



Sigma Nu Fraternity

Pursuit of Excellence Program Submission

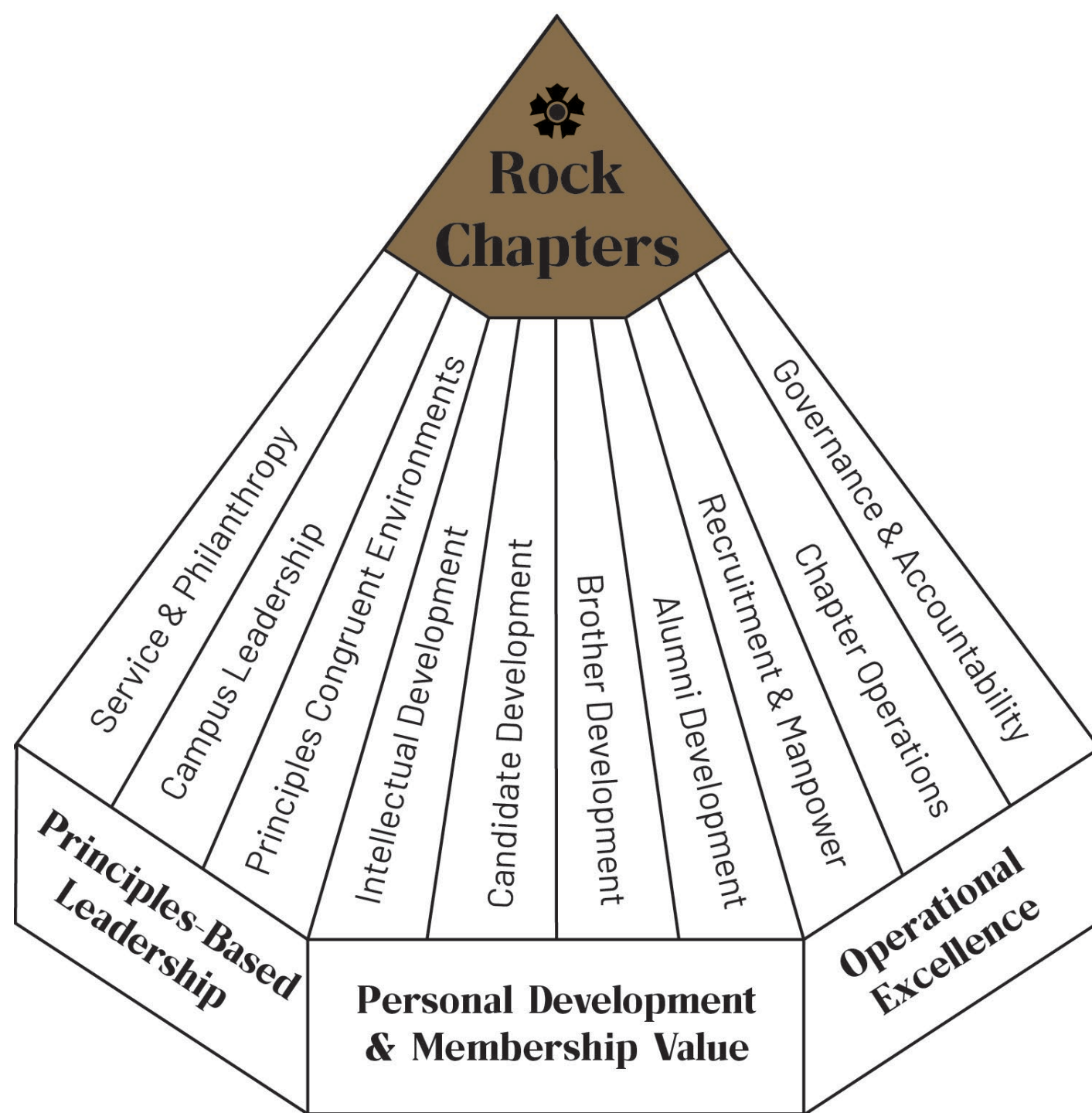
Alumni Engagement Series



Today's Presenter

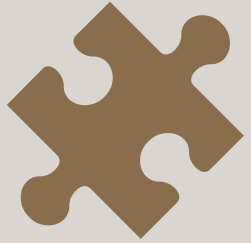
Scott Smith (Central Arkansas)
Director of Leadership Development





The Pursuit of Excellence Program (PEP)

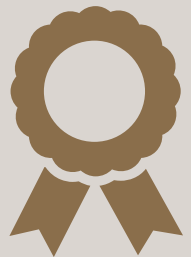
PEP Basics



Prescriptive guide for improving a chapter, piece by piece.



Limited to operations and standards appropriate for all chapters.



Identification of “acceptable” and ideal performance.

Accountability and support for those that underperform the former.

Awards and recognition for those achieving the latter.

PEP Over Time: Raising the Bar

2002

- Minimum standards program introduced. Accreditation model.

2008

- Redesigned to comprehensive evaluation, planning, and awards program. (2009 is first assessment year).

2014

- Council reset of standards in summer 2014 (effective for 2015 assessment).

2020-2022

- Pandemic adaptations 2020-2022.

2023

- High Council reset of standards in summer 2022 (effective for 2023 assessment).

2022 – PEP Recalibration

Strategic goal to “*evaluate and re-calibrate PEP to continually improve chapter performance across the Fraternity.*”

Spring 2022 High Council review of pre- and pandemic-era criteria, current best practice for chapters, similar campus-based and national fraternity programs. Updates to ensure evaluation guidelines:

- Appropriately reflect the Fraternity’s strategic plan, policies, and programs.
- Provide clear distinctions between each performance level.
- Continue to promote improvement of chapter operations relative to achieving increasing levels of excellence.

Recalibration Results

Updated evaluation guidelines through:

- Removing criteria that are no longer relevant due to changes in Fraternity policy, practice, and programs.
- Retaining or modifying criteria that were amended during the pandemic and have promoted innovation and improved efficiency and effectiveness in chapter operations.
- Adding new criteria to promote continuous improvement by chapters, to ensure clear distinctions between each performance level, and to institute Fraternity or fraternal community best practices.

Terminology Update (2025)

Starting with the 2025 submission and awards process, the Fraternity has replaced “values” with “principles.”

- Values = personal, temporal
- Principles = organizational, timeless
 - Reference the Fraternity’s cardinal principles and Five Objects as described by The Law and Ritual.

Impact

- Principles-Based Leadership and Principles Congruent Environments, as well as

How It Works





Exceptional Organizations

Model for visioning and planning:

- Pick a point in the future (specific date)
 - Decide, as an organization, what they will be at that point in time (accomplishments, size, revenue, infrastructure, etc.)
 - Work backward from set date to present day – major themes and strategies to bridge gap from envisioned future to current context
 - To-do list of goals and action items to guide progress – including assignment of due dates, budget allocations, and responsibilities across committees/members
 - When the selected future date arrives – stop, look around, assess where they are
 - Where they wanted and expected? Why? Why Not?
 - How to go farther, faster next time
-

PEP Timeline

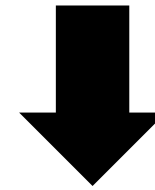
Start of Academic Year

Ratings & Feedback
Strategy session
Goals & Action Plans
Communicate plans to advisors



During Academic Year

Execute goals and action plans
Communicate progress (internally and externally)



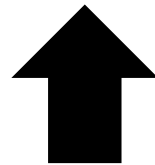
End of Academic Year

Self-assessment (chapter reflection) and PEP submission
Submissions are made to pep@sigmanu.org by April 30



Summer

PEP submissions reviewed
Chapters receive ratings and feedback
Chapter awards and accountability



PEP Evaluation Guidelines

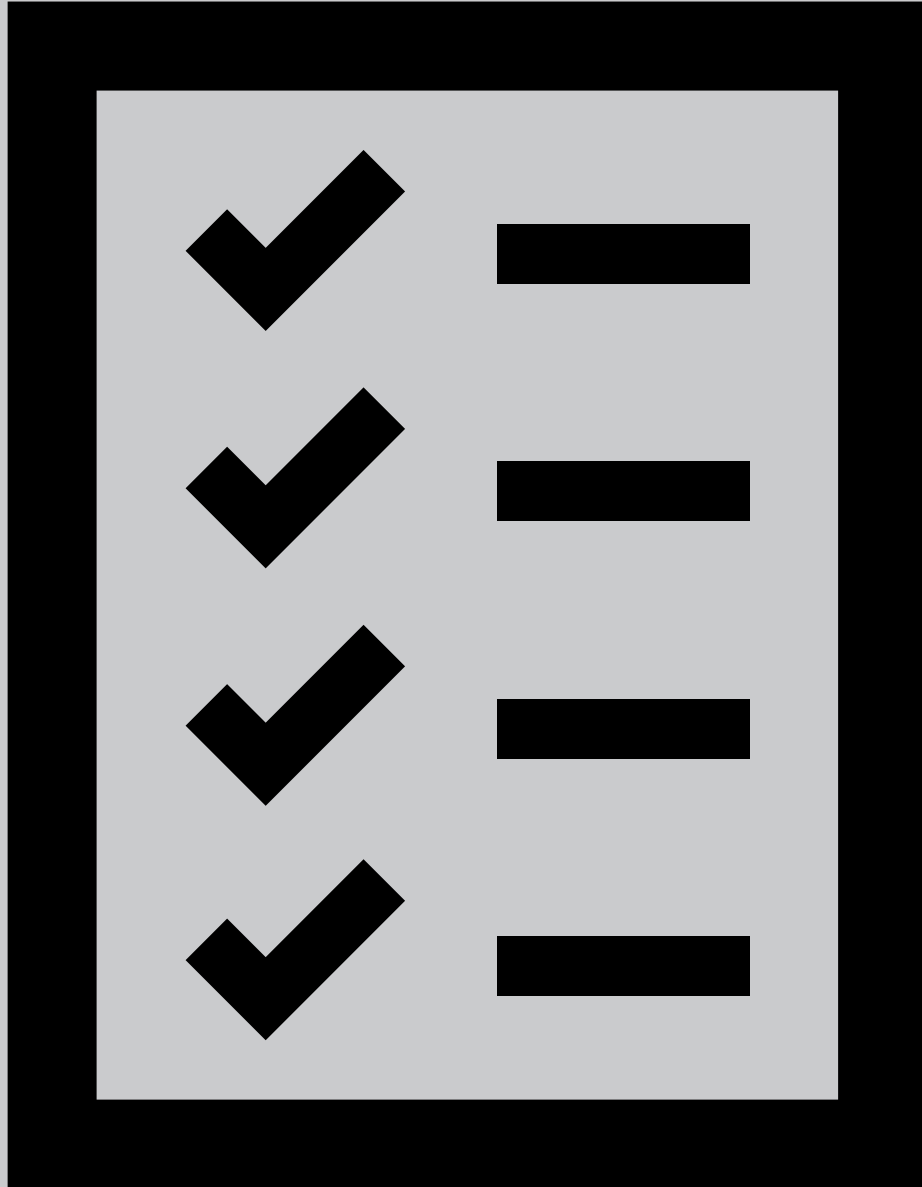
[Sample] Brother Development

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

Acceptable to Excellence Criteria

- Either increase in intensity (e.g., 2 phases of LEAD vs. 3, 4, or all 5), OR,
- Higher levels of performance add additional criteria

2022 Criteria changes noted in **bold text on [PEP Evaluation Guidelines](#).



Chapter Self-Assessment

Process and Resources

Self-Assessment

What

Review of past 365 days –
comprehensive assessment of the year

Should involve all officers and
committees in addressing the questions
in the self-assessment booklet and
preparing supporting materials.

Clearly describe its plans, actions, and
achievements for the past year –
resulting in a full accounting of both
what and how things were
accomplished.

Why

Accounting of what the chapter set out
to do, how they did it, and results
yielded.

Benefits reviewers – Fraternity staff and
within the chapter (general members
learning more about a given area, future
officers attempting to replicate or
improve upon prior plans and results, or
advisors looking for specific areas to
offer additional guidance)

Awards

PEP: Excellence in... requires 3 Excellence ratings in a category

- Principles-Based Leadership and Operational Excellence = Excellence in 3/3
- Personal Development & Membership Value = Excellence in at least 3/4 (fourth is Acceptable or better)

Rock Chapter = Very Good/Excellence average for the two years of a biennium (e.g., 2020 & 2021, 2022 & 2023, 2024 & 2025)

Most Improved Chapter = Qualifying chapters are those that have shown significant improvement in PEP ratings from first to second year of the biennium, and in the second year are performing at Rock Chapter levels.

Other Awards & Recognition

Derived from PEP submission and other chapter annual reporting:

- **Academic** – based on past calendar year
- **Manpower** – academic year
- **Service & Philanthropy Contribution** – highest per man average, based on submission of Service and Philanthropy Tracking Sheet
- **LEAD** – Excellence in Phase = PEP submission; “of the Year” require LEAD awards application
- **Colony Petitions (to Charter)** – reach Rock standards (i.e., Very Good/Excellence average)



Resource & Process Walkthrough

Key Resources

General

- sigmanu.org/pep
- Overview and FAQ
- Strategy Session
- Evaluation Guidelines
- Improvement Plan Guidelines
- Resources by operational area

Self-Assessment

- [Self-Assessment Guide](#)
- [Submission Booklet](#)
- Advisor invitations to provide feedback
 - Requests sent by email to AAB Chairmen, Chapter Advisors, Division Commanders
 - Short survey to capture feedback and suggestions for improvement

Best Practices



Best Practices

Year-Round

PEP Committee – tracks goals/results against PEP and campus-based standards

Use **shared file storage** to build supporting materials over time and to compare year-over-year

- Google Drive or similar

Do a mid-year update

(December/January)

- Capture summer/fall results – especially if elections on calendar year

Self-Assessment

Use the Guide and do the Session

- As a Chapter or in Committees

Be comprehensive – as if you're writing a how-to for future officers

- Answer each question fully, provide suggested documents

Edit – Lt. Commander and/or AAB final review

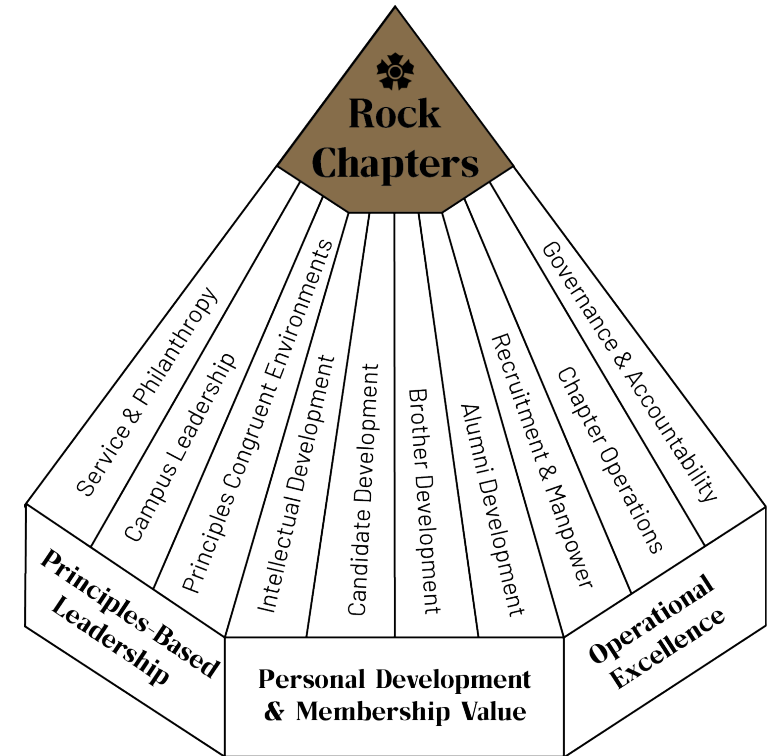
What's Next?

Schedule Self-Assessment Session

- Ideally held in mid-April
 - Option 1: Full Chapter Workshop
 - Option 2: Committee Sessions
- Chapter/Committees report on goals, plans, actions, and achievements for past year
 - Collect supporting documents

Complete Chapter Self-Assessment Booklet

- Lt. Commander and/or PEP Committee compile chapter/committee work and organize supporting material into final submission
- Advisors review and suggest edits
- Submit booklet & documents to pep@sigmanu.org by April 30



Awards Reminder

Awards applications/nominations are due April 30.

Collegiate Awards – sigmanu.org/awards

- Alpha Affiliate (top 10 graduating seniors); Man, Scholar, Talent, Athlete of the Year

Alumni/Volunteer Awards – sigmanu.org/alumniawards

- Campus Advisor (Fraternity/Sorority Advisor or similar)
- Division Commander, Chapter Advisor, Alumni Chapter Officer, House Corporation Officer of the Year, Alumnus of the Biennium



Questions?



Thank You!

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