ZETA PSI FRATERNITY

CHAPTER GUIDE 2025

INSIDE:

HOW TO RUN A SUCCESSFUL CHAPTER IN 2025

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OVERVIEW

WELCOME TO THE 2025 CHAPTER GUIDE

This information is both a reference and a resource, designed to help your chapter get the most value from its relationship with the staff of the International Headquarters (IHQ). It's organized into clear sections for easy use.

At the core, we share common goals:

- Your chapter strives toward the **Ideal Chapter Standards** 🔗.
- Your chapter operates safely at all times—for members, new members, and guests.
- Your chapter receives the educational support it needs and makes full use of the resources available.
- Your members grow as leaders, developing life skills that complement and elevate your university experience.

Your chapter thrives on your terms. **Together, we fulfill our mission:**

"A global fraternity sustained by love and lifelong friendships since 1847, Zeta Psi members recruit and develop authentic, honorable men, loyal to creating a better brotherhood and better communities."

BEST PRACTICES

WORKING WITH YOUR REGIONAL EDUCATIONAL CONSULTANT & IHQ

- Download the **Basecamp 4** application on your main devices.
- Adjust your notification settings to one email per day, so you don't shut them off entirely at a later date. Use the tool.
- Basecamp is the primary and mandatory method for communication in Zeta Psi.
- **Exception:** In the case of an emergency, please call emergency services immediately (if needed), followed by a call to your assigned Consultant. If you reach voicemail, please request a callback ASAP and **do not disclose details via voicemail**. If you don't receive a return call in a timely manner, make a Campfire post in your chapter Basecamp that says, "I called [*consultant*] requesting a call back, but haven't heard back."
- Communicate regularly and respond promptly to messages. When you see a message, please comment or boost to confirm its receipt.
- Your Consultant is your ally to accomplish your goals and objectives. Talk with them about this constantly.
- Be honest and forthcoming in all communications. There is *nothing* you cannot tell your assigned Consultant. We will help you as best we can, constrained only by the five points of Zeta Psi fellowship.
- Meet all deadlines set by IHQ (e.g., reports, forms, event summaries).
- Ask questions and seek advice—**we are here to help**.

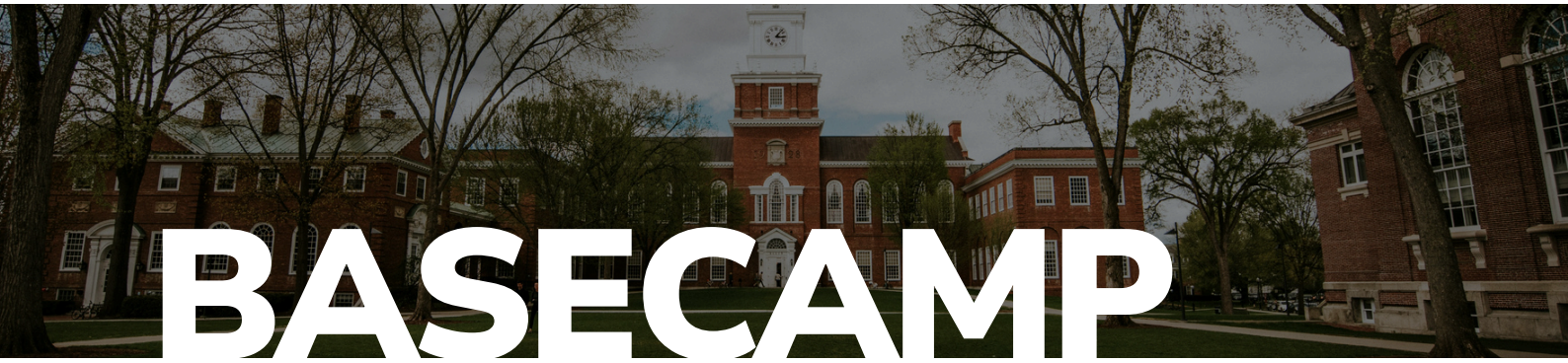
If you can't talk to a consultant about something, and you know it's a concern, report the issue anonymously on **EthicsPoint** 🔗.

Your consultant will actively work to maintain a strong relationship with your Chapter. They will do their best to respond quickly, address your concerns before focusing on deadlines, and support your Chapter's goals and events.

A strong Chapter is built on strong relationships. By maintaining regular, respectful, and proactive communication with elders, your on-campus advisor, and your Regional Education Consultant, your Chapter will be better equipped to face challenges, seize opportunities, and uphold the values of Zeta Psi.

Bonus Tip:

Maintaining a consistent Chapter social media presence assists in keeping each of the above audiences informed, while supporting the chapter's recruitment, community engagement, and reputational goals.



UTILIZATION

All executive members of the Chapter are expected to be active on the Chapter's Basecamp. When any Chapter member is tagged in Basecamp, you are expected to confirm "signal" by boosting or commenting. As a Chapter leader, you are expected to keep your members engaged and active on Basecamp.

When the user first logs onto the Basecamp website, these functions will appear at the top of the screen:

- **Home:** Basecamp home page.
- **Pings:** Privately message anyone on Basecamp. Pings should not be used to discuss Chapter matters. That should be done on the chapter message board.
- **Hey!:** Notifies the user of any messages or to-dos they were tagged in, for easy access to items the user needs to have their attention towards.
- **Activity:** Track the Basecamp activity of any individual or specific project. This is very useful to help hold individuals accountable for any Basecamp tasks they were assigned.

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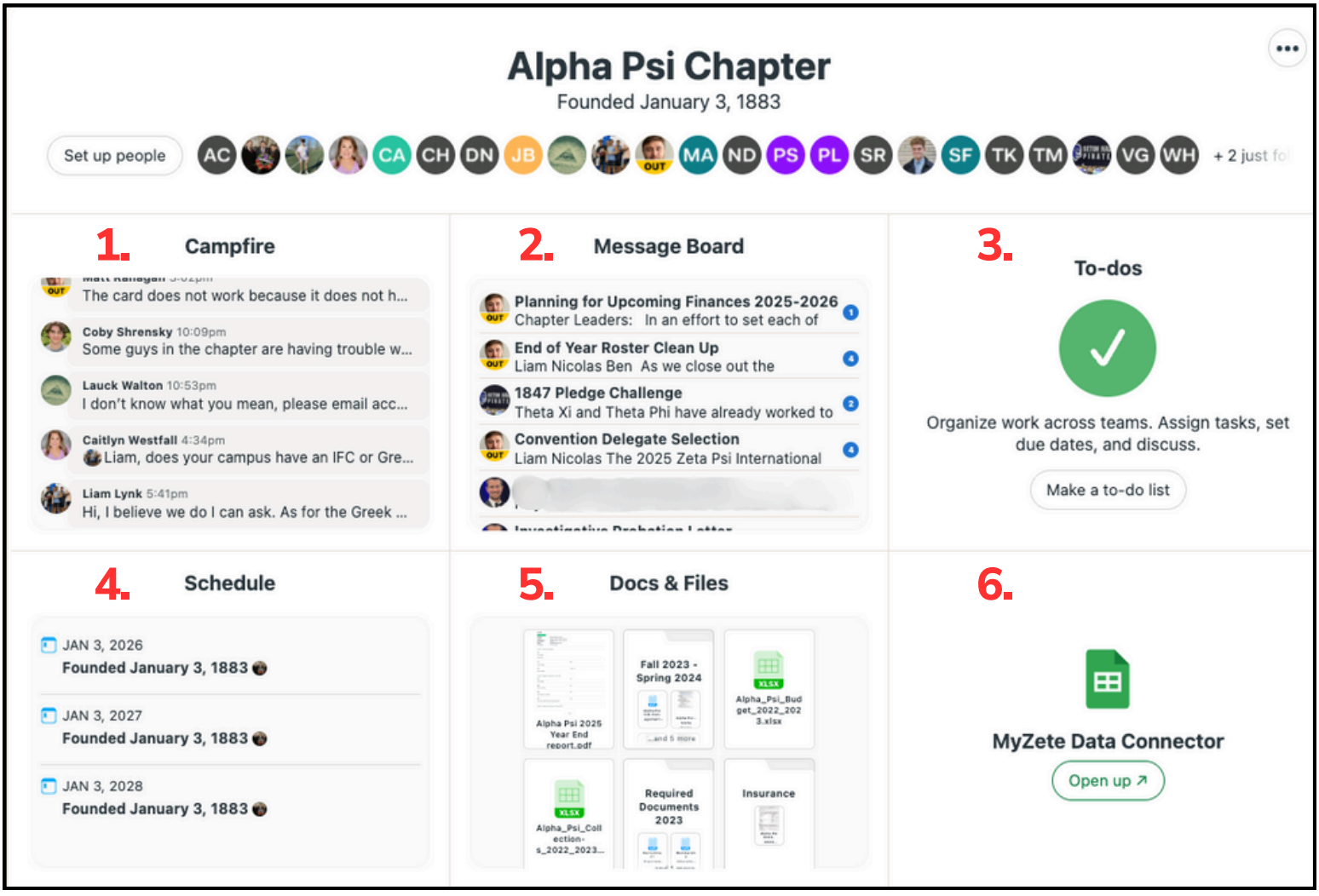
- **My Stuff:** Keep track of any messages the user bookmarks, any assignments given to the user, schedule, recent user activity, drafts, and any boosts the user has received on messages.
- **Find:** A search bar to look for anything the user has access to on Basecamp.

BASECAMP TOOLS

Your Chapter's basecamp page will have multiple different tools and functions to help assist the Chapter. Take note of the sample chapter basecamp page below:



Every chapter basecamp page includes the following tools:

1. Campfire: Casual way for a chapter to message IHQ staff and other members in the Basecamp; non-serious issues or simple questions can be posted on here.

2. Message Board: The Chapter's primary way of communicating with IHQ in regards to important chapter operations, such as: finances, rosters, questions, or concerns. This is where IHQ staff will share important updates, Chapter requirements, ask questions of the Chapter, and post Weekly 1-on-1 meeting minutes.

3. To-Dos: A tool allowing IHQ staff and the Chapter to set deadlines for important tasks. This is incredibly helpful for keeping track of tasks such as payment deadlines, LTI requirement completion, and other tasks that involve a set due date. You can also set tasks for specific people by assigning them to the to-do.

4. Schedule: Basecamp's calendar tool. Use this tool to set up important events and keep track of key dates throughout the semester on a calendar. You can use this to track things such as recruitment event dates, social events, and breaks that occur during each semester.

5. Docs & Files: Storage for any important documents the chapter has, such as chapter bylaws, safety policies, chapter budgets, etc. The Chapter can upload any additional documents to this tool. It's also a great way to share photos with IHQ staff for use on social media, the Zeta Psi website, and official documents.

6. MyZete Data Connector: This tool will take you to a spreadsheet containing live data for the chapter. Each tab at the bottom of the sheet can be used to track different aspects of the chapter's operations and requirements. Tabs include:

- **Associate Members:** lists PNMs that fill out the new member form on MyZete and tracks their initiation fee payments and foundations course progress.
- **Initiations:** tracks members initiated into the Chapter, their date of initiation, and Greek letter name (if on file).
- **LTIs:** tracks the chapter's progress towards their LTI requirement completion and provides a list of individuals who have completed an eligible LTI course.
- **Orders:** tracks any outstanding invoices the chapter has that are due to IHQ, as well as the remaining balance left to be paid until it reaches $0.

All data shown on the spreadsheet is directly tied to the Chapter's MyZete and is automatically updated four times a day at 9AM, 12PM, 3PM, and 6PM (all times EST) to reflect changes made by the chapter or its members in MyZete.

Basecamp Tip:

Basecamp is provided as a tool for you to use beyond your interactions with IHQ. Feel free to have executive board discussions, record internal minutes, plan with the chapter, and more on the platform.

Transparency is always a positive.

WEEKLY 1-ON-1s

ONE-ON-ONE MEETING GUIDELINES

All chapter presidents participate in weekly one-on-one Zoom calls with their assigned regional education consultant. These meetings are essential touchpoints for both the chapter and the International Headquarters to stay aligned on goals, challenges, and upcoming expectations.

To make these calls as productive as possible, please ensure you have a list of items you want to discuss before hopping on the call. These topics might include internal concerns, upcoming events, recruitment strategy, or anything the President/Chapter as a whole feels needs attention or support. The latter portion of the call will be dedicated to discussing IHQ updates and chapter requirements for the semester, ensuring your Chapter is meeting expectations and deadlines. **Transparency during these discussions is key**—consultants are best positioned to help when they have a full understanding of the chapter's current status, goals, and challenges.

While the primary participant is the active chapter Phi, from time to time the IHQ, President, or Elder Advisors may ask for specific officers to be in attendance for these calls to discuss specific matters related to finances, chapter rosters, and health and safety.

After the meeting, consultants will post a summary of the discussion and any next steps in the chapter's Basecamp within one hour of the meeting's conclusion. IHQ's priority is to support your chapter's success, maintain chapter safety, and help the chapter meet its stated objectives. These calls are a vital opportunity to connect, collaborate, and chart the path forward.

CHAPTER VISITS

CHAPTER VISIT EXPECTATIONS

A Chapter visit is an essential opportunity for IHQ to engage with key members of a Chapter, assess progress, and provide support. The visit should be structured, purposeful, and focused on open communication and collaboration. During each visit, the following components are expected:

REQUIRED MEETINGS

During the Chapter visit, it is expected that meetings will be held with the following individuals or groups:

- **Executive Board:** Meet with the full executive board to discuss chapter operations, leadership development, and strategic planning.
- **New Members:** Engage with new members to understand their experience, gather feedback on the new member process, and foster a connection with IHQ.
- **Fraternity/Sorority (FSL/FSP) or Greek Life Advisor:** Coordinate with campus professionals to align on institutional expectations, ongoing support, and any concerns related to the chapter's standing or operations.
- **Chapter Meeting:** Hold a chapter meeting with the IHQ consultant. The consultant will present a 20-30 minute long educational program on a timely topic for the chapter that should be selected in advance; please plan for a longer meeting to accommodate this. If the consultant is coming on a non-regular meeting day, please move your chapter meeting to occur during the visit.
- **Elders:** Connect with Elders of the chapter, especially leaders, to gather their perspective on the chapter and how IHQ can continue to be good partners.

The Chapter should be fully prepared to have these meetings and it is on the Chapter to take the lead in ensuring they are set up accordingly. If you need assistance setting up these meetings, reach out to your consultant.

DISCUSSION TOPICS

Chapter visits are your opportunity to get expert help on the topics that matter most to the chapter. Conversations during the visit should include (but are not limited to) the following topics:

- **Chapter Status and Goal Setting:** Discuss where the Chapter currently stands in terms of membership, academics, operations, and culture. Identify short- and long-term chapter goals and the specific strategies the chapter is using or planning to implement to achieve them.
- **Chapter Finances:** Review the chapter's financial health, budgeting processes, and any challenges. Consultants will offer guidance on financial best practices.
- **Recruitment Strategies:** Evaluate past and upcoming recruitment efforts. Discuss goals, successes, areas for improvement, and adherence to national recruitment standards.
- **Ritual Review:** Ensure that the chapter understands the correct process for Zeta Psi ritual ceremonies and that the chapter has a full collection of ritual equipment.
- **Member Education:** In addition to presenting an educational program during their visit, your consultant can also advise you on how to best meet your chapter's membership education requirements, particularly recommending LMS courses or training that would be most beneficial for your chapter.
- **Service/Philanthropy:** Your consultant can help your chapter generate ideas to improve your community service and/or philanthropic efforts, including utilizing our preferred partner, CrowdChange, to enhance your fiscal collection efforts.
- **Risk Management/Health and Safety:** Ensuring the chapter has a strong understanding of Zeta Psi's health and safety policy is crucial to chapter success, as well as an internal process to review Zeta Psi's policies and your own.
- **Support from IHQ:** Identify areas where International Headquarters (IHQ) can offer assistance, including programming, operational training, or connections with external stakeholders.

Chapter Visit Tip:

Chapter visits are a great test case for utilizing the To-Dos and Schedule tools in your chapter's Basecamp. Create a To-Do for each meeting you need to schedule, and check it off when completed. Once scheduled, add each meeting to the Schedule in Basecamp and tag your consultant.

RECRUITMENT PLANNING GUIDE

THE 4 STEPS OF RECRUITMENT: A SIMPLE, EFFECTIVE FRAMEWORK

To complement your Chapter's full recruitment strategy, every brother should internalize and use this simple, proven 4-step method:

1. Meet People:

- Be proactive. Introduce yourself on campus, in classes, at events, and through mutual friends.
- Be visible. Wear letters and show up to student organization events.
- Every brother is a recruiter. Treat every interaction as a potential connection.

2. Make Friends:

- Be authentic and engaging. Ask about their interests, background, and goals.
- The Goal: Build a real relationship before introducing Zeta Psi.

3. Introduce Zeta Psi:

- Share what Zeta Psi means to you: Brotherhood, leadership, growth, or support.
- Explain how it's elevated your college experience — but don't sell, relate.
- Bring them to events that reflect your chapter's values.

4. Close:

- If there's a strong connection and values alignment, close.
- Always follow up. Let them know you want them to be a part of your chapter.

Up Next: Steps to Planning a Successful Recruitment

1. DEFINE YOUR CHAPTER'S IDENTITY AND GOALS

Before you even start planning events, your chapter should be aligned on:

- **Values and Mission:** What makes your Chapter of Zeta Psi unique? Leadership, service, brotherhood, academics, social life?
- **Ideal Member Profile:** What qualities are you looking for? (e.g., involvement, character, GPA, personality)
- **Goals:** How many members do you want? Are you targeting quality, quantity, or both?

Recruitment Tip:

Host a pre-recruitment meeting to align the whole chapter on your recruitment strategy & expectations of members.

2. RECRUITMENT COMMITTEE AND ROLES

A successful recruitment is **organized** and **intentional**. Every conversation matters!

Key Roles:

- **Recruitment Chair:** Leads and oversees the process.
- **Event Coordinator:** Plans and executes recruitment events.
- **Marketing Chair:** Manages social media, posters, and digital communication.
- **Data/Contact Manager:** Tracks PNMs (Potential New Members), follow-ups, and voting.
- **Interview/Standards Team:** Conducts conversations or formal interviews to evaluate fit.

3. MARKETING & OUTREACH

Digital Presence:

- Up-to-date social media showing brotherhood, involvement, and lifestyle.
- Share upcoming recruitment events with easy-to-find dates, times, and RSVP links.

On-Campus Presence:

- Set up a recruitment table with eye-catching banners or host an open lunch and allow anyone to join and chat.
- Hand out flyers, wear letters, and strike up conversations with new students.

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- Collaborate with orientation leaders, resident assistants (RAs), and student organizations, including attending their meetings and talking about recruitment during new business.
- Example: “Storm the dorms” is a unique approach (if allowed on your campus) where you go through residence halls and personally knock on doors to invite prospective members to events.

Recruitment Tip:

Recruitment is the responsibility of all members, not just your recruitment chair. Encourage all brothers to be actively recruiting throughout the school year — every conversation matters.

4. EVENT PLANNING: BUILDING A GREAT RECRUITMENT WEEK

Successful recruitment events are:

- **Welcoming:** Focus on hospitality, not pressure.
- **Varied:** Offer a mix of casual hangouts, active events, and deeper conversations.
- **Well-Executed:** Start on time, have enough food/drinks, and keep it organized.

The best events are the ones that are well planned and work best for your campus. Your chapter consultant will work with you to help you craft a schedule that fits your campus culture.

As a reminder, all recruitment activities are to be dry events, per the Zeta Psi Fraternity Safety Policy. This also means that current members must be sober.

5. BUILD RELATIONSHIPS, NOT JUST AN IMAGE

- Ask genuine questions (interests, major, goals).
- Pair PNMs with brothers they naturally connect with.
- Remember names and follow up with personal outreach (texts, calls, etc.).
- Look for potential, not polish. Not every great member starts out loud or confident.

Recruitment Tip:

“Rushing” shouldn’t feel rushed – listen more than you speak.

6. INTERNAL EVALUATION AND VOTING

- Use a system to track interactions with PNMs (Google Sheets, ChapterBuilder, etc.).
- Create clear criteria for bids (values alignment, engagement, reputation, etc.).
- Vote fairly and respectfully — confidentiality and integrity are key.

7. BID DAY AND BEYOND

- Make Bid Day fun and energetic, but also meaningful.
- Immediately begin new member education and retention efforts.
- Keep checking in with new members to ensure they feel welcomed and integrated.

8. POST-RECRUITMENT REFLECTION

- What worked well? What didn't? Don't be afraid to change things up!
- Survey PNMs (including ones who didn't join). Just because they didn't join doesn't mean the friendship has to end or that they may not join in the future. You want as many people as possible to speak highly of the chapter, not just brothers within the chapter.
- Debrief with your recruitment team and record feedback for next semester.

Recruitment Tip:

Don't skip the debrief. Continuous improvement = long-term chapter success.

FINAL TIPS FOR A STANDOUT RECRUITMENT

- Be genuine. People join people, not sales pitches.
- Involve the whole Chapter. Every brother is a recruiter.
- Focus on connection over impressing.
- Stay organized. Logistics matter more than you think.
- Remember your values. Recruit people who elevate the brotherhood.

EDUCATION GUIDELINES

OVERVIEW

Developing a strong understanding of our values, history, and leadership practices is at the core of both new and active members' development as a brother of Zeta Psi. This section outlines the education requirements and processes that all chapters must follow to remain in good standing.

NEW MEMBER EDUCATION REQUIREMENTS

A well-structured new member education program is essential for fostering strong, informed brothers. Zeta Psi policy states that the new member education period aligns with the number of new members, not exceeding eight (8) weeks. For example, two (2) new members should correspond to two (2) weeks of education. Ideally, the new member period should last six (6) weeks to provide a balanced and effective program.

All new members must complete the **Zeta Psi Foundations** course hosted on the Zeta Psi Learning site (www.zetapsilearning.com) at the beginning of the new member process. This online course complements local new member education efforts and provides an essential overview of Zeta Psi's international organization.

Failure to complete the Zeta Psi Foundations course prior to initiation will result in the chapter incurring a surcharge equivalent to 7% of the chapter's annual insurance invoice. This surcharge is applied for all new member classes that don't finish the courses before the initiation date. To avoid a surcharge, and to allow time for any unforeseen delays, we recommend new members begin the course upon acceptance of a bid.

Up Next: Registration Process

REGISTRATION PROCESS

- Upon acceptance of the bid or at the first new member meeting, new members must register themselves through the official **Zeta Psi New Member Registration Form**: my.zetapsi.org/new-member-form
- New Members are asked to provide their **Full Name** which will be used to complete their membership certificate at the time of initiation. They will also be required to provide their preferred name (Bill instead of William for example), birthdate, phone number, non-university email, and an emergency contact (ideally a parent/guardian). **Please note:** they will need to know the name of the chapter to complete the form, please tell them which name to select.
- Upon registration, an account for the learning platform (Thinkific) is automatically created using the email address provided.
- **Important:** New members should **not** attempt to create their own Thinkific accounts; self-created accounts will not contribute to the Zeta Psi Foundations completion requirement.
- Once registered, each new member will be enrolled in the **Zeta Psi Foundations course**. This is the only course required prior to initiation. It should ideally be completed at the first new member meeting.
- To successfully complete the course, members must finish the entire presentation.

TRACKING PROGRESS

Chapter leaders can monitor new member progress through the **MyZete Data Connector**, a Google Sheet linked in each chapter's Basecamp, under the "Associate Member" tab.

	Count	Member Name	Email	University	Initiation Fee	Foundations %
2	1	[redacted]	[redacted]@gmail.com	[redacted]	0	100.00%
3	2	[redacted]	[redacted]@gmail.com	[redacted]	0	100.00%
4	3	[redacted]	[redacted]@gmail.com	[redacted]	0	100.00%
5	4	[redacted]	[redacted]@gmail.com	[redacted]	0	100.00%

SUPPORT

For any questions or assistance with planning your chapter's new member education program or related events, please contact your assigned chapter consultant.

Up Next: Active Member Education Requirements

NEW MEMBER EDUCATION REQUIREMENTS

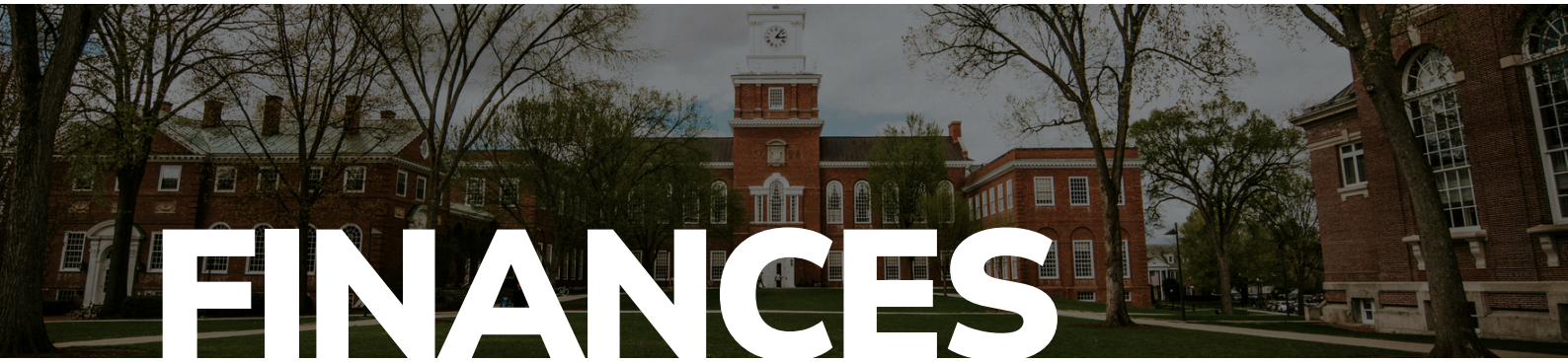
Ongoing education is equally important for active members of Zeta Psi. Each academic year, chapters must ensure that at least 50% of their active membership complete a course on the Zeta Psi Learning Site (www.zetapsilearning.com). This course will be selected from the offerings provided at the beginning of the academic year and **cannot be the Zeta Psi Foundations course**.

KEY POINTS

- The 50% completion requirement applies to all active members, including new members who have not yet completed their initial term.
- Courses offered will cover topics such as leadership, personal development, and fraternal education, furthering members' knowledge and engagement.

TROUBLESHOOTING

- Members who forget their login information or encounter issues accessing the Zeta Psi Learning site should reach out to their chapter consultant for help.



FINANCES

FINANCIAL MANAGEMENT

Proper financial management is crucial to ensuring the long-term sustainability of your chapter. Understanding your financial obligations and establishing a sound budget will help prevent financial issues and set your chapter up for success each year.

CHAPTER FINANCIAL OBLIGATIONS

North American chapters are required to pay several key fees throughout the academic year. These include the **Fall Chapter Fee**, **Insurance**, **Spring Chapter Fee**, and the **Convention Assessment**.

EMEA chapters, by contrast, are currently only required to pay the **Convention Assessment**.

Each initiated member also pays their own one-time initiation fee through the MyZete system.

It is important to note that all invoices are typically due within the **first month** of the respective terms. Prompt payment is necessary to ensure the chapter remains in good standing.

PAYING CHAPTER INVOICES

Chapters will receive a web link to the MyZete payment portal directly from their assigned consultant. This portal allows for easy and secure payment of all chapter invoices. Currently, payments can be made using a credit card, Google Pay, or Apple Pay, providing flexible options for chapter treasurers and officers.

For members and chapters outside the United States, all charges are denominated in $USD. Please be sure to use a credit card that doesn't charge a foreign currency transaction fee. The exchange rates are calculated at the time of payment by your service provider.

Timely payment ensures your chapter remains financially compliant and avoids unnecessary complications during the year.

WHY FINANCIAL MANAGEMENT MATTERS

Strong financial management practices not only maintain operational stability but also allow your chapter to focus on its broader goals of leadership, brotherhood, and service. Financial stability strengthens your chapter's ability to provide meaningful experiences for all members and ensures its success for years to come.

CHAPTER BUDGETING

DETERMINING YOUR BUDGET

Building a strong budget begins with early and thorough planning. Starting the budgeting process early gives your chapter the flexibility to make adjustments and ensures that all members are informed of their financial responsibilities well before payment deadlines. Below are the key steps chapters should take when preparing their budgets:

1. Review All Sources of Income: Consider membership dues, fundraising events, and donations to understand expected revenue.

2. List All Expenses for the Year: Identify both fixed costs (e.g. rent, insurance, chapter fees, convention assessment) and variable costs (e.g., event expenses, supplies).

3. Forecast Upcoming Costs: Plan for expenses across the entire academic year and ensure fees are collected ahead of expenses to avoid unexpected shortfalls.

4. Set Aside Reserves: Allocate funds for emergency situations and for long-term financial planning.

5. Monitor and Adjust the Budget: Review financial performance regularly and adjust the budget based on actual income and expenses.

6. Calculate Member Dues: Use the following formula to ensure dues are sufficient to cover the chapter's expenses:

(Total Chapter Expenses + Chapter Operating Budget) ÷ Members

Always build in a buffer to account for less-than-full collection rates, as extenuating circumstances can happen. If you measure your chapter's average collection rate, you can use that in the future to calculate the necessary buffer.

USE PROFESSIONAL INVOICING TOOLS

Every chapter should issue professional invoices to members. If you don't yet have a system in place, contact your chapter consultant or staff liaison for help. Invoices should ideally be sent by July, giving members time to budget over the summer.

LegFi is Zeta Psi's preferred invoicing and financial management tool. Check if out at **https://www.legfi.com/**

EXTERNAL RESOURCES

STAKEHOLDER RELATIONSHIP MANAGEMENT

There are many external resources to assist the chapter, such as the relationships between Elders and advisors. Before we get into the section, here are a few key terms to understand:

- **Beta Pi:** Elected position of the elder chapter. Serves as alumni advisor to the active chapter.
- **Elder Phi:** Phi of the elder chapter. May supplement the role of alumni advisor in the absence of a designated Beta Pi.
- **Fraternity/Sorority Advisor (if applicable):** The chapter's designated advisor from the host college/university Fraternity and Sorority Life or Greek Life Office.
- **Faculty/campus advisor (if applicable):** A designated member of the college/university faculty or staff that help advise the chapter.

ACTIVE CHAPTER & ELDER CHAPTER

Chapter alumni are among the Chapter's greatest resources. These are brothers who have gone through the same challenges, ritual, and experiences and often have a deep-rooted interest in the continued success of the chapter.

Any elder brother who wishes to be kept apprised of the Chapter's activities and endeavors should always be granted that opportunity. When elders know what's going on within the Chapter, they are in a much better position to offer meaningful assistance—whether through guidance, financial support, or networking opportunities. We strongly recommend adding all of your Elder advisors – formal and informal – to your Chapter's Basecamp.

Best practices for staying connected with the chapter's elders:

- Create and distribute a monthly or quarterly newsletter and/or post regular updates on the Chapter's social media.
- Maintain an active alumni group chat or mailing list.
- Schedule biweekly or monthly Zoom calls with elder leaders.
- Keep elder brothers in the loop about major events, chapter successes, and areas where support is needed.

These simple, proactive steps can strengthen the bond between active brothers and elder leaders—ensuring institutional memory is preserved and support systems remain in place.

ACTIVE CHAPTER & ON-CAMPUS ADVISOR(S)

Many North American universities have paid administrative staff that work with fraternities. When present, a chapter's relationship with its on-campus advisor is a crucial component of maintaining good standing with the host college or university. A positive, professional relationship with your advisor helps ensure that your chapter is viewed as a responsible and contributing member of the campus community.

On-campus advisors can be powerful allies—they can connect your chapter to campus resources, provide insight into university policies, and advocate on your behalf if concerns ever arise.

Best practices for working with your FSL/Greek Life office:

- Schedule regular one-on-one or executive board meetings with your advisor.
- Attend all school-mandated FSL/Greek Life events.
- Follow all University and FSL/Greek Life policies consistently.
- Maintain open, honest, and timely communication.

By being proactive and transparent, your Chapter will build a reputation of reliability and accountability—earning the trust of both your advisor and the university.

ACTIVE CHAPTER & IHQ REGIONAL EDUCATION CONSULTANT

The Regional Education Consultant is your Chapter's main point of contact with Zeta Psi International Headquarters. Their role is to support your Chapter's success, offer guidance, and help resolve issues before they escalate.

Your assigned consultant's ability to assist is directly tied to the strength of the working relationship they have with the Chapter; so please make sure to show up to your weekly meetings, keep your consultant in the loop, and use the support they offer.

APPENDIX

IMPORTANT DATES

Please ensure your chapter is aware of and prepared for the following key dates throughout the academic year. Missing deadlines may result in surcharges, loss of privileges, or non-compliance status.

- **Sept. 30:** Insurance and Chapter Fee Due
- **Nov. 1:** Kirby Delegate Submission Deadline
- **Jan. 8–11:** Kirby Presidents Conference
- **Jan. 31:** Convention Assessment & Chapter Fee Due
- **Mar. 31:** Convention Delegate, Year End Report, Awards Applications Due
- **Jul. 29 - Aug. 2:** 179th Annual Convention (Chapel Hill, NC)

CHAPTER COMPLIANCE CHECKLIST

To remain in good standing with the International Headquarters (IHQ), each chapter must complete the following tasks by their respective deadlines:

□ **Maintain an accurate chapter membership roster.** This includes removal of graduating members at the end of the academic year and renewing the memberships of those returning for the next academic year.

□ **Add all officers (and remove previous) to the chapter Basecamp.** This should be updated anytime there is a change in elected officers.

□ **Attend weekly one-on-ones with assigned consultant.** Engage in the process to help the Chapter meet its objectives, meet and exceed standards, and to help the chapter maintain safe operations at all times.

□ **Pay Fall Chapter Fee and Insurance.** Due September 30.

□ **Complete the Fall Semester education requirements.** Due November 15.

□ **Add all new members onto MyZete.** Should be completed immediately after bid acceptance.

□ **Ensure all new members complete the Foundations course.** The course is available on the Zeta Psi Learning Site and a surcharge will be assessed if the course is not completed prior to initiation.

□ **Ensure all new members pay their initiation fees.** This must be completed prior to initiation.

□ **Convert all new members to "Initiated" status on MyZete.** This must be done immediately following the initiation ceremony.

□ **Pay Spring Chapter Fee and Convention Assessment.** Due January 31.

□ **Complete the Year End Report and Awards Application.** Due March 31.

□ **Complete the Spring Semester Education Requirements.** Due April 15.