

# MONTHLY ADVISOR REPORT TO CAB CHAIRMAN

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## General Information:

Colony Name: \_\_\_\_\_ College/University: \_\_\_\_\_

Name: \_\_\_\_\_ Position on Board: \_\_\_\_\_

Date of this Report: \_\_\_\_\_

## Colony Operations:

Met with Corresponding Officer(s) of Colony on: \_\_\_\_\_

Attended Colony/Committee Meeting on: \_\_\_\_\_

Progress Toward Colonization/Installation: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Areas in Need of Improvement: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Plans for Improvement: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Additional Comments: \_\_\_\_\_

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\_\_\_\_\_

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# **MONTHLY CHAIRMAN REPORT TO PROVINCE PRESIDENT**

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## **General Information:**

Colony Name: \_\_\_\_\_ College/University: \_\_\_\_\_

Name: \_\_\_\_\_ Date of this Report: \_\_\_\_\_

## **Financial Adviser:**

Met with Colony Treasurer on: \_\_\_\_\_

Attended Colony Meeting on: \_\_\_\_\_

Attended Advisory Board Meeting on: \_\_\_\_\_

Comments and/or Progress: \_\_\_\_\_

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## **Risk Management Adviser:**

Met with Colony Risk Management Chairman on: \_\_\_\_\_

Met with Colony Social Chairman on: \_\_\_\_\_

Attended Colony Meeting on: \_\_\_\_\_

Attended Advisory Board Meeting on: \_\_\_\_\_

Comments and/or Progress: \_\_\_\_\_

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**Phikeia Education Adviser:**

Met with Colony Phikeia Educator on: \_\_\_\_\_

Attended Colony Meeting on: \_\_\_\_\_

Attended Advisory Board Meeting on: \_\_\_\_\_

Comments and/or Progress: \_\_\_\_\_

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**Recruitment Adviser:**

Met with Colony Recruitment Chairman on: \_\_\_\_\_

Attended Colony Meeting on: \_\_\_\_\_

Attended Advisory Board Meeting on: \_\_\_\_\_

Comments and/or Progress: \_\_\_\_\_

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**Academic Adviser:**

Met with Colony Scholarship Chairman on: \_\_\_\_\_

Attended Colony Meeting on: \_\_\_\_\_

Attended Advisory Board Meeting on: \_\_\_\_\_

Comments and/or Progress: \_\_\_\_\_

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**Faculty/Staff Adviser:**

Met with Colony Public Relations Chairman on: \_\_\_\_\_

Attended Colony Meeting on: \_\_\_\_\_

Attended Advisory Board Meeting on: \_\_\_\_\_

Comments and/or Progress: \_\_\_\_\_

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**Alumni Relations Adviser:**

Met with Colony Public Relations Chairman on: \_\_\_\_\_

Attended Colony Meeting on: \_\_\_\_\_

Attended Advisory Board Meeting on: \_\_\_\_\_

Comments and/or Progress: \_\_\_\_\_

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**Member-at-Large:**

Comments and/or Progress: \_\_\_\_\_

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# COLONY RECOGNITION CHECKLIST

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

- 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
  - Primary phone number
  - Primary email address
  - Home address
  - School address
  - Major field of study
  - Expected graduation year
  - Previous terms GPA and cumulative GPA
  - Involvement and leadership positions in other campus organizations
- A copy of the interest group's bylaws, which mirror the policies and procedures of *The Code*.
- A complete list of chapter officers (see page 17 of *The Guide to Colony Organization* for complete list).
- A vision statement, which includes the interest group's goals and objectives.
- A Chapter Advisory Board (CAB) consisting of no less than three members.
- Letters of recommendation pledging support for the interest group to be named as an official colony of Phi Delta Theta from:
  - Dean of Students or other appropriate college/university official
  - CAB Chairman
  - Province President
- The completion of biographical data cards for all members listed on the interest group roster.
- The financial commitment by the members of the group. A check from the interest group for \$175.00 (colony fee and insurance assessment) from each member should be included in the petition of colony recognition (explanation of these fees can be found on page 28 of *The Guide to Colony Organization*).
- A budget for the current semester/term including a detailed accounts receivable, accounts payable, and projected monetary allocations for general and committee expenses.
- All members of the interest group must sign the *Risk Management Affidavit* acknowledging the understanding of Phi Delta Theta's *Risk Management Policies* (found on page 21 of *The Guide to Colony Organization*).

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.



## CHAPTER INSTALLATION CHECKLIST

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A Colony of Phi Delta Theta will be awarded a charter upon the receipt of a formal petition which addresses the following prerequisites. Once the petition is completed, a copy should be forwarded to the Province President and the General Headquarters.

- The colony membership should be greater than 35, (colony members and colony Phikeia) however; a colony membership of at least 40-50 is strongly encouraged. A membership roster must be included in the petition and shall identify the following:
  - Full Name
  - Primary phone number
  - Primary email addresses
  - Home address
  - School addresses
  - 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**)
  
- The colony must provide information about housing accommodations for its members, meeting facilities used on campus, sites for social functions, and locations of interactions. Along with this information, a calendar of events should be submitted along with three completed and accepted event planning forms.
  
- The colony must achieve an overall academic standard which places them in the top 1/3 of all fraternities. Include an academic report that includes academic statistics on the campus and fraternity system.
  
- The colony must submit all Fraternity reports (following the date of Colony Induction) required of colony officers. Refer to the *Red Letter Days Calendar* for specific report information.
  
- The colony must submit the Monthly Progress Report to the General Headquarters. Include copies of each report in the petition. Monthly reports are due the first Monday of each month during the school year. It is expected that progress reports are turned in for more than 80% of the months during the colony period.
  
- The colony must develop, implement, and submit copies of written programs in at least the following areas:
  - Recruitment
  - Alumni Relations
  - Scholarship
  - Risk Management
  - Community Service & Philanthropy
  - Phikeia Education
  
- The colony must develop and utilize resource files for each officer. An outline and pictures of a sample resource file for at least one colony officer shall be included in the petition.
  
- Each colony member must have passed an examination testing his knowledge of all aspects of the Fraternity and the colony. The test must be administered by a member of the Chapter Advisory Board and results must be included in the petition. The final test can be received from the General Headquarters.

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- 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.
- The colony must complete the *Chapter Operations Assessment* just prior to the submission of the petition. A copy of the assessment and its Summary Analysis must be included in the petition.
- 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.
- The colony must receive a favorable vote from the chapters in the province, the Province President, the Survey Commission, and the General Council.
- All members of the colony must sign the *Risk Management Affidavit* acknowledging the understanding of Phi Delta Theta's Risk Management Policies.

