SAME PAGE CHAPTER GUIDE

A GUIDE TO HELP CHAPTER OFFICERS MEET FRATERNITY REPORTING REQUIREMENTS AND TO KEEP YOUR CHAPTER IN GOOD STANDING
A chapter in good standing is one that meets its yearly financial, administrative and Charter Reaffirmation obligations to the National Fraternity; is not more than 90 days delinquent in its financial accounts with the National Office; has maintained its 501(c)(3) not-for-profit status with the federal government and any appropriate state and local not-for-profit status; has confirmation of submission of a Spring Youth Service Day Participation Report and a National Service Week Participation Report; has at least one active member; and has not been declared inactive, suspended or had its charter revoked, or has not otherwise been deemed in violation of the policies of the National Bylaws of Alpha Phi Omega or of the rules, regulations or policies of its school.

### GOOD STANDING CHECKLIST

**ARTICLE X, SECTION 8. CHAPTERS IN GOOD STANDING**

A chapter in good standing is one that meets its yearly financial, administrative and Charter Reaffirmation obligations to the National Fraternity; is not more than 90 days delinquent in its financial accounts with the National Office; has maintained its 501(c)(3) not-for-profit status with the federal government and any appropriate state and local not-for-profit status; has confirmation of submission of a Spring Youth Service Day Participation Report and a National Service Week Participation Report; has at least one active member; and has not been declared inactive, suspended or had its charter revoked, or has not otherwise been deemed in violation of the policies of the National Bylaws of Alpha Phi Omega or of the rules, regulations or policies of its school.

<table>
<thead>
<tr>
<th>ACTIVITIES CONDUCTED</th>
<th>DATE DUE</th>
<th>RELEASE DATE ON THE OP</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLEDGES</td>
<td>Within 10 business days of the pledge ceremony</td>
<td>Available 24/7</td>
</tr>
<tr>
<td>INITIATES</td>
<td>Within 10 business days of the initiation ceremony</td>
<td>Available 24/7</td>
</tr>
<tr>
<td>CHARTER REAFFIRMATION &amp; AMD</td>
<td>Fall: Nov. 15, Spring: April 15</td>
<td>Sept. 1, Jan.</td>
</tr>
<tr>
<td>NATIONAL SERVICE WEEK</td>
<td>No later than Nov. 15</td>
<td>Sept. 1</td>
</tr>
<tr>
<td>SPRING YOUTH SERVICE DAY</td>
<td>May 1</td>
<td>Feb. 1</td>
</tr>
<tr>
<td>OUTSTANDING DEBTS</td>
<td>Nov. 15, April 15, ongoing</td>
<td>Available 24/7</td>
</tr>
<tr>
<td>CHAPTER OFFICERS LIST</td>
<td>After each election</td>
<td>Available 24/7</td>
</tr>
<tr>
<td>GRADUATING SENIORS LIST</td>
<td>June 1</td>
<td>Available 24/7</td>
</tr>
<tr>
<td>ANNUAL FINANCIAL REVIEW</td>
<td>July 31</td>
<td>Sept. 1</td>
</tr>
<tr>
<td>MAINTAIN 501(c)(3) NOT-FOR-PROFIT STATUS</td>
<td>By the 15th day of 5th month of chapter’s tax year</td>
<td>IRS website available 24/7</td>
</tr>
<tr>
<td>CHAPTER BYLAWS</td>
<td>Immediately after revision</td>
<td>Available 24/7</td>
</tr>
</tbody>
</table>

**Activities Conducted**

- **PLEDGES**: Input new pledges into the Officer Portal and pay $31 fee ($25 pledging fee and $6 insurance fee).
- **INITIATES**: Input initiates into the Officer Portal and pay $35 initiation fee.
- **CHARTER REAFFIRMATION & AMD**: Complete Fall or Spring Charter Reaffirmation Form in the Officer Portal. Pay Active Membership Dues (AMD) and insurance for each member - $20 per active member ($14.50 national, $1.50 regional, $1 sectional and $3 insurance fee).
- **NATIONAL SERVICE WEEK**: Submit the National Service Week Participation Report in the Officer Portal.
- **SPRING YOUTH SERVICE DAY**: Submit the Spring Youth Service Day Participation Report in the Officer Portal.
- **OUTSTANDING DEBTS**: Chapters are required to pay any outstanding debts to the National Office. Chapters can determine if they have any debts in the Dashboard section of the Officer Portal.
- **CHAPTER OFFICERS LIST**: Update current officer listing in the Officer Portal after officer transition.
- **GRADUATING SENIORS LIST**: Submit list of graduating seniors for fall and spring semesters in the Officer Portal.
- **ANNUAL FINANCIAL REVIEW**: Submit verification of review of previous year’s financial records if not already completed with charter reaffirmation. Form available in the Officer Portal.
- **MAINTAIN 501(c)(3) NOT-FOR-PROFIT STATUS**: Chapters not using school checking must file the 990-N epostcard once per year. Check the Chapter Dashboard in the Officer Portal to determine specific due dates.
- **CHAPTER BYLAWS**: Submit copy of revised chapter bylaws within the charter reaffirmation and upload revisions through the Officer Portal.
PLEDGES
Submit pledge classes and pay fees ($25 pledge fee and $6 insurance fee per pledge member) via the Officer Portal (OP). Payment can also be made by mailing a check to the National Office. The fee shall be nonrefundable and shall be sent no later than 10 business days after the pledging ceremony is conducted.

INITIATES
Submit initiate classes and pay fees ($35 per initiate) via the OP. Payments can also be made by mailing a check to the National Office. The fee shall be nonrefundable and shall be sent no later than 10 business days after the initiation ceremony.

CHARTER REAFFIRMATION & AMD
ARTICLE X, SECTION 6. CHARTER REAFFIRMATION
Each chapter shall biannually reaffirm its charter by November 15 and April 15 by submitting a roster of the active members, a roster of the advisory members, payment of Active Membership Dues, a copy of the current chapter bylaws, standing policies, membership policies, and other policies that are specific to the chapter’s operation and management, and certifications that the chapter is in compliance with the Membership and Risk Management Policies of the Fraternity and is in compliance with the Standard Chapter Articles of Association.

ARTICLE IX, SECTION 5. ACTIVE MEMBERSHIP DUES
Biannually by November 15 and April 15, each chapter shall submit to the National Office a roster of active members, together with the Active Membership Dues of seventeen ($17) dollars per active member regardless of Society of Life Member status. The minimum dues per chapter shall be equal to the sum of the Active Membership Dues for three (3) active members. A chapter, to remain active and in good standing, must meet the above requirements by paying all dues. Of the Active Membership Dues, each region shall receive one dollar and fifty cents ($1.50) per active brother twice per year in that region. Of the Active Membership Dues, each section shall receive one dollar ($1.00) per active brother twice per year in that section.

Submit the charter reaffirmation in the OP after updating the chapter roster. At that time, an invoice for $17 per active member will be created. This can be paid via the OP or by mailing a check to the National Office.

NATIONAL SERVICE WEEK
Submit the National Service Week Participation Report in the OP by November 15. This report must be completed whether or not the chapter completed a National Service Week project.

SPRING YOUTH SERVICE DAY
Submit the Spring Youth Service Day Participation Report in the OP by May 1. This report must be completed whether or not the chapter completed a Spring Youth Service Day project.
CHAPTER FORMS, AWARDS & RECOGNITION GUIDE

**OUTSTANDING DEBTS**
Chapters must pay all debts to the National Office. Invoices and statements can be found in the OP Dashboard.

**CHAPTER OFFICERS LIST**
Chapters must keep a current list of officers on file with the National Office. When new officers take office, a chapter officer or advisor should update the current officer listing within the OP’s Officer tab. Once this change is processed, new officers will be able to establish their OP account.

**GRADUATING SENIORS LIST**
Submit the chapter’s list of graduating seniors for the fall and spring semesters under the OP’s Members tab. This can be done at any time after the graduation date, but graduates must be reported by June 1.

**ANNUAL FINANCIAL REVIEW**

**ARTICLE X, SECTION 18. FINANCE AND PROPERTY**
Chapter officers shall, annually cause the appropriate local, state and federal income tax forms to be filed. The financial records of each chapter shall be inspected annually by an official approved by the institution in which the chapter is located, and the inspector shall be independent of the chapter’s financial accounts and records. A confirmation of the inspection will be sent to the National Office upon request by the National Executive Director.

The annual financial review must be conducted by the chapter and reported to the National Office by July 31. This can be documented on the charter reaffirmation (due on Nov. 15 and April 15) or through a separate form in the OP if the review is completed after Nov. 15 or April 15.

**990-N epostcard**
Chapters who bank outside of a school checking account must maintain their 501(c)(3) status by completing the 990-N e-postcard each year. The chapter’s specific due date may be found within the Dashboard tab in the OP. This should be submitted to the IRS by the 15th day of the fifth month of the chapter’s fiscal year. For example, if the chapter’s fiscal year is June 1-May 31, the form must be filed out after June 1, but before Oct. 15. The 990-N electronic form can be found on the IRS website.

**CHAPTER BYLAWS**
Chapters may attach a copy of their most recent bylaws during the charter reaffirmation submission (due on Nov. 15 and April 15). They may also submit a copy post changes via the Forms icon within the OP.
OPTIONAL FORMS & AWARDS

OPTIONAL ITEMS

The following forms and awards are not required to remain in good standing, but they may be helpful to chapters or deserving individuals.

ANNUAL SERVICE HOURS REPORT
Chapters may submit a summary of their service for the school year by submitting this form in the OP. This optional form is available to be completed towards the end of the school year by July 31.

JAMIE CONOVER STEWART CHAPTER GROWTH GRANT
This grant is available to fund activities to promote membership development and recruitment for extension groups and at-risk chapters. Applications can be submitted online via the Chapter Officer Portal at any time during the year. To find out if you qualify, talk to your sectional chair or email chapter.admin@apo.org.

DISTINGUISHED SERVICE KEY AWARDS (DSK) RECIPIENT
Chapter officers should report DSK recipients to the National Office by completing the notification form in the OP. Although this is not required, this allows the award to be on file with the National Office.

YOUTH SERVICE GRANT
Chapters may submit the Youth Service Grant Application to assist with funding their Spring Youth Service Day project. Applications can be found in the OP and must be submitted by Feb. 1 to qualify. If the chapter receives the grant, there is a required grant report due within two weeks of project completion or by Nov. 15, whichever comes first. This due date will be calculated based on the project date on the grant application. Projects should be scheduled between March 15 and Nov. 15. Instructions for the Youth Service Grant can be found in the OP Library or at https://apo.org/about-us/our-story/apo-awards.

JOHN MACK SCHOLARSHIP
Brothers may apply through the member’s page on www.apo.org. Applications are due by May 1.

FALL PLEDGE CLASS NAMESAKE HONOREE
Nominations are taken each year for the Fall Pledge Class Namesake Honoree. The nomination form and instructions for submission can be found on the member’s page on www.apo.org. Nominations are due by May 1.

CHAPTER ASSESSMENT & PLANNING SESSION (CAPS)
CAPS is an annual review of the chapter’s goals and plans for the coming year. There are two required CAPS forms:
- Step 1 helps identify goals by assessing the previous year.
- Step 2 is a documentation of the goals and how to achieve each one. Both forms are optional to remain in good standing and are collected on July 31 each year.

ANNUAL CHAPTER EVALUATION
Chapters can find this form on the OP. This evaluation is required as part of the H. Roe Bartle Award; however, it is not required for good standing. This is collected by Nov. 15 of each year.

H. ROE BARTLE AWARD
Chapters can find this form on the OP after completing the Annual Chapter Evaluation. Chapters do not have to qualify for the award to complete the application form, and the form is not required for good standing. This is collected by Nov. 15 of each year.
TROUBLESHOOTING GUIDE

This guide should be used in the event a chapter is missing a required item in order to remain in good standing. For further assistance, please contact the National Office.

CHARTER REAFFIRMATION
Each chapter president must submit the chapter’s charter reaffirmation. This is due by Nov. 15 and April 15 of each year. To complete this task, first log in to the Officer Portal and locate the Charter Reaffirmation - Active Membership Dues (AMD) Form using the Forms link.

1. Complete the required information, reading each item carefully and responding accurately. Upload the latest copy of the chapter’s bylaws and then click Submit Charter Reaffirmation.

2. The next page allows you to confirm and submit all active advisory members as required to remain in good standing. Please make sure the advisors listed are actively involved. Remove any that are no longer active with the chapter. Click the Next button at the bottom of the page.

3. The next page allows you to confirm all active members who were active on the roster by Aug. 1 and the end of spring (the beginning and end of the school year). Please remove any members who were not active during this date using the applicable drop-down selection under Reason for Removal, then click Submit Roster and Review Changes.

4. The final page reviews the information you just submitted and allows you to make any changes. Once the roster is accurate, click Submit AMD Roster. At this time, you can view and pay for all AMDs.

5. This task is considered complete after the charter reaffirmation is submitted by the chapter president, approved by the chapter advisory chair and AMD payment is received.

AMD PAYMENT
Each year, every chapter is required to pay its Active Membership Dues. After the chapter president completes the Charter Reaffirmation, the invoice for AMDs is created and can be viewed and paid for on the Officer Portal. NOTE: AMD payment will not be accepted until the chapter president has submitted the charter reaffirmation. This ensures the roster and payment are accurate.

1. The chapter president or treasurer must log into the OP at https://op.apo.org and click on the Dashboard link.

2. To view the invoice, click Click Here to Download the Chapter’s Open Invoices. An Adobe PDF of all open invoices will be created and can be saved or printed for chapter records.

3. Payments can be made on the OP using the Dashboard link, over the phone by calling the National Office or by mailing a check to the office. AMD payments are due by Nov. 15 and April 15.

ANNUAL FINANCIAL REVIEW
Chapters must perform a financial review once per year. The review must be completed for the chapter to remain in good standing and reduce financial risk. If the current school year’s review is performed prior to submission of the charter reaffirmation, it can be reported there. If the review is performed after submission of the charter reaffirmation:

1. The chapter president or treasurer should log into the Officer Portal at https://op.apo.org and navigate to the Forms icon.

2. Locate the Financial Review Form, complete the required information and submit the form.
TROUBLESHOOTING GUIDE

NATIONAL SERVICE WEEK OR SPRING YOUTH SERVICE DAY PARTICIPATION REPORT
Each year, chapters must complete a report for both National Service Week and Spring Youth Service Day, regardless of participation. NSW is due by Nov. 15 and SYSD is due by May 1. The chapter president or service vice president should complete the form on the OP.

1. The chapter president or service vice president must log into the OP at https://op.apo.org and click on the Forms link.
2. Locate the applicable form. Please note, as this is required, forms from previous years will still remain and will need to be completed even if they are late.
3. Select the answer that best describes the chapter’s participation: Yes if a project was completed, No if it was not. Submit the form.
4. If Yes is selected, a more detailed form will then be available in the Forms section where the chapter needs to provide more information about the project: what it was, who benefited and if money was raised.
5. If No was selected, the chapter has fulfilled the reporting requirement.

YOUTH SERVICE GRANT REPORT
Chapters that receive a Youth Service Grant must report on the project within two weeks of the project or by Nov. 15, whichever is sooner. The chapter president or service vice president must complete this form.

1. The chapter president or service vice president must log into the OP at https://op.apo.org and click on the Forms link.
2. Locate the Youth Service Grant Report Form.
3. Complete the required information. This includes pictures from the event, receipts and data on all attendees.
4. Submit the form. Any unused funds must be returned to the National Office promptly after submitting the form.

IRS REVOCATION
A chapter’s nonprofit status will be revoked by the IRS due to failure to file their 990N, 990EZ, or 990 for three consecutive years. Failure to maintain nonprofit status puts the chapter at risk and requires immediate attention. After revocation, Form 1023 will be mailed from the National Office. It is important to complete and submit this form to resolve the situation.

1. If the chapter has not yet filled out the Form 1023 and has questions, please contact the National Office for assistance.
2. If the chapter has filed but has not yet been reinstated, please email a copy of the letter from the IRS you receive stating that the form has been received to accounting.admin@apo.org.
3. If the chapter has been reinstated, email a copy of the letter from the IRS stating that it has been reinstated to accounting.admin@apo.org. A member of the National Office finance team will attach the letter to the chapter’s file and change the chapter’s status back to good standing.
REQUIRED ADVISORS
According to the National Bylaws, each chapter shall have an advisory committee consisting of four or more advisors including, at a minimum, two advisors from the faculty, administration, or staff, one advisor representing Scouting or other youth services and one advisor from the community. One of the advisors shall be elected by the chapter as the chair of the advisory committee and shall serve on the chapter’s executive committee. Officers should keep the advisory listing up to date and accurate to facilitate communication with the Fraternity.

Officers needing to update the advisory listing should log into the Officer Portal at https://op.apo.org and follow the instructions below pertaining to the needed action. If a chapter would like assistance in locating a new advisor, they should contact the National Office and speak with the Director of Member Engagement.

TO ADD AN ADVISOR WHO IS AN APO MEMBER AND/OR TO REMOVE AN INACTIVE ADVISOR:

1. Go to the Officers tab and click the Edit button to the far right of the advisory position needing to be updated.
2. If a replacement advisor has not yet been located, select Remove this Person from Office, but No Replacement at this Time. This will install a temporary officer placeholder while the chapter searches for a new advisor. It’s very important to install this placeholder if needed so that the National Office staff is aware that the chapter is currently in need of a new advisor and can help.
3. To replace the advisor and select a new one, select the first option and search for the new officer. The required information (first name, last name, city of residence) is based on the information currently in our database, so you may have to check with the new advisor to verify that what the Fraternity’s system has listed is correct.
4. NOTE: Only current members of APO can be added using this method. To add an advisor who is new to APO, follow the instructions below.

TO ADD AN ADVISOR WHO IS NEW TO APO AND REMOVE AN INACTIVE ADVISOR:

1. Go to the Forms tab and locate the form titled Chapter Advisor Form for NEW APO MEMBERS ONLY.
2. Complete all required information. If this new advisor is replacing an advisor currently in office, please indicate this on the form.
3. Submit the form. Advisors will be added into the system by the National Office staff soon after submission.

PAST DUE INVOICES
Chapters are required to fulfill all financial obligations to the Fraternity by paying invoices promptly.

1. The chapter president or treasurer must log into the OP at https://op.apo.org and click on the Dashboard link.
2. To view invoices, click Click Here to Download the Chapter’s Open Invoices. An Adobe PDF of all open invoices will be created and can be saved or printed for chapter records.
3. Payments can be made on the OP using the Dashboard link, over the phone by calling the National Office or by mailing a check to the office.
These awards for outstanding chapters are available for any chapter in good standing. Applications can be found in the OP, and are due by July 31. All requirements for these awards must be completed prior to submitting the applications for each. Use the checklists on the following pages to determine the criteria for each award. Guides and tutorials for Officer Portal activities can be found under the Library tab in the Officer Portal.

The purpose of the Chapter of Excellence (COE) and Pledge Program of Excellence (PPOE) awards is to recognize chapters whose programs of Leadership, Friendship and Service promote growth, retention and stability for the active chapter, while providing a positive, inviting and educational environment for prospective and new members. These awards are also designed to promote better communication between the chapter, sectional, regional and national leadership through regular and timely reporting of chapter activities.

Each award has three levels of achievement (BLUE, GOLD and DIAMOND) which have a corresponding number of requirements that must be met in order to achieve each level of excellence.

In each award, there are a certain number of required and optional elements that every chapter must meet in order to qualify for a given level of excellence. The purpose of the specific categories in the COE is to ensure that a chapter has a well-rounded program that includes not only the required (mostly reporting) elements, but also good chapter programs in the areas of development and service. The purpose of the required elements in the PPOE is to ensure chapter compliance and familiarity with the National Pledging Standards.

The requirements for each award must be completed during the annual reporting period of August 1 through July 31, which corresponds to the Fraternity’s fiscal year. A chapter may only achieve one level of excellence in each award per year (the highest level based on the number of requirements completed), but may qualify for both awards in the same fiscal year.

COE and PPOE recipients will be recognized at the National Convention in odd-numbered years and at regional conferences in even-numbered years.

Requirements need to be signed off on by the sectional chair, regional chair or other designated alumni volunteer. The chapter president should be in contact regularly with the sectional chair and regional chair (and their alumni volunteers) to monitor the progress of the chapter during the reporting period of August 1 through July 31 each year.

All chapters in good standing are eligible to apply for these awards. See the Chapter Good Standing Checklist on page two for the definition of “good standing.”

These programs have been created and will be administered by the Membership & Extension Committee in partnership with the Board of Directors and sectional chairs.
# CHAPTER OF EXCELLENCE AWARD (COE)

## LEVELS OF EXCELLENCE

### BLUE LEVEL
Must complete all nine (9) numbered items in Required category, plus an additional three (3) items, one from each of the other three categories (Development, Reporting, Service).

### GOLD LEVEL
Must complete all nine (9) numbered items in Required category, plus an additional six (6) items, two from each of the other categories (Development, Reporting, Service).

### DIAMOND LEVEL
Must complete all nine (9) numbered items in the Required category, plus an additional nine (9) items, three from each of the other categories (Development, Reporting, Service).

## CATEGORY | ACTIVITIES CONDUCTED
---|---
**Each numbered item represents one of four categories:** Required, Development, Reporting, Service

### 1. SUBMIT REQUIRED PAPERWORK
- Charter Reaffirmation Form
- Active Membership Dues (AMD) of $17 total per semester per active member

**DATE DUE:** November 15, April 15

### 2. COMPLETE ANNUAL SERVICE PROJECTS & SUBMIT REPORTS
- Conducted a service project in conjunction with National Service Week AND
- Conducted a service project in conjunction with Spring Youth Service Day

**DATE DUE:** November 15, May 1

### 3. SUBMIT PLEDGE & INITIATE ROSTERS AND FEES
- Submit pledge rosters and fee of $31 per pledge ($25 pledge fee, $6 insurance fee)
- Submit initiate roster and fee of $35 per initiate

**DATE DUE:** Submitted within 10 business days of respective ceremonies

### 4. CONDUCT OFFICER TRANSITION
- Held an orientation/training session for all chapter officers and advisors

**DATE DUE:** After each election, July 31

### 5. ALUMNI
- Hosted a chapter alumni event OR
- Published an alumni newsletter

**DATE DUE:** July 31

### 6. ATTEND OR HOST CONFERENCES
Hosted or attended (by at least one active voting delegate):
- Annual sectional conference AND
- Regional conference or National Convention

**DATE DUE:** Contact regional/sectional chairs for dates

### 7. CONDUCT CAPS & SUBMIT FORMS
- Conduct a Chapter Assessment and Planning Session
- Submit all relevant forms in the Officer Portal

**DATE DUE:** July 31

### 8. SUBMIT ANNUAL CHAPTER EVALUATION & H. ROE BARTLE AWARD
- Complete evaluation and award application forms in the Officer Portal

**DATE DUE:** November 15

### 9. ANNUAL FINANCIAL REVIEW
- Verified review of chapter’s previous year’s financial records (may be done with charter reaffirmation)
- Fill out 990-N, if applicable (see guide above)

**DATE DUE:** July 31

### 10. ATTEND OR HOST LEADERSHIP DEVELOPMENT ACTIVITIES
- Attend or host at least two leadership development events or activities, at least one of which must be Fraternity-affiliated (such as APO Leads course)

**DATE DUE:** July 31
<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>ACTIVITIES CONDUCTED</th>
<th>DATE DUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEV</td>
<td><strong>11. MANAGE MEMBERSHIP RETENTION</strong>&lt;br&gt;• Perform a survey at start of each semester to determine needs of chapter OR&lt;br&gt;• Develop a plan of action to achieve retention and recruitment goals established during CAPS OR&lt;br&gt;• Achieve membership retention rate of at least 75 percent for the year</td>
<td>JULY 31</td>
</tr>
<tr>
<td>DEV</td>
<td><strong>12. MANAGE PLEDGE PROGRAM</strong>&lt;br&gt;• Conduct a pledge program in which pledges are educated fraternity history and functions AND&lt;br&gt;• Conduct a pledge-planned project where both actives and pledges participate</td>
<td>JULY 31</td>
</tr>
<tr>
<td>DEV</td>
<td><strong>13. MANAGE INTERCHAPTER RELATIONS (FRIENDSHIP)</strong>&lt;br&gt;• Attend at least one fellowship activity with another chapter, not including sectional, regional or national events</td>
<td>JULY 31</td>
</tr>
<tr>
<td>REP</td>
<td><strong>14. MANAGE COMMUNITY PUBLICITY</strong>&lt;br&gt;• Maintain a chapter website, Facebook, Twitter or Instagram OR&lt;br&gt;• Obtain local media coverage about a chapter service project or activity (notified sectional chair about local media coverage)</td>
<td>JULY 31</td>
</tr>
<tr>
<td>REP</td>
<td><strong>15. MANAGE FRATERNAL PUBLICITY</strong>&lt;br&gt;• Submit an article or photo for the Torch &amp; Trefoil OR&lt;br&gt;• Submit an article or photo to national, regional or sectional website</td>
<td>JULY 31</td>
</tr>
<tr>
<td>REP</td>
<td><strong>16. MAINTAIN CHAPTER OFFICER LIST</strong>&lt;br&gt;• Update officers in the Officer Portal after each officer transition</td>
<td>UPDATED WITHIN 10 DAYS OF TAKING OFFICE</td>
</tr>
<tr>
<td>REP</td>
<td><strong>17. SUBMIT LIST OF GRADUATING SENIORS</strong>&lt;br&gt;• Submit a list of graduating seniors in the Officer Portal</td>
<td>JUNE 1</td>
</tr>
<tr>
<td>SERV</td>
<td><strong>18. SUBMIT A YOUTH SERVICE GRANT APPLICATION</strong>&lt;br&gt;• Submit a Youth Service Grant Application for a pre-college-age-based service project.</td>
<td>FEBRUARY 1</td>
</tr>
<tr>
<td>SERV</td>
<td><strong>19. SUBMIT A LETTER OF RECOMMENDATION FROM CHAPTER ADVISORY CHAIR</strong>&lt;br&gt;• Submit a letter from the chair outlining the chapter’s service on campus during the year (submit letter to sectional chair for review)</td>
<td>JULY 31</td>
</tr>
<tr>
<td>SERV</td>
<td><strong>20. ENGAGE ALPHA PHI OMEGA’S NATIONAL PARTNERS</strong>&lt;br&gt;Engage in a project or program with one of the following:&lt;br&gt;• America’s Promise&lt;br&gt;• Boy Scouts of America&lt;br&gt;• Campfire USA&lt;br&gt;• Girl Scouts of the United States of America&lt;br&gt;• President’s Student Service Awards&lt;br&gt;• Relay for Life&lt;br&gt;• Special Olympics&lt;br&gt;• USA FreedomCorps&lt;br&gt;• Youth Service America</td>
<td>JULY 31</td>
</tr>
<tr>
<td>SERV</td>
<td><strong>21. FOUR FIELDS OF SERVICE</strong>&lt;br&gt;Conduct at least four projects in each of the following fields of service:&lt;br&gt;• Fraternity&lt;br&gt;• College&lt;br&gt;• Community&lt;br&gt;• Nation</td>
<td>JULY 31</td>
</tr>
</tbody>
</table>

Chapters must meet all of the deadlines in requirements 1-9 to qualify for each level. Please submit all documentation to your sectional chair for verification and approval prior to the July 31 deadline. Documents not submitted via the Officer Portal (when applicable) will not be accepted.
PLEDGE PROGRAM OF EXCELLENCE (PPOE)

LEVELS OF EXCELLENCE

BLUE LEVEL
Must complete all 12 numbered items in Required category, plus an additional two (2) items from the Optional category.

GOLD LEVEL
Must complete all 12 numbered items in Required category, plus an additional four (4) items from the Optional category.

DIAMOND LEVEL
Must complete all 12 numbered items in Required category, plus an additional six (6) items from the Optional category.

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>ACTIVITIES CONDUCTED</th>
<th>DATE DUE</th>
</tr>
</thead>
</table>
| **REQ** 1. SUBMIT PLEDGE & INITIATE ROSTERS & FEES | • Submit pledge rosters and fee of $31 per pledge ($25 pledge fee, $6 insurance fee)  
• Submit initiate roster and fee of $35 per initiate | SUBMITTED WITHIN 10 BUSINESS DAYS OF RESPECTIVE CEREMONIES |
| **REQ** 2. INSTRUCT PLEDGES ON APO HERITAGE       | Pledges are educated on...  
• Purpose of Alpha Phi Omega  
• National history (bylaws; Articles of Association; national, regional and sectional officers)  
• Chapter history (bylaws, officers, advisors, key campus officials)  
• Leadership, Friendship and Service | JULY 31                                                                 |
| **REQ** 3. MANAGE A BIG BROTHER PROGRAM           | • Big Brother/Little Brother Program or other mentoring program AND  
• Develop requirements for the Big Brother/mentor to fulfill, including attending pledge meetings and activities | JULY 31                                                                 |
| **REQ** 4. DEVELOP LEADERSHIP AMONG PLEDGES       | • Elect pledge officers OR  
• Pledge participation in chapter planning functions AND pledge participation in at least one leadership development experience | JULY 31                                                                 |
| **REQ** 5. PERFORM RITUALS & WEAR INSIGNIA        | • Perform Pledge Ritual for pledges AND  
• Perform Initiation Ritual for new members AND  
• Encourage pledges to wear the official pledge pin at all appropriate times | JULY 31                                                                 |
| **REQ** 6. MAINTAIN PLEDGE PROGRAM LENGTH         | • Pledge period should last between six and 10 weeks (unless otherwise specified by the school policy) | JULY 31                                                                 |
| **REQ** 7. MANAGE PLEDGE SERVICE REQUIREMENTS     | • Pledge service requirements are to be equal to that of active members AND  
• Complete a pledge-planned service project under the leadership of the pledge class | JULY 31                                                                 |
| **REQ** 8. EVALUATE/REVIEW THE PLEDGE PROGRAM     | • At least one opportunity at the conclusion of the pledge program for constructive evaluation of the program (could be done during CAPS) | JULY 31                                                                 |
The award is given annually based on the chapter meeting these requirements for each pledge class within that school year. Each numbered item falls into one of two categories: Required and Optional.

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>ACTIVITIES CONDUCTED</th>
<th>DATE DUE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REQ</strong></td>
<td><strong>9. PLEDGES ATTEND CHAPTER MEETING</strong>&lt;br&gt;• Pledges must attend one or more (enough to allow pledges the direct observation of the decision-making process) active chapter meetings</td>
<td>JULY 31</td>
</tr>
<tr>
<td><strong>REQ</strong></td>
<td><strong>10. MANAGE PLEDGE REQUIREMENTS</strong>&lt;br&gt;• Develop pledge requirements in advance of each pledge period AND&lt;br&gt;• Write and provide pledge requirements to each interested individual at informational meetings</td>
<td>JULY 31</td>
</tr>
<tr>
<td><strong>REQ</strong></td>
<td><strong>11. PROMOTE FRIENDSHIP &amp; INTERCHAPTER RELATIONS</strong>&lt;br&gt;• Pledge participation in at least one chapter fellowship event AND&lt;br&gt;• At least 10 percent of pledges participate in interchapter relations such as conferences, interchapter APO LEADS courses, visiting another chapter or similar activities</td>
<td>JULY 31</td>
</tr>
<tr>
<td><strong>_REQ</strong></td>
<td><strong>12. MAINTAIN PLEDGE RECORDS</strong>&lt;br&gt;• Each pledge maintains a permanent record which documents successful completion of the pledge program requirements</td>
<td>JULY 31</td>
</tr>
<tr>
<td><strong>OPT</strong></td>
<td><strong>13. COMPLETE PLEDGE-PLANNED EVENTS</strong>&lt;br&gt;• Complete pledge-planned fundraising project OR&lt;br&gt;• Complete pledge-planned fellowship event</td>
<td>JULY 31</td>
</tr>
<tr>
<td><strong>OPT</strong></td>
<td><strong>14. MAINTAIN A PLEDGE TRAINER/EDUCATOR HANDBOOK</strong>&lt;br&gt;• Pledge trainer/educator creates (or updates already existing) supplemental handbook for future pledge trainers/educators that is passed on to the successor</td>
<td>JULY 31</td>
</tr>
<tr>
<td><strong>OPT</strong></td>
<td><strong>15. MAINTAIN PLEDGE RETENTION</strong>&lt;br&gt;• At least 85 percent of pledges become active members</td>
<td>JULY 31</td>
</tr>
<tr>
<td><strong>OPT</strong></td>
<td><strong>16. PERFORM SERVICE</strong>&lt;br&gt;Pledges are required to perform at least one hour of service and/or one project in each of the four fields of service: Fraternity, Community, College, Nation</td>
<td>JULY 31</td>
</tr>
<tr>
<td><strong>OPT</strong></td>
<td><strong>17. PLEDGE HANDBOOK</strong>&lt;br&gt;• Chapter or pledge trainer/educator shall develop a pledge handbook to supplement the National Pledge Book to assist pledges in their APO education</td>
<td>JULY 31</td>
</tr>
<tr>
<td><strong>OPT</strong></td>
<td><strong>18. MAINTAIN PLEDGE CLASS DIVERSITY</strong>&lt;br&gt;• Diversity of pledge class is consistent with that of the university OR&lt;br&gt;• Actively recruit and work towards obtaining a diverse pledge class consistent with that of the university</td>
<td>JULY 31</td>
</tr>
<tr>
<td><strong>OPT</strong></td>
<td><strong>19. MANAGE RECRUITMENT PROGRAM</strong>&lt;br&gt;• Recruitment period includes at least two meetings at different times and days AND&lt;br&gt;• A service project AND a fellowship event</td>
<td>JULY 31</td>
</tr>
<tr>
<td><strong>OPT</strong></td>
<td><strong>20. PUBLICIZE RECRUITMENT</strong>&lt;br&gt;• Chapter uses at least four different methods for publicizing recruitment to the campus/community</td>
<td>JULY 31</td>
</tr>
</tbody>
</table>

Chapters must meet all of the deadlines in requirements 1-12 to qualify for each level. Please submit all documentation to your sectional chair for verification and approval prior to the July 31 deadline. Documents not submitted via the Officer Portal (when applicable) will not be accepted.
NATIONAL OFFICE STAFF

NATIONAL EXECUTIVE DIRECTOR
Executive.Director@apo.org, (816)373-8667, ext. 11
Works with the Board of Directors to implement the strategic direction of the Fraternity while supporting the National Office with a wide range of matters relating to National Convention, vendors and partnerships. Oversees the Fraternity publications, affinity programs and all matters pertaining to risk management and spirit & standards.

DEPUTY EXECUTIVE DIRECTOR
Deputy.Director@apo.org, (816)373-8667, ext. 13
Provides support to the National Executive Director, helps to streamline and advance Fraternity operations while developing new initiatives that touch chapters, students and alumni. Oversees all services to chapters handled through the National Office including educational programs, online learning, programs that support chapter operations and liaisons to national program committees.

ACCOUNTANT
Accountant@apo.org, (816)373-8667, ext. 12
Provides financial support relating to the Alpha Phi Omega Endowment and the Fraternity. Manages all areas of the finance department and oversees the national budgets.

ACCOUNTING ASSISTANT
Accounting.Admin@apo.org, (816)373-8667, ext. 21
Assists with finances, chapter membership payments, chapter suspense and credit card processing.

DIRECTOR OF CHAPTER SERVICES
Chapter.Services.Dir@apo.org (816)373-8667, ext. 19
Oversees all programs that support and assist chapters, and handles the scheduling and daily management of the Chapter Development Coordinator.

CHAPTER DEVELOPMENT COORDINATOR
Chapter_Services@apo.org
Serves as a liaison between chapters and the National Fraternity. Monitors membership trends to apply solutions that support membership growth. Enhances chapter operations and development in areas like recruitment and retention strategies, leadership transitions, service and brotherhood program development and organizational practices.

CHAPTER SERVICES ADMINISTRATOR
OPSsupport@apo.org, (816)373-8667, ext. 25
Supports all chapter services handled through the National Office including charter reaffirmations and AMDs, reporting, chapter awards and extension support. Helps with providing member support for the National Volunteer Conference and National Convention within the National Office. Manages chapter and extension group reporting through the Officer Portal for database management and membership credentialing for pledges and initiates (actives), honorary members, advisory members and life members.
NATIONAL OFFICE STAFF

MARKETING AND COMMUNICATIONS MANAGER
Director.Communications@apo.org, (816)373-8667, ext. 20
Responsible for managing and developing all national public relations, graphic standards and social media aspects for the Fraternity. Implements branding and trademark maintenance. Writes and delivers press releases, the Torch & Trefoil, Tribute to Alpha Phi Omega Supporters, Torch Topics enewsletter and Officer Letter enewsletter.

MEETINGS AND REGISTRATIONS COORDINATOR
Registration@apo.org, (816)373-8667, ext. 18
Manages, schedules and tracks participant registrations and presenters for APO LEADS courses. Coordinates member registrations for National Convention, National Volunteer Conference and small meetings such as APO IMPACT, Membership Academy/University and Sectional Chair Academy. Provides member support for coordinating regional and sectional conferences.

DIRECTOR OF MEMBER ENGAGEMENT
Member.Engagement@apo.org, (816)373-8667, ext. 33
Measures and increases membership engagement to support strategic direction of the Fraternity. Connects and interacts with members as they transition between membership stages for further member development and engagement. Works with staff to coordinates messaging to members and serves as a resource for providing member support within the Fraternity.

STORE & MAIL CLERK
Supplies@apo.org, (816)373-8667, ext. 16
Completes all order requests for merchandise, supplies and workshop materials handled through the National Office. Manages outgoing shipments and tracking information.