



SIGMA NU FRATERNITY

Excelling with Honor

PURSUIT OF EXCELLENCE PROGRAM

STANDARDS AND CRITERIA FOR EXCELLENCE

The Pursuit of Excellence Program includes three standards with a total of ten subcategories in which chapters are assessed in their development towards excellence.

VALUES-BASED LEADERSHIP

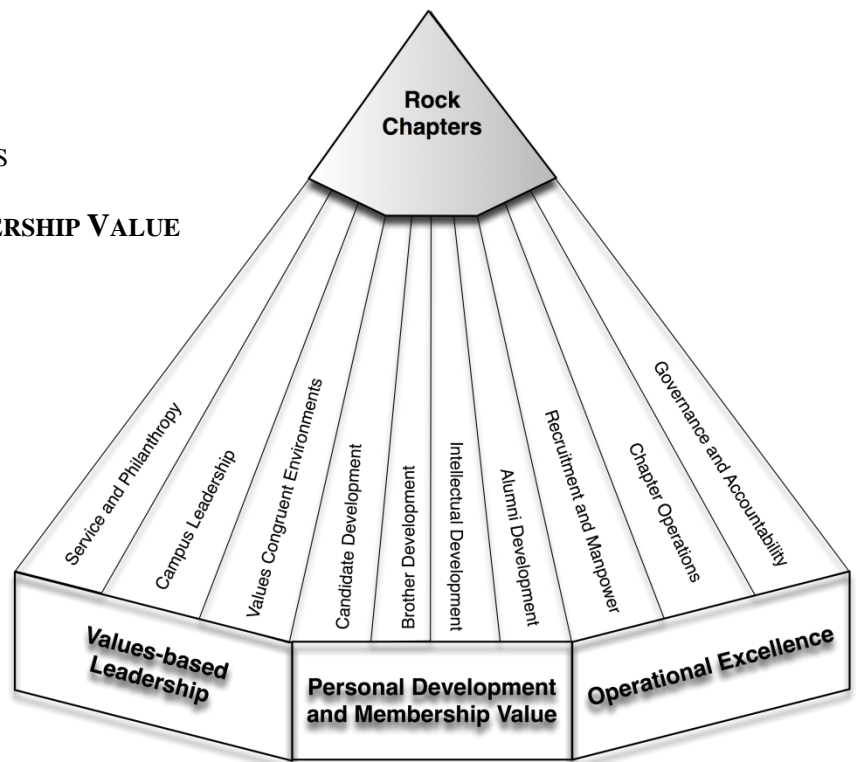
- SERVICE AND PHILANTHROPY
- CAMPUS LEADERSHIP
- VALUES CONGRUENT ENVIRONMENTS

PERSONAL DEVELOPMENT AND MEMBERSHIP VALUE

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

OPERATIONAL EXCELLENCE

- RECRUITMENT AND MANPOWER
- CHAPTER OPERATIONS
- GOVERNANCE AND ACCOUNTABILITY



Each of the standard areas and criteria for excellence can be found on the following pages. Available resources are indicated beneath each excellence criterion. Suggestions for supporting documents to be collected throughout the year are also listed at the end of each section.

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VALUES-BASED LEADERSHIP

Sigma Nu transforms society through the commitment of its members to the Fraternity's founding principles, leadership and ethical living.

Values-Based Leadership focuses on the role that chapters and their members play in the communities in which they are embedded. As current and future leaders, we must model exemplary citizenship and create positive environments.

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.

CRITERIA FOR EXCELLENCE

- Chapter volunteered to provide direct community service at least monthly and has an established relationship with a local non-profit organization.
 - [LEAD Phase I Session 11: Community Service](#)
- Each member completes six (6) 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).
 - [Community Service and Philanthropy Chairman Manual](#) (Event Marketing & Promotion)
- Chapter incorporated the values of Sigma Nu into all Service and Philanthropy events.
 - LEAD Phase III Module 5: Social Change and Service (online content)
- Chapter incorporated periodic reflection after service and philanthropic activities to help members process the experience. This should help members better understand the impact of their service and philanthropy activities as it relates to the values and purpose of the Fraternity.
 - [LEAD Phase I Session 11: Community Service](#) AND LEAD Phase III Module 5: Social Change and Service (online content)
- Members are involved in individual service in addition to chapter projects.
 - LEAD Phase III Module 5: Social Change and Service (online content)
- Chapter has advocated for their non-profit partners to help create awareness about the issues these partners address. This should help others in the community understand the importance of supporting these causes.
 - [Community Service and Philanthropy Chairman Manual](#) (Event Marketing & Promotion)
- Chapter encourages others to support local non-profits, including those it selects for its own community service and philanthropy projects.
 - [Helping Hand Initiative](#) web pages
- Chapter co-sponsors a community service or philanthropy project with another campus student organization.
 - [Community Service and Philanthropy Chairman Manual](#) (Event Planning Procedures)

SUPPORTING DOCUMENTATION

- Values-Based Leadership: Service and Philanthropy Self-Assessment
- Record of community service hours per member with a description of the service project(s)
- Contact information for partner non-profit organizations
- Record of chapter functions that are service-oriented
- Record of chapter activities to collaborate with other organizations to increase service

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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.

CRITERIA FOR EXCELLENCE

- Chapter has demonstrated a high level of involvement in campus sponsored activities and leadership development programs.
 - LEAD Phase I [Session 3: Leadership & Working in Groups](#), [Session 8: Leadership: The Basics](#), and [All Chapter LEAD Module B, Session 6: Campus Involvement](#)
- At least 80% of chapter members are involved in other student organizations.
 - [All Chapter LEAD Module B, Session 6: Campus Involvement](#)
- Chapter meets or exceeds all IFC and host institution expectations.
 - [LEAD Phase I Session 8: Leadership: The Basics](#)
- Chapter established a positive relationship with campus fraternity/sorority advisor and other campus administrators who serve as a resource.
- Chapter has actively assisted members in becoming involved in other organizations or campus programs.
 - [All Chapter LEAD Module B, Session 6: Campus Involvement](#)
- Chapter sends representatives to campus-wide and IFC-sponsored leadership development programs, if such programs exist.
- More than 10% of chapter members have leadership roles in other student organizations or campus programs.
- Chapter hosts at least one campus-wide event or program.
 - [Community Service and Philanthropy Chairman Manual](#) (Event Planning Procedures)
- Chapter has received recognition for their involvement on campus or has received recognition through campus or interfraternal awards programs.
- Chapter has been a leading voice in issues facing the fraternity/sorority community.
 - [LEAD Phase II Session 8: Living Our Values](#)

SUPPORTING DOCUMENTATION

- Values-Based Leadership: Campus Leadership Self-Assessment
- Letter from sponsor or attendance certificate for campus-wide leadership development program verifying participation
- Chapter roster including organizational involvement, indicating leadership positions where appropriate

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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.

CRITERIA FOR EXCELLENCE

- Chapter has not been in violation of The Law of Sigma Nu Fraternity, Inc., the *Risk Reduction Policy and Guidelines* or college/university policy in the last year.
 - [The Law of Sigma Nu Fraternity, Inc.](#)
 - [Sigma Nu Fraternity, Inc.'s Risk Reduction Policy and Guidelines](#)
- Chapter creates a safe and healthy social environment.
 - Sessions from [All Chapter LEAD, Module C](#)
 - [Sigma Nu Fraternity, Inc.'s Risk Reduction Policy and Guidelines](#)
- Chapter Candidates complete the Risk Reduction session from LEAD Phase I.
 - [LEAD Phase I Session 5: Risk Reduction](#)
- Chapter sponsors one session from the Risk Reduction and Personal Development modules of All Chapter LEAD each semester.
 - [All Chapter LEAD Modules A and C](#)
- Chapter sponsors one program related to wellness or diversity with another student organization on campus.
 - All Chapter LEAD Module A [Session 1: Wellness](#) AND [Session 6: Diversity](#)
- Chapter sponsors an anti-hazing or sexual assault educational workshop/speaker each year.
 - [All Chapter LEAD Modules A and C](#)

SUPPORTING DOCUMENTATION

- Values-Based Leadership: Values Congruent Environments Self-Assessment
- Chapter Social Calendar
- Chapter Risk Management/Reduction Plan

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STANDARDS AND CRITERIA FOR EXCELLENCE

PERSONAL DEVELOPMENT AND MEMBERSHIP VALUE

Through the development of the organization and the individual the Fraternity adds value to the experience of its members by fostering the personal growth of each man's mind, heart, and character. This added value perpetuates a lifelong commitment to the organization.

Personal Development and Membership Value stresses the importance of the development of our members as candidates, initiates, and alumni. The Fraternity adds value to their lives by creating extracurricular experiences that support the mission of Sigma Nu and the educational purpose of their host institutions.

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.

CRITERIA FOR EXCELLENCE

- 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.
 - [All Chapter LEAD Module A Session 3: Scholarship](#)
 - [Scholarship Chairman's Manual](#) (section on Goal Setting)
- Chapter sets a minimum GPA for new members, active members, and officers as part of a written scholarship plan for its membership.
 - [Scholarship Chairman's Manual](#) (section on Enforcing Minimum Standards)
- Scholarship committee and advisors provide individual support for members who are struggling academically.
 - [Scholarship Chairman's Manual](#) (section on Academic Resources)
- Chapter has a written scholarship plan with defined goals that are well articulated and easy to measure.
 - [Scholarship Chairman's Manual](#) (section on Academic Program and Standards)
 - [Scholarship Plan Components](#) – a guide to creating a comprehensive scholarship plan
 - [All Chapter LEAD Module A Session 3: Scholarship](#)
- Chapter provides incentives and recognition as components of its written scholarship plan.
 - [Scholarship Chairman's Manual](#) (section on Incentives and Rewards)
- Chapter connects members with campus academic resources, including introducing new members to these resources.
 - [Scholarship Chairman's Manual](#) (section on Academic Resources)
- Chapter members pursue admittance to honors programs and academic groups (such as Order of Omega, Omicron Delta Kappa, and other Honoraries).
 - [All Chapter LEAD Module B Session 6: Campus Involvement](#)
 - www.orderofomega.org and www.odk.org
- Chapter encourages members to participate in intellectually stimulating activities (i.e. lectures, study abroad, campus programs, faculty presentations and/or undergraduate research).
 - LEAD Phase III Module 2: Personal Development (online content)
- Chapter has a faculty advisor who assists with scholarship and works with the chapter's Scholarship Chairman.
- Chapter ranked among the top third of chapters in GPA among IFC fraternities at least once in the previous year.
 - [All Chapter LEAD Module A Session 3: Scholarship](#)

SUPPORTING DOCUMENTATION

- Personal Development and Membership Value: Intellectual Development Self-Assessment
 - Written Scholarship/Academic Plan
 - College/University grade reports for fraternities and sororities from previous **calendar year**
 - Report from Faculty Advisor on their role with the fraternity and support of academic initiatives
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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.

CRITERIA FOR EXCELLENCE

- Chapter completes all LEAD Phase I sessions and utilizes guest facilitators in the program.
 - [LEAD Chairman's Manual](#) (section on Guest Facilitators)
 - [LEAD Guest Facilitators page](#)
- Chapter initiates at least 90% 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 and Guidelines*.
 - [The Law of Sigma Nu Fraternity, Inc.](#)
 - [Sigma Nu Fraternity, Inc.'s Risk Reduction Policy and Guidelines](#)
 - [Risk Reduction Affidavit](#)
- Candidates complete a community service activity as part of the Candidate Education Program. Experience includes follow up discussion to help candidates understand the importance of these activities to the community and to the Fraternity.
 - [LEAD Phase I Session 11: Community Service](#)
- Chapter reinforces the messages communicated through Values-Based Recruitment with members serving as role models of the mission and values of Sigma Nu.
 - [The Recruitment Bluebook](#)
- Chapter has clearly defined expected outcomes for their Candidate Education Program.
 - [Marshal's Manual](#) (section on The Candidate Education Program)
- Candidates attend all campus-based programs sponsored for new members.
 - [All Chapter LEAD Module B Session 6: Campus Involvement](#)
- Chapter has clear expectations for what Candidates can expect of the chapter and active members.
 - [Marshal's Manual](#) (sections on The Candidate Education Program and Candidate Scholarship Program)
- Chapter can articulate the impact of LEAD on their Candidate Education Program and Candidates.
- Chapter utilizes the Candidate Class Retreat from LEAD Phase I.
 - [LEAD Phase I Session 3: Leadership & Working in Groups](#) (2 sample retreat agendas with activities are available)
 - Sample candidate retreat agenda from the [Best Practices Library](#) (Candidate Education Ideas)

SUPPORTING DOCUMENTATION

- Personal Development and Membership Value: Candidate Development Self-Assessment
- Candidate Education calendar, including LEAD calendar for previous two academic terms
- Candidate Retreat agenda and overview
- Written candidate program

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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.

CRITERIA FOR EXCELLENCE

- Chapter utilizes all phases of LEAD with guest facilitators.
 - [LEAD Chairman's Manual](#) (section on Guest Facilitators)
 - [LEAD Guest Facilitators page](#)
 - [LEAD Session Inventory](#)
- Chapter members attend campus or interfraternal leadership development programs (i.e. UIFI, IMPACT, LeaderShape, and officer training programs).
 - [Undergraduate Interfraternity Institute \(UIFI\)](#)
 - [LeaderShape](#)
- Chapter attends College of Chapters and Grand Chapter.
 - [College of Chapters, Grand Chapter](#)
- Chapter attends regional Sigma Nu programs.
 - [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.
 - [LEAD Chairman's Manual](#) (section on Guest Facilitators)
- Chapter sponsors an Officer Transition session as part of its transition plan each semester.
 - [All Chapter LEAD Module B Session 5: Officer Transitions](#)
- Chapter demonstrates a commitment to the LEAD Program through the establishment of a LEAD Committee that includes the Commander, Marshal, LEAD Chairman and at least one other brother in the chapter.
 - [LEAD Chairman's Manual](#) (chairman summary and section on Creating a LEAD Committee)
- Chapter sponsors a brotherhood retreat on an annual basis.
 - Sample retreat agenda from the [Best Practices Library](#) (Brotherhood Ideas)
- Chapter can articulate the impact of their LEAD programming.

SUPPORTING DOCUMENTATION

- Personal Development and Membership Value: Brother Development Self-Assessment
- Written membership development plan for previous year, including LEAD Calendar
- [LEAD Session Inventory](#)
- Schedule and materials for brotherhood retreat
- Chapter retreat agenda and overview

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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.

CRITERIA FOR EXCELLENCE

- Chapter has an active Alumni Advisory Board.
 - [Alumni Relations Chairman's Manual](#) (section on Advisory Roles)
 - [Alumni Advisory Boards](#)
 - [Chapter Advisors](#)
- Chapter produces and distributes alumni newsletters each academic year, at least three times per year, in paper OR electronic formats.
 - Sample newsletters from the [Best Practices Library](#) (Alumni Relations and Engagement)
 - [Alumni Newsletter Guide](#)
- Chapter communicates regularly with alumni through email updates.
 - [Alumni Relations Chairman's Manual](#) (section on Communication with Alumni)
- Chapter sponsors two alumni events each year.
 - [Alumni Relations Chairman's Manual](#) (sections on Alumni Events & Communication)
- Chapter keeps alumni updated on the chapter through a chapter website.
 - Ideas from the [Best Practices Library](#) (Alumni Development > Alumni Development Ideas)
- Chapter promotes interaction between alumni through a social networking group.
 - [Alumni Relations Chairman's Manual](#) (section on Communication with Alumni)
- Chapter utilizes alumni as guest facilitators for the LEAD Program on an annual basis.
 - [LEAD Chairman's Manual](#) (section on Guest Facilitators)
 - [LEAD Guest Facilitators page](#)

SUPPORTING DOCUMENTATION

- Personal Development and Membership Value: Alumni Development Self-Assessment
- Written alumni development plan and calendar of alumni events
- Report from Alumni Advisory Board or Alumni Chapter describing role and relationship with chapter
- Copies of chapter communications with alumni and chapter website address
- Copies of minutes from Alumni Advisory Board meetings from the **current academic year**
- Chapter volunteer directory – Excel or Word file with listing by position, name, email, phone of Chapter Advisor, Alumni Advisory Board members, House Corporation officers, and Alumni Chapter officers

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OPERATIONAL EXCELLENCE

Sigma Nu's organizational structure and internal operations will provide for the effective deployment of resources to deliver excellence in every facet of the Fraternity.

To achieve excellence a chapter must have a structure and adequate resources in place to facilitate chapter success. These structures must maintain the integrity of the values and mission of the Fraternity to ensure long-term success and development.

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.

CRITERIA FOR EXCELLENCE

- Chapter meets or exceeds the average manpower size for the college/university.
 - [The Recruitment Bluebook](#)
 - [Year-Round Recruitment Plan Template](#)
- Chapter has exhibited healthy growth in the previous year OR chapter maintains a healthy manpower for its campus environment.
 - Ideas from the [Best Practices Library](#) (Recruitment and Manpower)
- Chapter's recruitment efforts are focused on Sigma Nu's Values-Based Recruitment program, with particular emphasis on the values and purpose of the Fraternity.
 - [Recruitment Chairman's Manual](#)
- Chapter has a written, year-round, recruitment plan which places emphasis on the development of positive relationships on an individual level and has a recruitment goal and plan in place to reach or maintain a specific total manpower size.
 - [The Recruitment Bluebook](#)
 - [Year-Round Recruitment Plan Template](#)
- Chapter can articulate what type of member they target to achieve their stated purpose as an organization.
 - [The Recruitment Bluebook](#) (section on Chapter Recruitment Meeting)
 - [Chapter Recruitment Meeting Agenda](#)
- Chapter leveraged a recruitment best practice from the Best Practices Library.
 - Ideas from the [Best Practices Library](#) (Recruitment and Manpower)
- Chapter established and leveraged a process for alumni referrals and/or campus and community resources (e.g. parents, high schools, honorary or values-based organizations, admissions office).
 - [BecomeASigmaNu.org](#)
 - [Membership Referral form](#)
 - [The Recruitment Bluebook](#) (sections on Master Prospect Lists and Generating Names)
- Chapter has created and demonstrated use of a system for identifying and recruiting legacies.

SUPPORTING DOCUMENTATION

- Operational Excellence: Recruitment and Manpower Self-Assessment
- Year-round Recruitment Plan for the **current academic year**
- College/University manpower and recruitment reports

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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.

CRITERIA FOR EXCELLENCE

- Chapter operates on an annual budget with a 5% revenue over expense margin.
 - [Treasurer's Manual](#) (section on Budgeting)
- Chapter has had no past due balance with the General Fraternity, College or University, or any other entity.
 - [Treasurer's Manual](#) (section on Managing Debt with Sigma Nu)
- Chapter has no 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.](#)
 - [The Law of Sigma Nu Fraternity, Inc.](#) (Article 4, Section 7)
- Chapter keeps all financial records electronically.
- Chapter utilizes two signature checks.
 - [Treasurer's Manual](#) (section on Check Signing)
 - [The Law of Sigma Nu Fraternity, Inc.](#) (Article 7, Section 5.4)
- Chapter operates under a written strategic plan with measurable goals and objectives that are reviewed annually by the chapter.
 - [All Chapter LEAD Module B Session 1: Goal Setting](#)
 - [All Chapter LEAD Module B Session 4: Strategic Planning](#)
- Chapter utilizes Ritual for each chapter meeting as well as proper induction and initiation ceremonies.
 - [Chaplain's Manual](#) (section on Utilizing the Ritual)
- Chapter operates on the committee system and the committees meet at least monthly to discuss business.
 - [Lt. Commander's Manual](#) (section on Committees)
- Chapter members are involved in creating a chapter budget which expends financial resources in a manner which supports the mission of the Fraternity.
 - [Treasurer's Manual](#) (section on Creating a Budget)
- Chapter utilizes an outside financial service to collect dues and/or collects at least 95% of annual billings.
 - [Treasurer's Manual](#) (section on External Collections and Dues)
- Chapter maintains a savings account.
- Chapter has Ritual discussions after induction and initiation.
 - [Chaplain's Manual](#) (section on Utilizing the Ritual)

SUPPORTING DOCUMENTATION

- Operational Excellence: Chapter Operations Self-Assessment
- End of year financial statements
- Copy of Chapter budget and budget planning process
- Copy of e-file confirmation or copy of 990 filing document(s)
- Committee structure and meeting schedule from previous year
- Copy of chapter plan and goals from the previous year with an evaluation of progress made toward each goal

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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.

CRITERIA FOR EXCELLENCE

- Chapter utilizes the Trial Code Procedure of The Law of Sigma Nu Fraternity, Inc. when necessary to discipline chapter members.
 - [The Law of Sigma Nu Fraternity, Inc.](#) (Trial Code)
 - [The Visual Trial Code](#)
- Chapter has not been in violation of The Law of Sigma Nu Fraternity, Inc. or the *Risk Reduction Policy and Guidelines* in the last year.
 - [The Law of Sigma Nu Fraternity, Inc.](#)
 - [Sigma Nu Fraternity, Inc.'s Risk Reduction Policy and Guidelines](#)
- Chapter has not violated college/university policy in the last year.
- Chapter bylaws are current.
 - [Lt. Commander's Manual](#) (section on Reviewing and Maintaining Bylaws)
- Chapter has a written Crisis Management plan and members are educated.
 - [Risk Reduction Chairman's Manual](#) (section on Crisis Management Plan)
 - [Sample Crisis Management Plan](#) (Best Practices Library > Social Events and Risk Management)
- Chapter utilizes a documented system of accountability and discipline, educates its members on the process, and reviews the process each year.
 - [Lt. Commander's Manual](#) (section on Honor Board and Discipline)
 - [All Chapter LEAD Module B Session 7: Accountability](#)
- Chapter has conducted one or more of the following sessions from Module B of All Chapter LEAD – Session 2: Delegation; Session 3: Effective Meetings; Session 5: Officer Transition; Session 7: Accountability.
 - [All Chapter LEAD Module B Session 2: Delegation](#)
 - [All Chapter LEAD Module B Session 3: Effective Meetings](#)
 - [All Chapter LEAD Module B Session 5: Officer Transition](#)
 - [All Chapter LEAD Module B Session 7: Accountability](#)

SUPPORTING DOCUMENTATION

- Operational Excellence: Governance and Accountability Self-Assessment
- Chapter judicial board (or other accountability mechanism) process
- Report from college/university fraternity/sorority advisor indicating that the chapter has not been in violation of college/university policy in the past year
- Chapter bylaws
- Chapter crisis management plan