, and Sunday; with one remote day for finalization). A breakdown of the three days can be seen below:

REMOTE CALL-IN
An evening meeting, usually at 7:00 p.m., that consists of the colony development specialist meeting with the entire colony to go over the breakdown of the weekend. Additionally, the colony will sing a minimum of “Eternal Praise” and “Opening Ceremony” to the General Headquarters staff as both songs are needed throughout the weekend.

SATURDAY
The installation ceremony and retreat should take place on Saturday morning. One-and-a-half hours will be required for the installation ceremony, which should take place in attractive surroundings such as a church, lodge hall, or college auditorium (this ceremony can take place before or after the installation retreat).

The place where the initiation ceremony is to be held should be reserved two (2) months in advance of the ceremonies. It must be a place where absolute privacy is assured. The room must be large enough to accommodate the entire group and it should have an anteroom where the candidates may be prepared for initiation. A waiting room away from the initiation hall is also necessary. Four to five (4–5) hours will be required for the ceremony and those other than members of Phi Delta Theta are not to be invited.

FRIDAY
Will be focused entirely on the initiation ceremonies. It is suggested that arrangements be made promptly for all who wish to be initiated when the chapter is installed. All colony alumni who cannot be initiated should be initiated as soon as possible thereafter by the chapter. The General Council allows a period of one (1) year for such initiations, after which time the chapter must petition the General Council for special dispensation to initiate alumni members of the local fraternity or colony.
An evening social function is typically held after the banquet to culminate the installation weekend. **This event is to be alcohol-free.**

The newly installed chapter will meet their new regional leadership consultant at the post-installation retreat. This retreat is to be scheduled for a three-hour time slot in the late morning to early afternoon. The retreat is the obligation of the chapter president to organize with the new leadership consultant in advance of the installation weekend.

During the installation banquet ceremony gifts from the chapter commemorating the weekend are given to the General Council member(s) in attendance, Chapter Advisory Board Chairman, and whoever else the new chapter feels played a significant role in the process of installation. Examples are director of expansion, Greek advisor, involved alumnae, colony development specialist, etc.

The chapter will receive a full set of Phi Delta Theta’s ritual paraphernalia from the General Headquarters through the mail. The paraphernalia should not be unpacked except by an initiated member of Phi Delta Theta Fraternity.

All bona fide alumni of the colony shall be eligible for initiation. A list of such alumni, together with the complete list of undergraduate candidates, must be submitted to the General Headquarters of Phi Delta Theta at least two (2) weeks before the installation weekend. Every candidate for initiation, both undergraduate and alumnus, must have completed the online membership submission for GHQ prior to the installation weekend.

The local and nearby alumni of Phi Delta Theta should be ready to assist the chapter in all arrangements in connection with the installation, both in regard to the ceremonies and the social function. The local alumni should be shown a copy of these installation instructions.

The installation team will consist of several General Officers (Fraternity staff and volunteers) whose names will be made known to you well in advance of the installation date. A normal installation team will consist of one General Council member, the province president, the Chapter Advisory Board and House Corporation Board, two members of the GHQ staff, local alumni and nearby chapter members.

Before the initiation, each member must pay the colony treasurer the colony fee ($150), insurance fee ($85), and an initiation fee ($285) that must be paid to the General Headquarters. The online submission for each prospective initiate must be on file at GHQ prior to the installation weekend.
INSTALLATION WEEKEND
SETUP INFORMATION

INSTALLATION CEREMONY

SATURDAY
First portion of installation banquet ceremony. Takes place in front of installation banquet seating.

Φ White table cloths should drape over tables
Φ Three blue candles/three white candles
Φ Colony members sit in front of guests
Φ Microphone needed for president
Φ Chairs are needed for six Founding Fathers
Φ Churches, lodge halls, auditoriums
INSTALLATION BANQUET

SATURDAY
Immediately follows installation ceremony and is held within the same room and facility. The installation ceremony is simply held at the front of the room that the installation banquet is held in.

Φ Banquet halls, nice restaurants, catered
Φ Banquet program for order of events
Φ A/V equipment if needed to show slideshow
Φ Guestbook and nametags should be present

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INSTALLATION BANQUET SAMPLE PROGRAM

INSTALLATION CEREMONY

Welcome 12:00 p.m.

Director of expansion (insert name)

Installation and presentation of charter 12:05 p.m.

Lunch (served) 12:25 p.m.

Speakers (begin after lunch is served to all) 12:55 p.m.

Fraternity and sorority life advisor (insert name)

Chapter Advisory Board Chairman (insert name)

Remarks by chapter president 1:05 p.m.

Chapter president name

Remarks by General Council member 1:10 p.m.

General Council member position and name

* Event concludes after the General Council member speech. Gifts are usually given during the chapter presidents speech. Speeches shall be know more than two to three minutes. Agendas should also include a list of chapter member’s names, the date, and location of event, etc. These can act as a keepsake for those participating.
INSTALLATION WEEKEND PREP CHECKLIST

TWO MONTHS
Φ Petition to colony development specialist 75 days prior to proposed install date for 60-day General Council vote.
Φ Confirm date of installation weekend with director of expansion (check with campus calendar for conflicts).
Φ Reserve rooms. Specifics about room needs can be directed to the director of expansion and colony development specialist. The specifics of the initiation room will be conveyed over the phone to those responsible in the colony for planning the installation weekend.
Φ Check GHQ roster to see if every member has completed the online roster submission (OmegaFi).
Φ Begin learning “Opening Ceremony Song,” “Eternal Praise,” and one other song of the members’ choice (found in the back of the Phikeia Manual).

ONE MONTH
Φ Send invitations. Include date, time, location, and cost of event in invitation. RSVP’s should be requested to get an accurate number of guests (only members of Phi Delta Theta can attend the initiation ceremony on Friday, but anyone is welcome for the installation banquet on Saturday).
   Φ University employees (Greek life office, dean of students, president, etc.)
   Φ Parents
   Φ Fraternity and sorority presidents (IFC, Panhellenic Council, Pan Hellenic Council)
   Φ Phi Delta Theta alumni
   Φ Province president
   Φ Colony Advisory Board
   Φ Local Phi Delta Theta chapters and their advisors
   Φ Any others who have helped along the way
Φ Work with Chapter Advisory Board to create program for banquet. Secure individuals to speak.

TWO WEEKS
Φ Learn at least three Phi Delta Theta songs, for the initiation and installation ceremonies. “Eternal Praise” and “Opening Ceremony” are required.
Φ Send in a complete roster of names of the men that will be initiated to General Headquarters. The list should have the correct order determined by the point system so bond numbers can be assigned. This list must include their legal first, middle, and last names, and any suffix (example: Robert Morrison IV).
Φ Contact the school newspaper to let them know about the upcoming installation of the chapter.
Φ Identify a location for all in attendance to eat following the initiation ceremony (individuals pay).
Φ Send check for the full amount of initiation dues owed to GHQ.

WEEK OF AND FOLLOWING INSTALLATION
Φ Confirm that the rooms will be open on time for the ceremonies.
Φ Meet with General Headquarters representatives to go over weekend agenda.
Φ Send thank you notes to all guests.
Φ Write an article for The Scroll plus campus and local news.
SAMPLE INSTALLATION WEEKEND AGENDA

REMOTE CALL-IN
Video call with colony development specialist to confirm final details and logistics of installation weekend.

FRIDAY
Φ Noon: Setup of initiation hall begins
Φ 2:00 p.m.: General Council member arrives
Φ 5:00 p.m.: Colony members/expansion team arrive at initiation venue
Φ 7:00 p.m.: Initiation ceremony begins (attire: shirt and tie)

SATURDAY
Φ 8:30–11:00 a.m.: Post-installation retreat and ritual review
Φ 11:00 a.m.: Set up for installation ceremony
Φ 11:30 a.m.: Initiates and those playing a role in the ceremony arrive at installation banquet venue
Φ 12:00 p.m.: Installation banquet ceremony begins
POST-INSTALLATION CHECKLIST

Following installation this document should be used as a checklist. The purpose of this checklist is to guide our newest chapters to become successful and award winning. Our newest chapters are many times some of our best. As you know, you have worked very diligently to get to chapter status. Installation is not the end of your hard work, but the beginning of becoming a prosperous chapter!

MINIMUM CHAPTER EXPECTATIONS AND STANDARDS (MCES)

BECOMING A GOLD STAR CHAPTER

CHAPTER GREATNESS CHECKLIST AND THE GHQ AWARD

The Chapter Greatness Checklist consists of six reports for the chapter to complete during the year. Each report contains a number of items. The Guide to Completing the Chapter Greatness Checklist explains how the chapter president can best prepare for each report and identifies which officers can assist. To be awarded for Excellence in GHQ Reporting at the end of the year, chapters must complete the following items on time: 1) all six reports, 2) conference registrations, 3) insurance bill paid, 4) $0 GHQ balance, 5) up-to-date membership roster, 6) risk management affidavits, and 7) six event planning forms.

ACADEMICS

There are two goals to focus on when looking at the chapter’s academic focus:

A. Written Scholarship Program: The scholarship chairman should have already created a scholarship plan for the chapter. This scholarship plan does no good on paper, as it should be implemented at the beginning of the next semester. A portion of the chapter’s budget should be allocated to the scholarship chairman to use for the scholarship program. When most people think of scholarship programs they think of study hours, academic probation, grade reports, etc. Yes, these could be valuable aspects of a scholarship program, but be creative and find incentive-based programs that will encourage your brothers to improve their academic performance.

B. Placing in the top third of fraternities or above the All-Men’s Average: Simply stated, Gold Star chapters excel academically and place either in the top third of the fraternities on campus or above the All-Men’s Average. Accomplishing this is also a great selling point for your upcoming recruitment period.

CHAPTER FINANCES

Here are six main goals when looking at a chapter’s financial situation:

A. Accounts receivables are less than five percent of the yearly budget: Is the money owed to you greater than five percent of your budget? If so, a very slippery slope is approaching the chapter financially. Your brothers should be held accountable for their bill to the chapter. Brothers who do not pay their bill only hold the chapter back from accomplishing larger goals. Those brothers who make no effort to pay their bill should be considered for suspension. See The Code and bylaws for the necessary actions to place a delinquent brother on suspension.
B. Accounts payable are less than three percent of the yearly budget: Is the amount of money you owe to different people greater than three percent of the yearly budget? Once again, delinquency brings many issues to a young chapter. Many working relationships the chapter develops can be immediately ruined by tardy payments.

C. List of accounts receivables detailing delinquencies: The treasurer should have an accurate list of each brother’s financial status. Does he owe money? Does the chapter owe him money? When was the date of his last payment?

D. Procedure for debt collection (A/R): What if a brother does not pay? What does the chapter have in place to take care of these issues? Many chapters use financial programs such as Omega Financial (OmegaFi) to implement accountability within the treasury, as these companies are linked to collection agencies. Does the chapter have provisions in its bylaws to deal with delinquent payments and non-responding brothers? If these bylaws are there, will the chapter take proper action on these brothers?

E. Procedures for payment of debt (A/P): Does the chapter have a process for recording incoming bills, future bills, etc. Financial software programs such as Microsoft Money and Quicken are great tools for accuracy.

F. Pay your insurance bill on time: You will receive an invoice about your insurance bill upon arrival back to school in the fall. The insurance bill is expected to be in the Fraternity’s insurance provider’s hands by October 1. The address for our insurance provider is on the Chapter Greatness Checklist.

REVISING THE CHAPTER’S BYLAWS
By the time of initiation and installation, the chapter’s bylaws may be outdated. The bylaws need to be revisited to fix any flaws or misinterpretations. The bylaws should:

A. Have a description of the executive committee structure and function
B. Have a description of all chapter committees (titles and functions)
C. Be distributed at the beginning of each semester to all members

GOAL SETTING FOR THE FUTURE
It will be very important for the chapter to set goals and objectives for the future. If not, its operations will become stagnant and the chapter will have no vision and direction. The following tasks should be accomplished and documented:

A. Two retreats should be planned and executed: The chapter should schedule goal-setting retreats for the beginning of each semester. These retreats will establish excitement for the semester, and will allow the brothers to plan what they want to accomplish. Phikeia retreats are another great idea.

B. Document your chapter’s goals and objectives: If someone asks you what your chapter’s goals and objective are, you should be able to show them those goals on paper.

ALUMNI RELATIONS
The Fraternity for Life concept begins with the chapter. How is the chapter going to bring alumni back to campus, help them reunite with their chapter brothers, and keep them informed of what’s going on in the chapter and amongst its alumni?

A. Alumni newsletters: The chapter should create an alumni newsletter each semester that is sent to every living alumnus with a current email or physical address. Seventy percent of the alumni newsletter should
revolve around alumni, as older members will want to hear about the guys they already know. Thirty percent of the newsletter should revolve around the undergraduate chapter and its accomplishments and upcoming dates.

**B. One alumni function planned and completed:** The chapter should plan one major alumni event for the year. Whether this event is a homecoming BBQ, a golf tournament, Founders Day, etc., these events are very important.

**C. Evaluate your Chapter Advisory Board:** Give you Chapter Advisory Board constructive feedback that will help them improve in the future. If your CAB needs to grow, begin actively searching for additional members. If any assistance is needed, contact Phi Delta Theta’s Director of Chapter Services Dylan Berg at dberg@phideltatheta.org.

**PHIKEIA EDUCATION**

Start with the Phikeia Education Facilitators Guide found at PhiDeltaTheta.org! In this guide you will find all the materials needed to lead and facilitate the enhanced in-person Phikeia experience that takes place as a supplement to the newly revised PDTU Phikeia Education Modules. Discussion questions, team builders, brother builders, processing activities, and a host of resources are provided to you that will all complement the information the Phikeias will review online. In addition, there are a number of places to incorporate your own colony information and content, as well as customizing activities and brotherhood initiatives. This guide is just one item to be used to help you become a great Phikeia educator. By attending the Phikeia Educators College and utilizing the resources provided on the Phi Delta Theta website, you have all the materials to create a great program.

**A. Give your recently initiated brothers a Phikeia feedback form:** Who better to get feedback from than the members who just went through the program? It is also important to get feedback from the initial Founding Fathers.

**B. Take this feedback and make additions/changes to the program:** After you’ve figured out what changes need to be made, allow the Phikeia committee to sit down with the program and revise it.

**C. Present the revised program to the chapter:** Make sure all brothers know of any changes and are clear about the upcoming program.

**D. Present the program to potential new members:** Allow your new recruits to get a sense of what the Phikeia program is all about. This will ease their fears of hazing and will show them what is expected out of them.

**E. Post-recruitment new member reporting:** The Phikeia educator should sit down with the new members and log onto MyPDT where he can fill out the necessary paperwork for new members. Look for “New Member Reporting.” Here you will be asked to fill in important contact info for each new member.

**RISK MANAGEMENT AND SOCIAL ACCOUNTABILITY**

Phi Delta Theta has seen its share of new chapters that only exist for short time. The reason is one of two: (1) can’t recruit, or (2) Risk Management Violations.

**A. Creation of a social calendar:** The social calendar, created by the social chairman and his committee, should be submitted to the General Headquarters at the beginning of each semester according to the Chapter Greatness Checklist. This social calendar will give us an understanding of when we should expect Event Planning Forms (EPFs), though events and dates may be subject to change.
B. **Event Planning Forms:** The risk management chairman should focus on those social events and when the necessary event planning forms are due. Participating in the event planning program will save the chapter money on its insurance bill. Three approved forms per year are required to be eligible for most awards.

C. **Educational programming:** The chapter should work to host one educational programming seminar per semester focused around risk management. These seminars can be for the chapter only or opened up to the Greek or campus community.

**COMMUNITY SERVICE/PHILANTHROPY**

The next step in the chapter’s work in the community is to strengthen the relationships you may already have or to create new relationships with entities that the chapter would like to help.

A. **Five community service projects:** Gold star chapters succeed in completing five community service projects throughout the year.

B. **Two philanthropic events:** One of the most rewarding aspects in moving forward is to create a philanthropic event that the campus and surrounding community will look forward to every year.

**ABOVE AND BEYOND THE GOLD STAR AWARD**

The following list will give you an idea of the programs and activities in which our best chapters are participating. Challenge the chapter to gradually accomplish what’s below, and see how success and support for the chapter grow exponentially.

A. **Develop a parents club and parents weekend:** Introduce the brothers’ parents to each other and utilize their support in fundraising, recruitment, and public relations efforts.

B. **Host a scholarship banquet and invite your professors:** Show the faculty, staff, and administration of your institution that fraternities are more than a social club at this dinner. Utilize this night to reward individual brothers for their accomplishments in the classroom.

C. **Establish an alumni mentorship program:** Work with your chapter’s alumni to link brothers with alumni that have similar tastes, backgrounds, and interests. This program will broaden the scope of your alumni relations program and will build a solid support structure for the chapter.

D. **Get involved with IFC or Greek council:** Don’t like how the fraternities are being led on campus, challenge your brothers to run for a position on the IFC or Greek Council. Being a new group, your influence will help hold other chapters on campus accountable for their actions.

E. **Sponsor an educational seminar:** Work with the programming board on your campus to sponsor and educational speaker. Think about what topics and stereotypes fraternities have to combat, and ask a professional to speak about it. This is great for PR!

F. **Host an etiquette dinner:** Work with the campus or another sorority to host an etiquette dinner. The event will both help you prepare for future professional endeavors and allow you to socialize with others on campus.

G. **Establish an annual Founders Day event:** Develop alumni support while celebrating the birthday of Robert Morrison. (March 15). This is also where many groups perform the silver, gold and palladian legionnaire ceremony for older alumni.

H. **Regular brotherhood events:** Encourage the chapter’s brotherhood chairman to have brotherhood activities schedule on the chapter’s calendar. These events build the bond that will help the chapter accomplish other goals and work through tough decisions.
I. **Be prepared for your leadership consultant visit:** The chapter will receive a pre-visit packet about your upcoming leadership consultant visit. Make sure all needs and requests are taken care of prior to his arrival. His job is to consult with the chapter and work on certain aspects that may need improvement.

J. **Highlight your recent graduates:** In the alumni secretary's manual you can find the alumni induction ceremony that should be performed for those graduating seniors in your chapter. This simple ceremony will show graduates that they are just as important as alumni as they were as undergraduates.

### HOW TO BECOME OXFORD, FOUNDERS, OR KANSAS CITY TROPHY WINNER

By accomplishing what's listed below, your chapter accumulates points that go towards winning the large trophies.

1. Win the Gold Star Award.
2. Achieve the highest GPA ranking of all fraternities on campus.
3. Get brothers involved in professional fraternities, departmental honor societies, recognition societies, local honoraries, and local scholarships.
4. Win your campus’ intramural competition or win individual or team competitions.
5. Get brothers involved in the school newspaper.
6. Get brothers involved in student government or your campus’ IFC.
7. Win or place in the All-Fraternity sing or talent show.
8. Win or place in the campus’ homecoming competition.
9. Win or place in the campus’ Greek week competition.
10. Win campus awards.
11. Encourage your members to become involved in student organizations on campus.
12. Apply for and win a Phi Delta Theta Foundation Scholarship.
13. Apply for and become a peer mentor of Phi Delta Theta.
14. Support the LiveLikeLou Foundation through your philanthropic efforts and encourage members to become Iron Phis.

### AWARDS MOST LIKELY TO WIN AS A NEW CHAPTER:

Φ T. Glenn Cary Award
Φ Gold Star Award
Φ Silver Star Award
Φ CHQ Award
Φ Hayward S. Biggers Ritual Award
Φ Community Service Citation
Φ #1 Scholarship Award
Φ Risk Management Recognition Award

Once again, this document should be used as a working checklist in order to keep the chapter moving forward. While installation may feel like a giant weight has been lifted off the chapter's shoulders, it is only the beginning of the chapter's longevity. Our best new groups take this attitude and go above and beyond what was accomplished as a colony. Congratulations on becoming an official chapter of Phi Delta Theta, but now place your focus on becoming one of the greatest chapters within Phi Delta Thetal!
APPENDIX

GENERAL:
Fraternity Website ........................................ phideltatheta.org
Foundation Website ........................................ phideltathetafoundation.org
Phi Delt Museum ........................................ museum.phideltatheta.org
Future Phi Delt ............................................... futurephidelt.org
Famous Phis .................................................. phideltatheta.org/famous-phis
About Phi Delt ................................................ phideltatheta.org/about
Phi Delt 2020 Strategic Plan ............................. phidelt2020.com
Health and Safety .......................................... phideltatheta.org/about/health_safety
Locate a Chapter ........................................... phideltatheta.org/join/locate-phi-delt
Fraternity Staff .............................................. phideltatheta.org/groups/fraternity-staff
Expansion Success ....................................... phideltatheta.org/join/start-a-chapter
Phi Delt Store ................................................ phideltstore.com

COMMUNICATIONS AND SOCIAL:
The Scroll (Magazine) ..................................... phideltscrollarchive.com
The Scroll News ............................................ phideltatheta.org/scroll-news
Road to Greatness ....................................... phideltatheta.org/road-to-greatness
Blog ................................................................ phideltatheta.org/blog
Facebook ..................................................... facebook.com/phideltatheta
Twitter ......................................................... twitter.com/phidelt
Instagram ..................................................... @phideltatheta
Snapchat ...................................................... @phidelt
Videos ......................................................... youtube.com/phideltathetaghq
The Phi Delt Network (App) ............................. thephideltnetwork.org

CONFERENCES:
Convention .................................................. phideltatheta.org/members/the-academy/convention
Kleberg Emerging Leaders Institute ..................... phideltatheta.org/members/the-academy/kleberg-emerging-leaders-inst/
Phikeia Educators College ................................ phideltatheta.org/members/the-academy/phikeia-educators-college
Shaffer Honors College of Leadership ................... phideltatheta.org/members/the-academy/shaffer-honors-college-leadership
President Leadership Conference ....................... phideltatheta.org/members/the-academy/presidents-leadership-conference
Province President Retreats ............................... phideltatheta.org/members/the-academy/province-retreats/
House Corporation Summit .............................. phideltatheta.org/members/the-academy/house-corporation-summit
General Officers Conference ............................. phideltatheta.org/members/the-academy/general-officers-conference
Bystander Education ...................................... phideltatheta.org/members/the-academy/bystander-education-workshop/
Health and Safety Initiative .............................. phideltatheta.org/members/the-academy/fhsi/

PHILANTHROPY:
Iron Phi ......................................................... ironphi.org
The LiveLikeLou Foundation ............................. livelikelou.org

RESOURCES:
PDT U-Online Education .................................... phideltatheta.org/members/the-academy/pdt-u
Chapter Officer Resources ............................... phideltatheta.org/members/resources/chapter-officers
The Code of Phi Delta Theta .............................. phideltatheta.org/resources/the_code.pdf
Minimum Standards Policy ............................... phideltatheta.org/resources/minimum_standards_policy.pdf
Risk Management Policies ............................. phideltatheta.org/resources/risk_management_policies.pdf
GUIDE TO COLONY ORGANIZATION