**Standards of Excellence (SOE) – Full Details**

SOE reflects what the chapters need to be doing to follow ZBT Policy and Procedures, provide value to their brothers, and achieve at the highest level. This document outlines the components of the fraternity experience as they relate to the C.O.R.E. Four structure (Conduct, Operations, Recruitment, Education).

The submission portals are open from September 1, 2020 through May 9, 2021 followed by an appeals window to review submissions with staff. The submission portal will tell you exactly what we are looking for the chapter to submit.

[Conduct Submission Portal](https://zetabetatau.wufoo.com/forms/r197bbe01axxxqr/)

[Operations Submission Portal](https://zetabetatau.wufoo.com/forms/r1d3xys91gfh7rv/)

[Recruitment Submission Portal](https://zetabetatau.wufoo.com/forms/r1f04des0e5u4pt/)

[Education Submission Portal](https://zetabetatau.wufoo.com/forms/r1w45inv0rqvza4/)

**Chapter Rankings:**

**Accreditation** – 23 or more out of 30 Accreditation Points

**1 star** – 25% of the star points in Conduct, Operations, Recruitment, and Education

**2 star** – 50% of the star points in Conduct, Operations, Recruitment, and Education

**3 star** – 75% of the star points in Conduct, Operations, Recruitment, and Education

***You cannot achieve a 1-Star, 2-Star, or 3-Star Chapter Ranking or win awards without being accredited.***

***Standards in red font are not being required or recorded this year due to COVID-19. Those points will be automatically awarded to each chapter.***

**If Not Accredited:**

**Year One Non-Accredited:**

* The chapter will work with staff to create a development plan to meet the minimum accreditation level.
* The chapter will receive a priority visit from staff early in the academic year to review implementation of the plan.

**Year Two Non-Accredited:**

* The development plan will be reviewed and revised as appropriate.
* The chapter will receive a priority visit from a senior staff member at the start of the academic year and its leadership and advisors will receive specific training surrounding chapter expectations.

**Year Three Non-Accredited:**

* The chapter will be audited by the Fraternity staff and may need to present a “show cause” to the Supreme Council.
* The chapter will be placed on a probationary status and must meet the minimum standards for at least one year following the audit to regain good standing.
* Visits to the chapter will remain at high priority level for up to two academic years

**Conduct**

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| *ACCREDITATION (3)* | *WHAT YOU NEED TO SUBMIT* |
| The chapter submits their Risk Reduction Protocol and Crisis Management Plan and documentation of a workshop reviewing these documents with at least 80% of the brothers. | Risk Reduction Protocol, Crisis Management Plan, workshop materials, workshop date(s), and the list of brothers in attendance. |
| Each brother completes myZBT registration, which includes acknowledgement of compliance with the Fraternity’s risk management and insurance policies. | **HQ Tracked** |
| The chapter was not found responsible for any policy violations in the academic year, either from the fraternity or the institution. | **HQ Tracked** |

**Star Points – Conduct**

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| ***STAR POINTS – CONDUCT (11)*** | ***WHAT YOU NEED TO SUBMIT*** |
| The chapter submits documentation of its sober monitor training. | Sober monitor training materials, training date(s), and list of brothers in attendance. |
| The chapter hosts a workshop on the appropriate conduct of a brother at social events. | Workshop training materials, training date(s), and list of brothers in attendance. |
| The chapter educates the brothers on the Code of Zeta Beta Tau Fraternity. | Information related to how this education was delivered, and list of brothers in attendance. |
| The chapter hosts at least one alcohol-free social event with non-ZBTs in attendance each term. | Date(s) of event, list of guests, and any photos of the event. |
| The chapter attends or hosts a hazing prevention training with a non-undergraduate facilitator/presenter where at least 80% of the brothers are in attendance. | Materials covered, training date(s), contact information of facilitator, and list of brothers in attendance. |
| The chapter attends or hosts a workshop on sexual misconduct or bystander intervention with a non-undergraduate facilitator/presenter where at least 80% of the brothers are in attendance. *Note: Up to 2 points, 1 point for an additional workshop.* | Materials covered, training date(s), contact information of facilitator, and list of brothers in attendance. If more than one occurred, submit the above for that training as well. |
| The chapter attends or hosts a workshop on health and wellness with a non-undergraduate facilitator/presenter where at least 80% of the brothers are in attendance. *Note: Up to 5 points, 1 point per each additional workshop.* | Materials covered, training date(s), contact information of facilitator, and list of brothers in attendance. If more than one occurred, submit the above for that training as well. |

**Operations**

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| ***ACCREDITATION (9)*** | **WHAT YOU NEED TO SUBMIT** |
| The chapter submits a copy of their current constitution and bylaws with proof that it was reviewed that academic year. | Constitution, bylaws (should have Brotherhood Quality Standards), and meeting minutes of most recent update to these documents. |
| The chapter hosts a Semi-annual Brotherhood Review Vote (SBRV) in the fall and spring. | Materials shared with brothers regarding each member’s contribution and the SBRV Verification Form. |
| The chapter executes Zeta Beta Tau Fraternity Rituals (e.g. initiation, Big/Little and Graduation Ceremonies). | Photos of the event(s), ritual date(s) and list of brothers in attendance. |
| The chapter submits an inventory of its ritual regalia and a plan to purchase the missing/damaged items. | Ritual Inventory form and date(s) items will be purchased. |
| The chapter achieves a GPA of at least 2.70 in all academic terms. | GPAs of all brothers and the chapter GPA for each academic term. |
| 100% of brothers are involved in a registered student organization outside of Zeta Beta Tau or holds a job or volunteer position on/off campus. | Chapter roster with the name of the organization the brother is affiliated with. |
| The chapter submits verification of its tax-exempt status. | Copy of the email or receipt of tax-exempt status (Form 990) for the submission year. |
| The chapter is at a zero balance as of the Standards of Excellence deadline. | **HQ TRACKED** |
| The chapter meets the attendance expectation for all Fraternity-required programs (International Convention and Regional Officer Institutes). | **HQ TRACKED** |
| The chapter fully utilizes the Fraternity’s director-based officer structure as reflected in officer contacts in Vault, and the chapter has an individual listed for all 8 executive officer positions and the following positions: Standards Director, Provost, Academic Chairman, Alumni Chairman, Heritage Chairman, Community Service Chairman, and Philanthropy Chairman. | **HQ TRACKED** |

**Star Points – Operations**

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| ***STAR POINTS – ATTENDANCE (5)*** | **WHAT YOU NEED TO SUBMIT** |
| The chapter attends at least one Fraternity-organized program Recruitment University; Emerging Leaders Institute; James E. Greer, Jr. Presidents Leadership Academy and I-Connect). *Note: An additional 4 points available per program attended by the chapter.* | **HQ TRACKED** |

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| ***STAR POINTS – INTERNAL OPERATIONS (4)*** | **WHAT YOU NEED TO SUBMIT** |
| The chapter has a functioning committee structure with each brother on at least one committee or board (e.g. standards, academic, brotherhood, recruitment, alumni/family, heritage, philanthropy, service, apparel, social). | Each committee and the list of brothers on it. *Note: Each Director and Chairman are already a member of their respective committee.* |
| The chapter submits its overall calendar. | Full academic year programming calendar. |
| The chapter submits its Standards Board processes and documentation of their monthly meetings. | Standards Board policies, Standards Board processes, and minutes of their monthly meetings. |
| The chapter submits their officer transition program. | Content covered, who lead, who was present, and date(s). |

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| ***STAR POINTS – RITUAL (2)*** | **WHAT YOU NEED TO SUBMIT** |
| The chapter holds the Officer Installation Ceremony for each new executive board. | Photos of event and date(s) occurred. |
| The chapter holds a dress rehearsal for the Initiation Ritual. | Date(s) occurred and list of brothers in attendance. |
| The chapter reviews the Initiation Ritual with each new brother class. | Content covered, date(s) occurred and list of brothers in attendance. |

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| ***STAR POINTS – ACADEMIC (4)*** | **WHAT YOU NEED TO SUBMIT** |
| The chapter has an academic improvement plan for brothers under a 2.7 cumulative GPA. | The improvement plan for the submission year. |
| The chapter has a study program that applies to all brothers. | The outline of the program. |
| The chapter GPA is above the all-men’s average. | GPA information list from the fraternity and sorority office. |
| The chapter GPA ranks in the top 25% among the men’s fraternities in the council in which the chapter is affiliated. | GPA information list from the fraternity and sorority office. |

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| ***STAR POINTS – ALUMNI/FAMILY ENGAGEMENT (5)*** | **WHAT YOU NEED TO SUBMIT** |
| The chapter engages alumni through at least two newsletters or events per academic year. *Note: An additional point available for sending a third newsletter per academic year.* | The newsletter and date sent. If you had an event, submit the date the event took place, the event invitation, and the event agenda. |
| The chapter engages families through at least two newsletters or events per academic year. *Note: An additional point available for sending a third newsletter per academic year.* | The newsletter and date sent. If you had an event, submit the date the event took place, the event invitation, and the event agenda. |
| The chapter invited alumni (non-advisors) to chapter meetings and/or events (e.g. chapter meetings, chapter homecoming events, ritual). | The invitation, the list of attendees, and date(s). |

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| ***STAR POINTS – CAMPUS EXPERIENCE (7)*** | **WHAT YOU NEED TO SUBMIT** |
| The chapter has at least one officer on the executive board of their respective governing council. | Who is serving as an officer and what their position is. *Note: IFC delegate does not count.* |
| The chapter has representation on their respective governing council’s committees. | Who is serving on the committee, what committee, and what is their role. *Note: IFC delegate does not count unless he is serving on a specific committee.* |
| The chapter sponsors or co-sponsors a campus-wide event other than philanthropy. *Note: An additional 2 points available per additional events sponsored throughout the year.* | What was the event, the date(s) of the event, and content covered. *Note: Sponsoring or co-sponsoring is specific to providing funds, products or services.* |
| The chapter hosts a campus-wide event other than philanthropy. | What was the event, the date(s) of the event, and content covered. *Note: Hosting means development of an idea with the chapter managing logistics and marketing of the event.* |
| At least one brother holds a leadership role in another RSO or event. *Note: up to 5 points, 1 point for every additional brother in a leadership role.* | The brothers name, organization they are serving, and what is their position. |
| At least one brother receives local recognition for his involvement on campus. | Name of the brother and description of the recognition. *Note: Recognition would be receiving an award or an honor.* |
| The chapter receives local recognition for involvement on campus. | Why was the chapter recognized and who recognized them. *Note: Recognition would be receiving an award or an honor.* |
| The chapter submits their score/review for any campus-based accreditation program OR the chapter submits a letter of review from the campus fraternity/sorority advisor, including indication that the chapter is in good standing with the institution. | The accreditation score OR the letter of review from the fraternity/sorority advisor. *Note: This cannot be the ZBT chapter advisor, and if your chapter is not recognized by the campus, ZBT HQ will evaluate your standing.* |

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| ***STAR POINTS – FINANCE (5)*** | **WHAT YOU NEED TO SUBMIT** |
| The chapter submits their dues collection plan. | Policies or plan of collecting both local and international dues. |
| The chapter appropriately uses collections for brothers who are delinquent on their dues. | Proof of collections use. *Note: If not used and in good financial standing, the chapter will receive this point.* |
| The chapter contributes at least 3% of its annual budget to savings. | Documentation of the 3% saved. |
| The chapter contributes at least 5% of its annual budget to savings. | Documentation of the 5% saved. |
| The chapter conducted a financial review (e.g. by an advisor) within the last year. | Date(s) performed and who performed them. *Note: If you do not have an advisor, speak with ZBT’s Chief Financial Officer.* |

**Recruitment**

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| ***ACCREDITATION (5)*** | **WHAT YOU NEED TO SUBMIT** |
| The chapter hosts at least one recruitment workshop each term (e.g. conversations, ideal ZBT, logistics, standards for bidding). | Content covered, date(s), and list of brothers who were in attendance. |
| The chapter submits documentation of the information provided to Potential New Brothers regarding time commitments, financial and academic requirements, as well as expectations during the recruitment period. | Content given to Potential New Brothers. |
| The chapter recruits and retains at least the minimum number of men as set by the International Headquarters. | **HQ TRACKED** |
| The chapter reports its recruitment dates prior to the start of recruitment to their staff liaison and reports its new initiates in Vault within 72 hours of initiation. | **HQ TRACKED** |
| The chapter meets its annual recruitment projection as determined by Headquarters staff. | **HQ TRACKED** |

**Star Points – Recruitment**

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| ***STAR POINTS – RECRUITMENT (9)*** | **WHAT YOU NEED TO SUBMIT** |
| The chapter is among the top 25% on campus in terms of total new initiates throughout the academic year. | Report detailing average size of other fraternities within their governing council. *Note: If this information is not typically shared, request information from your fraternity and sorority advisor.* |
| The chapter is at equal to or higher than the median campus chapter size. | Community report detailing average size of other fraternities within their governing council. *Note: If this information is not typically shared, request information from your fraternity and sorority advisor.* |
| The chapter has social media accounts to promote their events (Instagram, Facebook, Twitter, etc.). | Submit the chapter’s social media handles. |
| The chapter actively promotes Zeta Beta Tau Fraternity through virtual and physical marketing, branding, and outreach. | Documentation of social media posts, tabling events intended to promote ZBT, letter days, or any other applicable outreach materials. |
| The chapter executes Year-Round Recruitment. | Materials related to recruitment meeting schedules, events, recruitment referrals (alumni, community groups, local high schools), ongoing committee roles, ongoing chapter roles, or other applicable materials. |
| The chapter has recruited within 10% of their recruitment goal set by HQ. | **HQ TRACKED** |
| The chapter has exceeded their recruitment goal set by HQ. | **HQ TRACKED** |
| The chapter retains at least 85% of its new brothers through the 30-day disaffiliation period. | **HQ TRACKED** |
| The chapter retains at least 90% of brothers from the previous year, excluding graduates. | **HQ TRACKED** |

**Education**

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| ***ACCREDITATION (10)*** | **WHAT YOU NEED TO SUBMIT** |
| The chapter holds a Pre-Initiation meeting in accordance with the Gold Book. | Information covered, date(s) of meeting(s), and who was in attendance. |
| Brotherhood Orientation | Content covered, who lead the program, date(s) of orientation, and time(s) of orientation. *Note: Deviations from the orientations outline in THE JOURNEY, needs to be approved by the chapter’s HQ staff liaison.* |
| Big Brother Mentoring Program | Application used, Big Brother training (dates, times, and content), and a copy of the expectations agreement. |
| Brotherhood Bonding Activities | What were the events, what were the dates of the events, list of brothers who attended the events, and any photos of the events. |
| Brotherhood Retreat | Content shared, date(s) of retreat, and list of brothers who attended. Photos can be a bonus of proof of the event. |
| Milestone Workshop & Core and Elective Experiences | Core and Elective Experiences tracking document, and the date(s) the workshop took place. |
| Educational Programs | Name of programs, who presented/facilitated (presenter/facilitator should have professional experience on the topic), date(s) of the programs, and list of brothers who attended. |
| Senior and Alumni Panels | Panelists, date(s), and list of brothers who attended. |
| The chapter hosts or co-hosts at least one program dedicated to exploring ZBT’s heritage. | Event topic, what was covered, date(s) of the event, and list of brothers who attended. |
| The chapter averages at least 20 hours of community service per brother for the academic year. | Roster of brothers listing their hours of community service performed and with which organization they did community service hours. |
| The chapter hosts one chapter-wide community service event, in an academic year, in which 80% of the brothers attend. | What was the event, who was the event supporting, date(s) of the event, and list of brothers who attended. |
| The chapter demonstrates financial support of the fraternity’s official philanthropic partners: Children’s Miracle Network Hospitals, Jewish Women International, and the Zeta Beta Tau Foundation. | Documentation showing that the chapter has financially supported the fraternity’s official philanthropic partners. |

**Star Points – Education**

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| ***STAR POINTS – HERITAGE (10)*** | **WHAT YOU NEED TO SUBMIT** |
| The chapter holds the Holocaust Remembrance Ceremony. | Photos of the event. *Note: We recommend this is done in conjunction with educational programming on the historical incident.* |
| The chapter hosts a Founders Day or Roger Williams Day event. | Event agenda, date of the event, and photos of the event. |
| The chapter demonstrates an active partnership and relationship with Hillel, Chabad or another Jewish community partner. | Documentation of the partnership through events such as service, Shabbat, or any other applicable documentation. *Note: This must be an ongoing partnership.* |
| The chapter hosts events and/or educational programs connected to a Jewish holiday. *Note: up to 4 points, 1 additional point per event.* | Documentation of content covered or presented, date(s) of event, who presented it, and list of brothers who attended. |
| The chapter hosts an Israel advocacy, education or celebration event. | Documentation of content/celebration OR documentation regarding the event with photos of the event. List of brothers attended, and date of event is needed for all options. |
| The chapter applies for a Heritage Grant and executes the program successfully. | **HQ TRACKED** |

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| ***STAR POINTS – COMMUNITY SERVICE (0)*** | **WHAT YOU NEED TO SUBMIT** |
| The chapter promotes at least ten opportunities of community service per academic year via their calendar and chapter communication. | Documentation of communication to the chapter, and date(s) of the event. *Note: This could be through group chat, internal social media, emails, or meeting minutes.* |
| The chapter hosts a Gift of Life Bone Marrow Registry Drive. | Date(s) of the event and list of brothers in attendance. |
| The chapter creates or maintains an ongoing relationship with a local volunteer organization. | Documentation proving a relationship with a local volunteer organization. |

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| ***STAR POINTS – PHILANTHROPY (7)*** | **WHAT YOU NEED TO SUBMIT** |
| Total fundraising for the calendar year exceeds $18.00 per brother. | Proof of financial support given to a philanthropic organization like receipts. |
| Total fundraising for the calendar year exceeds $36.00 per brother. | Proof of financial support given to a philanthropic organization like receipts. |
| Total fundraising for the calendar year exceeds $72.00 per brother. | Proof of financial support given to a philanthropic organization like receipts. |
| The chapter raises at least $18 per brother for Children’s Miracle Network Hospitals. | Proof of financial support given to Children’s Miracle Network Hospitals like receipts. |
| The chapter raises at least $18 per brother for Jewish Women International. | Proof of financial support given to Jewish Women International like receipts. |
| The chapter raises at least $18 per brother for Zeta Beta Tau Foundation. | Proof of financial support given to Zeta Beta Tau Foundation like receipts. |
| The chapter raises at least $108, total, for Gift of Life Bone Marrow Registry. | Proof of financial support given to Gift of Life Bone Marrow Registry like receipts. |

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| ***STAR POINTS – EDUCATIONAL PROGRAMMING (4)*** | **WHAT YOU NEED TO SUBMIT** |
| The chapter hosts at least one Fraternity-sponsored program (Words to Action (anti-hate), Safe Smart Dating (healthy relationships and sexual violence prevention), the National Coalition Building Institute (social justice skill building) and the Alcohol Skills Training Program (alcohol and drug awareness education) OR a campus-based program that is like the aforementioned Fraternity-sponsored programs facilitated by a campus or community professional. *Note: Up to 3 points, 1 per additional programs executed.* | If it is a ZBT program, it will be **HQ Tracked.**  If it is **not** a ZBT program, submit the name of the program, who was presenting the program, what was the content shared, the date(s) of the program, and the list of brothers who were attendance to the program. |

**Standards of Excellence – Accreditation Checklist**

The items listed below are all of the accreditation points that are achievable by the chapter. If it says “HQ Tracked” and you want to make sure your chapter is on the path of achieving that point, please reach out to your HQ staff liaison. The chapter must achieve 23 out of 30 accreditation points to be accredited.

**Conduct**

\_\_\_\_The chapter submits their Risk Reduction Protocol and Crisis Management Plan with documentation of a workshop reviewing these documents with at least 80% of the brothers.

\_\_\_\_**HQ Tracked:** Each Brother completed myZBT registration.

\_\_\_\_**HQ Tracked:** The chapter was not found responsible for any policy violations in the academic year, either from the fraternity or the institution.

**Operations**

\_\_\_\_The chapter submits a copy of their current constitution and bylaws.

\_\_\_\_The chapter hosts a Semi-annual Brotherhood Review Vote (SBRV) in the fall and spring.

\_\_\_\_The chapter executes Zeta Beta Tau Fraternity Rituals.

\_\_\_\_The chapter submits an inventory of its ritual regalia and a plan to purchase the missing/damaged items.

\_\_\_\_The chapter achieves a GPA of at least 2.70 in all academic terms.

\_\_\_\_100% of brothers are involved in a registered student organization outside of Zeta Beta Tau or holds a job or volunteer position on/off campus.

\_\_\_\_The chapter is at a zero balance as of the Standards of Excellence deadline.

\_\_\_\_The chapter submits verification of its tax-exempt status.

\_\_\_\_**HQ Tracked:** The Chapter meets the attendance expectation for all Fraternity-required programs.

\_\_\_\_**HQ Tracked:** The chapter fully utilizes the Fraternity’s director-based officer structure as reflected in officer contacts in vault, and the chapter has an individual listed for all 8 executive officer positions and the following: Standards Director, Provost, Academic Chairman, Alumni Chairman, Heritage Chairman, Community Service Chairman, and Philanthropy Chairman.

**Recruitment**

\_\_\_\_The chapter recruits and retains at least the minimum number of men as set by HQ.

\_\_\_\_The chapter hosts at least one recruitment workshop each term.

\_\_\_\_The chapter submits documentation of the information provided to Potential New Brothers regarding time commitments, financial and academic requirements, as well as expectations during the recruitment period.

\_\_\_\_**HQ Tracked:** The chapter reports its recruitment dates prior to the start of recruitment, to their staff liaison, and reports its new initiates in Vault within 72 hours of initiation.

\_\_\_\_**HQ Tracked:** The chapter meets its annual recruitment projection as determined by HQ.

**Education**

\_\_\_\_The chapter holds a Pre-Initiation meeting in accordance with the Gold Book.

\_\_\_\_Holds a Brotherhood Orientation for each Initiation Class.

\_\_\_\_Fully utilizes the Big Brother Mentoring Program.

\_\_\_\_Hold Brotherhood Bonding Activities throughout each academic term.

\_\_\_\_Holds a Brotherhood Retreat twice an academic year.

\_\_\_\_Executes the Milestone Workshop & Core and Elective Experiences each academic term.

\_\_\_\_Has Educational Programming each academic term.

\_\_\_\_Holds Senior and Alumni Panels.

\_\_\_\_The chapter hosts, or co-hosts, at least one program dedicated to exploring ZBT’s heritage.

\_\_\_\_The chapter averagers at least 20 hours of community service per brother for the academic year.

\_\_\_\_The chapter hosts one chapter-wide community service event, in an academic year, in which 80% of the brothers attend.

\_\_\_\_The chapter demonstrates financial support of the fraternity’s official philanthropic partners: Children’s Miracle Network Hospitals, Jewish Women International, and the Zeta Beta Tau Foundation.