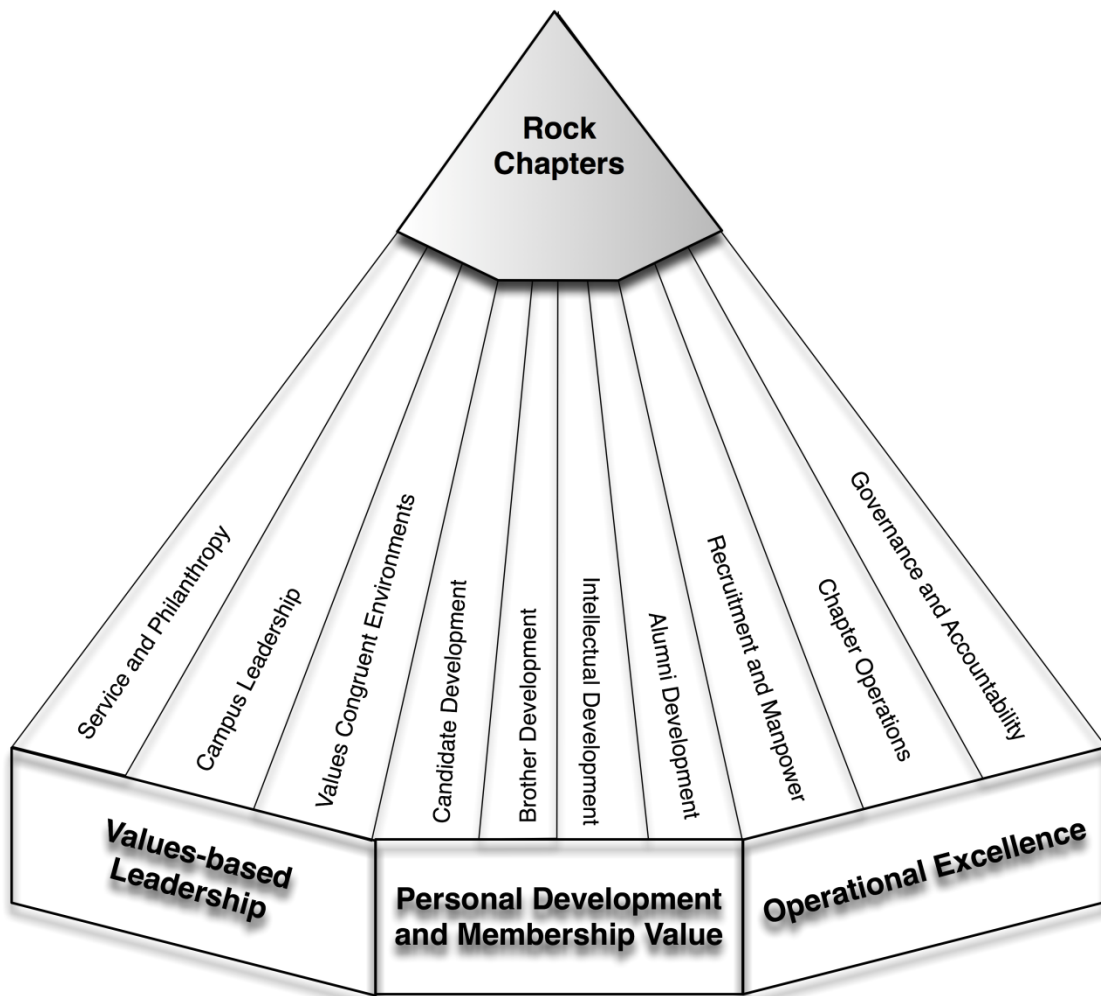




# Sigma Nu Fraternity

EXCELLING WITH HONOR

## PURSUIT OF EXCELLENCE PROGRAM CHAPTER IMPROVEMENT PLAN GUIDELINES FOR VIRTUAL OPERATIONS



The Pursuit of Excellence Program structure includes three standards with ten subcategories in which chapters are assessed in their development towards excellence. **Chapters achieving a rating below “Acceptable” should use the guidelines contained in this document to assist them in creating a plan for improvement in any areas of deficiency.**

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According to the Pursuit of Excellence Program adopted by the 63<sup>rd</sup> Grand Chapter, any chapter receiving an achievement level below Acceptable in a subcategory must submit a plan of action for improvement in that area to the General Fraternity. Improvement plans will be reviewed by General Fraternity staff to ensure viability and to ensure that, if followed, the plans will result in the chapter achieving ratings of at least Acceptable in the next assessment. Plans for improvement should be generated, or at a minimum confirmed, by the chapter membership prior to their submission. Ultimately, the chapter as a whole will be responsible for achieving any plans created and submitted. Creation of improvement plans should be a result of a chapter's completion of the Pursuit of Excellence Program's [Strategy Session](#).

After review, plan(s) for improvement will be returned to the chapter and shared with the Leadership Consultant, Chapter Advisor, Division Commander, and Campus Fraternity/Sorority Advisor. Plans should be reviewed by the chapter leadership, members, and above listed advisors throughout the academic year.

**Unique for the 2020-2021 academic year, there are two versions of the Pursuit of Excellence Program (PEP) – one for chapters operating mostly in-person and one for chapters operating mostly virtually. The criteria for Acceptable through Excellence have been adjusted to reflect the limitations of either operating in-person with social distancing restrictions or operating mostly virtually.**

**In-Person – the host institution is conducting most, if not all, classes in-person and chapter operations are at, or near, 100% in-person based.**

**Virtual – the host institution is conducting most, if not all, classes entirely online and chapter operations are at, or near, 100% virtual based.**

**The standard areas and Acceptable criteria can be found on the following pages. Suggested improvement plan items are also included. Finally, available resources are indicated at the end of each subcategory.**

Improvement plans should be submitted, in writing, to the General Fraternity **by September 30<sup>th</sup>**. Failure to submit by this time will result in a **suspension from participation in events with alcohol** until viable improvement plans are submitted and reviewed. Should a chapter fail to submit viable improvement plans **by October 30** then **all chapter activities will be suspended**.

Digital submissions are required and will be accepted at [pep@sigmanu.org](mailto:pep@sigmanu.org).

#### **VALUES-BASED LEADERSHIP**

- SERVICE AND PHILANTHROPY
- CAMPUS LEADERSHIP
- VALUES CONGRUENT ENVIRONMENTS

#### **PERSONAL DEVELOPMENT AND MEMBERSHIP VALUE**

- INTELLECTUAL DEVELOPMENT
- CANDIDATE DEVELOPMENT
- BROTHER DEVELOPMENT
- ALUMNI DEVELOPMENT

#### **OPERATIONAL EXCELLENCE**

- RECRUITMENT AND MANPOWER
- CHAPTER OPERATIONS
- GOVERNANCE AND ACCOUNTABILITY

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**DEVELOPING A CHAPTER IMPROVEMENT PLAN**

Chapters are required to create and submit improvement plans, at minimum, for any areas that received a rating of Poor, Substandard, or Fair. Improvement plans should be submitted to [pep@sigmanu.org](mailto:pep@sigmanu.org) for review by **September 30<sup>th</sup>**. Viable improvement plans will be returned to the chapter leadership and shared with the chapter's key advisors. Chapters are expected to update advisors on their progress towards achieving goals and completing tasks as outlined in the improvement plan.

- Use the [PEP Strategy Session](#) to answer discussion questions pertaining to this area. This session will help the chapter determine the vision and goals for this area, leaving appropriate officers to follow up in the creation of specific objectives and plans for action to achieve the chapter's vision of reaching excellence in this area.
- Review the [PEP Evaluation Guidelines](#) to determine where the chapter currently stands and to identify key benchmarks for improvement within the next six-to-twelve months.
  - Improvement should be directed at improving deficient areas to **Acceptable levels**. In other areas, the chapter is encouraged to create plans directed at either maintaining current levels of performance or improving performance to the next level (e.g. from Acceptable to Good).
- Create specific goals, with detailed plans of how the chapter will achieve these goals, in this area to improve to, at minimum, the **Acceptable level within one year**. Use the [Strategic Planning and Action Plans Overview](#) to assist with the goal setting and action planning process.

**IMPROVEMENT PLAN FORMAT**

Action Plan templates are available to address all PEP areas. **Submit a completed action plan for this academic year as your improvement plan.**

[Service and Philanthropy Action Plan](#)

[Campus Leadership Action Plan](#)

[Values Congruent Environments Action Plan](#)

[Intellectual Development Action Plan](#)

[Candidate Development Action Plan](#)

[Brother Development Action Plan](#)

[Alumni Development Action Plan](#)

[Recruitment and Manpower Action Plan](#)

[Chapter Operations Action Plan](#)

[Governance and Accountability Action Plan](#)

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**SERVICE AND PHILANTHROPY**

*Future leaders are transformative throughout the communities they interface with. Service to others, through the donation of time, talent, and treasure, is a core mechanism for creating leaders as engaged citizens in their local community.*

**ACCEPTABLE CRITERIA**

- Chapter performs one (1) or more virtual volunteerism or philanthropic activities with participation from most members each academic term.
- Each member completes at least three (3) hours of community service each semester.
- Chapter has incorporated education about the cause being supported into at least one fundraising event (e.g. brochures about the cause or a speaker on the issue).
- Chapter incorporated the values of Sigma Nu into all service and philanthropy events.

**IMPROVEMENT PLAN COMPONENTS**

- [Service and Philanthropy Action Plan](#)

**SERVICE AND PHILANTHROPY RESOURCES**

- [Service and Philanthropy Virtual Operations resources](#)
- Officer Resource Page – [www.sigmanu.org/cspchairman](http://www.sigmanu.org/cspchairman)
- [Best Practices Library](#)
- [LEAD Phase I Session 11: Community Service](#)
- [Community Service and Philanthropy Chairman Manual](#)
- Helping Hand Initiative – [www.sigmanu.org/helpinghand](http://www.sigmanu.org/helpinghand)

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**CAMPUS LEADERSHIP**

*Members of the Fraternity enhance their host institution by becoming engaged as leaders in campus and interfraternal activities and organizations. Through their leadership, members advance the purpose of both the fraternity and their institution. This is recognized as a contribution to the greater good.*

**ACCEPTABLE CRITERIA**

- At least 60% of chapter members are involved in other student organizations.
- Chapter meets all IFC requirements.
- Chapter meets with fraternity/sorority advisor once per semester.
- Chapter has actively assisted members in becoming involved in other organizations or campus programs.

**IMPROVEMENT PLAN COMPONENTS**

- [Campus Leadership Action Plan](#)

**CAMPUS LEADERSHIP RESOURCES**

- [Campus Leadership Virtual Operations resources](#)
- [Best Practices Library](#)
- LEAD Phase I
  - [Session 3: Leadership & Working in Groups](#)
  - [Session 8: Leadership: The Basics](#)
- [LEAD Phase II Session 8: Living Our Values](#)
- [All Chapter LEAD Module B, Session 6: Campus Involvement](#)
- [Community Service and Philanthropy Chairman Manual](#) (Event Planning Procedures section)

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**VALUES CONGRUENT ENVIRONMENTS**

*The physical and social environments created by the Fraternity foster positive growth and development and the establishment of lifelong friendships. This includes the promotion of a safe and healthy lifestyle. The chapter will foster a brotherhood that respects the dignity of people while embracing the free exchange of ideas.*

**ACCEPTABLE CRITERIA**

- Chapter has not been in violation of The Law of Sigma Nu Fraternity, Inc., the *Risk Reduction Policy*, or college/university policy in the last year.
- Chapter creates a safe and healthy social environment.
- Chapter Candidates complete the Risk Reduction session from LEAD Phase I.

**IMPROVEMENT PLAN COMPONENTS**

- [Values Congruent Environments Action Plan](#)
- Chapters with confirmed violations of Fraternity policy in the past academic year receive an automatic deficiency in this area. Chapters that have already completed a Plan of Action to address their violation(s) should provide the following:
  - Confirmation of continued use of any operational items created as part of the Plan of Action (e.g. crisis management plan, risk reduction plan, candidate program, internal judicial procedures). Any updates to these plans should be noted.
  - Action steps or protocols the chapter has put in place for the current academic year to ensure recent violations are not repeated.

**VALUES CONGRUENT ENVIRONMENTS RESOURCES**

- [Values Congruent Environments Virtual Operations resources](#)
- Officer Resource Page – [www.sigmanu.org/riskreductionchairman](http://www.sigmanu.org/riskreductionchairman)
- Risk Reduction resources - [www.sigmanu.org/riskreduction](http://www.sigmanu.org/riskreduction)
- [Best Practices Library](#)
- [The Law of Sigma Nu Fraternity, Inc.](#)
- [Sigma Nu Fraternity, Inc.'s Risk Reduction Policy](#)
- [LEAD Phase I Session 5: Risk Reduction](#)
- All Chapter LEAD
  - Module A
    - [Session 1: Wellness](#)
    - [Session 6: Diversity](#)
  - [Module C](#)
- [Sigma Nu Talks...Social Issues](#)

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**INTELLECTUAL DEVELOPMENT**

*Chapter will positively impact intellectual development by promoting the importance of academics and by supporting its members through activities which develop the intellect and support critical thinking.*

**ACCEPTABLE CRITERIA**

- Chapter earned a GPA above both all-male and all-fraternity averages, or chapter GPA was above a 3.0 for the previous two semesters.
- Chapter has a minimum GPA for candidates, initiates, and officers.
- Scholarship Committee and/or advisor provide individual support for all members (e.g. regular check-ins, self-reporting by members).
- Chapter has a written scholarship plan with defined goals.
- Chapter provides incentives OR recognition for academic success.
- Chapter helps members connect with campus services for academic success.
- Chapter promotes use of virtual study groups (not necessarily limited to their own chapter/campus).

**IMPROVEMENT PLAN COMPONENTS**

- **[Intellectual Development Action Plan](#)**

**INTELLECTUAL DEVELOPMENT RESOURCES**

- [Intellectual Development Virtual Operations resources](#)
- Officer Resource Page – [www.sigmanu.org/scholarshipchairman](http://www.sigmanu.org/scholarshipchairman)
- [Scholarship Chairman's Manual](#)
- [Best Practices Library](#)
- [Scholarship Plan Components](#) resource
- [All Chapter LEAD Module A Session 3: Scholarship](#)
- [All Chapter LEAD Module B Session 6: Campus Involvement](#)
- [www.orderofomega.org](http://www.orderofomega.org)
- [www.odk.org](http://www.odk.org)

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**CANDIDATE DEVELOPMENT**

*Through a variety of learning and mentoring experiences, candidates are prepared to be active members of the Fraternity with a commitment to the values and purpose of Sigma Nu.*

**ACCEPTABLE CRITERIA**

- Chapter utilizes LEAD Phase I and may incorporate some guest facilitators.
- Chapter initiates at least 70% of candidates (excluding those de-pledged for disciplinary reasons).
- Chapter articulates to all members and candidates that Sigma Nu is an anti-hazing organization and all members understand the definition of hazing as described by The Law of Sigma Nu Fraternity, Inc., and the *Risk Reduction Policy*.
- Candidates complete a service project OR individually complete two (2) or more hours of service (in-person or virtual volunteerism).
- Chapter reinforces the messages communicated through Values-Based Recruitment with members serving as role models of the mission and values of Sigma Nu.
- Chapter has clearly defined expected outcomes for their Candidate Education Program.
- Chapter encourages candidates to participate in virtual chapter operations (e.g. chapter meetings, virtual brotherhood events).
- Chapter hosts a virtual meeting with candidates once per month with at least 65% of chapter members (candidates and initiates) in attendance.

**IMPROVEMENT PLAN COMPONENTS**

- [\*\*Candidate Development Action Plan\*\*](#)

**CANDIDATE DEVELOPMENT RESOURCES**

- [Candidate Development Virtual Operations resources](#)
- Officer Resource Page – [www.sigmanu.org/marshal](http://www.sigmanu.org/marshal) or [www.sigmanu.org/leadchairman](http://www.sigmanu.org/leadchairman)
- [Marshal's Manual](#)
- [Candidate Education Program Components](#) document
- [Best Practices Library](#)
- [Big Brother Program](#) resource
- [LEAD Phase I Session 11: Community Service](#)
- [All Chapter LEAD Module B Session 6: Campus Involvement](#)
- [The Recruitment Bluebook](#)
- [The Law of Sigma Nu Fraternity, Inc.](#)
- [Sigma Nu Fraternity, Inc.'s Risk Reduction Policy](#)



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**BROTHER DEVELOPMENT**

*The chapter prepares brothers to be effective in leadership roles within Sigma Nu and other organizations and experiences. In addition, active members are prepared to be successful alumni.*

**ACCEPTABLE CRITERIA**

- Chapter utilizes two or more phases of LEAD with guest facilitators.
- Chapter members attend campus or interfraternal leadership development programs (i.e. UIFI, IMPACT, LeaderShape, and officer training programs), if virtual programs are available.
- Chapter attends College of Chapters and Grand Chapter.
- Chapter attends all available regional Sigma Nu programs (e.g. Sigma Nu Institutes).
- The position of LEAD Chairman is an elected, major office.
- Chapter has compiled a list of possible guest facilitators and their contact information.
- Chapter sponsors an Officer Transition session as part of its transition plan each semester.
- Chapter holds a virtual brotherhood event at least once per month.

**IMPROVEMENT PLAN COMPONENTS**

- **[Brother Development Action Plan](#)**

**BROTHER DEVELOPMENT RESOURCES**

- [Brother Development Virtual Operations resources](#)
- Officer Resource Page – [www.sigmanu.org/leadchairman](http://www.sigmanu.org/leadchairman)
- The LEAD Program – [www.sigmanu.org/lead](http://www.sigmanu.org/lead)
- [Best Practices Library](#)
- [LEAD Chairman’s Manual](#)
- [LEAD Session Inventory](#)
- [Sigma Nu Institutes](#)
- [College of Chapters](#)
- [Grand Chapter](#)
- [All Chapter LEAD Module B Session 5: Officer Transition](#)
- [Undergraduate Interfraternity Institute \(UIFI\)](#)
- [LeaderShape](#)

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**ALUMNI DEVELOPMENT**

*Sigma Nu shall identify and engage alumni and volunteers to support the success of the chapter, develop and perpetuate fraternal leadership and increase the value of lifelong membership.*

**ACCEPTABLE CRITERIA**

- Chapter has an active Alumni Advisory Board or Chapter Advisor.
- Chapter produces and distributes alumni newsletters at least once each academic year.
- Chapter communicates regularly with Alumni Advisory Board or Chapter Advisor.
- Chapter offers an opportunity for alumni to connect with one another and the collegiate chapter.

**IMPROVEMENT PLAN COMPONENTS**

- **[Alumni Development Action Plan](#)**

**ALUMNI DEVELOPMENT RESOURCES**

- [Alumni Development Virtual Operations resources](#)
- Officer Resource Page – [www.sigmanu.org/alumnirelationschairman](http://www.sigmanu.org/alumnirelationschairman)
- [Alumni Relations Chairman's Manual](#)
- [Best Practices Library](#)
- [Alumni Advisory Boards](#)
- [Alumni Newsletter Guide](#)
- [LEAD Chairman's Manual](#)

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**RECRUITMENT AND MANPOWER**

*The manpower of a chapter must be sufficient to maintain all successful chapter operations in a manner which provides a positive fraternal experience. Further, Sigma Nu will strive for growth through an innovative, values-based recruitment program that engages new members who are committed to the founding principles of the Fraternity.*

**ACCEPTABLE CRITERIA**

- Chapter meets or exceeds the average manpower size for the college/university.
- Chapter's recruitment efforts are focused on Sigma Nu's Values-Based Recruitment program and show some emphasis on the values and purpose of the Fraternity.
- Chapter has a written, year-round, recruitment plan.

**IMPROVEMENT PLAN COMPONENTS**

- [Recruitment and Manpower Action Plan](#)

**RECRUITMENT AND MANPOWER RESOURCES**

- [Recruitment and Manpower Virtual Operations resources](#)
- Officer Resource Page – [www.sigmanu.org/recruitmentchairman](http://www.sigmanu.org/recruitmentchairman)
- Values-Based Recruitment resources – [www.sigmanu.org/vbr](http://www.sigmanu.org/vbr)
- [Best Practices Library](#)
- [The Recruitment Bluebook](#)
- [Recruitment Skills Workshop](#)

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**CHAPTER OPERATIONS**

*Sigma Nu will ensure the necessary structures, systems, and resources are in place in support of the Fraternity. This includes fiduciary responsibility, organized administration, and effective planning so as to best achieve the aims of Sigma Nu.*

**ACCEPTABLE CRITERIA**

- Chapter operates on an annual budget with a 5% revenue over expense margin.
- Chapter has no past due balance with the General Fraternity, College or University, or any other entity.
- Chapter has no more than 10% of accounts receivables in excess of 30 days and for candidates and brothers who are in arrears, the chapter utilizes the 30/60/90 policy as per The Law of Sigma Nu Fraternity, Inc.
- Chapter uses a digital format for most financial transactions with appropriate control and oversight protocol.
- Chapter operates under a written strategic plan with measurable goals and objectives that are reviewed annually by the chapter.
- Chapter operates on the committee system and the committees meet on a schedule determined by the chapter.

**IMPROVEMENT PLAN COMPONENTS**

- [Chapter Operations Action Plan](#)
- Copy of the chapter's written strategic plan with measurable goals and objectives.
  - [Chapter Strategic Plan Template](#)

**CHAPTER OPERATIONS RESOURCES**

- [Chapter Operations Virtual Operations resources](#)
- [Chapter Strategic Plan Template](#)
- Officer Resource Page – [www.sigmanu.org/treasurer](http://www.sigmanu.org/treasurer) or [www.sigmanu.org/chaplain](http://www.sigmanu.org/chaplain)
- [Treasurer's Manual](#)
- [Lt. Commander's Manual](#)
- [Chaplain's Manual](#)
- [Best Practices Library](#)
- [The Law of Sigma Nu Fraternity, Inc.](#) (Article 4, Section 7 and Article 7, Section 5.4)
- [All Chapter LEAD Module B Session 1: Goal Setting](#)
- [All Chapter LEAD Module B Session 4: Strategic Planning](#)

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**GOVERNANCE AND ACCOUNTABILITY**

*Effective governance structures and measures of accountability must be in place within the Fraternity. These measures should complement the values of the Fraternity while maintaining integrity to the purpose of the organization.*

**ACCEPTABLE CRITERIA**

- Chapter utilizes the Trial Code Procedure of The Law of Sigma Nu Fraternity, Inc. when necessary to discipline chapter members.
- Chapter has not been in violation of The Law of Sigma Nu Fraternity, Inc., or the *Risk Reduction Policy* in the last year.
- Chapter has not violated college/university policy in the last year.
- Chapter bylaws are current.
- Chapter establishes a virtual operations plan at the beginning of each academic term.

**IMPROVEMENT PLAN COMPONENTS**

- **Governance and Accountability Action Plan**
- Chapters with confirmed violations of Fraternity policy in the past academic year receive an automatic deficiency in this area. Chapters that have already completed a Plan of Action to address their violation(s) should provide the following:
  - Confirmation of continued use of any operational items created as part of the Plan of Action (e.g. crisis management plan, risk reduction plan, candidate program, internal judicial procedures). Any updates to these plans should be noted.
  - Action steps or protocols the chapter has put in place for the current academic year to ensure recent violations are not repeated.

**GOVERNANCE AND ACCOUNTABILITY RESOURCES**

- [Governance and Accountability Virtual Operations resources](#)
- Officer Resource Page – [www.sigmanu.org/ltcommander](http://www.sigmanu.org/ltcommander)
- [Lt. Commander's Manual](#)
- [Best Practices Library](#)
- [Risk Reduction Chairman's Manual](#) (section on Crisis Management Plan)
- [Honor/Judicial Board Structure](#) resource
- [All Chapter LEAD Module B Session 7: Accountability](#)
- [The Law of Sigma Nu Fraternity, Inc.](#) (Trial Code)
- [Trial Code Procedures Checklist](#)
- [Visual Trial Code](#)
- [Sigma Nu Fraternity, Inc.'s Risk Reduction Policy](#)