

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:

Pi Beta Phi

Assistant Director:

Andrew Dorriere

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

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.

N/A

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.

When reflecting on our prioritization of member engagement and accountability, we evaluated that our chapter displayed above average efforts. Despite the challenges COVID-19 has presented our chapter, we have remained diligent in our efforts to bring our sisters together in ways that are engaging and safe. Given the restrictions put in place by Lehigh and our desire to be safe, we held the majority of our sisterhood events online this year. During the fall semester, we arranged casual meetings on Zoom to catch up with one another and stay connected. These events were either ones where sisters would just talk to one another, or partake in an activity like a movie night or playing Kahoots. These events were imperative to our members feeling connected to one another, as well as providing a support system and a feeling of normalcy in these times.

As we better adapted to the constraints of COVID-19, we developed more engaging ways to interact with one another. This semester we have hosted a variety of events, primarily centered around when the Member Class of 2021 joined. One of the first sisterhood events we had this semester was Bid Day, and shortly followed by COB Bid Day. These virtual events allowed members to meet each other and serve as a jumping off point for further conversation. To encourage friendships between the new member class and the previous ones, we held 'speed dating' events on Zoom in which members were put into breakout rooms for a couple of minutes and presented with a question in which they then would discuss with one another. This event helped to engage all sisters and foster relationships despite being unable to see one another in a more normal fashion. We had several other online events such as bingo night, Kahoots, Zoom yoga, and cookie shines (a Pi Beta Phi tradition). We also held a New Member Kahoot Night which helped the new members meet one another.

To encourage engagement and support in areas outside of structured events, we utilized Arrow Board to do chapter check ins, award people for helping out during recruitment, do birthday shoutouts on the chapter Instagram account, and have open conversations about mental health. One of the most effective sisterhood events we did were Halo Huddles, where groups of five were randomly assigned each week and were encouraged to meet, whether virtually or in person following all COVID-19 guidelines. Outside of formal events, we used the Annual Member Evaluation data, which is collected via survey response from members each year. This data helped us to understand where our members were seeing areas of weakness and how

our members' satisfaction compared to other Pi Phi chapters. Once we knew where weaknesses were, we were better able to intervene in these areas and help improve chapter moral and engagement.

Pi Beta Phi Founder's Day is April 28th. Our Vice President of Member Experience, Vice President of Community Relations, Director of Social Events, and Director of Fraternity Heritage have been working closely together to plan a virtual celebration. This celebration will involve utilizing our alumni Facebook group so we can invite chapter alumni. We plan to engage in a series of fun, Pi Beta Phi centered activities such as 'Which Founder Are You?' and other fun events. This event will be important to introduce the members from the 2020 member classes and the 2021 member classes to all the past members that have made this chapter thrive.

Our chapter has worked extremely hard to achieve better accountability. The incoming Vice President of Risk Management attended multiple training sessions from our Regional team and Pi Phi headquarters. The Director of Member Conduct(DMC), Member Conduct Committee (MCC) members, and Director of Policy and Prevention Education (DPPE)were slated and received training in their respective roles. The DMC and DPPE attended a training from regionals; the entire Risk Management team had a meeting with Jen Mandeville, our regional risk specialist, and Allie Griffin, our chapter support officer. At this meeting, we discussed strategies to better hold our chapter members accountable. We brainstormed ideas and conversations we would like to have with the chapter. The risk team has presented at various chapter meetings to educate our members on anti-hazing protocols, self-care and stress-management tips, and the role of MCC. We stressed to our members that MCC is not just disciplinary; this committee is meant to foster an environment for care and concern for each other. By having this discussion, we feel as though our members feel more comfortable and encouraged to hold each other accountable. In addition, MCC holds office hours every other Tuesday at 6:00 pm. Chapter members are encouraged to go to office hours if they have questions about risk, want to report someone, or have concern for a member. We also have an anonymous Google form where chapter members can report concerns to MCC. Only the VPRM and DMC have access to this google form.

Our chapter has swiftly handled COVID investigations in conjunction with Lehigh. Although we have had many productive discussions with members about COVID safety, the risk team is planning to hold another meeting in the coming weeks. Our chapter president had a preemptive meeting with Holly Taylor in February. Elizabeth and Holly discussed the importance of utilizing the internal risk process as a preventive strategy. They discussed how important it is to create an appropriate process that becomes more strict as violations increase. Overall, the discussion helped our chapter understand what we need to do to be a successful and safe chapter, and Holly also highlighted how she has noticed that as sisters we have always looked out for each other and that we have few to no anonymous reports within the past year. They discussed how using sisters to keep each other accountable can oftentimes be more effective than people in administration telling students how to keep each other safe. We as a chapter have done well with responding to OFSA and Conduct Office emails in a timely manner, and have followed through on action items and investigations in a similar manner. We pride ourselves on the 24 hour rule when responding to emails, and will continue using this rule in the future.

In November of 2020, our chapter hosted our virtual Critical Conversations Speaker, Diane Humphreys the Assistant Director of Leadership and Curriculum Development for Phi Mu sorority. Critical Conversations is a Pi Beta Phi initiative where speakers talk to chapters about different topics. Our chapter chose the "Every Act of Yours" Critical Conversation. Every Act of Yours is a conversation about how confrontation and accountability are integral pieces of Sincere Friendship. This program helps members understand that having the care to confront and hold their sisters accountable are life skills that will benefit them far beyond college. The program focuses on every member's role in creating safe and successful environments for their sisters, while maintaining their personal best. Our chapter found this conversation to be informative and eye opening. In addition to having a critical conversations speaker, our chapter presented "Member Obligations" Critical Conversations Webisode #1 to all members at the First Chapter Meeting. This webisode goes in conjunction with members signing their Member Obligations. During the webisode, our members are

refreshed on their responsibilities as being a part of Pi Beta Phi.

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

Exceptional

OFSA & panelist feedback to chapter for this evaluation area.

Pi Beta Phi has clearly earned an Exceptional rating for this area despite rating themselves as Above Average. The chapter created new and innovative ways to engage members, hold them accountable, and be proactive in their approach to COVID-19 safety. Inviting the Director of Student Conduct, Holly Taylor, at the beginning of the Spring semester to the chapter shows they wanted to ensure the health and safety of their chapter and the community. One panelist wrote, "I enjoyed hearing the creativity they approached these issues with to keep the 102 members engaged. Their meetings looked like they integrated fun opportunities to connect." As Lehigh plans for a more normal Fall 2021 semester, the chapter should think of ways to still encourage internal accountability and member retention after an incredibly tough year. The strong focus on mental health will be invaluable for the chapter as well moving forward. All of this to say is why Pi Beta Phi earned an Exceptional rating in this area based on various feedback.

Chapter Development Questions:

1. What might accountability look like for Fall 2021?
2. What might engagement look like moving back into the chapter house and for members who will be off campus?

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.

We believe that our chapter has shown exceptional action in showing dedication to educational initiatives and chapter priorities. Our effort to fulfill one of Pi Beta Phi's core values of personal and intellectual growth can be seen in the variety of educational workshops we have hosted for our members. Our most frequent visits are from Pi Beta Phi's Leadership Development Consultants (LDCs); this past year, we have had 3 visits. These women not only support our chapter by meeting with our Executive Council to see which areas we can improve upon, but also by connecting with the whole chapter. Each time the LDC visits, she hosts a chapter-wide workshop - Leading With Values. This program reinforces Pi Beta Phi's values and how chapter members can exhibit them to reflect our organization positively.

Each visit, the LDC came with a different focus. In the Fall semester our LDC Olivia came to start getting the newly elected officers prepared and trained for the following year. Her visit allowed for the current executive team to understand the expectations of what we would be completing and fulfilling for the year. In the Spring semester, our LDC Rachel came to visit twice. Her first visit was during recruitment where she made sure that we maintained the standards of recruitment and that we were using Pi Beta Phi core values to guide us through the process. She also helped us learn more about how to use Omega Recruit, and led a talk about various kinds of mental health awareness. Given how stressful recruitment can be, her guidance and focus on educating the members on positive mental health made the process run smoothly. She visited a month

later to see how the executive team was doing on our terms of probation and maintaining the standards of our chapter throughout the pandemic. She led a workshop to our whole chapter about understanding the importance of sympathy versus empathy. It is important that the chapter is educated about things that are not often talked about such as how to actively support someone and how to take care of yourself, so these LDC seminars were incredibly useful and helpful for our chapter.

In addition to having visitors from Pi Beta Phi Headquarters, we also recently had the opportunity to bring in representatives from the Rauch Center for Business Communication at Lehigh University. Our chapter members were able to grow professionally as they learned pragmatic and useful tips to use in the business world. Some topics covered included the do's and don'ts when creating a resume and writing an effective cover letter.

While our external visitors have given us opportunities to build connections with other organizations, one of our most engaging workshops this year came from an internal source: an alumna of Pi Beta Phi who just recently graduated from Lehigh University, Isabelle Gage-Marshall. She also served on our Executive Council and was able to truly connect with our members during her presentation. She hosted a LinkedIn workshop where chapter members were able to learn how to cultivate a strong and professional profile. She provided tips on how to communicate one's strengths and personality through their profile, what should and shouldn't be included, and what employers are looking for.

One of our biggest priorities as a chapter is to fulfill our probation terms. Despite having inherited a chapter on probation, our Executive Council has been working hard to fulfill the conditions. Our chapter understands the importance of taking accountability and maintaining good relations with both Pi Beta Phi and Lehigh University. With that being said, it is worth noting the terms we have fulfilled:

- 100% signed member obligations (102 members)
- Showing the "Critical Conversations" webisode to all chapter members prior to signing member obligations
- The calendar for chapter events (ex: meetings, philanthropy, sisterhood events) was sent to all of our AAC counterparts and Regional Team
- All new members have completed their New Member Education Courses
- Electing a new Member Conduct Committee
- Having all Member Conduct Committee Members and Risk management team attend their Fraternity, Regional, and Individual trainings
- Submitting all budget materials to our Regional Team
- Hosting bi-weekly finance/housing modules

As a chapter, ensuring we are fiscally responsible and that our members increase their financial awareness is one of our utmost priorities. To increase financial stability of the chapter, we prepared the incoming Vice President of Finance and Housing to take out a bridge loan from the Pi Beta Phi headquarters. This year, to adapt to the pandemic, we were able to lower dues for all members and increase the number of chapter members utilizing payment plans. We promoted and sought out scholarships for our members through Lehigh, Panhel, and Pi Beta Phi. We also encouraged our new members to apply for the Student Opportunity Fund to assist in due payment, which many of them received. We discussed financial responsibility with our new members through workshops, and intend to offer interested members payment plans and the ability to apply for Pi Beta Phi scholarships in the fall.

We have held many constructive finance education modules as recommended by our probation status. Examples include an alumni speaker discussing her job, Isabelle Gage-Marshall, a recent graduate, leading a LinkedIn session, breaking down the allocation of dues, and explaining member obligations. To further increase financial transparency, we send emails to members and host finance-housing modules almost every Friday. We also met with the Lehigh financial aid director to understand how aid can help dues and presented it in a finance module.

One of our core values is Integrity. One of the easiest ways to see this value in action is in how we portray ourselves and how we act. Given our commitment to our core value of Integrity, we strive to hold all of our members accountable. We are proud to have a complete Risk Team, which is supported by our AAC, Regional Team, and Headquarters. Risk has been an area of improvement for our chapter, and we are happy with how successful our efforts have been at prevention, education, and postvention! As mentioned earlier, our full risk team is fully trained, and even participated in extra trainings and seminars. We provide multiple educational opportunities, and ensure that all of our members are well versed in their obligations. In an effort to minimize risk, the risk team held a workshop during the New Member Education period. This workshop is about Pi Beta Phi's Policy and Position statements. The Policy and Position Statements are the overarching policies affecting chapters and members. Per the Member Obligations, each member has a personal responsibility to know the policies and abide by them. Member conduct was discussed at large; this policy explains how Pi Beta Phi members must conduct themselves at all times. Our members were educated on expectations around alcohol and drug use.

We stress to our members that hazing is prohibited. A separate workshop was held in order to discuss the importance of anti-hazing at length. Hazing by any collegiate or alumna member of Pi Beta Phi is prohibited. We teach our chapter that willingness, and permission or approval by a person being hazed is not a defense. The risk team has made it very clear to our chapter members that hazing will not be tolerated.

Stress management is another area in which the risk team has made an effort to greatly impact the chapter. During one of our chapter meetings, the DPPE presented a few of her favorite tips to help with stress and anxiety. We also reminded our members that Lehigh offers a Headspace subscription for free and where the link can be found. In addition to this presentation, we made the chapter aware that the MCC is not only for disciplinary purposes. We discussed that MCC is also there to help our members out of concern for someone's well-being. MCC office hours have been implemented biweekly, and we see this as a wonderful opportunity for chapter members to converse with MCC in a stress-free environment.

Our chapter has worked tirelessly to ensure the safety of our members. As a sisterhood, we educate each other on important topics, look out for each other in trying times, and hold each other accountable when the time comes. Our chapter members are aware of what Pi Phi expects of them.

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

Exceptional

OFSA & panelist feedback to chapter for this evaluation area.

Pi Beta Phi stayed true to their educational initiatives and priorities as a chapter. They faced a tough year outside of the COVID-19 pandemic. By working with their headquarters, hosting multiple LDC visits, and increasing financial literacy, focusing on mental health, and hazing workshops, they have been able to turn the chapter around in a short amount of time. Utilizing their values to coincide with their programming shows that the chapter has a strong understanding of their ritual and wants to lead as a values based organization. One panelist wrote, "I appreciated their financial literacy opportunities and lowering dues with the explanation of where the money goes." They even hosted a recruitment workshop with the Pi Beta Phi chapter at Lafayette College. They are truly utilizing the opportunities available to them. Another panelist noted their use of zoom to build a stronger relationship with their headquarters because of the accessibility of zoom. Based on the various feedback, Pi Beta Phi has also been assigned the rating of Exceptional in this category.

Chapter Development Questions:

1. What will financial literacy look like for the chapter coming out of the pandemic?
2. How can the chapter continue to have alumnae engagement in chapter initiatives?

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.

This year, social justice, diversity and inclusion have been a key focus in our chapter, which is why we evaluated our efforts towards diversity equity and inclusion to be exceptional. Our chapter is proud to be a diverse group of women, but we continue to live one of our values, personal and intellectual growth, to grow, to change and to learn about how to be allies and actively anti-racist, anti-ablest, and anti-homophobic. Our diversity initiatives include fundraisers, chapter discussions and changes in procedures, learning initiatives, and advocacy.

Our chapter has a lot of representation from the Asian American and Pacific Islanders (AAPI) community, so when the tragic events targeted towards the Asian community occurred this March, we were quick to support our sisters, as well as other women in the AAPI community outside of the chapter. We set up a fundraiser with the fraternity Alpha Epsilon Pi to support AAPI Women Lead, an organization that "aims to strengthen the progressive political and social platforms of Asian and Pacific Islander communities in the US through the leadership of self-identified AAPI women and girls.". Together we raised \$1,140, for this organization. We also supported the Black Lives Matter protesters and citizens in Minneapolis by raising money with the sorority Gamma Phi Beta. Together we were able to raise \$4,459.32; a member of Gamma Phi Beta loaded up three cars with supplies bought at Costco with the money we raised to give to the people in the Minneapolis community. In addition to this, Pi Beta Phi alone raised \$363 for mutual aid efforts in Minneapolis. Some of these included basic necessities like food, water, toiletries, etc., housing for people displaced by the protests, funds to rebuild businesses in North and South Minneapolis, and financial support to BIPOC healers who held community and space to heal during the difficult time.

Our discussions and learning initiatives have included resources and programming from both Lehigh and Pi Beta Phi. Last semester, our executive council met with the diversity office in order to understand how to be a more antiracist organization. From this conversation, we have advocated for changes in our organization, and have worked towards opening conversations with the help of groups on Lehigh's campus. Our headquarters have been working on creating a Vice President of Inclusion, and director roles to be voted on at our summer convention for the upcoming year. Since these positions have not yet been approved, we have structured our Vice President of Membership Experience to act as our diversity, equity and inclusion head. In order to create a more inclusive environment during recruitment, we voted to change our bylaws regarding legacies, which is further discussed below. Our dedication to inclusion is also found in our leadership and nominating process. All initiated members of Pi Beta Phi are encouraged to apply to be a leader within our organization. Members apply to be a leader in Pi Phi, and through the application and interview process are nominated for a position that most aligns with their interests, background, and experiences. Our model of servant leadership further exemplifies our inclusive model. Our servant leadership model puts the members above the leaders. Everything our leaders do is for the betterment of our general members. We incorporate our general members' thoughts, ideas, and goals into our own. This allowed us to focus on the above mentioned organizations, groups, causes, and educational opportunities.

Recruitment is a time where diversity and inclusion are not always considered. This year, diversity and

inclusion became a main focus of our practices. Greek Life has come under scrutiny for being a place that is not open to diversity, and our chapter wanted to be a group that was active in trying to not only change the perception of Greek Life, but also to ensure that Greek Life truly was a place that would be open for anyone that wants to be a part of it. We evaluated and edited our By-Laws to promote a place of greater inclusion. We decided to expand the term legacy to include step family members, meaning step grandmothers, step mothers and step aunts. This effort was made to include families that do not follow the traditional family structure, and to recognize the important role that step mothers and other members of step families play in many women's lives. We also edited our policies regarding legacies. We want amendments to our bylaws to make the recruitment process more open to those that did not have parents in college, and to take away disadvantage to those that do not have Greek Life in their family. During our spirit days, we had a third workshop with the Diversity Peer Educators about acknowledging and combating unconscious bias. Our chapter dedicated ourselves to making conscious efforts to be not only anti-racist, but aware of other biases such as sexuality, ability, religion and any other aspects that may set people apart. As part of Pi Beta Phi's DEI initiatives specifically geared towards recruitment, over winter break, each member was charged with watching pre-recorded online trainings on implicit bias specific towards recruitment. Upon returning for spirit week, our Vice President of Membership Experience Olivia Talbott, and our former president Tracie Dinh led a workshop where we discussed those online trainings, which was helpful to facilitate an active conversation about how we could put words into action.

At Lehigh, our chapter received a shoutout on the OFSA instagram because we exceeded the 75% requirement for completing the Diversity Equity and Inclusion Training. During the first semester, we had the Diversity Peer Educators come and lead two different workshops. The first workshop was on how to be a good ally. This workshop focused on understanding what it means to an ally, what discrimination looks like on campus, and identifying our own privilege. During our second workshop with the Diversity Peer Educators, we had a discussion on language. The language workshop focused on origins of common racist phrases and explored the significance and meaning of these phrases. Our goal in having this workshop was to ensure that our members are aware of how some commonly accepted phrases have harmful implications. In order to be committed to diversity, equity and inclusion we found it important that our actions and our words showed that.

This past month we also met with SPEAK, which is an organization that comes to educate clubs and organizations on campus about gender and sexuality. They focused on educating us on basic terminology used in the LGBTQ+ community. This workshop then focused on how to be an ally. We learned about how allyship is not a passive, but an active role that someone must play to support the LGBTQ+ community. We also learned that educating yourself through reading and keeping updated in current events is key to supporting minorities of any group.

Related to diversity and inclusion, our chapter has worked in the area of advocacy. The members of Pi Beta Phi committed ourselves to making a change nationally. During the Galvanize the Greeks movement our chapter posted on our instagrams tagging members to challenge them to register to vote. Our chapter received a special mention for having the most voter registration with 100% of our members being registered to vote. This allowed for our chapter members the opportunity to make their voices heard through voting. Advocacy towards diversity and inclusion initiatives have been intertwined in all of the fundraisers, educational initiatives, and discussions with members and alumni. We understand that being a diverse and inclusive organization is a never-ending process that includes learning and changing our practices. We are proud to be continuously working on ourselves and our organization as a whole.

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

Exceptional

OFSA & panelist feedback to chapter for this evaluation area.

Pi Beta Phi showed their commitment this year to Diversity, Equity, and Inclusion and even put their money

where their mouth is. They were able to raise thousands of dollars for various causes such as AAPI Woman Lead, the Black Lives Matter protesters in Minneapolis alongside Gamma Phi Beta, and Mutual Aid funds for Minneapolis as well. The chapter has utilized both Lehigh and national resources in order to help educate their members and had over 75% completion of the EverFi module offered through OFSA. They have educated their members on Stop Asian Hate, Black Lives Matter, the LGBTQ+ community, and much more. They even looked at internal procedures such as by-laws and recruitment which can often have unseen barriers to joining for minorities. One panelist wrote about how the chapter has taken strides in DEI, shown their commitment and acted on it. The panelist also commended them for ensuring that their members of color feel loved and supported. Another panelist wants them to think deeper and dive into the action side of DEI work which will be helpful to think about for the future semesters. Based on the various feedback and their self rating of Exceptional, Pi Beta Phi has been assigned a rating of Exceptional in this area.

Chapter Development Questions:

1. What might DEI efforts look like in the future and how can Pi Beta Phi continue to help and educate?
2. Are there headquarters resources the chapter can utilize more for this area?

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.

When evaluating our ability to adapt and implement creative and innovative methods in chapter programming we assessed that we were above average. This past year, Pi Beta Phi has focused on maintaining the standards of our sorority, while adapting to an almost completely virtual format. We have strived as a group to make sure that we focus on all of the core values of Pi Phi, which includes embracing sincere friendship, but also displaying a commitment to philanthropic service to others. As an organization we have dedicated ourselves to national philanthropic work as well as direct community outreach. We ensured that we could use Instagram, Zoom, and GroupMe to maintain membership engagement, sincere friendship, and philanthropic service to others.

This year we made sure to focus on childhood literacy, while also ensuring that we supported other organizations that our sisters are passionate about. In the past, our key philanthropy events have been events such as Pie a Pi Phi and Lemonade for Literacy. Since these events could not occur in person this past year, our focus has been to adapt to virtual fundraising through social media platforms, mainly on Instagram. During the first semester, our fundraisers for the Pi Beta Phi Foundation, which in part goes to our philanthropic initiative Read > Lead > Achieve, included an Instagram fundraiser with the fraternity Alpha Tau Omega where we raised a total of \$1,232.35. Of that we donated \$616.12 to the Pi Beta Phi Foundation and the other \$616.12 in this fundraiser went to the Community Service Office (CSO) to buy food gift cards for local Bethlehem families for aid during the pandemic. We also organized a fundraiser with the Psi Upsilon fraternity for Halloween in which we raised \$1,340 for the Bethlehem Boys and Girls Club. Another one of our fundraiser's involved teaming up with our member Tracie Dinh, who runs a small jewelry business, and we donated the profits from her company over a two week span to the Pi Beta Phi Foundation. We also received an FDS 500 grant which was \$750 that allowed us to provide 500 brand new books to Fountain Hill Elementary School.

This semester we were able to get an in person philanthropy event approved, which was exciting for our sisters. We allowed people to buy candy grams and we delivered them safely around campus to different recipients. With this fundraiser we were able to raise \$96 in total in which half of the donations will go to the

Pi Beta Phi Foundation. Our creative efforts to help with children's literacy will continue to extend throughout the semester as we are planning a book drive with Fountain Hill Elementary School for the end of the month of April. We felt it was important to reach out to Fountain Hill because as of the 2017-18 school year, the percentage of students that achieved proficiency in reading was 40%, which is lower than the average of 63% in the state of Pennsylvania. We are excited to share their book lists with our friends and family so that they can get specific books delivered right to their doors!

Beyond the Pi Beta Phi Foundation, we continued to strive to put our sisters' passions in the forefront of our philanthropic events. We were able to raise \$600 with Project Hearts to Homes, one of our sister's organizations, for PPE gear to help with the COVID-19 pandemic. We also paired up with Gamma Phi Beta to raise \$4,459 for Black Lives Matter. We also raised \$1,140 for AAPI Women Lead with the Alpha Epsilon Phi fraternity. We are currently participating in the Relay for Life to raise money for the American Cancer Society. We have currently raised \$5,445, but the event is still ongoing.

This year specifically, maintaining engagement has been our biggest challenge due to COVID-19. However, in an effort to combat this issue, our chapter utilizes a point system that incentivizes attendance. The Vice President of Operations takes attendance for all mandatory events, each chapter meeting, sisterhood event, philanthropy activity, volunteering, etc. Each mark of attendance or volunteer activity is equivalent to a certain amount of points depending on the weight of the endeavor. These points are then added together and used to determine priority for things like room picks. A remote setting makes it difficult to stay connected but our chapter has developed strategies to adapt to the circumstances.

This year in order to prepare and learn a new, online way of recruitment we began the year with multiple workshops on the basics of recruitment, teaching how to use omega recruit, how to be authentic in conversations, and how to find girls that exemplify Pi Beta Phi values. We practiced using zoom and breakout rooms in a recruitment setting as well as even having a mock recruitment with the Pi Phi chapter at Lafayette college. In that session we practiced navigating zoom quickly and efficiently as well as using conversational skills to talk to the women in break out groups.

In the fall we held multiple "Say Hi to Pi Phi" events in order to meet new girls eligible for fall recruitment during our COB process followed by coffee date follow ups. We then extended bids to eleven sophomores and met quota for the year. At the end of January we had multiple spirit days preparing for recruitment where we went over rules, got organized, and even had Christie from the TV show Dance Moms come speak to our chapter. This special guest was very exciting for our members because she is very popular amongst chapter members, and she talked to us about female empowerment and how to empower your sisters. We then had a successful and smooth primary recruitment where we gained 26 new members. In the following weeks we had new members recommend girls for the COB process as well as advertised it online and held another "Say hi to Pi Phi" event and extended seven more bids to the member class of 2021.

We are now preparing more workshops in order to teach the new member class the basics of recruitment in order to keep it fresh in their mind, on April 19th. This will teach them the inner workings of recruitment, the do's and don'ts, and get them excited for their first in person recruitment process! Overall, we adapted very well to the virtual recruitment setting and our chapter members were very engaged throughout the whole process!

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

Exceptional

OFSA & panelist feedback to chapter for this evaluation area.

Pi Beta Phi was incredibly adaptive to the new virtual environment that 2020 brought us. They hosted an impressive number of events for the chapter and that includes philanthropy. Once again, they tied their operations and events to their core values as an organization only deepening their commitment to being a

values based organization. In addition to raising money for DEI efforts, they raised thousands of dollars for other philanthropies such as the Boys and Girls Club, Project Hearts to Home, Relay for Life, and so many more in addition to partnering with other fraternities and sororities. One panelist wrote, "They fully embraced being virtual and used it to their advantage. They were extremely successful with their philanthropic adventures this semester which also showed their ability to adapt." They also had a strong focus on member engagement and that includes the 26 new members from virtual recruitment. The chapter should consider what member engagement will look like as we return to more normal operations and the flexibility that zoom offers. The chapter rated themselves as Above Average but based on the various feedback the chapter has been assigned Exceptional in this area.

Chapter Development Questions:

1. What has the chapter learned this past year that might be useful moving forward?
2. Are there ways the chapter can continue to be flexible and still utilize virtual means?

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.

When evaluating our new member education and onboarding of new members throughout the year we decided that our chapter was above average. Our goal for this year was to ensure that the new member period was as special as in past years, despite the COVID-19 pandemic. This year we had three different experiences of taking new members. We took eleven COBs in the fall, twenty-six new members through formal recruitment and an additional seven COBs after formal recruitment.

Throughout the new members periods we ensured that we maintained the quality of the new member education by having weekly new member meetings on Friday afternoons.

In order to engage our new members, we have utilized zoom to have various events with alumni. In the fall the whole chapter, including Spring 2020 new members and Fall 2020 new members, had a workshop with Isabelle Gauge-Marshall who led an active seminar on using Linked-In. This seminar allowed members to see the way that Pi Beta Phi can help with networking, and how members can utilize their experiences doing philanthropy work, or being on the Chapter Leadership team to help build their resume and network. As previously mentioned, we had a recruitment workshop with Lafayette's Pi Beta Phi chapter which also allowed the Spring and Fall 2020 new members to engage with active members from another university.

New member education this year presented many challenges due to the limitations presented by COVID-19. We had to rearrange previous plans and adapt to these circumstances while staying committed to the education of our new member class. For the actual education aspect, we held new member education meetings every Friday which were led by our Director of New Member Education and sat in on by either our Vice President of Membership Experience or our Chapter President. These meetings were a place for our Director of New Member Education to present the lessons provided by Pi Beta Phi, and also provided an opportunity for members to discuss the lessons they had learned in the online training of modules provided by Pi Beta Phi.

To further incorporate the new members into our chapter, we started with making sure they were included in all channels of communication, which meant adding them to some of our GroupMes, such as one for important chapter information and another one with Member Class 2021 and exec. For the formal process of onboarding the new member class, we held a formal pledging ceremony for them and then several weeks later following the completion of their new member education, we held initiation. This served as an incentive for the members to complete their courses and remain engaged in their learning as they could not become initiated members of Pi Beta Phi until they completed their modules and successfully passed their online test.

We have hosted many events this semester which were primarily centered around when the Member Class of 2021 was added. One of the first sisterhood events we had this semester was Bid Day, and was shortly followed by COB Bid Day. All members of the chapter attended these events in order to properly welcome the new member class and integrate them into our chapter. To encourage friendships between the new member class and the older ones, we held 'speed dating' events on Zoom in which members were put into breakout rooms for a specified number of minutes and presented with a question that they would then discuss with one another. These speed dating events helped members engage with one another and most importantly, welcome the new member class. As part of our programming, we hold How to Be a Mentor/How to Be a Mentee workshops for the potential Bigs and Littles each new member period. We successfully held two Big/Little Weeks (one for each new member period), which followed all University COVID-19 Guidelines. We were so excited to be able to use the Pi Beta Phi house for Big/Little Reveal this Spring. This was our new members' first experience in the house, and we were so excited for them to have that opportunity in a safe way! These events, plus the overall welcoming spirit of our chapter, have helped to make onboarding a successful process.

We are very proud of our chapter's ability to adapt to a virtual new member period for our Fall 2020 COB class. We were able to get our plans completely approved by Lehigh and Pi Beta Phi. Having this COB new member period in the Fall allowed the chapter to better adapt the Formal Recruitment New Member Education Plan. We were able to learn and grow so that the next group had an even smoother new member period. We are proud of our work in ensuring that all our new member periods (Fall 2020, Spring 2021) were fully approved and well executed, following all Pi Beta Phi and Lehigh University rules and regulations.

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

Above Average

OFSA & panelist feedback to chapter for this evaluation area.

Pi Beta Phi recruited a very large number of new members this past year and had a large emphasis on the new member process between Fall 2020 and Spring 2021, they welcomed in 44 new members. Their focus on ensuring that their process felt as normal as possible while still being virtual is incredibly admirable. The focus on relationship building is clear through the many events that they hosted including an event with an alumnae member showing the life-long membership of sorority life. One panelist wrote, "From their report and interview it seems that their new member education process went well and their new members became very close even in a virtual environment." The chapter should consider what relationship building will look like as members begin to engage with each other more in person and living in the house next year. The chapter rated themselves as Above Average in this area and based on feedback that is what they have been assigned.

Chapter Development Questions:

1. With so many new members from the past year, what might sisterhood bonding look like for the chapter and amongst different member classes?
2. Are there aspects of virtual NME that the chapter enjoyed?

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:

<p>Strengths:</p> <ul style="list-style-type: none">• Our focus on our value of sincere friendship through virtual events and daily interactions• Our sorority academics are strong as we have a chapter average gpa of 3.70• Our dedication to creating new and unique philanthropy events, particularly focusing on causes our members are passionate about• Our dedication to diversity and inclusion including educational initiatives and discussions, advocacy efforts, fundraising efforts, and systemic changes	<p>Weaknesses:</p> <ul style="list-style-type: none">• Our biggest weakness would be membership engagement from older members, but we are continuously thinking of different initiatives• Membership retention has been one of our weaknesses this year due to COVID-19
<p>Opportunities:</p> <ul style="list-style-type: none">• Continue to use our inner member conduct committee to ensure membership accountability and risk management• Use our terms of probation and utilize our chapter supervision officer to grow and continue with new initiatives• Continue using risk management workshops, and other webinars offered by HQ to strengthen our officers' knowledge• Offer more events focused on careers and the future to make more engaging events for our upperclassmen• We will likely be adding a VP of Inclusion in the upcoming year which will allow us to continue to focus on diversity and inclusion	<p>Threats:</p> <ul style="list-style-type: none">• COVID-19 has led to more members than in the past dropping due to the limits in our abilities to do in person events<ul style="list-style-type: none">◦ We hope that this will not start of a precedent of people dropping• Our financial status is a threat, and with the need to lower dues we hope to be able to maintain the standard of Pi Beta Phi• The inability for all of our juniors to live in the house next year is another contributor to potential disaffiliation of members

OFSA & panelist feedback to chapter for the SWOT Analysis.

Pi Beta Phi was incredibly thoughtful in their SWOT Analysis. It is clear they took time to really think deeper about chapter strengths and areas of improvement. One panelist noted how thorough and honest their analysis was and another wrote how this will allow them to create a plan and be successful in the future. The chapter should consider how they can create longevity for some of their plans and set up future executive boards for success with strong transitions. The chapter should also consider how they can keep a lot of the momentum they've created surrounding their strengths and how they can continue to utilize those to better the chapter.

Concluding Summary

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

Exceptional

OFSA concluding summary.

<p>Pi Beta Phi absolutely deserves an overall rating of Exceptional. They tackled each obstacle with grace and thoughtfulness through an incredibly challenging year. One panelist gave some final thoughts and wrote, "Overall, I found the group to be very, very impressive. They seemed to have done an excellent job of overcoming the obstacles they faced ---- probation from their HQ last academic year, impact of the pandemic, including member disaffiliation." They had a very successful year in a virtual environment as it relates to DEI, recruitment and new member education, philanthropy, and so much more. The chapter will surely be set up for another successful year as we return to a more normal Fall 2021 semester.</p>
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