



Sigma Nu Fraternity

Utilizing the Pursuit of Excellence Program

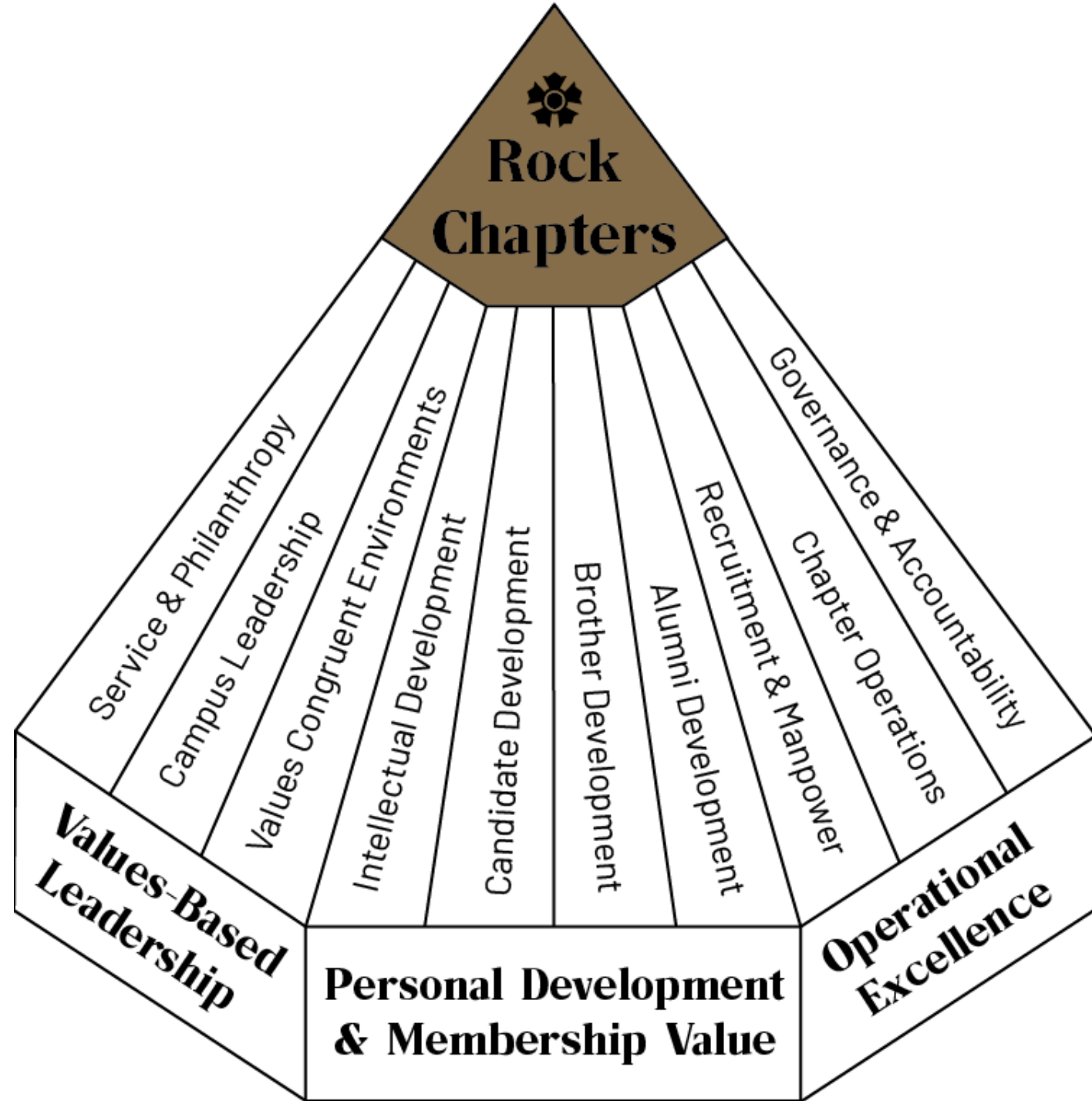
Alumni Engagement Series

Today's Presenters

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Director of Chapter Services

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Director of Leadership Development





The Pursuit of Excellence Program (PEP)

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

History

2002 (original program created)

- Created by the 60th Grand Chapter in response to 2000 Strategic Plan goal of developing a set of “minimum standards” for chapter performance
- Points-based accreditation system - Separate from the Rock Chapter awards program

2006 (need for change)

- 62nd Grand Chapter resolution to appoint ad-hoc committee to evaluate current program and recommend updates

2008 – version 2.0 (program overhaul)

- 63rd Grand Chapter adopts reimagined program - Comprehensive evaluation and continuous improvement program
- Alignment with Rock Chapter and work in support of initiatives in strategic plan

2014 (evaluation criteria updates)

- Following an historic number of Rock Chapters and improving trends in overall chapter performance, High Council “resets the bar” from Acceptable to Excellence across 9 of 10 subcategories

2020 (pandemic accommodations)

- Staff level changes to review process and criteria adjustments accommodate for the loss of final two months of academic term

2021 (dual operations)

- Two sets of evaluation criteria to account for virtual or in-person with social distancing limitations

2022 (continuation of pandemic conditions)

- Single set of criteria - continuation of 2021’s in-person with limitations and virtual alternatives criteria

2023 (recalibration)

- High Council update for evaluation criteria for post-pandemic (best of pre- and pandemic era, as well as path for future performance)

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.

How PEP 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
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MY SECRET
PLAN
TO RULE
THE WORLD

PEP Timeline

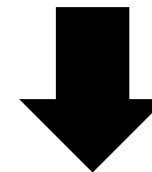
Start of Academic Year

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



During Academic Year

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



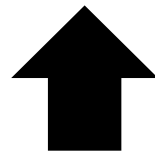
End of Academic Year

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



Ratings & Feedback

Chapters receive ratings, feedback, and next steps instructions in mid-August.

Ratings are the beginning of each year's ongoing *pursuit of excellence*.

- Honest and objective review of the materials submitted by the chapter
- Encouragement and advice for continually improving operations.
- Foundation on which to build this year's strategy, goals, and action plans.

Need a copy of this or a prior year's results? Email pep@sigmanu.org to request past submission materials and/or ratings & feedback.

PEP Evaluation Guidelines

Comprehensive evaluation of three overarching categories of chapter operations, broken into 10 specific areas for measurement

Values-Based Leadership

- Service & 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

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

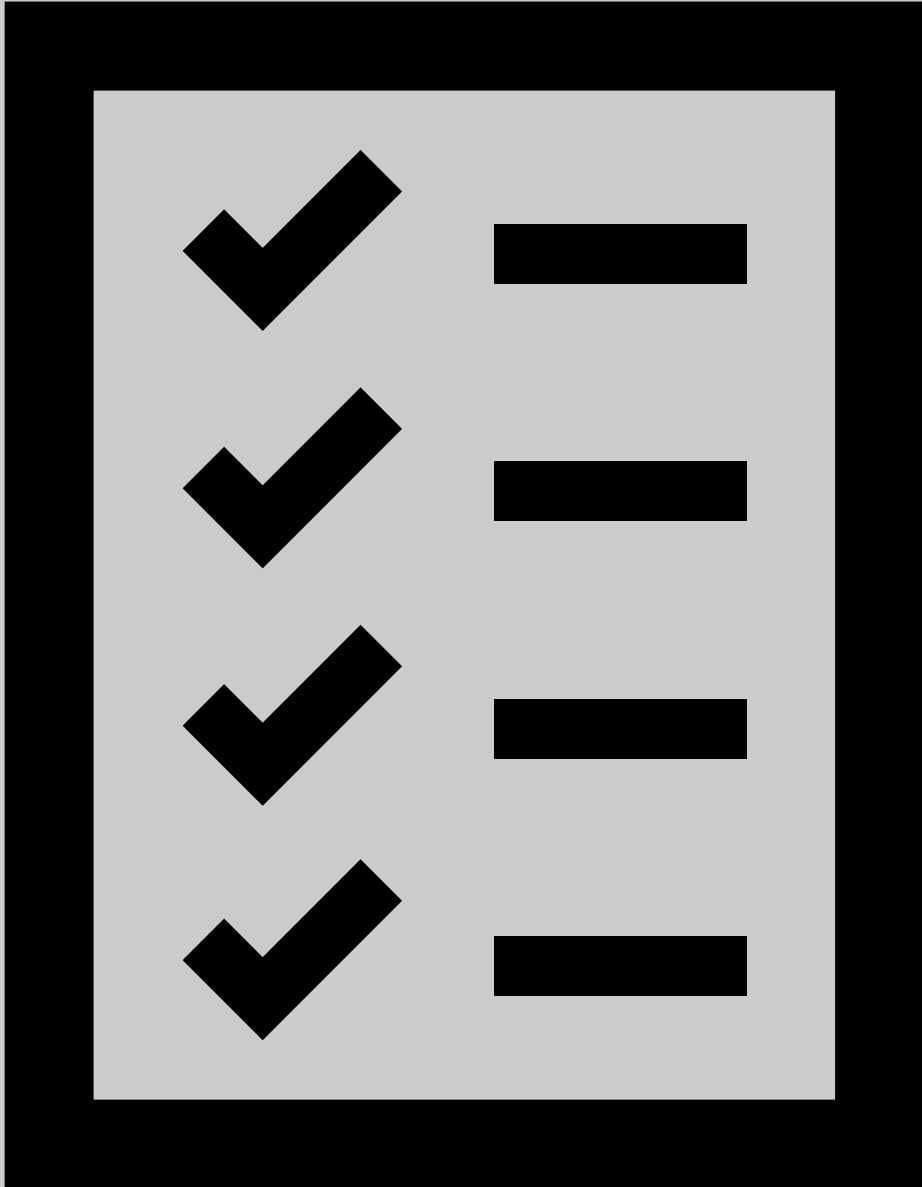
- Either increase in intensity (e.g., 2 phases of LEAD vs. 3, 4, or all 5), OR,
 - Higher levels of performance add additional criteria
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Updates: Effective August 2022

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](#).



Strategy Session and Action Plans

Process and Resources

Strategy Session

What

Chapter-level goal setting for the academic year

Should involve all officers and committees in addressing discussion questions related to Acceptable and Excellence criteria.

Focus the chapter and committees on benchmarks to achieve this year – can also incorporate local campus awards or standards programs

Why

Chapter-wide engagement and voice in what the chapter wants to accomplish this year.

Review of objective outside measurement (PEP ratings) of the chapter's performance relative to the Fraternity's standards.

Review of prescriptive benchmarks for improvement (PEP evaluation guidelines).

Action Plans

Templates to guide officers/committees in developing comprehensive operational plans for each of the ten (10) PEP areas.

A work plan for each officer/committee that describes:

- Their role and resources (e.g., committee, budget)
- Chapter-level goals and expectations
- Prompts to develop specific plans, processes, policies to address Sigma Nu's minimum standards and ideal practices (excellence / Rock Chapter criteria)

Templates

sigmanu.org/collegiate-members/pursuit-of-excellence#ActionPlans

Designed to be updated each academic term

Serve as a record of what the chapter set out to do and how it attempted to do so.



Resource & Process Walkthrough

Key Resources

General (sigmanu.org/pep)

- [Overview and FAQ](#)
- [Strategy Session](#)
- [Evaluation Guidelines](#)
- Self-Assessment Guide & Booklet (for annual submissions in April)
- Resources by operational area

Strategy and Action Plans

- [Chapter Improvement Plan Guidelines](#) – instructions on addressing deficiencies (i.e., ratings of Poor, Substandard, Fair)
- [Action Plans](#)
 - Template for each of 10 PEP areas.
- [Strategic Planning Resources](#)

Best Practices



Best Practices

Ratings to Strategy

Do the Strategy Session upon returning to school

- As a Chapter or in Committees

Review the Evaluation Guidelines and set goals for improved or continued excellent performance

Officers/Committees update Action Plans for term

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
- Conduct an interim/update goal-setting or strategy session

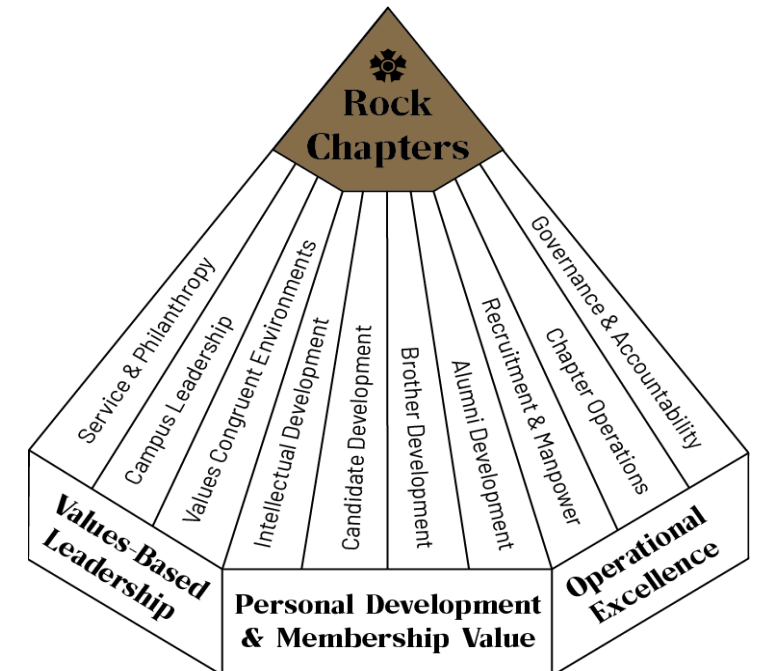
What's Next?

Schedule Strategy Session

- Ideally held in late August / early September
 - Option 1: Full Chapter Workshop
 - Option 2: Committee Sessions
- Chapter/Committees review PEP criteria and participate in guided discussion to set goals, plans, actions, and desired achievements for upcoming year
 - Report back to Chapter / Executive Team

Officers/Committees Update Action Plans

- Build from prior term, update to meet new chapter goals
- Chapters with deficiencies (Poor, Substandard, Fair ratings) submit by September 30 to pep@sigmanu.org



Thank You

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