

PURSUIT OF EXCELLENCE PROGRAM OVERVIEW

The Pursuit of Excellence Program (PEP) is Sigma Nu Fraternity's chapter assessment, standards, and improvement program. Unlike traditional "minimum standards" programs, the Pursuit of Excellence Program is designed to be a year-round planning, evaluation, and improvement program.

HISTORY OF THE PURSUIT OF EXCELLENCE PROGRAM

The Pursuit of Excellence Program was created in 2002 as a minimum standards program for the Fraternity. This represented a great step for the organization in the establishment of standards to guide our undergraduate chapters. This program consisted of various criteria within six areas: Membership Development, Chapter Development, Chapter Management, Support Structure, Chapter Governance and Campus and Community Involvement.

At the 62nd Grand Chapter in 2006, it was resolved that a review of the Pursuit of Excellence Program should be conducted and recommendations should be made for updates to the program. An ad hoc committee began meeting via conference call in January 2008 and proposed a revised program at the 63rd Grand Chapter in July 2008.

PHILOSOPHY THAT GUIDED CHANGES TO THE PURSUIT OF EXCELLENCE PROGRAM

As the Pursuit of Excellence Ad-Hoc Committee began its work, several underlying principles guided their thinking.

- The Pursuit of Excellence Program should set a standard that drives our undergraduate chapters and the entire fraternity toward the realization of the Fraternity's Vision "Excelling with Honor."
- Standards should be set to assess our chapters in their alignment with the Mission of the Fraternity.
- It is vital that the program include a viable feedback mechanism whereby chapters can utilize information from the assessment to drive the organization forward toward excellence.
- The Pursuit of Excellence Program should align with the Rock Chapter criteria and work in support of the Fraternity's strategic initiatives under the strategic plan.

CHANGES TO THE PURSUIT OF EXCELLENCE PROGRAM

The program that was approved in July 2008 by the 63rd Grand Chapter represents a significant shift, not necessarily in the standards set, but in the process of the program and the manner in which the Fraternity assesses its chapters and utilizes the results. The revised Pursuit of Excellence Program has three main standards:

- Values-Based Leadership
- Personal Development and Membership Value
- Operational Excellence

Within these standards there are a total of ten subcategories. For each subcategory there is a criterion for excellence and suggested documentation. These criteria serve as a guide to define excellence for our fraternity. The standards build together and those chapters which truly excel in all facets of the Fraternity will attain our highest recognition of Rock Chapter.

PURSUIT OF EXCELLENCE PROGRAM OVERVIEW

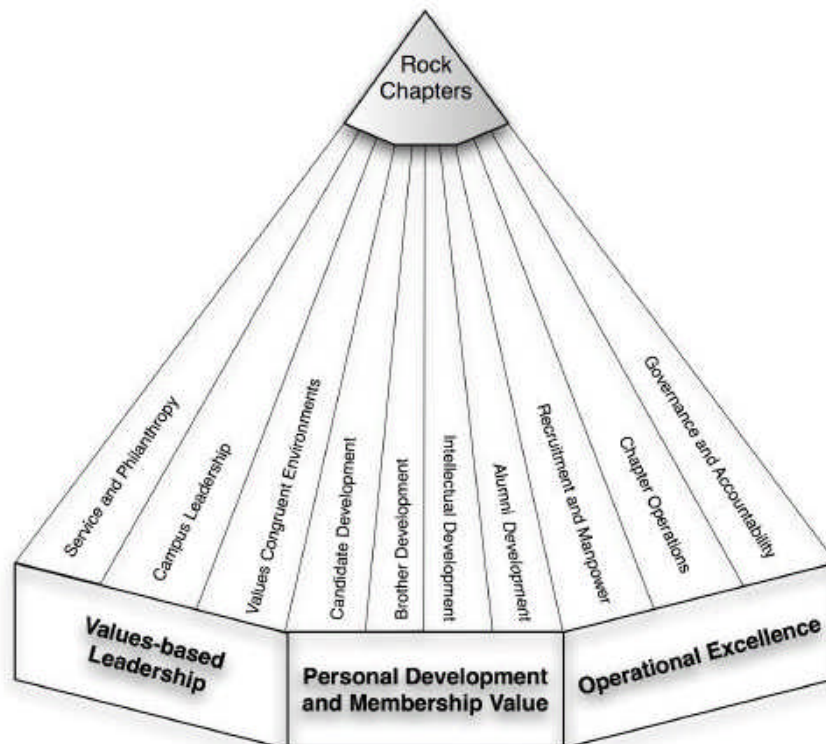
COMPARISON OF PREVIOUS VERSION OF THE PURSUIT OF EXCELLENCE PROGRAM VS. NEWLY ADOPTED PURSUIT OF EXCELLENCE PROGRAM

OLD VERSION

- Extensive supporting documentation
- Does not reflect new Fraternity initiatives and programs
- Focus on minimum standards
- Separate application for Pursuit of Excellence and Rock Chapter
- Only feedback is score
- Yes or no checklist to meet standard
- No tool to engage chapter in understanding of program
- No timeline
- Reactive
- 6 categories
- Total score of 110 pts

NEW VERSION

- Reduced documentation
- Does include all new Fraternity initiatives and programs
- Drives toward excelling
- Combines both, Pursuit of Excellence and Rock Chapter criteria in one process
- Feedback includes explanation of ratings
- Holistic chapter rating scale
- Includes strategy session to engage chapter in dialogue
- Includes timeline
- Proactive
- 3 categories
- No point totaling
- Aligns with the Fraternity's Strategic Plan



FREQUENTLY ASKED QUESTIONS (FAQ'S)

WHEN WILL CHAPTERS BEGIN WORKING ON THE PURSUIT OF EXCELLENCE?

At the start of the academic year, chapters and their alumni leadership – Chapter Advisor, Alumni Advisory Board – should review the feedback and ratings they received from the previous year. This will help to inform a [strategy session](#) which will be supplied through All-Chapter LEAD to help the chapter do a self assessment.

HOW CAN THE CHAPTER ENGAGE MORE BROTHERS IN THE PROCESS?

Chapters will be able to engage the entire chapter in a dialogue about plans and goals for the upcoming year. This will be done through the discussion questions and facilitation tools provided in the [Strategy Session](#) in All-Chapter LEAD. The ideas and plans that result from the discussion should then be shared with key constituents. This process will help the chapter engage a broad support network and develop relationships that may result in increased support.

HOW CAN CHAPTERS ASSESS THEIR PROGRESS?

Throughout the year chapters should continually engage in self assessment. Chapters will be most successful when they are constantly evaluating their progress as it relates to the standards of the Fraternity. Once again, this creates an opportunity for the entire chapter to have discussions about the progress of the chapter. In addition, during the year chapter leadership should meet with alumni, their Division Commander, Leadership Consultant, and Campus Fraternity/Sorority Advisor to talk about progress and challenges. If these individuals are already aware of the chapter's goals from conversations earlier in the year they will be more effective in helping the chapter throughout the rest of the year.

The final assessment will take place towards the end of the academic year. First, the chapter leadership should meet with their Chapter Advisor and/or Alumni Advisory Board and their Campus Fraternity/Sorority Advisor to evaluate the previous year. This will be a great opportunity for the leadership to get some guidance in their reflection. It will also help those advisors in providing an informed perspective to the General Fraternity in their reports.

WHAT WILL CHAPTERS DO TO PREPARE FOR THE FINAL SUBMISSION OF THE PURSUIT OF EXCELLENCE AT THE END OF THE ACADEMIC YEAR?

Chapters will also complete a [self-assessment](#) at the end of the year. To do this the chapter will utilize the [self-assessment guide](#) provided by the General Fraternity to complete a [chapter self-assessment booklet](#).

WHO WILL SERVE AS THE “ASSESSMENT TEAM” TO HELP EVALUATE CHAPTERS?

While it is not financially feasible to fly in an assessment team to each campus, we can create a form of an assessment team which can provide different perspectives toward a more complete picture of the current reality of a chapter. The assessment team will consist of the following:

- Chapter's Leadership Consultant who submits a report as a part of their annual or semester consultation.
- Chapter Advisor or Alumni Advisory Board who submits a report at the end of the year based on their interactions with the chapter throughout the year.
- Division Commander submits a report at the end of the year based on their interactions with the chapter throughout the year.

PURSUIT OF EXCELLENCE PROGRAM – FREQUENTLY ASKED QUESTIONS

- Campus Fraternity/Sorority Advisor who submits a report at the end of the year based on their interactions with the chapter throughout the year.

WHAT IS THE PURPOSE OF THE “ASSESSMENT TEAM”?

The purpose of these inputs is to provide a greater depth of understanding regarding the chapter's current state. It also helps to infuse feedback from each of these people into the information that is communicated back to the chapter so that they can understand how they are perceived by others. Now, we do recognize that it may be a challenge to collect reports from some of these individuals at different institutions. It would not be the responsibility of the chapter to gather these reports; they would submit them directly to the General Fraternity. Further, if someone did not submit a report it would not negatively impact the chapter. For example, if your Chapter Advisor did not get around to submitting the report, it would not have an adverse impact on the chapter's achievement level. Also, each of these reports would represent only one piece of a large picture. If one person had a skewed view of the chapter it might not necessarily impact the chapter negatively.

HOW WILL CHAPTERS CONDUCT THEIR OWN ASSESSMENT OF PROGRESS?

The old program required chapters to compile a large binder of documentation to accumulate various points at the end of the year. Generally, this process was delegated to one or two officers in the chapter, and was not incredibly enjoyable.

The new self-assessment will include a guide with discussion questions. As a chapter you will bring your members together to discuss what you did to excel in each standard. Then, the answers to those questions along with some supporting documentation that you want to attach will become your Pursuit of Excellence submission. This engages the entire chapter, and hopefully makes the Pursuit of Excellence Program more about brothers sitting down and talking to each other than one or two brothers compiling binders of documents.

The [self-assessment guide](#) and [chapter self-assessment booklet](#) are available online and should be utilized by all chapters. Both include step-by-step instructions for performing the assessment session, completing the booklet, and making the chapter's annual submission to the General Fraternity. Each chapter should submit their completed [chapter self-assessment booklet](#) and any supporting documents via email to pep@sigmanu.org by April 30 of each year.

HOW WILL THE STAFF MEMBERS EVALUATE CHAPTER PERFORMANCE?

General Fraternity staff will use [evaluation guidelines](#) which define criteria for each achievement level from “poor” to “excellence.” This will create consistency across evaluations. This also ensures a focus on evaluating chapters individually to the standard rather than trying to rank chapters in relation to one another. The information from the evaluation will be communicated back to chapters, key alumni, and campus advisors. Finally, the Leadership Consultant is able to utilize this feedback in planning upcoming consultations for optimal effectiveness in addressing chapter needs. In this review by the General Fraternity staff, each chapter will receive an achievement level on a seven point scale that ranges from “poor” to “excellence.” They will also receive an explanation for that rating and suggestions for improvement. This feedback will be important if the program is going to have the purpose of driving our chapters toward constant improvement.

PURSUIT OF EXCELLENCE PROGRAM – FREQUENTLY ASKED QUESTIONS

HOW WILL CHAPTERS BE EVALUATED IN THE REVISED PURSUIT OF EXCELLENCE PROGRAM?

The program will no longer have a total score that chapters must attain. Instead, chapters will receive their achievement level in each of the ten subcategories. The rating scale for each area is provided below. Specific benchmarks for each area can also be reviewed in the program's [evaluation guidelines](#) document.

Poor Substandard Fair Acceptable Good Very Good Excellence

If chapters receive ratings below “Acceptable,” the mid-point of the seven point scale, in any subcategory then the chapter must submit a plan of action to the General Fraternity to articulate how the chapter will improve in that area. If a chapter has an achievement level below “Acceptable” in five or more of the subcategories then they will be placed on a show cause status with the General Fraternity.

WHAT HAPPENS IF A CHAPTER IS PLACED ON SHOW CAUSE STATUS?

Chapters will work with a General Fraternity staff member to create an overall action plan for improvement in all areas. This will include the creation of a strategic plan at the beginning of the academic year (September), addressing operational infrastructure items throughout the fall (e.g. updating bylaws, revising their candidate education plan, and creation of a written scholarship plan or year-round recruitment plan), and making an early submission of the next year's submission (end of March rather than April). The High Council will review the charters and results of these chapters' early submission to determine whether they will be returned to good standing or have their charters suspended.

WHAT IS THE PURPOSE OF THE IMPROVEMENT PLANS?

The purpose of this action plan is to create a specific course of action that will help a chapter improve areas of weakness or challenge. This plan will be submitted to the General Fraternity within the first month of the start of the academic year. The chapter should also share this plan with alumni and campus advisors to engage their support and guidance.

It is still possible that a chapter that fails to create improvement plans could be recommended for suspension, however, the focus is placed heavily toward guiding and coaching chapters toward success. It should also be noted that at this point no chapters have been closed because they could not meet the basic expectations of the Pursuit of Excellence Program.

HOW WILL CHAPTERS WHO ARE EXCELLING BE RECOGNIZED?

Each chapter who has an achievement level of excellence in three or four subcategories of a standard will receive recognition for the Pursuit of Excellence in that standard. So, for example, if a chapter receives “excellence” ratings in all three subcategories of Value-Based Leadership they will receive The Pursuit of Excellence in Values-Based Leadership. Thus, we could have any number of chapters receiving recognition, but would only recognize those chapters who were deserving.

HOW DOES THE PURSUIT OF EXCELLENCE RELATE TO THE ROCK CHAPTER CRITERIA?

Rather than having a separate application process and separate criteria for Rock Chapter, there will be one standard of evaluation and one evaluation process to help streamline operations and reduce workload. Chapters which achieve an overall level of excellence for three years or more will be considered for Rock Chapter at Grand Chapter.

PURSUIT OF EXCELLENCE PROGRAM – FREQUENTLY ASKED QUESTIONS

General Fraternity staff will determine what additional information chapters who want to be considered for Rock Chapter may need to submit. This would make it so that all chapters were reviewed for Rock Chapter each year and only those most deserving chapters would receive our highest honor for their dedication and commitment. We think it is important that the Fraternity not only create standards, but that we create resources to help chapters utilize these standards to excel.

DEFINITIONS

- Evaluation Guidelines- a predetermined guide for evaluating each category
- “Acceptable” – the minimum category chapters are accountable for meeting in each subcategory
- Assessment – measurement process used to provide a snapshot of a chapter’s journey toward excellence
- Subcategory – 3-4 factors making up each of the 3 main categories
- Standards – performance indicators leading to a chapter’s excellence