

## 2020-2021 Year End Evaluation Feedback Report

Given the impact the COVID pandemic has had on our community and chapter operations, OFSA has elected to alter Accreditation for 2020-2021. For the 2020-2021 academic year, chapters will be assessed through a modified Year End Evaluation Report process.

### Chapter:

Chi Phi
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### Assistant Director:

Devore McIntosh
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### Rating Scale

For the 2020-2021 academic year, chapters will not be assessed based on Accredited with Excellence, Accredited, Unaccredited or Unacceptable. Instead, each area will be assessed by a panel of students, faculty, staff and advisors. The combined average will produce a numerical average value signifying Exceptional, Above Average, and Average. This evaluation is not only based on performance, but also on effort made to prioritize these essential areas during a pandemic in lieu of more traditional fraternity and sorority efforts and operations.

**Exceptional [3]** - extraordinary demonstration of chapter operations and membership engagement in the area of evaluation

\*remarkable commitment to chapter and community purpose, mission and values

**Above Average [2]** - commendable demonstration of chapter operations and membership engagement in the area of evaluation

\*outstanding commitment to chapter and community purpose, mission and values

**Average [1]** - standard demonstration of chapter operations and membership engagement in the area of evaluation

\*acceptable commitment to chapter and community purpose, mission and values

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### 2020-2021 Year End Evaluation Report Areas

1. Prioritization of membership engagement & accountability
2. Dedication to educational initiatives & chapter priorities
3. Commitment to diversity, inclusion & equity
4. Ability to adapt and implement creative and innovative methods
5. Emphasis on new member education and the onboarding of Spring 2020, Fall 2020 and Spring 2021 new members

Chapters are encouraged to upload any supplemental materials to their Year End Evaluation Report folders. Doing so will allow the interview panel and Assistant Directors the ability to provide meaningful feedback as they prepare to interview and evaluate chapters.

*Examples include, but are not limited to, marketing materials, program flyers, chapter meeting minutes, Summit of Headquarters chapter presentations, recruitment materials (videos, presentations), overview of community service hours/member, overview of philanthropy events and dollars raised and donated to charities/foundations.*

**List any chapter provided supplemental materials.**

Images of Meetings, Community Service, house tour

**Demonstrated effort toward prioritization of membership engagement & accountability.**

*Examples could include but are not limited to*

- *Hosted virtual brotherhood/sisterhood events to keep members engaged outside of chapter meetings.*
- *Evaluated and restructured our standards board to achieve better accountability in the chapter.*
- *Focused on engagement of members in all classes.*
- *Chapter responded to OFSA related emails within the required deadlines.*

**Chapter's demonstrated description and justification.**

Following Lehigh's transition to remote learning, the brothers of Chi Phi knew that we would need to reimagine our approach to risk management upon our return to campus. There was no precedent to rely on, so brothers were forced to adapt to changing situations. The uncertain nature of the predicament forced many students across the Greek community to sign leases for off campus houses, posing several challenges from a risk management perspective for our executive board to overcome. These changes were driven by a revised Student Code of Conduct, the restructuring of chapter communications, and an updated standards process to ensure that brothers remained accountable to themselves, their peers, and the holistic Bethlehem community.

One inevitable challenge this year was the dispersion of brothers across both on- and off-campus housing. With chapter members spread thinly, communicating with others was not as easy as it was living communally in the chapter house. To remedy this, our executive board restructured chapter meetings to occur by means of weekly Zoom meetings intended to update brothers on changes in Lehigh's Student Code of Conduct and Covid-19 guidelines. It was initially challenging for our new members to feel engaged with the fraternity, having only been members for a few weeks before students were sent home in March 2020, but as we acclimated to online new member education, we were able to further connect with them and involve them in our brotherhood.

As a chapter, Chi Phi did not host any social gatherings this past academic year. As a social fraternity, Chi Phi members pride themselves on being friendly and outgoing men who enjoy engaging with other members and Lehigh organizations. However, due to the pandemic, we were forced to prioritize the health and safety of our friends, peers, family members, and the Bethlehem community over any social desires. In fact, on August 22nd, chapter President Matthew Tashjian made an explicit post to our chapter's Facebook group condemning any social event or violations of the schools Code of Conduct. This sentiment was reiterated during weekly virtual chapter events, solidifying the importance of maintaining individual accountability. To foster consistent engagement, executive board meetings were restructured to permit underclassmen to attend. This allowed for younger brothers to learn how to lead chapter events and understand the intricacies of executive board positions which they would soon be in contention for. This improved interchapter communication and laid the foundation to support chapter progression.

Another challenge that our chapter was proud to overcome this year was transitioning into a fully virtual new member recruitment process. In order to abide by Lehigh's guidelines restricting in-person recruitment, we hosted multiple recruitment events over Zoom. These events included virtual poker, Among Us, Cards Against Humanity, Uno, and Monopoly. We also hosted virtual viewings of sports events and had multiple Zoom calls during which potential new members were encouraged to speak freely and bond with our members outside of the typical social environment. Brothers who wanted to get to know potential new members better participated in breakout sessions in order to understand the true character of the potential members to whom we were issuing bids.

To ensure that brothers remained accountable to themselves, we were sure to utilize all of the resources afforded to us. To start, Chi Phi prioritized their commitment to currentness with IFC expectations, which benefited from our two members on the IFC executive board regularly sharing updates at chapter meetings. Our alumni also proved to be a valuable resource during this academic year. Alumni held discussion panels to have honest conversations with active members to facilitate in maintaining optimism and hope during these stressful times. Alumni also aided in revising our internal judicial system and standards board. It was critical that our standards process was revised to accommodate for virtual hearings and sanctions for individual members who may have violated the Student Code of Conduct. This process proved imperative during the second semester when we had one incident of Covid-19 violations. In the latter half of February, one member acted alone in putting potential new members in a difficult situation by asking them to violate Covid-19 guidelines. When the executive board found out about this infraction, we immediately launched an internal investigation to determine the severity of this member's actions. As a chapter, we held a Court of Chapter including an interim suspension order to educate and reprimand our brother in the most effective manner. Moreover, this action prompted our executive board to take actions to ensure that this isolated incident can be treated as a learning experience for all brothers. Following the incident, the chapter hosted a mandatory risk management webinar hosted by our national alumni advisors. During the talk, our advisors Matt Scheller, Jay Crosby, and Dave Long emphasized the importance of individual accountability and advised our chapter to consider mechanisms that can hold members responsible for their actions. These talks were extremely valuable in facilitating ongoing conversations with both active members and alumni to keep everyone updated on risk management policy. All chapter members attended anti-hazing webinars as well as a national risk management webinar to ensure that all active members were up to date with current policy as per Chi Phi National. This year was an extremely powerful learning experience. As a chapter, we were fortunate to overcome several unforeseen obstacles and adapt to rapidly changing situations. We are extremely proud of the work that we have accomplished so far and look forward to continuing to make improvements in educating new members on the importance of proper risk management policy.

***Rating assigned to this evaluation area? [Exceptional, Above Average, and Average]***

Above Average

***OFSA & panelist feedback to chapter for this evaluation area.***

Chi Phi was able to interact with their members through various forms of online methods, ranging from zoom to online video games which provided a much-needed reprieve from the everyday isolation. There was a focus on the conduct system and holding individual members accountable which diminishes the great work they were doing in the member engagement aspect. The challenges in the conduct area set the chapter up for other challenges ahead.

**Chapter Development Questions & Rating:**

Chi Phi was doing well in terms of member engagement, but it seems to have been forgotten because of the conduct issue they faced.

- What could have been done differently in the membership engagement looking back on it?

- What resources were available to the chapter to assist with their success in a virtual environment?

### **Demonstrated effort toward dedication to educational initiatives & chapter priorities**

Examples could include but are not limited to

- *Hosted a virtual visit from Educational Leadership Consultant (or equivalent).*
- *Took specific steps to ensure the chapter was fiscally responsible, offering flexible opportunities for membership dues or payment plans due to financial issues or concerns related to the pandemic.*
- *Chapters should be attending all necessary National/regional/area organizational meetings as required.*

### **Chapter's demonstrated description and justification.**

Throughout this semester, Chi Phi and our alumni network worked together to arrange multiple Zoom calls with Chi Phi alumni in several different professional fields. From February to March, our chapter has conducted virtual networking meetings with notable Chi Phi alumni including Mike Lozanoff, John Toriello, Andrew Basso, and Tim Onderko. These alumni, who work for JP Morgan, the Blackstone Group, KPMG, and Langan Engineering, emphasized the importance of being proactive with your future careers while being a student, as well as potential networking opportunities for brothers. Members were encouraged to ask questions about anything relating to their careers. The Zoom calls consisted of our alumni speaking about how Lehigh University developed their professional skills and provided insight on how to prepare ourselves for success after graduation. Insight they provided included, but was not limited to, specific courses brothers should take for various majors, programs and clubs they should join, and advice on how to effectively network. Currently, many active brothers are working with some of these alumni to develop their networking skills and access valuable resources in order to achieve their career goals.

In addition, we continued to hold our annual resume workshop on March 3rd with our alumni advisor, Kenneth Sinclair. His presentation, "Steps to Guarantee an Internship or Job Offer", is broken down into ten main talking points. He proceeds to give similar advice from the alumni calls of getting involved on campus and the importance of giving yourself leadership positions. The main points taken from this seminar are the importance of building a strong resume and networking as early as possible. Professor Sinclair then began delving into the later stages of college about having interviews, presenting yourself, and executing these through the use of Career Services. He then proceeds to finish his presentation by talking about what steps need to be taken once you secure a job. Topics include proper etiquette in the professional workplace, as well as presenting yourself through wardrobe choice.

Before the start of the 2020 school year, the executive board planned on budgeting the financials for the year based on the assumption that we would be living in the chapter house. However, once it was clear that no active members would be living in the chapter house, we revised our original plan to account for the fact that many of the chapter expenses would not be incurred. Throughout this process, we were transparent with the general members that were living off-campus or at their homes about the cost of dues for both the Fall and Spring semesters. The executive board made it clear that despite the living situations of members, National dues were still expected to be paid by all members despite not living in the chapter house. All members were made aware of the fiscal responsibilities that needed to be fulfilled on a semesterly basis, which provided reasoning for the cost of dues for members who were hesitant to pay. We took the initiative to email parents about these costs associated with fraternity membership in order to offer transparency about the cost of dues, given that in this financially stressful time during the Covid-19 pandemic, many families are experiencing strains in their finances. We offered special payment plans over the course of the semester to accommodate financially burdened members and to reduce the strain of these dues on their finances. Our executive board was in active communication with our national office regarding the state of future chapter finances in light of changing Covid-19 protocols. We had multiple budgets prepared for different scenarios regarding the varying levels of the strictness of Covid-19 policies on both a school and National level.

Depending on the severity of these protocols, different budgets would need to be in place to account for the costs the chapter would incur. For example, in the Fall semester we budgeted the possibility that Lehigh University would allow chapter members to live in their respective facility, and prepared the finances for this scenario.

One of the more important financial decisions that the executive board needed to budget was the costs associated with recruitment related activities. Initially the school outlined a plan that allowed small in-person dinners for brothers and potential new members which we budgeted into the cost of recruitment, but this activity was quickly ruled out by the school only a few days after being set into place. We followed the new protocols set by Lehigh University and transitioned into a variety of virtual events for potential new members. Another aspect related to our chapter finances involved submissions to the standard board for missing mandatory events such as initiation or other events deemed important for the development of our brotherhood and the community. We understand the importance that these events bring to our brotherhood and we seek to ensure that all members participate in these chapter sanctioned events.

During the 2020-2021 academic year, there were only a limited number of national and regional events that our fraternity members were required to attend. Many of these meetings centered around the development of our executive board, with our national office requiring virtual officer training sessions which gave the executive board guidance and coaching that ensured our operations were running well. All of the executive boards attended accreditation webinars in the early months of the fall semester to assist in completing our accreditation report for our national office, which was submitted on time and was accredited. Another National office requirement pertained to all members attending Briarfield, Chi Phi's alumni group, in a virtual setting. In this meeting, all current members introduced themselves and their majors to the alumni in attendance. Then, each member of the executive board shared an update on what they have accomplished so far in their role, as well as what they hope to accomplish in the future. Finally, alumni shared where our current Briarfield budget sits and their suggestions on what to accomplish in the remainder of this academic year.

***Rating assigned to this evaluation area? [Exceptional, Above Average, and Average]***

Above Average

***OFSA & panelist feedback to chapter for this evaluation area.***

Chi Phi did a tremendous job in utilizing the resources that were at their disposal, they were able to reach back and ask members of their organization for assistance in near the future. It was a great idea to begin to use their alumni support to their advantage, what better way to get through a pandemic than a workshop with the ways to get hired. The pandemic provided an opportunity that the organization had not thought of previously and that is innovative, the use of alumni and social media. Due to the pandemic, many of their usual chapter initiatives were postponed. We would have liked to see a shift in chapter priorities to membership engagement.

**Chapter Development Questions & Rating:**

Chi Phi did well in utilizing their alumni for support and to use their expertise for the benefit of the members. But more could have been done to shift the chapter priorities especially in membership engagement.

- Could the chapter have shifted chapter priorities to membership engagement?
- Will the partnership with the Chi Phi Alumni continue moving forward as it has been utilized in 2020-2021?

## **Demonstrated effort toward commitment to diversity, inclusion & equity**

Examples could include but are not limited to

- *75%-100% completion of the EverFi Course on DEI.*
- *Hosted various offices on campus during chapter virtually for education on Black Lives Matter, the Election, the LGBTQ community, and supporting a diverse membership.*
- *Evaluated by-laws and recruitment practices for potential or unintentional bias.*
- *Held conversations with chapter members and/or the executive board using guiding questions from OFSA.*
- *Programming was conducted with at least 1-3 organizations that are non-greek affiliated or culturally based.*

## **Chapter's demonstrated description and justification.**

Diversity, equity, and inclusion are values that Chi Phi takes extremely seriously. Our executive board constantly discusses new ways to start conversations with the rest of our fraternity. These conversations were based on how we could become a more diverse and inclusive organization despite being in a virtual environment. One way we did this came after the completion of the EverFi Course on DEI. 35 of our brothers completed the course which totaled to an 80% house wide completion percentage. After the majority of brothers completed the course, we had a Zoom chapter meeting to discuss what we learned and how we can apply everything to our daily fraternal lives. During this Zoom meeting, we discussed some of the issues presented in the videos and went over some of the questions from the quiz. As an executive board, we came up with a few scenarios that pertained to us as a fraternity and presented them to the rest of the chapter. One of the examples we came up with pertained to a recruitment event. In said scenario, a potential new member was hanging out with some brothers and uttered a racial slur. The following discussion was based around how to handle this situation. Many of the brothers that spoke said they would have pulled the student aside and explained to him how the use of racial slurs does not fit the values of Chi Phi. Brothers expressed they would then politely ask the student to leave the event because it is evident that the student doesn't align with our inclusive fraternity values. Members who did not attend these Zoom calls were sent to our standard board for punishment unless they had a justifiable excuse.

During the Fall semester, one of the members of the executive board proposed the idea of watching the Presidential debates as a chapter via Zoom. A handful of brothers discussed some of the issues the two Presidential candidates talked about. Furthermore, this semester our chapter elected our first Diversity and Inclusion Chairman, Josh Buck. This position was made in order to help us find more opportunities to work with other organizations and discover new methods to recruit a more diverse group of people in the future. One of the first things Josh did as the Diversity and Inclusion Chair was to make it mandatory for every brother to go to at least one diversity and inclusion talk led by a Lehigh University organization. Many brothers did this rather quickly and attended the *Invisible at the Margins: A Frank Talk on the History of Intersectional Anti-Asian Violence and Resistance*. The talk focused on some of the factors that have led to an increase in Asian-hate crimes this year. Looking forward as a chapter, we will continue to highly encourage brothers to attend some of these events and implement these talking points into our fraternity.

On Thursday April 1<sup>st</sup>, Chi Phi had a discussion about diversity and inclusion with Donnie Roberts and Denise Beautreau from the Diversity and Inclusion Office at Lehigh. The talk began by discussing the goals that we as a chapter have for creating a more diverse and inclusive environment. Brothers shared ideas on how they thought we could become more inclusive and ways to be proactive in the future. One of the common themes was to not be afraid to put yourself out there and reach out to bodies of students that we might not have thought about in the past for recruitment. By exploring different interests, it will enable us to meet new people with diverse backgrounds. Another theme that was brought up was to not be afraid of having uncomfortable conversations as a chapter. It is important to have these discussions in order to foster an environment that allows people to feel comfortable regardless of race, religion, gender identity etc. From an organizational standpoint, we decided we should get involved with different on campus groups.

Collaborating with on-campus organizations will help us recruit potential new members while also reaching a wider variety of people. The talk ended with Donnie and Denise giving us some resources that we can use to learn more about diversity and inclusion. Before we logged off of the call, we invited Donnie and Denise to a dinner at our chapter facility once Covid-19 policies permit. Going forward, we are going to invite leaders of Lehigh organizations to sit down with us for a more personalized talk at our chapter house. We look forward to recruiting a more diverse group of new members in the future.

On April 13<sup>th</sup> at 4:30, we will be having a discussion with Dr. Donald A. Outing to talk about diversity and inclusion. We hope that this talk will further elaborate on some of the topics that we discussed with Donnie and Denise, and we look forward to sharing this discussion during our End of Year Report presentation. We have also been selected to participate in a Fraternity and Sorority Gender Violence Prevention Pilot Program and research study. This is a 60 minute long program that discusses gender violence statistics, survivor experiences and bystander interventions. As an executive board we are going to make it mandatory for brothers to attend and will send those who do not to our standards board. We also intend to host a discussion on the main takeaway points of this meeting. We are hoping to reach a 100% completion of this program because we value this cause.

As an executive board, we had a Zoom to go over the bylaws in order to see if anything worked against diversity and inclusion. We could not find anything in the bylaws that was anti-diversity or inclusion.

**Rating assigned to this evaluation area? [Exceptional, Above Average, and Average]**

Above Average

**OFSA & panelist feedback to chapter for this evaluation area.**

Chi Phi made major strides in the area of diversity equity and inclusion, as a chapter that did not actively seek such information it was redeeming to see the chapter actively participate in wanting to understand the various aspects and situations around DEI. The relationship with Donnie Roberts, Dr. Denise Beaudreau, and Dr. Donald Outing will be one that if the chapter continues will be very fruitful and will only lead to a further understanding and place Chi Phi a leader in that area on the campus, next up is a plan with actionable steps.

**Chapter Development Questions & Rating:**

To see Chi Phi seek out offices for a further understanding of what DEI is and to have those tough conversations with the membership is a great first step, Chi Phi needs to follow through at this point.

- What other offices and organizations can Chi Phi Partner with to further their understanding of DEI?
- Will there be a DEI chair implemented in the chapter moving forward?

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**Demonstrated effort toward ability to adapt and implement creative and innovative methods**

Examples could include but are not limited to

- Hosted a virtual philanthropy event through xyz platform and raised x amount of dollars.
- Created new communication and incentive programs.
- Hosted virtual recruitment/mock recruitment events to help prepare the chapter for recruitment/intake.

**Chapter's demonstrated description and justification.**

Chi Phi demonstrated a continuous effort towards adapting our philanthropy and new member recruitment events to an online setting. Throughout the year, our chapter has used social media to spread information

regarding our philanthropy events as well as our recruitment Zoom calls. This year has forced us to focus on social media as an avenue to continue our history of philanthropy and use it to our advantage in order to raise more money for our causes and spread our values past Bethlehem.

An example of this is our continuation of our annual fundraiser for the organization "Holden's Heroes." Holden's Heroes is an organization that raises money for rare disease research, and was started to raise money for a brother's younger cousin named Holden who is suffering from Dup15q syndrome. Dup15q syndrome is a rare genetic disorder impacting roughly 1,400 individuals worldwide. As a result of Dup15q, Holden has epilepsy, autism, sensory processing disorder, hypotonia, cortical visual impairment, and intellectual disabilities. In the past, we would sell wristbands on the front lawn to raise money for Holden, but due to this year's circumstances we had to adapt to a virtual setting. Our chapter held a Zoom call with all active members to educate them on Holden's syndrome and how they could utilize social media to raise money for Holden's Heroes. We then all took a Zoom picture and shared it on Facebook along with a brief description of Holden's Heroes and Dup15q syndrome, as well as a link to where people could donate to support rare disease research. Over the last three years, we have raised close to \$3,000 to support rare disease research, and this year we raised over \$1,000, which is a new milestone for our chapter. We believe this increase is due to our utilization of social media to further our fundraiser and philanthropy events, which we will continue to incorporate in the future.

Another philanthropy event we conducted this year was a Thanksgiving food drive to benefit Caring Hearts of Allentown to provide non-perishable food items to local homeless populations. Feeding America estimated that 45 million people in the US, 15 million of whom are children, experienced food insecurity in 2020. This was a huge increase from previous years because of the Covid-19 pandemic. Due to this staggering statistic, our chapter elected to conduct a social media fundraiser new to this year. Our "Psi of Relief" fundraiser for Caring Hearts of Allentown entailed all members posting an infographic on their Instagram stories with a brief description of the cause and a link to collect donations. We ended up raising over \$1,200, which went towards helping feed the homeless of Allentown. Through this fundraiser, Chi Phi was able to cultivate valuable relationships with leaders of our community. One of these mentors was Denise Martinez, the founder of Caring Hearts and a social entrepreneur. Her life story was shared with the brotherhood to highlight the importance of recognizing our privileged position as Lehigh students and giving back to our surrounding community. We were fortunate to further cultivate this relationship with Ms. Martinez by expanding philanthropic efforts with all members of IFC in a recent drive to collect hygienic items for Caring Hearts. Chi Phi is optimistic that the continued relationship with pillars of our local community is essential in galvanizing future success of philanthropic efforts within our brotherhood.

Due to the global pandemic, our philanthropy events have had to adapt to an online setting, which prevented some past philanthropy commitments from being conducted this year. These past events include our partnership with The Boys and Girls Club of America, which we intend on continuing when able to next academic year. Throughout our philanthropic events this year, advantages regarding room picks were given to members who collected the most donations, thus incentivising philanthropy as a whole. Although the circumstances were challenging, Chi Phi rose to the occasion creating new philanthropy events as well as adapting previous ones to help those in need in the Bethlehem area and beyond while abiding by Covid-19 guidelines.

With the new and extenuating circumstances this semester, Chi Phi was forced to conduct recruitment remotely. The utilization of Zoom was crucial in recruiting new members without in-person gatherings. Throughout the recruitment process, numerous events were held in which potential new members could virtually meet current brothers and ask questions about the fraternity and its culture. Over winter break, our executive board and recruitment chairs held multiple Zoom meetings regarding virtual recruitment. These meetings resulted in a virtual recruitment schedule consisting of events that included a virtual chapter house tour, virtual poker, online multiplayer games, and a chapter Q&A.

In order to work around not having access to the chapter facility due to Covid-19, we conducted a virtual tour narrated by brother William Schwartz. We believed it was important that all new members have a chance to see their potential housing for next semester. Virtual poker nights were a chance for potential new



members to meet brothers and unwind after a long day of classes. *It should be noted that real currency was not utilized for this event as Chi Phi does not condone gambling of any kind.* Online multiplayer games were another chance for potential new members to meet active members and ask questions about the fraternity. The games played involved critical thinking skills, team building exercises, and provided much needed socialization throughout these trying times. The chapter Q&A was a chance for potential new members to ask questions to the chapter president, recruitment chair, and members of the executive board. There were over 100 potential new members in attendance. This was the final event scheduled the day before bids were distributed, allowing any last minute questions to be answered.

**Rating assigned to this evaluation area? [Exceptional, Above Average, and Average]**

Above Average

**OFSA & panelist feedback to chapter for this evaluation area.**

Chi Phi did well in the area of service and philanthropic efforts the chapter seemed to have found a cause that they believe in, and they were able to raise a substantial amount over the past three years at over \$3000 with the chapter raising \$1000 this semester, their biggest to date. It seems the utilization of social media has allowed the chapter to tap into a marketing aspect they have not used before and hopefully they keep up this positive use of social media for good causes such as (Holden's Heroes and the food drive for Caring Hearts of Allentown) which they had much success with this past academic year. With the use of social media, the chapter used Zoom and other social media (gaming) methods for communication with potential new members and interact with them.

**Chapter Development Questions & Rating:**

Chi Phi's use of social media in their philanthropic efforts was a tremendous tool for them as they were able to bring awareness to the various causes they sponsored as well as the thousands of dollars raised.

- What will the chapter adapt moving forward that worked well in 2020-2021?
- What aspect of virtual recruitment would be implemented in future recruitment events?

**Demonstrated effort toward emphasis on new member education and the onboarding of Spring 2020, Fall 2020 and Spring 2021 new members**

Examples could include but are not limited to

- *Collaborated with Headquarters to initiate new members virtually.*
- *Maintained frequent contact with new members through various means such as text, GroupMe, Zoom, etc.*
- *Provided opportunities for new members to engage with active members, chapter leaders and alumni.*
- *Chapters need to adhere to the timelines and schedules given to the office as well as the names of Potential new members in a timely manner.*

**Chapter's demonstrated description and justification.**

In this unique circumstance with the global pandemic, additional emphasis was placed on our virtual New Member Education process, which was conducted for both the Spring 2020 new members and Spring 2021 new members (Note: Spring 2020 new members completed their final initiation ceremony in Fall 2020). In this new process, there were seven 2-3-hour meetings beginning with a pledging ceremony, GreeklifeEDU, and the Code of Conduct. New members were thoroughly introduced to the Code of Conduct and made

aware of the harsh repercussions for violating this or the social contract every Lehigh student signed at the beginning of the academic year. Furthermore, new members completed the oath of new membership, which was then followed by a discussion about the responsibilities and obligations of being a member of Chi Phi.

In the second meeting, new members were taught about Greek life on campus in the New Member Academy. This meeting was organized and led by the director of Greek life or a representative from the office. Although this academy was more of a discussion, new members were encouraged to ask specific questions including:

- What is the climate of Greek life on campus?
- Where do you see Greek life heading?
- What type of environment do you want Greek life to be?
- What are some initiatives from OFSA?
- How can Chi Phi help achieve those initiatives?
- Why is inter-fraternalism so vital for the survival of Greek life as a whole?
- What can you do as Chi Phi to promote inter-fraternalism on your campus?
- What is Chi Phi's brand on campus currently?
- Does that brand align with the Chi Phi Creed and values?

This was done so the new members could further understand how this discussion relates to their chapter and future Lehigh experience. In addition to a discussion with Devore, the importance of philanthropy was emphasized. As discussed in previous sections, Chi Phi's partnership with the Boys and Girls Club of America was thoroughly explained to ensure new members understood the value of this partnership for both strengthening themselves as brothers and for helping the Bethlehem community. While we were unable to work alongside these organizations this year because of the pandemic, we are hopeful that we will renew our relationship in the Fall semester.

In the third new member education meeting, a representative of Briarfield, Chi Phi's alumni organization, presented and discussed the history of the national fraternity and the local chapter. Our Creed and Prayer were introduced in this meeting and debriefed to understand the true meaning behind them and how they convey Chi Phi's values. The values of Chi Phi were discussed in great detail by alumni so new members could learn and understand the importance of abiding by these values both while an active member and as an alumnus. The "True Gentleman" and Gather Brothers traditions were presented to the new members, before being debriefed to understand the importance of these documents, particularly how they convey Chi Phi's values.

In the fourth meeting, the big little ceremony was conducted virtually with emphasis on the importance of this ceremony for lifelong brotherhood. Alumni were encouraged to attend this ceremony and breakout rooms were created for big/little families to connect on a more personal level.

A fifth meeting on chapter operations was conducted to formally introduce chapter meetings, including motions, voting, order of business, and proper decorum. Chapter officers discussed their positions in this meeting for new members to start learning the importance of leadership within the fraternity. The general introduction to chapter operations was also discussed with new members from the New Member Resource Guide (NMRG).

In the sixth meeting, our risk manager and academic chair led a presentation on the importance of our no tolerance policy regarding hazing, our risk management policy, and our support system for academics. The risk manager specifically spoke of how hazing goes against the values of Chi Phi and our creed as well as the negative implications hazing could have on Chi Phi. All new members were required to complete the risk training module created by Briarfield, our alumni board. Our academic chair introduced the new members to our internal academic probation policies and shared resources for academic support within Lehigh. Specific academic standards were shared with the new members and additional emphasis was placed on these standards being upheld by all current members. Specific statistics on how Chi Phi's academic average compares to the all-Greek metrics were shared and it was also mentioned that GPA is used in determining

bedrooms in the chapter house to further incentivize and stress the importance of strong academics. New members were provided with a copy of the chapter's Academic Plan and were advised on the academic requirements for brothers and new members.

In the final meeting, initiation led by members of the national grand lecture occurred virtually to officially welcome every new member into the Psi Chapter of Chi Phi. In this meeting, each member was individually introduced to the vow of the novitiate and accepted into the fraternity by alumni and current members. At the end of this meeting, the grand lecturer debriefed the vow with the new members to ensure they fully understood the vow they just undertook. Emphasis was taken on how to carry yourself as a brother to adhere to these values.

After new members were initiated, they were added to GroupMes with the current members as well as a Facebook group used for important information and chapter meeting links. A GroupMe was created for just the new members class and a spreadsheet was created including all of their personal information such as home address, siblings, phone number, and email so that they could begin bonding before virtual initiation. All of the new member education events were communicated to the new members through GroupMe. To further engage new members in fraternal regularities, they were invited to attend chapter meetings as well as discussions with our Briarfield Association. Additionally, new members were invited to attend alumni interviews and discussions.

**Rating assigned to this evaluation area? [Exceptional, Above Average, and Average]**

Average

**OFSA & panelist feedback to chapter for this evaluation area.**

Chi Phi did a good job at committing their new member operations even with all of the uncertainty and new methods of recruiting and onboarding members. Chi Phi was clear in what each meeting would consist of and the duties of the potential new members. Chi Phi should be proud of the work they were able to complete, concise, and efficiently. However, there was a breakdown in communication as a chapter toward the end.

**Chapter Development Questions & Rating:**

Chi Phi had almost no issues when it came to onboarding their new members until the ending when there was a situation involving their new members and the Lehigh campus COVID policy.

- What would be changed looking back at the spring 2021 new member process?
- What could have been done to better support Chi Phi during the new member education period?

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**Chapter SWOT Analysis**

In order for the interview panel and OFSA to have a clear understanding of the current celebrations and challenges your chapter faces, OFSA is expecting chapters to evaluate their current state by conducting a SWOT analysis. This does not have to be lengthy, but should include a snapshot so that we are able to offer specific and clear feedback and action items moving into the 2021-2022 academic year.

*This section will not directly impact the overall evaluation rating.*

Chapter's provided response in text boxes below:

Strengths:	Weaknesses:
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<ul style="list-style-type: none"> <li>• Earned a chapter GPA of 3.60 (2nd highest), beating all Greek average</li> <li>• Adapted an entirely virtual new member education process which included initiation with the National office</li> <li>• Adopted fundraisers via social media to replace fundraisers on front lawn</li> <li>• Continued weekly chapter meetings virtually to retain member accountability, awareness, and fraternity transparency</li> <li>• Held Briarfield, Chi Phi's alumni group, virtually to continue tradition of Briarfield meetings</li> <li>• Organized risk management seminar training for all current and new members</li> <li>• Organized weekly networking calls with alumni</li> </ul>	<ul style="list-style-type: none"> <li>• Could continue to improve diversity inclusion efforts like seminars and hosting events in conjunction with non-greek cultural organizations</li> <li>• Holding members more accountable for their actions even when we are separated due to the global pandemic</li> <li>• Lack of in person communication with the entire fraternity</li> </ul>
<p>Opportunities:</p> <ul style="list-style-type: none"> <li>• Recruit with more diversity</li> <li>• Establish relationships with more clubs and co-host events</li> <li>• With Covid-19 restrictions potentially easing before the start of the fall semester, the chapter can invite Lehigh professors and staff to the chapter house to foster connections with members</li> <li>• Holding more joint philanthropy opportunities with other Greek organizations and non-Greek organizations</li> <li>• Have more alumni speakers to take advantage of our alumni network and the center for career and professional development</li> </ul>	<p>Threats:</p> <ul style="list-style-type: none"> <li>• The brotherhood aspect of our chapter being negatively impacted due to the unforeseen circumstances of Covid-19</li> <li>• Brothers living in the chapter facility next year will have never gone through a "normal" experience of Greek life due to the Greek pause and the Coronavirus pandemic</li> <li>• The prior bullet can also be brought up in the sense that the next brothers to take the positions on the executive board were never given the opportunity to witness what a traditional role each position plays throughout the academic year and in the chapter facility.</li> <li>• The chapter being placed on Disciplinary Dissolution until the Spring of 2022 will pose great challenges in many different aspects.</li> </ul>

#### ***OFSA & panelist feedback to chapter for the SWOT Analysis.***

Chi Phi's SWOT analysis was very detailed and every honest as they highlighted various points that were spot on, the lack of a traditional experience will be a theme with the new members to monitor, The Disciplinary Dissolution coupled with chapter morale will be something that the chapter will need to lean on the assistance of nationals and the office OFSA for guidance and support. Chi Phi showed they are self-aware as a chapter with this SWOT analysis, the only caveat will be their follow through and willingness to work toward becoming a better chapter

#### **Concluding Summary**

##### ***Overall evaluation rating. [Exceptional, Above Average, and Average]***

Above Average

#### ***OFSA concluding summary.***

Chi Phi has undergone a real shift as a chapter, the leadership has committed to being a better chapter and they began making those strides this past academic year. The momentum that was created with the new leadership was great to see; however, their conduct case towards the end of the year has placed the chapter in a precarious position and took away from the overall presentation in what work the chapter did throughout the year. Chi Phi is at another crossroads where they need to lean on the support of those around them from alumni, nationals, and campus support. The coming year will be a big test for Chi Phi, they showed great strides throughout the past year, it is up to Chi Phi to want to continue that trend.