

The Guide to Completing the Colony Greatness Checklist



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version of yourself*

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Introduction

This guide is intended for any Phi Delt President, Treasurer or other officer who has ever had a question regarding the Phi Delta Theta **Colony Greatness Checklist**. While most Colonies are aware of the checklist's existence, some do not understand the *importance* of completing the reports, and others do not understand *how* to complete the reports. This guide will not only explain the importance of completing each and every report and the benefit of doing so, but it will also provide a step by step process for completing each report found on the **Colony Greatness Checklist**. Hopefully this guide will clear up any confusion, misunderstandings, or questions that may arise or have arisen in the past. If you have any questions about the items on the **Colony Greatness Checklist**, either contact your Leadership Consultant or Director of Expansion Tucker Barney (tbarny@phideltatheta.org)

The Importance of Completing the Reports

There are several important reasons for completing all of the reports found on the **Colony Greatness Checklist**. While some may think that completion of these reports only benefits the General Headquarters, it is actually quite the contrary. For example, completing the awards packet and winning a Gold Star will reduce the Colony's insurance bill by up to ten percent. Sending in event planning forms and a social calendar each term will save the Colony up to five percent on its insurance bill. Some of the reports ensure the Colony's conference delegates a room at Kleberg, PLC, and General Convention. Other reports will help make Leadership Consultant visits run smoother, and some will even provide an opportunity to win scholarships from the Foundation. As stated above, there are many benefits to completing these reports, most of which benefit the Colony and its members. By completing 100% of the **Colony Greatness Checklist** reports, the Colony will also win the General Headquarters Trophy for outstanding Colony operations.

Before Getting Started

1) Obtain a copy of the Colony Greatness Checklist.

Conference delegates should receive a large color copy of this checklist at every Phi Delt conference (PLC, Kleberg), but extra copies can be found on the Phi Delt website. To find it, go to www.phideltatheta.org. Go to the Members drop down menu and select *Resources*. Then visit the *Expansion Resources* tab to download the **Colony Greatness Checklist**.

2) Register with myPhiDeltaTheta.

On the main Phi Delt website, there is a link on the right side of the page to sign in, and you can register from there. Many reports require access to the Chapter Desktop application of myPhiDeltaTheta. The outgoing officer must give you access to this area during the transition, so work with him to ensure that he completes this task before you begin.

3) Plan ahead and leave plenty of time to complete all the reports.

Do not start the report due May 1st on May 1st or the day before. You should complete the reports with plenty of time to account for technical difficulties and mailing time.

What reports are required for the Colony Greatness Checklist

Items to be completed by the President:

Risk Management Affidavit (5 points)

Mail to GHQ for Fall and Winter Reports (October 15 and January 31)

The Risk Management Affidavit is the member and Colony's legal agreement that they understand the risk management policies of the general fraternity. This form must be completed every semester as part of the appropriate reports. Failing to submit the report will increase the Colony's insurance bill for the next year. The form must be signed by every member of the Colony. Colony officers must sign in the appropriate area, including the Colony Advisory Board Chairman.

The Risk Management Affidavit is available for download on the website in Members tab dropdown, Resources, Colony Officers (Risk Management/Social).

This document *must* be sent as a paper copy to:

Phi Delta Theta General Headquarters
ATTN: Melanie Clayton, Director of Insurance & Safety
2 S. Campus Ave
Oxford, OH 45056

Social Calendar (3 points)

Email to GHQ for Fall and Winter Reports (October 15 and January 31)

The Social Calendar is an important planning tool for the Director of Insurance & Safety when processing Event Planning Forms. The Social Calendar lists all Colony events for the coming semester, including socials, tailgates, community service, philanthropy events or anything else where the Colony would fill out an Event Planning Form.

The Social Calendar should list dates, activities and locations for the coming semester. If the dates for events are not set in stone, set tentative ones and indicate that they could change on the calendar. Remember that Event Planning Forms must be sent in thirty (30) days in advance to ensure the event gets approved.

The Social Calendar may be emailed to Melanie Clayton, Director of Insurance & Safety, at melanie@phideltatheta.org.

Colony Officer List (3 points)

Update on the Colony Desktop through myPhiDeltaTheta for Fall, Winter and Summer Reports (October 15, January 31, and May 1)

It is important for Colonies to update their officer information online through the Chapter Desktop function of myPhiDeltaTheta. From time to time, important information will be sent to various Colony officers and having an up-to-date list will ensure that the information is sent to the right person.

To update your Colony's officers, go to the Administration tab of the Chapter Desktop and select Colony offices. To add a new officer, click the "Update Officers" button, select the office you are updating, then select the member who is assuming this office. Then select the start date of their term in the "officer from" box.

For existing officers, you must choose an end-date under the current officer in the "officer to" box. *Do not end-date an officer until his transition actually takes place.* This will result in multiple officers in the same office. Be sure to click the add/update officer button at the bottom when the update is complete. When your updates are completed, you must click the "Officer Update Complete" button at the top. Otherwise, the officers will not update and you will not receive GHQ points.

During some terms, your Colony might not transition officers even though it is listed in the Colony Greatness Checklist. If this is the case, go to "Update Officers," then click on "Update Offices." *This will notify GHQ that the Colony has no officer changes.* Or, notify Paula Seger (paula@phideltatheta.org) at GHQ, if there are no officer updates.

Phikeia/Colony Member Reporting (3 points each)

Update on the Colony Desktop through myPhiDeltaTheta for Fall, Winter and Spring Reports (October 15, January 31, April 1)

Reporting for new Phikeias/colony members and Initiates is **extremely** important for multiple reasons, namely billing and records. Reporting new Phikeias/Colony members into the system ensures that General Headquarters has a record for each member and contact information for our database. Without this information, it would be impossible to track members, have them register for conferences, or receive information from GHQ. It is also important to have up-to-date information for Phikeia/Colony members for billing purposes. As you know, Phi Delt is a non-profit organization and in order to continue to provide services, resources, conferences and consultant visits, dues must be collected.

To add new Phikeia/Colony Members, login to myPhiDeltaTheta and go to your Colony Desktop, then the Member Tab/Add New Member. Fill out all required information.

You might find during the course of the year that you do not have any Phikeia/Colony member reporting, even though it is listed in the Colony Greatness Checklist. The Colony still must notify Debbie Smith (Debbie@phideltatheta.org) and tell her that there are no new Phikeias or Initiates to report. *If you do not notify Debbie, you will not receive the points.*

Roster Updates (3 points for dues; 5 points for insurance)

Update for Membership Dues – Winter Report (January 31)

Every Colony of Phi Delta Theta must pay dues to General Headquarters once per year. In order to charge the correct amount, GHQ must have an accurate number of members on the roster. ***Member Dues are assessed on the number of members on the roster on January 31.***

To update the roster, access the Chapter Desktop application through myPhiDeltaTheta. From there, select the “Members” tab, then Update Records. From there, select “Member Status.” *You must change the Filter from Phikeia to Undergraduate.* To move a member from “Undergraduate” to “Alumnus,” select the member’s name, and choose the reason for the change. The system will not allow a change in member status without the reason.

If there are no changes in the member roster, you must email Debbie Smith (Debbie@phideltatheta.org) and explain the situation. *If you do not notify Debbie or update the roster, you will not receive the points.*

Update for Insurance – Spring Report (April 1)

Among the many factors included in the allocation of insurance is Colony size. There is a base figure that is assessed for each member for the school year. Rosters are set for insurance on April 1 for the coming academic year. ***If there are members who are graduating and are still on the roster, the Colony will be charged accordingly for insurance purposes.***

To update the roster, access the Chapter Desktop application through myPhiDeltaTheta. From there, select the “Members” tab, then Update Records. From there, select “Member Status.” *You must change the Filter from Phikeia to Undergraduate.* To move a member from “Undergraduate” to “Alumnus,” select the member’s name, and choose the reason for the change. The system will not allow a change in member status without the reason.

If there are no changes in the member roster, you must email Melanie Clayton (Melanie@phideltatheta.org) and explain the situation. *If you do not notify Melanie or update the roster, you will not receive the points.*

Prep for Leadership Consultant Visit (6 points)

Included in Summer Report (May 1)

Preparation for your Leadership Consultant is important and can make or break the experience. By providing your Leadership Consultant with a schedule of events, meetings, and meals during his visit, it will help him effectively prepare and maximize his time while he is on campus at your Colony. Also, it is very important that your reserve space for the meetings and prepare accordingly for any audio/visual equipment that he might need. Lastly, the consultant visit is meant to be an opportunity for the Colony to address their weaknesses, ask questions, and make positive change within their Colony. Without providing the necessary information requested in the pre-visit packet, it makes for a difficult time assessing the current situation and puts the consultant behind

schedule when setting goals for the future. Please have all information requested to your Leadership Consultant two weeks prior to his visit to ensure that you receive the points for this item.

You should receive a schedule from your Leadership Consultant at the beginning of each semester. Remember that his visit is based on your entire province and is subject to change with very short notice. Several weeks before your visit you should receive a pre-visit packet. Please read that thoroughly and begin to prepare for the visit at least **two weeks in advance**. Send any requested information to your Leadership Consultant by email. When your Leadership Consultant arrives, make sure he has a place to sleep, his meals are arranged, and any meeting space he requested is reserved.

At the end of the year, your Leadership Consultant will report whether or not your Colony was adequately prepared before his arrival with a schedule and completion of the pre-visit information, and he will report points based on the quality and overall outcome of the visit. If you have any questions or concerns about the preparation for his visit, be sure to ask him so those concerns are addressed before he arrives.

Monthly Colony Reports (8 points)

Emailed to Leadership Consultant by the 1st of Each Month (September-May)

The relationship between the Colony, Chapter Advisory Board, Province President and Leadership Consultant is essential to the continued success of the Colony. To further this relationship, each Colony must send a brief report once per month to the Leadership Consultant, and copy the CAB Chairman and Province President. This report serves as a snapshot of the month and provides the Colony the opportunity to address any questions for the Leadership Consultant. Additionally, the report helps the Colony show progress on the action plan created with the Leadership Consultant at his last visit to the Colony. These reports and the communication are extremely beneficial for the Leadership Consultant, CAB Chairman and Province President.

The monthly report can be accessed by logging into myPhiDeltaTheta and going to the Forms area, then Reports. Additionally, the Leadership Consultant will send out a blank report each month to the Colony.

There are 8 reports in total over the course of the academic year, one each for September through May. The report should cover the previous month, for example the October 1st report covers the month of September. If the report is not completed, the Leadership Consultant will request that you complete the information before the report is officially received.

Please email this report directly to the Leadership Consultant. Be sure to include your Chapter Designation (Tennessee Alpha, Missouri Theta, etc.) in the name of the report.

Presidents Leadership Conference Registration (5 points)

Complete online by November 15

Presidents Leadership Conference is the annual gathering of Phi Delta presidents where they can grow, share ideas, and learn the skills necessary to be a great leader within their Colony. PLC participants will learn the fundamentals of being a Colony leader, with emphasis on organizational management, teambuilding, goal setting, motivation, and personal development. This is a mandatory event for all Colony presidents. **Failure to attend this conference will result in a fine up to \$1000.00 and other consequences for the Colony.**

Registration is available online at www.phideltatheta.org through the myPhiDeltaTheta portal. The conference is in January, but all attendees must register in November so GHQ can plan accordingly. Try to schedule your elections before the November 15th deadline so the president-elect can attend. If your elections are later in November, please contact Renee Crist (renee@phideltatheta.org) and ask for an extension.

Kleberg Emerging Leaders Institute Registration (5 points)

Complete online as part of Summer Report (May 1)

Phi Delta Theta Fraternity and the Phi Delta Theta Foundation are committed to being the premier leadership development organization in the Greek world. Each summer, the fraternity hosts up-and-coming leaders from across the US and Canada at the Kleberg Emerging Leaders Institute in the birthplace of Phi Delta Theta, Miami University in Oxford, Ohio. Colonies can send three or more members to this “learning laboratory” for an unforgettable experience.

This learning institute happens late every summer, but registration must be completed before the end of the spring term. The deadline is May 1st to register the delegates. The costs for the institute are covered for two delegates, and more may attend for a nominal fee. This institute is mandatory for all Colonies of Phi Delta Theta. **Failure to attend will result in a fine up to \$1000.00 and other consequences for the Colony.**

Registration is available online at www.phideltatheta.org through the myPhiDeltaTheta portal.

General Convention Registration (5 points when applicable)

Complete online as part of Summer Report (May 1)

*****General Convention happens every 2 years, registration not included in CGC on off years*****

The General Convention of Phi Delta Theta is a celebration of the fraternity and the supreme governing body of the organization. General Convention is hosted all over the US and Canada in the summer every 2 years.

Phi Delta Theta is a democratic fraternity; as such each Colony has equal representation at the General Convention. Before the General Convention, each Colony must elect a voting delegate to represent their Colony. Registration for the General Convention opens in mid-spring and must be completed by May 1st. Each Colony must register a

minimum of one delegate. **Failure to attend the General Convention will result in a fine up to \$1000.00 and other consequences for the Colony.** Registration is available online at www.phideltatheta.org through the myPhiDeltaTheta portal. Additional Colony members may attend General Convention for no additional cost, but are responsible for their own arrangements.

Reporting Philanthropic Contributions (3 points)

Complete online as part of Summer Report (May 1)

Phi Delta Theta has the goal of capturing information that allows us to more accurately state how much Colonies are raising for The ALS Association and other non-profit entities during their philanthropic activities in any given academic-year. With this information, we'll be able to strengthen our relationship with The ALS association and get a sense for how many of our Colonies are supporting their efforts.

Colonies may submit their Philanthropic activities including the name(s) of the non-profit institutions that the Colony made donation(s) to, the address(es) to where those dollars were sent and the dollar amount of the donation(s) via the myPhiDeltaTheta portal at www.PhiDeltaTheta.org.

Awards Packet (8 points)

Submit to GHQ for Summer Report (May 1)

Applying for awards at the end of the year is the Colony's opportunity to showcase all of the great accomplishments throughout the year. There are many awards from the General Fraternity, including awards of excellence, housing, risk management, recruitment, publications and alumni. Some awards, such as the Colony Excellence Award (Gold Star), will even lower your insurance bill by up to 10%. Every Colony should apply for awards at the end of the year.

The application process is extensive and should not be put off until the last minute. The Colony's awards submission can be completed online, and sections can be submitted immediately as the Colony completes them. Your Colony does not have to rush to complete the entire submission as this deadline approaches. We recommend that you begin working on your awards materials early.

The online **Awards Portal** is available on the website. Go to the Members drop down menu and select *Resources*. Then visit the *Colony Officer Resources (Awards Chairman)* to access the portal.

Items to be completed by the Treasurer

Insurance Premium (8 points)

Must be received by October 1

US Colonies: Mail directly to JRF&Co

Canadian Colonies: Mail to GHQ

Every Colony of Phi Delta Theta is provided with liability insurance from James R. Favor & Company to protect the individual members of the Colony. Provided that Colonies are following the risk management policies of the fraternity and the law, any incident that happens in the Colony house or during a registered function, where a lawsuit is filed, will be covered by the policy. To learn more about risk management or liability insurance, please visit the Phi Delta theta website or contact Director of Insurance & Safety, Melanie Clayton.

Your delegates to the Kleberg Emerging Leaders Institute will receive a risk management packet, which includes your Colony's insurance premium. Please send your premium directly to James R. Favor & Co. directly at:

JRF & Co.
14466 East Evans Ave
Aurora, CO 80014-1409

Canadian Colonies must send the insurance premium to Phi Delta Theta General Headquarters at:

Phi Delta Theta General Headquarters
2 S. Campus Ave
Oxford, OH 45056

Note that the insurance premium must be **received** by October 1 by JRF & Co. Please take that fact into account and send the premium earlier rather than later to ensure it arrives on time.

Zero Balance to GHQ (12 points)

Must be received by April 30

At the end of each academic year, it is extremely important that each Colony has a zero balance with General Headquarters. Because Phi Delta Theta is a non-profit organization, it is very important that all dues are paid to the general fraternity so that the guidance, assistance and resources can continue to be provided each year.

Note that attaining a zero balance is worth more GHQ points than any other report on the Colony Greatness Checklist.