



**Sigma Nu Fraternity**

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# **Pursuit of Excellence Program Submission**

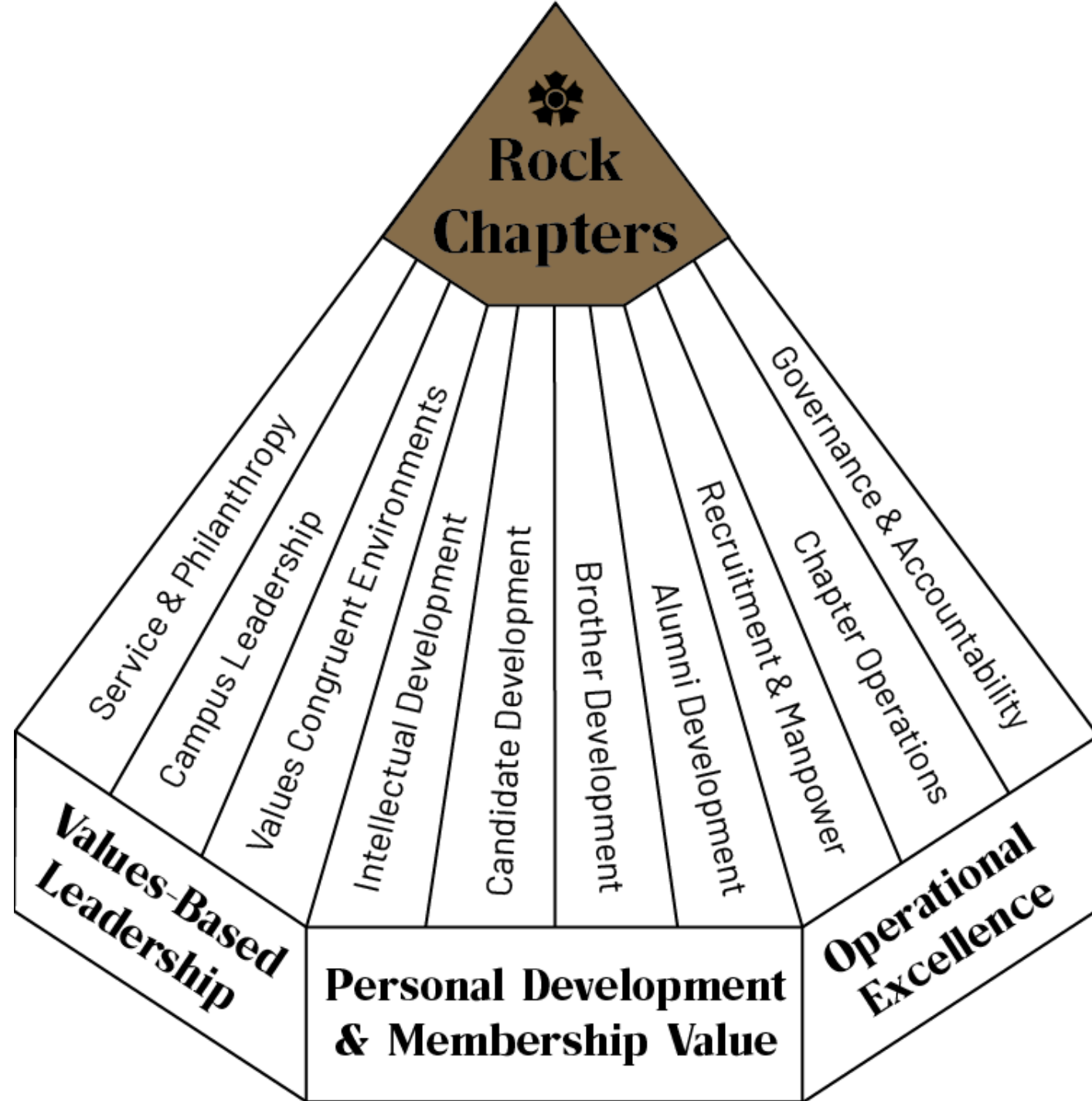
**Alumni Engagement Series**

# Today's Presenters

**Austin Lloyd (Arkansas-Fort Smith)**  
**Director of Chapter Services**

**Scott Smith (Central Arkansas)**  
**Director of Leadership Development**





# The Pursuit of Excellence Program (PEP)

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# PEP Basics

Sigma Nu's assessment, standards, and improvement program.

Designed as a year-round planning, evaluation, and improvement program.

- Prescriptive guide for improving a chapter, piece by piece
- Limited to operations and standards appropriate for all chapters
  - Comparison statistics are relative to local campus environment
    - E.g., local GPA benchmarks, average IFC chapter size
- 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

## 2002 – Program Created

Grand Chapter adopts minimum standards program measuring chapter use of “best practice” in 5 operational areas

Accrediting chapters who prove performance through documentation ( $\geq 80$  of 110 possible points)

## 2008 – Program Overhaul

Grand Chapter overhauls program to measure three overarching categories of chapter operations broken into 10 specific areas

Continuum of performance evaluated in each area

Includes feedback mechanism and absorbs chapter awards program (including Rock Chapter)

# PEP Over Time

## 2014 – Criteria Updates

High Council updates evaluation criteria in response to strong overall chapter performance

Resetting of Acceptable-Excellence criteria to set new standards for chapter excellence and minimum expectations

## 2020-2022 – COVID Adjustments

Accommodations and expectation updates responsive to operating conditions of the pandemic (virtual, in-person with social distancing limitations)

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# 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.

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# 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.



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# How It Works





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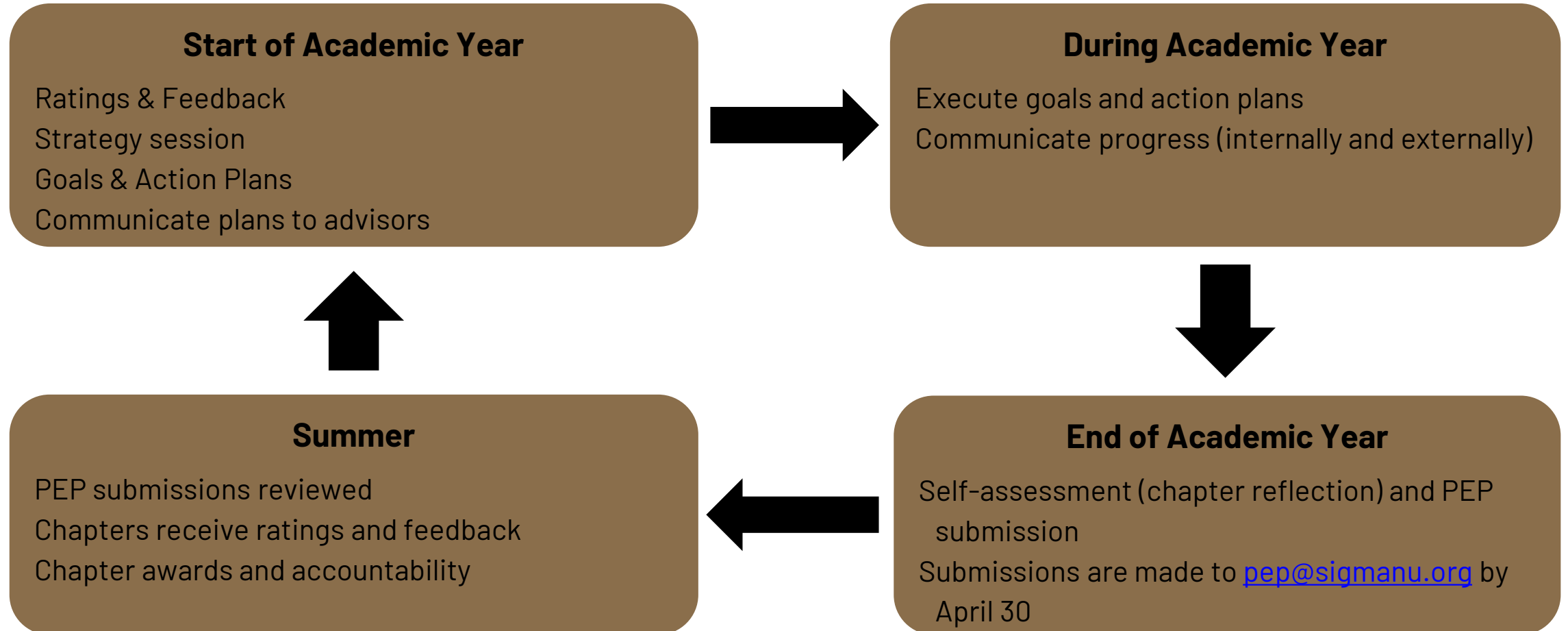
# Exceptional Organizations

## 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
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# PEP Timeline



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# 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
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# Updates: Effective August 2022

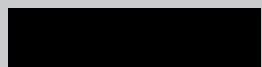
As colleges and universities came back to normal operating conditions the High Council reviewed the evaluation guidelines to reset expectations and raise the bar for chapter performance.

Criteria from both pre-pandemic and pandemic operations were reviewed, modified, extended to lower performance levels, or removed considering the future the Fraternity expects chapters to help create. The resulting updates to the evaluation guidelines include:

- 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.

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

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# Chapter Self-Assessment

Process and Resources

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# 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)

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# Awards

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

- Values-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., 2018-2020, 2019-2021, 2021-2023)

**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.

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# Other Awards & Recognition

Derived from PEP submission and other chapter annual reporting:

- **Scholarship** – 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)



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# **Resource & Process Walkthrough**

# Key Resources

## General

- [www.sigmanu.org/pep](http://www.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
  - <https://www.sigmanu.org/collegiate-members/pursuit-of-excellence/advisor-assessment>

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# 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 are 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

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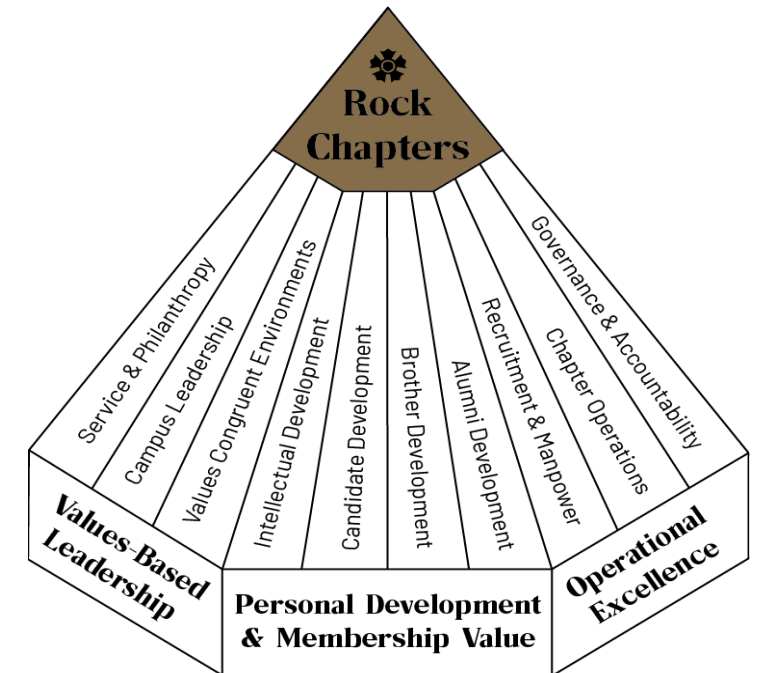
# What's Next?

## 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 and documents to [pep@sigmanu.org](mailto:pep@sigmanu.org) by April 30



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# Awards Reminder

**Awards applications/nominations are due April 30.**

**Collegiate Awards – [www.sigmanu.org/awards](http://www.sigmanu.org/awards)**

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

**Alumni/Volunteer Awards – [www.sigmanu.org/alumniawards](http://www.sigmanu.org/alumniawards)**

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



# Questions?



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# Thank You

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# EXTRA SLIDES





# **Realities of Success: Colony to Chapter / First Rock Chapter**

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# Realities: Three Choices

## **Keep doing what we're doing...**

- Regression to the mean

## **Enjoy and destroy**

- We've accomplished everything we wanted, let's celebrate and relax

## **What's next?**

- Re-establishing what excellence means
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