

## 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:

Sigma Phi Epsilon
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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.**

Covid Protocols, Pictures from events, Sigma Phi Epsilon Learning community materials, Recommendation Letters, Zoom Events, other materials

**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.**

**Introduction**

This year was quite possibly the most difficult year in SigEp's history in keeping everyone engaged and accountable. With the pandemic raging throughout the Fall and Spring semesters, we saw lower face-to-face contact than ever, much less overall brother interaction, and in general, just less chapter dedication expressed by members. However, we were resilient, and we showed how creative we can be when it comes to keeping our brothers engaged and accountable, ultimately navigating through the year very successfully.

**Membership Engagement Activities (Outdoor/Indoor/Virtual/New Mindset and the BMP)**

**Outdoor Activities**

We have always prioritized membership engagement as a critical part of our fraternity but particularly needed to stress it this year while many people were struggling to adjust to the pandemic. To do so we organized safe outdoor activities which allowed everyone to maintain their friendships from a proper distance. During times of nice weather we organized football games at Goodman Campus, pickup basketball games at nearby courts, ultimately seizing the opportunity of nice weather to spark energy within the house. Besides sporting events, some of our older members invited younger brothers over to grill food and play backyard games like spike ball and kan jam. Other outdoor activities included weekly trips to outdoor restaurants and group runs on the greenway. Overall, these activities were an incredible way to keep the brotherhood strong, relevant, and important in each member, without putting anyone's health or safety in jeopardy, or breaking any rules set forth by the university.

**Indoor Activities**

As a chapter, we are very proud of how we safely traversed the pandemic with our creativity. To promote fun but also safety we limited Indoor activities in the fall to almost none, but due to a rise in brother vaccinations in the Spring, trips to the nearby bowling alley, the Top Golf range, local driving range, and a brothers escape the room event were all planned. Each activity we went to included the use of masks, hand sanitizer, limited numbers of 3 per car, and strict adherence to the venue's COVID mitigation procedures.

Due to the nature of these activities, we were able to stay safe while still enjoying each other's company.

### **Virtual Events**

Indoor and Outdoor activities were very effective at keeping brothers engaged, but were extremely infrequent compared to our zoom events. We understood as a chapter, that while we wanted to see each other in person, it was only right to do so occasionally, and under the right circumstances. This is why we created "Zoom Hangout" hours. On nights that we normally would be together in the chapter house, a zoom link was sent in group chats so everyone could see each other's faces, converse, and catch up. Some memorable calls included "Thursday Dinners" where we all presented what we had cooked that night, "Friday Chill Rooms" where brothers told funny stories from their week, and Sunday chapter meetings where we continued our tradition of "Sunday Scaries". Furthermore, every other week we met on zoom to watch movies together. Some films watched were Inception, Toy Story 3, and Reservoir Dogs. Other virtual events we did were a SigEp fantasy baseball league and a march madness bracket competition. Having competitions like this kept banter in our group chats very alive and fun, and kept all the participants engaged in our activities, and ultimately the chapter as a whole.

### **New Mindset and the BMP**

In the past few years, Sigma Phi Epsilon has strived to create a more structured Balanced Man Program (BMP) with the aim of increasing brotherhood engagement and dedication to the chapter. The BMP was created as a way for brothers to personally develop and feel more a part of the chapter. In a typical year, BMP challenges would include primarily in person modules, which was entirely changed by the pandemic. Isolation and lack of activities can distance and damage a brotherhood, this is why we transitioned most of the BMP challenges to a virtual setting. The way our fraternity interacted and socialized during non-organized events changed. Brothers started having weekly zoom calls where they would play virtual games like "Quiplash" and "JackBox." We found that once brothers were able to adapt to the new social scene, they were very eager to get involved. There were no longer social pressures of "parties". Smaller groups and activities meant that individuals were able to build closer bonds. Specifically to the BMP, the usual challenges such as resume workshops and career workshops moved to a virtual setting. Other events conducted can be seen in our supplemental materials with markings next to the brothers who completed each challenge. This transition highlights an important point, one that was showcased through our outdoor, indoor, and virtual events, that the strength and engagement of brothers is not determined by social success, but by the bonds and interactions they make within the chapter.

### **Accountability (House Risk Management/ Standards Board/Executive Board)**

#### **House Risk Management**

The majority of the incidents that we had to deal with this year were violations of COVID-19 guidelines. No chapter or organization is without its rule breakers and haters, and we were not without these people during the pandemic. There were members who didn't see the value we were presenting in our indoor, outdoor, and virtual activities and wanted to act improperly and unsafely. To prevent this we drafted a house contract that outlined Sig Ep's COVID 19 pedestals, which was signed by nearly every brother. The contract included our expectations of activities, safety protocols, and also the explanation of our punishments for anyone who disobeyed the contract and can be seen in the supplemental materials. This helped to persuade some of the chapter's nay-sayers to act more responsibly, and also to explain the repercussions to the ones who didn't. Our strong efforts were showcased in not receiving a single positive in-house COVID test until very deep into the fall semester. Unfortunately, when COVID ran rampant at the start of the spring semester, SigEp was not left out. Multiple people from the chapter contracted the virus, but to keep with our strong safety measures, we conducted a contract tracing test, which ultimately helped to find the origin of the spread, and also to keep the spread from going further.

## **Standards Board**

The main goal for the Standards Board this year was to make it an official and respected legislative branch of the fraternity, that it wasn't quite yet. To accomplish this we created an anonymous form that brothers could submit to the chaplain, the head of the standards board, to send someone to standards if they did not feel comfortable doing it in front of the whole chapter. This has allowed us to address brothers' concerns that were not previously being addressed. We also set up a structure for virtual standards hearings that allows everyone involved a chance to speak and give their side of the story. This was very successful and allowed for productive and fair standards trials. Moving forward, once the pandemic eases and we are able to resume in person activities, we intend to keep this virtual format as an option for brothers who would feel more comfortable taking part in a virtual trial.

However, it was not always easy to keep brothers accountable in a virtual setting. Some brothers found more value disobeying our COVID guidelines. But by making the standards trials as official as possible, and giving out fair and productive punishments we feel that we were able to keep brothers accountable and contribute to keeping the Lehigh community safe. For example, some punishments we gave for COVID contract infractions were temporary suspension from activities and fines.

## **Executive Board**

An unexpected issue that we dealt with during the fall was a lack of brothers and executive board members on campus. Many members were attending class virtually for personal or financial reasons, and this took a toll on the chapter. Unfortunately, no matter how many activities or incentives are given to brothers to get involved, it is a near certainty that brothers on campus will be more engaged than brothers at home. Due to this, we saw that half of the executive board was excelling in leadership on campus, but the other half was struggling to fulfill their roles off campus. To overcome this bridge, we decided to elect a temporary executive board. The purpose of the temporary board was to fill each position of a brother not on campus with one at Lehigh, while still keeping the former member as an advisor for the role. The board worked magically because it allowed younger and hungrier members to take initiative, and create positive change, without removing the predecessor who had all the experience. Ultimately, the change allowed for a much more involved executive board and one that functioned as a team, instead of as 7 individuals. This brought importance and relevance back to the chapter's operations, kept executive members accountable for their assigned roles, and increased engagement from general members.

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

Above Average

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

Sigma Phi Epsilon performed admirably in this section focusing on the membership engagement during a time of extreme difficulty. The chapter focused on several key areas for membership engagement, outdoor/indoor activities, virtual events, and the BMP (Balanced Man Program). Due to the pandemic, the chapter decided to focus on what they can control to the best of their ability and selective outdoor activities were a way that the chapter connected and bonded while exercising their physical but also their mental fortitude due to isolation. Their indoors/virtual activities were conducted in a way to replicate the chapter house functions with their "Thursday Dinners", "Friday Chill rooms" and their Sunday Scaries" as well as other virtual bracket competitions; these were created to create a brotherly atmosphere for the members.

Sigma Phi Epsilon's Balanced Man Program was able to refocus on the betterment of member development without the "social pressure of parties", the members were able to build comradery through smaller groups and programs, a benefit of conducting the program in a virtual space. Sigma Phi Epsilon did a great job at crafting their own COVID 19 policy for their members to hold them accountable for infractions which highlight great self-awareness as a chapter. The creation of a chaplain where brothers could send their grievances to

be heard was a great addition to the virtual landscape for the chapter. The creation of a pseudo executive board to supplement members who were not on campus was a way to provide continuity and keep members accountable.

### **Chapter Development Questions & Rating:**

Just a notch below the prescribed rating of exceptional due to the fact there were breakdowns in communication when faced with conduct. The issue for an off-campus situation. As well as the membership engagement aspect seems that would have been done in a normal academic year; however, there is some merit in their attempt at some "normalcy" during very difficult circumstances.

- How will the chapter maintain the positive momentum that was gained this past academic year in terms of membership engagement?
- How will the creation of new roles translate when members are on campus?
- Can standards create a system to positively affirm their members?

### **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.***

#### **Introduction**

Adversity from COVID and a rapidly changing society has greatly affected the chapter's educational abilities, priorities, and academic initiatives. To overcome these changes we have started many new policies and educational programs to better our brothers. We've also further increased our relationship with our National organization.

#### **Educational Initiatives (Grades/SLC)**

##### **Grades**

After screening through the data given by OFSA it was clear that our grades have changed since last year's evaluation. Our average GPA dropped by 0.12 and our percent of members on the Dean's List has risen by 9%. The contradictory data explains that while the high-achieving brothers in the house received better grades, the ones who were already struggling began to struggle more. This is an upsetting statistic to witness. After delving into the GPA's of brothers year by year, we believe that part of the decrease in grades is due to the positive effect our older members who graduated had on the average GPA, now being lost due to their leaving Lehigh. To portray this point, there are currently 4 SigEp 5<sup>th</sup> years on the presidential scholarship. To try to stop the negative trend in grades we made three main changes to our academic procedures.

The first change we made was increasing the presence of our academic chair. This position had made large strides leading up to last year's report, and has only made more since then. Their original responsibilities were to simply compile schedules of each brother and try to get brothers in similar classes in touch with each other, but this clearly is not sufficient given the decrease in chapter GPA. Now the academic chair has bi-weekly meetings with each brother, which is much more effective than before. The purpose is to explain your academic struggles during the meeting, which allows the academic chair to better assist them now that they have a deeper understanding of whatever the issues may be.

The second change we implemented is a stronger connection with our recent alumni. Brothers that have just graduated are great resources to organize schedules, get career advice, and even to get informal tutoring. We have tracked down many of our recent graduates to compile a google sheet of their majors, strongest classes, and phone numbers, so that when brothers are struggling they have an easy resource to turn to. The final change we made was beginning a relationship with our faculty advisor for the first time. Sig Ep's faculty advisor is chemistry teacher Mark Chen who was just added to our roster. To start facilitating a relationship with Mark, president Jacob Saks met with him on multiple occasions to figure out how best he could assist the chapter. These meetings led to the identification of two major assets of Mark. Mark has great career coaching advice, and is also an excellent resource to help tutor brothers who are in chemistry or chemistry-related classes. The latter caught our eye as an especially useful trait because of the overwhelming amount of our chapter pursuing a degree in STEM, making classes like CHEM40 extremely common. Brothers haven't had the opportunity to take advantage of this resource yet due to the fact that our relationship with Mark is just beginning, but we hope to further that relationship in coming years by inviting him out to eat meals, other events such as our balanced man scholarship, and to Sunday chapter.

## **SLC**

A major progression in academics for our chapter was applying to be a SigEp Learning Community (SLC) through our National organization. Our chapter has been growing our relationship with Nationals for the past few years, and we felt it was time to take it to the next level. The SLC title designates chapters who are highly dedicated to their studies, very involved in community service and philanthropy, value the pedestals of what it means to be a SigEp, and have a strong initiative to better themselves. Becoming an SLC brand a chapter as one of the highest achieving SigEp chapters in the country and requires a multi-page report, multiple recommendation letters (which we received from both Olivia Miller and Andrew Dorrier in OFSA), hundreds of pages of supplemental materials, and overall an incredible amount of effort.

Our chapter received this designation due to our high achievements and hard work, and we couldn't be happier for it. Having this title will leave a legacy on the chapter for years to come that there is always room to grow and more to achieve. The application can be found in the supplemental materials.

## **Chapter Priorities (Career Building/National Organization Relationship/Finances/Extra Curriculars)**

### **Career Building**

Our chapter has many amazing priorities which can be showcased in other sections of the report such as our priority of friendship in membership engagement, or on community service in creative solutions, but in this section, we will discuss other noteworthy chapter priorities we have. This year we wanted to stress career building as an important pedestal. The job market is very different today than it was a year ago, unemployment is on the rise, and having a strong handshake account, great interview skills, and a polished resume are more important than ever. We made sure to set up a specified time slot with the Career Center in the Spring to force our upperclassmen into self-betterment, but more importantly, to show our new members how important professional development is. The event was highly attended and hopefully will lead to many internships and jobs.

### **Nationals Organization Relationship**

Our relationship with our national organization is very important to us. One way we showcased the importance of this relationship is through our SLC application, but another is by attending their yearly leadership retreat which occurred on January 9<sup>th</sup>, 2021. Unfortunately the retreat was forced into a virtual setting, which consisted of a long continuous zoom meeting with hundreds of SigEp chapters nationwide. The new executive board was introduced to representatives from our National headquarters along with some other brothers from different universities. This retreat was very beneficial for the 6 brothers that attended, because of the discussions it facilitated on important leadership qualities and what it means to be a SigEp. Another way we have expressed nationals as a priority is through our Buchanan Cup Application. Our chapter applied to become a learning community in early October, and received recognition in late January. After becoming an SLC we said "why stop there". The Buchanan Cup is a title given out every other year to SigEp chapters that exemplify only the highest academic, brotherhood, and leadership qualities. The award is so prestigious that it requires a 45 page report and the recipient is presented at conclave. The

Buchanan Cup is something that we have never applied for because of the incredible effort required, but we decided to change our mindset, and overcome the stagnant thoughts of the past. The winner will be decided in the summer, but whether or not we win, it is a great award to apply for and it shows Nationals and everyone involved in SigEp that we are always looking to improve, and we are one of the highest achieving chapters in the country.

### **Finances**

Our executive board had many conversations about National dues this year because of our understanding over the financial struggles many families were going through. To aid our brothers in paying their dues we have made major progress in cutting costs internally. The first step we took was lowering our "tier rating" with Nationals from a Tier 3 (moderate risk) to Tier 1 (lowest risk), which dropped our insurance bill by almost \$10,000. We also joined the SLC which further reduces our insurance. In addition to this, we have made more direct contributions to help out our seniors. Throughout the year, there is wear and tear in off campus houses and in order to make sure our brothers do not endure lost security deposits, we have crowdfunded for each residence to get their damages fixed. Overall, dues can range up to \$2,000 a semester when food is included, and we lowered them to only \$200 the entire year, which was an incredible achievement, and potentially saved us from losing many members to financial trouble.

### **Extra Curriculars**

While as a chapter SigEp did our absolute best to offer the most value possible, it was impossible to have the same amount of events we've had in the past. Due to this, we stressed to our members to get more involved with clubs, organizations, and the community to widen their scope at Lehigh. Below is a handful of clubs or organizations that SigEp is involved with and has joined this year.

- Rugby
- outing club
- EWB
- IBE council
- Steel Bridge
- Formula SAE
- Orientation Leader
- Accreditation Evaluation panel
- Finance Club
- Investment Management
- Work-study
- Douglas Dialogues
- Lehigh Med
- Soccer team
- SpikeBall
- Orientation Coordinator
- Wind Ensemble
- Jazz Ensemble
- Tour Guide
- Baseball team

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

Exceptional

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

Sigma Phi Epsilon saw a drop in their overall chapter GPA and this highlighted the members who were struggling, this prompted the chapter to create an academic chair for the chapter who will oversee and assist in the development in coordination with their academic advisor a plan of action for struggling members. Additionally, they have reached out to alumni and through the virtual nature of the semester have been able to create networking opportunities. The chapter has also earned the distinguished title of becoming an SLC or a SigEp Learning Community through their nationals. This distinction has labeled the chapter as a high-achieving chapter dedicated to their studies, community service, and philanthropy. Sig EP was able to get their dues lowered by being designated a tier 1 as a low-risk chapter which dropped their insurance cost in turn lowering their overall chapter dues, which will assist in keeping members as well potentially diversifying their membership.

#### **Chapter Development Questions & Rating:**

Sigma Phi Epsilon have become a leader amongst their peers as they have become an SLC which is selective for high achieving chapters.

- How will the chapter implement their academic plan for their members?
- How will the SLC distinction impact the chapter moving forward?
- With lower dues, how will this translate into a more diversified member class?

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#### **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.**

##### **Introduction**

Changing tides at Lehigh, the country, and across the globe have shown how important diversity, equity, and inclusion is, and how it should be in every aspect of our lives. A commitment to DEI shows common decency to other people, and a reliance on the golden principle of treating people how you would like to be treated. On behalf of SigEp, we candidly express that we, amongst many others at Lehigh, have not been perfect in this category in the past, however, we are trying to turn over a new leaf and improve this commitment. Some ways we have implemented our new commitment over the past year are through the creation of new diversity centered positions, DEI education, and extensive outreach to other Lehigh organizations for assistance.

##### **Refining Policies**

The first step we took as a chapter was a screening of our bylaws to find any inherently biased or inequitable provisions. No clear provisions came to light, however, it caused the chapter to look introspectively on what areas of our functioning may be exclusive. The first topic we came up with was the need for complete financial inclusion, because of how money can very often be a barrier of entry. As mentioned before, we lowered chapter dues as much as possible, but even further than that we made our



Vice President of Finances (VPF) speak to every member individually to make it clear that if anyone was unable to make payments for whatever reason, that he would work with them to make sure their finances would not obstruct them from being a brother.

It is one thing to say this to a brother and another to actually put into action. An example of how we applied inclusive financial practice was when one of our brothers was forced to de-brotherize this Spring due to financial issues. Instead of allowing him to leave, our VPF crowdfunded money from various alumni to cover the dues. Everyone knew how much this brother cares about the house, and how much effort he puts in to help SigEp, and seeing him leave over money would have been very upsetting. The money was raised, and he now plans on continuing his path in SigEp.

The second topic we found to be lacking in was inclusive recruitment. Recruitment in the past, while not intentional, was only reaching certain areas and groups of campus properly, and that needed to change. During rush week we completely restructured recruitment, and started the process by sending an email to every single freshman signed up for IFC rush, asking them to sign up for an interview with our chapter. We conducted over 200 interviews, and even encouraged freshmen to send the sign up link to anyone else that may be interested, but we didn't stop there. A personalized email was sent to every freshman interviewed, in the efforts of making them feel special in a recruitment time of such uncertainty. The positive response from them was incredible.

Other ways we began recruiting differently was by looking in new places. Our current Vice President of Recruitment, a rush chair at the time, spoke to many freshmen at a Hillel service, finding a completely new avenue to recruitment that nobody had taken advantage of before. The dividends to our inclusive practices have so clearly paid off because we received more than 20 new freshmen, and a handful of sophomores, creating the highest total of new members we have ever received in one semester!

It is also worth noting that compared to our chapter in the past, our house now is substantially more diverse because of the new members added. Whether this be in race, religion, sexual orientation, or culture, our house has evolved to become a place that is truly accepting of everyone.

## **Outreach**

A large aspect of our DEI effort has been reaching out to community experts who are well versed in creating inclusion. The first example of this was a 1 on 1 meeting in November between ex-president Jacob Saks and Olivia Miller to discuss DEI. They spoke about the best ways to get the ball rolling for inclusive practice, what resources are available on campus, and what simple things we could do to make a huge difference. One of the main provisions of the meeting was the need to elect a Diversity Chair as a new and important position.

After the meeting the chapter drafted up position requirements for the chair and held an election. New member Darren Chen was elected and has shown much promise in his want to create change within Greek Life. He has since reached out to Chad Williams, the director of multicultural affairs, to have a separate conversation. After creating the Diversity Chair, we thought to increase our inclusivity even further by adding a Social Media chair, who would run our Instagram page and get our message out to as many people as possible.

Further outreach we have undertaken were 2 personalized meetings with SPEAK and Greek allies to discuss inclusive language and LGBTQ+ on 4/7 and 4/14, one meeting with diversity peer educators about identity on 3/23, strong attendance of over 20 brothers at the "Why do the black kids sit together in the cafeteria" presentation, a BTS module on 4/19 about consensual sexual proceedings, and a handful of brothers who attended a virtual Sex After Dark event.

Very unfortunately, after our brothers attended the virtual Sex After Dark event, it came to our attention through a conversation had with a SPEAK officer that the members had acted disrespectfully and jokingly during the session, making the presenters feel marginalized and disrespected. This came as a surprise to us, and caused all of us to take an introspective look at the chapter to discuss the ways we may be harming people without even realizing or intending to. Through further conversations had with SPEAK and their faculty advisor about the incident, an external conversation was set up with SPEAK and the brothers involved, and an internal standards trial was established in the efforts of both properly informing the members on DEI practices, and most importantly keeping them accountable. We can't change what has happened in the past, but we can keep these members accountable and make sure the rest of the chapter knows that this type of behavior will not be tolerated. This culture cant and will not continue within our

organization.

### **Overall Practice**

The most continuous way we have committed to DEI is through frequent conversations and education. Examples of such conversations start with our Sunday Scaries event after chapter. Normally the event is meant for debates on trending topics between brothers to try and keep everyone in tune with what is going on in the world. This semester we changed the event to be less of a debate, and more of a conversation about important topics. This allowed us all to speak candidly in an open space about DEI aspects such as pronouns, the transgender community, and ethnicity.

Another important conversation we had was after Timothy Piazza's mom presented to Greek Life about hazing. Immediately after the zoom concluded we asked every new member to join a zoom call with our executive board, where we asked them to display their honest emotions after listening to the presentation. Some had little emotion, others were slightly concerned, and a few showed real nervousness that they would be put under similar situations presented in the call. As an executive board we explained very clearly that SigEp is a non-hazing fraternity, and that if they ever felt uncomfortable they should come directly to anyone on the board to get it sorted out. This made all of them feel much better and it was a very productive conversation.

The final important conversation we had was after the conclusion of the DEI course offered to Greek Life through OFSA. The course discussed topics such as our identities and any unearned privileges one might hold depending on their gender, race, and sexual orientation, and we wanted people to share their opinions on the course after taking it, that way it would be guaranteed that the topics would sink in. Sig Ep had 74% of the chapter complete the course, which unfortunately was just below the required benchmark of 75%, however, it is worth noting that 6-9 people started the course and never completed, which they later explained was either a mistake on their part, or a glitch. Ideally, if these people had properly finished the percent would be closer to 90%.

Overall, we as a chapter are doing our best to be a productive part of the inclusive practices going on at Lehigh, and not a part of the past issues, and hopefully it is clear from this submission that we are well on our way.

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

Above Average

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

Sigma Phi Epsilon had a very reflective year for their chapter. With the self-awareness to create a game plan to meet their own renewed standards when it came to diversity equity and inclusion. To set up a meeting with OFSA advisors to point out areas of improvement was a big step. New to reevaluate their bylaws to scrub any inflammatory or inequitable language to create a more inclusive chapter from within again was a big first step to take. Sigma Phi Epsilon seems to understand the necessary changes that need to be undertaken by its members and chapter as a whole, they have created a DEI chair and partnered with several outside offices including OMA and BTS, and others to further understand where they stand as a chapter and where they need to go. The chapter also dealt with some unsavory information about members being distracting and disrespectful during the presentation. On such matters the chapter has held those members accountable and to higher standards and through their internal standards board. Although Sigma Phi Epsilon did not meet the required 75% for the EVERFI DEI course there were factors that resulted in their low percentage.

### **Chapter Development Questions & Rating:**

Sigma Phi Epsilon has shown to make significant strides in the area, their self-awareness to want to be better has been translated in their actions as a chapter. Even as some of their members stumble, they hold them to a high standard and show they are about positive change in the area of DEI.

- Which organizations can you partner with to maintain the momentum from this past year?
- Moving forward what methods would be taken to support the chapter when completing workshops necessary in the space of DEI?

### **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.***

#### **Introduction**

Creativity is a necessity in times of extreme change. The pandemic took everything we knew about normal functioning and flipped it on its head, forcing us to either adapt to the change or to suffer the consequences. It is clear through our success in giving back to the community, and through our creative brotherhood activities that we implemented extremely innovative methods to benefit the chapter.

#### **Giving Back (Community service/Philanthropy)**

##### **Community Service**

With COVID making service and philanthropy more important than ever, but also more difficult than ever, we knew we had a large task ahead of us to properly contribute. To accomplish this, we completely restructured our community service and philanthropy positions. In the past, we have had one community service chair and one philanthropy chair, but they did not interact much or work as a team. This year, we appointed 3 members to a collective community service and philanthropy board, who work in unison. This change represents a more coordinated effort for SigEp that will stress the importance of community for years to come. That being said, although we have chosen to combine the two, that does not mean that we don't recognize the important differences between the two, it simply allows for more creativity and dedication overall.

Events we partook in included participation in the Holiday Hope Chest this December where we bought the family a whole new set of toys, a donation to the thanksgiving food drive, where we dropped an entire thanksgiving dinner at the southside box, and intentional donations back to local restaurants and businesses throughout each week.

With such a challenging time around the world, we knew local businesses would be struggling and we wanted to help support them. Brothers were encouraged to go out to eat every Sunday night so that cumulatively several places across Bethlehem would feel our footprint. A perfect example of this was during the Super Bowl where we all resided at different houses, but decided to order a few hundred dollars of food together from Campus Pizza. This also made our house feel more together during a tough time when we all wanted to be together.

The final act of community service we took part in was a large donation to our beloved, but currently unemployed, chef, Roland Watson. Roland has been our chef for over a decade and has left an impact on alumni that have long since graduated. Originally, we wanted to simply give him a holiday bonus, but word spread to young alumni who wanted to contribute and a GoFundMe was set up. The GoFundMe grew like wildfire and 96 people raised \$6,000 for Roland. After the money was collected, a group of 4 of us drove to Roland and gave him a check and thank you card, and he greatly appreciated the sentiment. Some future events we have coming are a pairing with Alpha Phi to clean Jacobsburg park on April 25th, and other

clean-up missions around the mountain.

### **Philanthropy**

To properly contribute to our partnered foundation of the Terri Brodeur Breast Cancer Foundation we knew we would have to get creative. Many of our classic activities such as the color run, dunk tank, and bench press competition were not feasible anymore. The first act of philanthropy that we embarked on was a Chipotle Fundraiser on February 3rd. Brothers were encouraged to place an order online to contribute to the cause, and \$250 was raised.

Continuing, on April 11th, SigEp partnered with Zeta Tau Alpha to post checkerboard donation boxes on each member's Instagram and snapchat pages, casting a wide net for possible donations. The current total stands at nearly \$500 dollars, but still climbing due to the recency of the fundraiser. The new 3 person community service board has been instrumental for these events, shown by their raising of over \$2,500 in Relay for Life fundraising.

Another philanthropy activity that we have coming up is a pairing with the outdoors club to sell merchandise such as t-shirts and reusable water bottles. On top of selling shirts with the Outdoors Club, the second part of the effort will be to use the awareness from the merchandise to increase the amount of people participating in the Lehigh trail clean up.

Overall, all of these acts of community service and philanthropy express our creative solutions to the pandemic, in finding ways to properly contribute and give back under any circumstances presented to us.

### **Brotherhood Activities (Executive Transition/Alumni Relations/Recruitment)**

#### **Executive Transition**

The executive transition this year could have been the most disastrous transition in SigEp history if it wasn't handled properly. The new executive board primarily consists of current sophomores, all of which have only spent 1 true in person semester at Lehigh, and have seen only a fraction of the fraternity's proceedings compared to past executive transitions. To overcome the massive gap of asymmetric information, a thorough executive transition plan was created. The plan described that for the first 6 weeks, every decision made for each position would be a joint decision, allowing the new exec member to truly be brought up to speed. Both executive boards had a weekly meeting with our National Organization to discuss leadership efforts, and each week a complete transition meeting was had before chapter. Possibly the largest change was the creation of training manuals for each position. The outgoing board created guides to pass down, essentially giving the new board all the information necessary for their job before even starting. We believe this was a very creative way to transition in such a difficult time, and it has worked incredibly.

#### **Alumni Relations**

In recent history the Penn Epsilon Alumni Board has been in shambles. The president stepped down a few years ago without finding a replacement, and unfortunately, this left our chapter out to dry when with alumni connections. To help fix the problem we contacted our Nationals Organization and got a list of every SigEp alumni and their email and sent out over one thousand emails reintroducing ourselves to them. The response was outstanding, and we used the interested alumni to create a list of past brothers who wanted to be on an ongoing email chain for updates. The email chain is active today and includes many of our chapter meeting notes to keep alumni in the loop, and remind them of the good old days.

After the list was garnered, we wanted to plan a large golf tournament to actually meet the alumni. There was big interest, but unfortunately due to COVID we were not able to do it, and instead intend to do it next year. One of the best uses of this list was to help raise money for our chef, Roland, which is why our donations were able to climb all the way to \$6,000.

Additionally, we have boosted our alumni LinkedIn group. We have had multiple alumni post job openings within their companies for us to apply to, and it has helped garner professional connections between alumni and undergraduate brothers. This is especially helpful during a time where the job market is suffering, and each connection is extremely important. Overall, we believe these were very creative solutions to facilitate alumni relations, donations, and internship possibilities during the pandemic.

## Recruitment

The recruitment process we undertook this semester was the most creative solution created to any of our problems. Virtual recruitment was entirely different than normal rush, and to succeed, we had to change our entire mindset and infrastructure. Instead of being discouraged by the change, we sprung into action and created a multistage virtual interview process. A personalized email with a sign-up sheet was sent to all 250 freshmen signed up through IFC, asking them to put their names down to meet a few brothers 20 minutes at a time. We conducted over 200 interviews as a chapter and used those conversations as a foundation to decide which potential new members were the best fit to join our house. Individual and personalized emails were sent as a follow-up to every student, which invited them to other events such as online poker, breakout room Q and A, Quiplash games, Sporcle Quizzes, and eventually invite-only events. Comments from freshman about our process included "This is the most organized rush I have seen from any chapter", "The personalized emails you have sent are awesome, I actually feel included and wanted during a time where it is really hard to meet fraternities", and "SigEp is the only chapter conducting interviews and virtual events in this manner and it makes me very interested in them". Many other details about our recruitment are listed in the supplemental materials under "SLC follow up information" which includes screenshots of interview sign-ups, zoom links, and many more explanations on our creative solutions. Overall, this was the most creative thing that we undertook, and the payout of it is so incredibly obvious through the success we had in getting over 20 new freshmen.

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

Above Average

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

In regard to demonstrating the ability to adapt and implement creative and innovative methods by Sigma Phi Epsilon, as a chapter they did a good job at dealing with the challenges they had at hand. In terms of community service, they utilized the virtual landscape is using GoFundMe to raise over six thousand dollars for their chef to support during the pandemic. When they were able to, they partnered with Alpha Phi to clean Jacobsburg park. They could've been a bit more creative through their philanthropy but they were able to raise a substantial amount of money through relay for life. Sigma Phi Epsilon was incredibly intuitive with how to meet first-year students, the utilization of resources that were provided to the organization led to Sigma Phi Epsilon being able to contact well over 200 first-year students and created 20-minute blocks with each student able to interview the chapter to see if they wanted to join their organization, this was an ingenious plan to meet new first-year students. The results were yielded in their new member class which was the largest they ever had as a chapter at Lehigh.

### Chapter Development Questions & Rating:

Sigma Phi Epsilon excelled in this area and went above and beyond to adjust to the landscape for meeting new members and reframing how they connect as a chapter with their alumni. Their lack of community service was something that could have been reimaged this past year.

- Will this way of recruitment be carried over into the next academic year?
- In terms of Alumni engagement, how will the success from this past academic year be sustained in a more normal setting?
- What service and philanthropic opportunities are emphasized that were not this past academic year, next year?

## **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.***

#### **Introduction**

Our original new member education (NME) plan had to be altered to properly adjust virtually. The NME plan focuses around many of the values that SigEp holds dear, and fortunately for our chapter, we were still able to implement these values into the new plan despite being virtual. Through the balanced man program, virtual rituals, new positions, and other adjustments we were able to properly educate our new members.

#### **Overview of NME plan**

Our NME process for each of the onboarding semesters was 6 weeks long, and began with a brief orientation and expectations module. NME activities included BMP challenges, weekly reviews and study hours to ensure that they were all keeping up with their challenge schedules and academic studies, mandatory LinkedIn profiles and resumes for older brothers to proofread, career fair attendance, and other important modules. Modules included workshops from the Career Center, a presentation about the importance of the environment from the Eco Reps, an effective organizational event planning module, a nutritional health module, and a sigma conclusion module to end the process. Modules and challenges were adjusted by semester because the number of people going through education was never the same, but the pedestals and overall goal of each NME was the same.

Overall the goal of the NME plan was to show the new members what being a productive and integral member of SigEp means. This entails knowing what the BMP is, being a balanced man, and representing our 4 platforms of Gentleman, Leader, Athlete, and Scholar. We believe that we accomplished this effectively through the programming created, and we intend to continue building the new members into better and more balanced brothers going forward. The main way we can continue our education properly is through the BMP.

#### **BMP**

The BMP stands for The Balanced Man Program and it is a staple of being a member of Sigma Phi Epsilon. The BMP is a 4 year-long challenge that forces brothers to constantly improve themselves. The challenge starts as a Sigma, moves to a Phi, then an Epsilon, and finally a Brother Mentor, traditionally having one challenge completed per year. When new members join the fraternity, the BMP is one of the first things they learn about and start to participate in. Since not all members are currently on or off campus in Bethlehem, most challenges were changed so that they could be completed completely virtually, or hybridly. Challenge highlights, activities, and checkpoints by brothers can be found in the supplemental materials where a spreadsheet details everyone's accomplishments so far. This is by no means a comprehensive list, and many other activities and modules were conducted, but it gives a good look behind the scenes on how the challenge is being tracked and implemented.

Having virtual challenge activities has been a huge success because it has allowed many members who aren't at Lehigh to still participate and feel connected to the fraternity despite not being in Bethlehem. It also allowed members more freedom when choosing what challenges they wanted to complete and how they were going to complete them. This has led to an increase in brother involvement and made people more invested in the BMP, especially the new members, who have fed off of the infectious energy. Other ways we

have shown emphasis on NME and the onboarding of members is through effective virtual rituals.

### **Virtual rituals**

Ritual has always been a very important part of the chapter's history and tradition, and we wanted to ensure that it stayed that way, despite having to operate virtually. With the new members having only recently met the rest of their brothers, we wanted to give them a ritual that they would remember. We used a variety of the features in Zoom, and the help of the entire executive board to create the experience. By using waiting rooms, breakout rooms, screen sharing, and annotation on whiteboards we were able to give brothers the same experience as an in-person ritual in information received, and the SigEp values presented. We conducted 2 rituals this way, our Sigma and Phi rituals, both of which went very smoothly. Virtual NME overall was very successful, but two other main changes were made within the chapter to make the onboarding process more efficient and more effective. These changes were the addition of several new positions, and also a restructuring of the New Member Educator roll because of the high amount of new members we received.

### **New positions**

A new portion of NME added this year was the addition of new positions. Past freshmen positions open for application were three recruitment chairs, a social chair, a community service representative, and philanthropy chair. We realized that these positions did not have enough variety, or enough impact on the group being educated. Almost half of the people would not be granted a position, and the positions are not individually great training to be on the eventual executive board. People with positions tend to be more invested in the fraternity, and also more knowledgeable, which is why we knew that new positions needed to be added, and also positions which were better training for future leadership.

The positions added were a finance chair, freshman risk manager, BMS chair, internal coordinator, diversity chair, and social media chair. Adding so many new positions gave many hungrier and more passionate freshmen the opportunity to showcase their skills, and they also are much more integral to specific executive board positions than the positions in the past. For example, the finance chair is responsible for shadowing the Vice President of Finance, the freshman risk manager shadows the actual risk manager, the internal coordinator shadows the president, and the BMS chair shadows the Vice President of Member Development while also organizing the Balanced Man Scholarship. New members were very happy to be a part of this change and hopefully we will see positives two-fold from it; new members will be more involved in their fraternity experience because of holding a position early in their journey, and future executive board members will be more prepared because of their shadowing.

### **Adapting to new demand**

What was an incredible achievement in the addition of so many new members, also came as a system shock to the fraternity. We had never had so many new members at one time, and educating each of them properly became a difficult task. To adapt to the overwhelming numbers we split the new members into two groups: freshmen and sophomores. The group numbers were very different, ranging from over 20 freshmen to only a handful of sophomores, however, we thought this most appropriate due to each year's shared experience, and also the yearly structure of the BMP. A new member educator was then assigned to each group to ensure that each year of new members was getting the proper NME experience, in essence preventing anyone from falling through the cracks.

Although this decision inherently made it so that the two groups were educated differently, the curriculum was identical, and the purpose was identical, so the outcome of a more efficient and personalized experience was definitely worth it. The freshmen and the sophomores involved applauded this move because it made them feel more special and more involved in all the education proceedings. Overall, Sig Ep prioritized NME through our modules and mission, our virtual rituals, and our incredible changes to existing procedures that only made everything run more smoothly.

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

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

Sigma Phi Epsilon did an adequate job at adjusting to the virtual landscape in terms of new member education. Sigma Phi Epsilon has a great program called the Balanced Man Program. This program focuses on the new members as they complete certain tasks for the benefit of each member, however; this year would be different as the chapter had to adjust to the virtual landscape and created a more hybrid model. This hybrid model allowed the members to create and build small groups where they had workshops and programs for onboarding new members into the organization. This was highlighted in their attempts to create networking opportunities for new members as they entered the organization connecting with alumni and older members via creating LinkedIn profiles which yielded positive results for the new member as it helped them focus on their career aspirations. Due to the size of the incoming new member class, the chapter had to adjust and create a new curriculum that was more ideal for balancing the number of the members that were onboarding into the organization. All while maintaining their core principles at the heart of the new member education plan.

**Chapter Development Questions & Rating:**

Sigma Phi Epsilon performed admirably in the realm of meeting new members and onboarding new members and even adjusted their plan to accommodate more members. Coupled with the alumni engagement and opportunities presented to the new members was great to see.

- Will the success of this past academic year influence necessary changes for the next new member class?
- How will it look in a more normal semester, what positive changes can be added to an in-person setting?
- Will the social scene impact the BMP and new member education as a distractor?

**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><b>Strengths:</b></p> <ul style="list-style-type: none"> <li>• Our 365 recruitment tool allows us to engage with more PNM's, letting use broaden our influence</li> <li>• Strong and continuously growing relationship with our National Organization</li> <li>• Limited conduct history due to diligent risk management and safe social behaviors</li> <li>• Large number of brothers leads to lower financial dues and ease of completion for large tasks</li> </ul>	<p><b>Weaknesses:</b></p> <ul style="list-style-type: none"> <li>• The channel of communication between the executive board and the rest of the chapter can be improved to increase overall transparency</li> <li>• An unfortunate social divide has progressed between people on and off campus because of less in person contact</li> <li>• Events can be planned further in advance to prevent cancelations because of lack of preparation or procrastination</li> <li>• We have better representation in clubs from</li> </ul>
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	last year, but a lack of representation on Greek councils such as IFC is a weakness
<b>Opportunities:</b> <ul style="list-style-type: none"> <li>Continued progress in Alumni relations could lead to strong career openings and large donations</li> <li>Strong drive and dedication from each member gears the chapter for continued future success</li> <li>Gathering so many new members this Spring grants us the opportunity to leverage the extra support and accomplish things that were previously impossible</li> <li>Changing circumstances from the pandemic gives creative chapters, which we are, a leg up due to their ability to adapt strongly</li> </ul>	<b>Threats:</b> <ul style="list-style-type: none"> <li>Improper training for executive boards can make the 1 year turnover of positions a nightmare for the chapter</li> <li>Many knowledgeable members of the chapter will be graduating and the wisdom leaving will be hard to replace</li> <li>Readapting to in person functioning next year may come as a system shock to the chapter</li> <li>The pandemic is not yet complete, and another wave of the virus will surely disrupt chapter operations</li> </ul>

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

The honesty in which Sigma Phi Epsilon has identified their SWOT analysis is refreshing; they understand that there will be a lack of divide between on-campus and off-campus students, so they are laying the groundwork to better strengthen that aspect as well as the representation in Greek councils. Sigma Phi Epsilon seems to be forward-thinking into what can make them a stronger chapter in case of unfortunate circumstances that may occur. They are very self-aware and it shows in their SWOT analysis.

### **Concluding Summary**

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

Exceptional

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

Overall Sigma Phi Epsilon has shown a great aptitude to progress to where they need to go. They have shown that Covid has affected all aspects of how they operate as a chapter and not all of the aspects have been positive however they have shown the wherewithal to progress as a chapter and to move forward to where they want to be. They have implemented the proper mechanisms to become a successful chapter moving forward. Sigma Phi Epsilon's self-awareness was on display throughout their entire report and presentation. They understood their shortfalls and where they needed to go to grow as a chapter. The very ability to be intuitive and resourceful given everything that has been going on was tremendous to see. And even when they went up against obstacles they were levelheaded and they conducted themselves as representatives of Lehigh's campus. The chapter becoming an SLC chapter was a major milestone for the chapter and should be celebrated. They are doing great work in the DEI area as they have met with several organizations and outside offices in the realm of equity and inclusion (SPEAK, Greek Allies, DPE (diversity peer educators), and BTS). They have also restructured and created new roles for more members to feel as though they belong and have a voice in the direction of the chapter. They still have areas where they can improve in terms of their service opportunities and their philanthropic efforts as well as how to bridge the divide between on-campus versus off-campus students in their organization. Sigma Phi Epsilon is on the right track, as long as they can utilize their headquarters experience as well as their Lehigh advisor's

experiences I see no issues with the organizations moving forward.