

## 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:

Theta Chi
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### Assistant Director:

Olivia Miller
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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.**

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.**

Our chapter worked swiftly to adapt to the challenges of running and participating in a fraternity through zoom and other virtual platforms. Historically our Chapter did not utilize many virtual platforms for member engagement aside from text messages, group chats, and the occasional email. As soon as we were told we would be moving to remote learning back in March 2020 the Chapter executive board worked to share information regarding housing, dues, social activity, and chapter meetings in our newly found virtual world. Since the early days of adjusting to not seeing our brothers everyday we have normalized and adjusted to the challenges of running our Chapter primarily virtually. All of our Chapter meetings are held entirely virtually and we have Brothers participating from every time zone across the United States. Aside from Chapter meetings we felt the glaring need to come up with virtual brotherhood events. Whether they were initiated by an executive officer or brothers coming up with their own social activities, brothers could frequently be found hanging out on zoom, playing video games, playing poker, and so many other virtual activities we can all relate to.

While keeping all of our Chapter traditions intact was difficult we were able to adapt and come up with virtual alternatives. Working closely with the school and our International Headquarters we have found virtual alternatives for all of the things that our Chapter holds sacred. The change to virtual meetings has created challenges, but it is important to recognize the benefits it has created. It has allowed Alumni to stay more involved in things such as Chapter meetings and brotherhood events. It is worth considering that moving forward our Chapter should always offer virtual options for Chapter meetings and other Chapter events so that when brothers cannot be physically present they can always remain involved.

Our standards board has undergone a lot of change over the last year and a half. Our Chapter first realized our standards board was not operating to its full potential before we were sent home due to COVID. Since then we have had them operate in new ways. Making sure the correct people are leading the standards board and they are being held accountable by the Chapter as a whole. They now meet bi-weekly or in some cases more frequently on an as needed basis. The last two semesters have proved even more challenging for the standards board as our brothers are scattered across both Bethlehem and the Country. It can be challenging for either executive officers or standards board officers to keep in touch with what is going on, but we have put an emphasis on brotherhood accountability. This can be demonstrated in our outstanding

conduct history over the past year.

Our Chapter has stayed up to date on all OFSA emails responding promptly and following through on our requirements. As well, we have consistently been attending IFC meetings and meetings with our OFSA assistant director, Olivia Miller. Our great working relationship with both Olivia and IFC has resulted in an easier relationship with the school and other Greek organizations.

Due to the exceptional circumstances of this year our Chapter is piloting a new transition process for our executive officers. Traditionally our election cycle is held in November when we elect the majority of our executive board. Typically the new officers are predominately Sophomores. This year was no exception, but instead of the new officers immediately taking office they are shadowing the past executive board members until the end of the semester. We feel this has been a positive experience and possibly a system we would like to continue in the future. We feel that having old members hold executive positions is in the best interest of the chapter, and combined with having a semester of experience before formally taking the role we are very excited for how this will impact our Chapter moving forward. This is something we have wanted to change for a long time and due to this year's changes we felt we were in a prime position to make positive changes. So far our program of electing officers and having them shadow the old executive members has been extremely beneficial and it is clear the new executive members are learning more and transitioning into their roles more smoothly than in the past.

We feel that our Chapter has handled the challenges of the past year extremely well. Beyond meeting the bare minimum of keeping our Chapter operating, functional, and engaged we have taken this as an opportunity to make positive changes within our Chapter. We have discovered new opportunities and reworked past flaws within our Chapter and will continue to innovate to improve our Chapter whether in a virtual setting or not.

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

Exceptional

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

Theta Chi places a high emphasis on membership and engagement and accountability in their chapter operations. When the academic year began and it was announced we would be preparing for a fully virtual experience, the chapter quickly strategized a communication plan for its members. Theta Chi began using GroupMe, group chats, email, Snapchat groups and Zoom platforms to increase communication. The chapter transitioned all chapter meetings to Zoom and worked with general membership to find meaningful brotherhood events. The chapter virtually engaged its members in a number of ways - Zoom hangouts, video game streams, virtual poker games, Jackbox games, and more. The panel could see that "Theta Chi worked really hard to keep members engaged". Theta Chi found through virtual operations, they were able to keep alumni more engaged than usual which was a huge benefit for the chapter. The chapter evaluated and improved many of its internal process over the past year. The first is the executive board transition process - the chapter elects a new executive board each November. Theta Chi understood the challenges of bringing in new leadership who haven't had experience leading the chapter during a 'normal' year and adapted their process to make the entire spring semester a transition period where the incoming executive board shadows the outgoing board. This allowed the chapter to prioritize having older members in leadership positions and gave extra support to the chapter through transition. The panel noted that Theta Chi was "committed to holding members of their organization accountable and were taking the necessary steps to ensure the standards process was being used correctly". The chapter recently re-evaluated and revamped its standards board and accountability process - the standards committee now convenes on a bi-weekly (or more frequent) basis, regardless if there are any standards issues, to hold members accountable and strategize how they can continue to prioritize brother accountability. The chapter also removed fines from the standards process and instead focused on educational sanctions, creating an anonymous reporting form. This should be considered a best practice in the Lehigh Greek community. The chapter has exemplary communication with

OFSA and over 90% of brothers are involved elsewhere in the Lehigh community. Having 0 brothers disaffiliation, opposite of the trend in IFC, is a testament to the chapter's commitment to membership engagement.

The panel believes Theta Chi is **exceptional** in 'demonstrated effort toward prioritization of membership engagement & accountability', a level above the chapter's self-evaluation.

Chapter Development Questions:

- How can the chapter continue to implement a comprehensive officer transition plan?
- In what ways can Theta Chi proactively prepare for an in-person return in the fall through their standards board?

### **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.**

Our Chapter prides itself on its dedication to education and academics as a whole. While academics are always our main priority, we have ensured that our members get positive educational opportunities outside of classes. Our brothers were very inspired by the accomplishments of our graduating seniors last year, which included the IFC President, the Editor-in-Chief of the Brown and White, the recipient of the Student Life Leadership Award, and the recipient of The University Service Award. While campus activities were largely restricted this year, our members have still found ways to be involved, including the IFC President, IFC Recruitment Chair, and an editor of the Brown and White. As campus hopefully becomes more open next year, our members will continue to be a part of the wider campus community.

Our Chapter has consistently maintained a high GPA in recent years. This has come from our members holding each other accountable, and our educational programs within the Chapter ensure this. We maintain a Scholarship Chair to oversee each of our member's academic success, and this process helps ensure that no member falls behind overall. Our Chapter's overall GPA dropped slightly this last semester, with our combined GPA dropping by only 0.08. This however was in line with the overall trend of the school. Our Chapter has consistently been above both the IFC GPA average and above the Lehigh All Men's average, and this year was no different. However, some of our members feel burned out from online schooling, and there is no easy solution to this problem. Overall, slight drops such as this are not an immediate concern, and we strongly believe that the plans we have in place will ensure our future academic success.

Our New Member Education program is one of the largest contributors to our Chapter's leadership development. As our new members go through the program, they get to hear from Chapter officers about what they do for the fraternity, and how it is beneficial to both the brotherhood and the individual to get involved in leadership roles. This experience provides background to new members about how they can help both in the future, as well as the present. This internal guidance in regards to our new members helps us to positively shape the culture of our Chapter, and through these positive initiatives we ensure that a maximum amount of people consider running for leadership positions.

The Chapter has maintained a budget surplus in recent years, with a large emphasis on using these funds to help our members pay dues. This practice has been exceptionally important this year, as the pandemic has wreaked havoc on the economic well being of many of our members. We were able to drastically reduce the

amount our members paid in dues this year, and this has helped us retain our members and prevent further financial hardships for them. Our alumni have also been an excellent resource in this regard, as our close relationship with them has kept many alumni connected to our Chapter. By keeping our alumni network open, they have been able to provide additional help to keep our Chapter financially sound and responsible.

Our Chapter in recent years has really increased our push to be representatives and leaders in IFC. For the past year, we have had members on the IFC executive board, with both the President and the Recruitment Chair being members of Theta Chi. This is something we see as a very positive development, and it demonstrates how our members are taking a more active role in leadership positions.

This year our National organization decided to host virtual conferences in January for the Presidents, Vice Presidents, and Marshals. These programs helped our leaders of the Chapter navigate the uncertain times of the present, and provided insight on how we can continue to keep our members engaged and positive. Each program focused on a different aspect of Greek life, from teaching how to lead (especially in a virtual setting), to keeping members accountable, to running the overall Chapter effectively and communicating with members regularly.

These programs also suggested ways to improve coming out of the pandemic, and emphasized that we should all continue to follow the core values of being a Theta Chi brother. Theta Chi prides itself on being a promoter of knowledge, and advancer of culture, and a builder of character. These were large parts of the overall message that our National organization delivered to us. That our academics are the main priority for our members, that we should always strive to improve on the culture of our Chapter, our university, our community, and our nation, and that we should learn from both our past experiences and the experiences of others. It also highlighted the core value of extending a helping hand to all who seek it, and that we should always be willing to look out for others.

This message is a core value of our chapter, and we make it clear to all of our members that each and every one of us is here as a resource to talk to when they feel down. This is especially important this year, as the pandemic has caused a large increase in depression globally. By providing a resource for our members, we have been able to make sure our brothers are seeking further help when necessary. Our motto of "An Assisting Hand" is a key part of our Chapter, and it is something our members truly embody.

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

Above Average

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

Theta Chi's membership experience emphasizes scholastic responsibility. The chapter makes academics a main priority, consistently performing above the All IFC, All Fraternity, All Lehigh Student and all Lehigh Men's GPAs - they credit the work of their academic chair to their success in this area. In addition to academics, Theta Chi ensures education outside of the classroom as well. Executive officers attended a virtual conference put on by HQ to talk about virtual engagement, accountability, and communication. The chapter plans to send as many members from their new member classes of 2020 and 2021 as possible, which their alumni committed to financially supporting. The panel believes Theta Chi has "phenomenal Alumni engagement" that should be considered a best practice in the Lehigh Greek community. The chapter has welcomed alumni brothers to chapter and executive meetings and have worked with them in career development effort. Theta Chi has a LinkedIn group with over 300 alumni brothers; recent alumni have held prominent positions on campus (IFC President, Brown & White Editor, etc.) and have supported current brothers in similar positions on campus now. Theta Chi alumni have also been a huge resource to help the chapter be financially stable. The chapter has operated in a surplus the past few years and has been able to make significant accommodations for financial hardship: drastically reduced dues, reallocated roll-over funds to subsidize dues for members struggling financially, and have provided financial support for leadership opportunities for members. The panel was "most impressed with their management of chapter finances and

being able to support the chapter given the financial burden of COVID 19 on their members” and “applauds the efforts that the chapter has taken to ensure that it is fiscally responsible and supportive of members who may financially need assistance with their dues”.

The panel believes Theta Chi is **above average** in ‘demonstrated effort toward dedication to educational initiatives & chapter priorities’. The chapter is clearly operating at a very high level and has set many best practices in this area. The panel believes it is essential for the chapter to branch out and partner with Lehigh offices and other Greek and non-Greek organizations on additional educational initiatives. Some examples of these are: Lehigh Career center for resume/internship/interview workshops, Peer Health Educators for programming during chapter, Center for Academic Success for workshops on studying habits, etc - there are plenty of resources on campus for meaningful, cost-free programming. Integrating these practices will easily help Theta Chi achieve their self-evaluation of exceptional in this area.

Chapter Development Question:

- How can Theta Chi continue to use virtual engagement with their alumni to benefit the membership experience?
- What offices on campus that support educational initiatives can Theta Chi bring to their chapter?

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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.**

Over the course of the last year our Chapter and it’s members have taken a much needed look at ourselves and our own actions to reevaluate what we are doing to promote diversity, equity, and inclusion. Many brothers took action on their own whether it was advocating for their beliefs within the chapter or in public, voting, raising awareness, or simply educating themselves on relevant topics. Having our individual members get involved for causes they believe in is something that we encourage and are proud of.

Our brotherhood had a great completion rate for the EverFi course with a 93% chapter completion based on the last report I saw. It is fantastic that our brothers took the time to take this course and educate themselves on such important topics. Within our own Chapter we have had discussions during Chapter meetings regarding what we can do to improve our diversity, equity, and inclusion. These meetings proved productive and we appointed a DEI chair to further these conversations and to meet with IFC to have more productive discussions for both the school and Greek life as a whole.

Our Chapter realized the significance of voting in the 2020 election. As a Greek Chapter that is part of a large national organization our Chapter cannot take a political stance. This is because it could not represent our entire brotherhood or our national organization, as we have a diverse group of political and ideological views. However, we felt that stressing the importance of voting was something our Chapter should stand behind and promote, regardless of each individual’s beliefs ideologically. Our Chapter had almost 100% voter registration and voting. All of our members who voted were given a Theta Chi shirt that says “I voted.”

While the shirt was not necessary to get our brothers to vote we felt it important to create this apparel to outwardly stress the importance of voting. We are proud that almost our entire brotherhood registered and voted in the past election and hope to continue this trend into the future as regardless of political view our Chapter stands behind everyone's right to vote.

Our Chapter has a proud and long history of diversity, dating back for 60 years. Our alumni have encouraged diversity in all forms of recruitment, including economic diversity. This is seen in our very inclusive and accommodating policies for dues, with both our alumni and our Chapter being open to assisting our members for whatever economic challenges they face. By keeping a tight budget in recent years, as well as having our alumni subsidize our Chapter, we were able to eliminate payment of dues for our members, hence why we had no members disaffiliate, even when other chapters at Lehigh saw this problem.

Our Chapter undergoes a by-law review every year to modernize, update, or add any new relevant subjects. During this by-law review we did not uncover any explicit or implicit bias in our recruitment or brotherhood policies. Our Chapter stresses that we are open to anyone from any background. This is evident in the way we manage our Chapter dues. We do not have a specific policy regarding financial difficulties for paying dues. We believe this is better because each individual brother is able to work with the Chapter leadership and Alumni advisor to come to a conclusion on how their financial responsibility to the Fraternity should be handled. In the last few years brothers have worked with Chapter leadership and the alumni advisor to come to solutions that range from paying the full Chapter dues, being on a payment plan, or on full scholarship for our Chapter. Overall we did not find any bias within the by-laws but we will continue to be cognizant of how we act and think to promote inclusion within our Chapter.

As a Chapter with 59 different backgrounds and opinions it would be inappropriate for us as a Chapter to make sweeping statements regarding any opinionated matters. That being said, we always actively encourage our members to stand for what they believe in and voice their opinion both within and outside the Chapter. This has led to many productive conversations among brothers in our Chapter and many of our brothers taking their own initiative to voice their opinions in other settings as well. We feel that the encouragement we have provided our members to get involved and educated for topics that matter to them and others can only lead to a more educated discussion on topics that impact our society today.

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

Above Average

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

Theta Chi has made some clear, intentional efforts in integrating diversity, inclusion and equity education into their membership experience. The chapter had a 93% completion of the EverFi DEI program through OFSA, exceeding the 75% completion requirement and being one of the highest completion percentages in the IFC community. The chapter also appointed a new DEI chair in their chapter and led conversations during chapter meetings on how they can improve their DEI work. The panel suggests that the chapter utilized their DEI chair to develop an action plan in this area - your OFSA advisor is a great resource for this. Theta Chi prioritized the importance of civic engagement during the 2020 Presidential Election and supports their brothers diverse political and ideological views - achieving an almost 100% voter registration. The chapter also reflected on the economic diversity of its members and accommodates their budget to make the chapter more accessible through a funding pool to help with dues and supporting membership development experiences and a flexible dues plan to relieve financial pressures of members. Theta Chi also did an internal review of their bylaws and recruitment practices for any examples of bias. In addition to an internal review the panel suggests the chapter "works with someone who could help advise them about how to review policies and practices with an eye towards bias". The panel would also like to suggest some free, on-campus resources the chapter could bring in to help in this area: the Office of Multicultural Affairs, the Diversity Peer Educators, the PRIDE Center, the Center for Gender Equity, CGC organizations or other student multicultural organizations could be helpful - specifically, the Diversity Peer Educators could bring

meaningful programming to chapter meetings. Theta Chi has certainly laid a solid foundation for success in diversity, equity and inclusion work in their chapter.

The panel believes Theta Chi is **above average** in ‘demonstrated effort toward commitment to diversity, inclusion & equity’. Through working with their DEI chair on action planning and collaborating with other offices and organizations on campus to bring meaningful programming to the community the chapter can achieve their self-evaluation of exceptional in this area.

Chapter Development Questions:

- What does Theta Chi want to prioritize in their diversity, equity, and inclusion work?
- Who can Theta Chi collaborate with in this area?

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

Examples could include but are not limited to

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

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

Our Chapter has adapted to the Covid pandemic in the best way possible. We pride ourselves on how well we have been able to implement much of our normal lives into a virtual setting. One thing we have successfully transitioned into is increasing our use of GroupMe as a brotherhood. This has allowed us all to use social media to connect to each other more, in ways that are both safe and allow us to bond with our new members. Brothers often use this platform to coordinate playing video games, talk about current events, and suggest new activities that can be done even in quarantine. This is something we can carry into the future, as having one, large chat allows us to stay connected even as brothers graduate. This can lead to better connections with alumni, and help our brothers get real-life advice and job opportunities from brothers who have left Lehigh and moved elsewhere. And while this was something we had already had before, our Chapter feels that it has been an instrumental part in keeping our brothers connected, as well as a key way to engage with our new members.

We also created large snapchat groups with our members. This was a more informal way for our brothers to quickly send snapshots of things that they experience in their days at home, from sharing a funny moment to remembering an old memory from before the pandemic. We feel that this has helped us also connect more on a personal level, in a way that simple texts do not.

We also have hosted a virtual candygram philanthropy event with Pi Beta Phi, for a joint fundraiser. This contributed towards both of our respective philanthropy organizations: the USO (United Service Organizations) and Read > Lead > Achieve. Doing a virtual philanthropy event with a sorority will help us connect more to other Greek organizations, which can lead to better overall relations with other organizations in the future. As the pandemic’s economic effects slowly recede, we have more fundraisers planned for next semester and next year as a whole, with the goal of providing support to members of the military and their families.

Implementing a virtual recruitment program took a lot of thought and effort from our Chapter. Being fully virtual, there are only so many different activities that can be done that are engaging to both the brothers and the PNMs. In order for us to make this a productive and useful experience, our brothers took a lot of time to find different activities. We planned our events in advance, and we had large groups of brothers attend “mock” recruitment events in order to help the process go as smoothly as possible. This helped us get feedback on how we were running events before they even began, and allowed us to adjust virtual activities



so that they were more fun. It was this process that gave us the ideas for many of our virtual events, from poker to online drawing games, simple meet and greets with engaging questions for conversations, and more. These activities are not a true substitute for in person meetings, however we feel that they are the best alternatives available at our disposal.

Virtual recruitment itself contained some challenges. At times, our events did not get as many participants as expected, especially during the later days of formal recruitment. While we are proud at how our members adapted to this challenge, it was disheartening to see that many PNMs were seemingly going to unofficial in-person events at other organizations. After getting feedback from some PNMs, we found that a number of PNMs stuck together as a group and chose another fraternity over ours. This was because they felt that they had been able to meet the members of that fraternity more due to in-person activities, and it did not surprise us when a number of other organizations faced disciplinary charges from hosting such events. Our commitment to staying fully virtual in recruitment was still the absolute best decision, as following both Lehigh and state guidelines helped keep our Chapter exemplary in terms of conduct. By being able to adapt to Lehigh's change in recruitment plan (from some in person events to fully virtual), we set ourselves up to have more options even in future recruitment events for years to come. Taking this experience and looking towards the future, virtual events are something that can be used for next year's recruitment. The pandemic will not go away immediately, and while next school year will hopefully be both safer and healthier for everyone, being able to utilize virtual recruitment events is something that can help us connect to PNMs regardless of where they are.

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

Exceptional

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

Theta Chi did a phenomenal job adapting to a virtual membership experience. The chapter leadership was transparent in that it was a lot of trial and error - some changes worked and a lot didn't. The chapter chose to focus on smaller things to adapt and change such as: increased utilization of GroupMe for chapter information and communicating expectations, engaging more with each other on social media to promote connection, developed a Snapchat group for more informal communication, streamed video games together, talked about current events in group chats, and involved the entire membership in suggesting new activities. The panel was extremely impressed with the chapter's ability to "find many positives during COVID" and "innovate their practices to advance". Theta Chi collaborated with a Panhellenic sorority to host a Candygram fundraiser, where half of the proceeds went to the chapter's national philanthropy, the United Service Organization. The chapter also talked about their plans for philanthropy and service going into the fall semester. Theta Chi's recruitment practices should be considered a best practice in the IFC community. The chapter developed a comprehensive, virtual recruitment plan which included poker, online drawing games, meet and greets, one on one conversations, and more. It should be highly commended that this chapter stuck to its values and recruitment remained in line with the University's guidance, when many other chapters did not. Prior to recruitment, the brothers has 'test-runs' of recruitment events to gather feedback and ensure the best experience for PNMs. Theta Chi's effort in this area clearly demonstrates their commitment to providing a values-based fraternity experience.

The panel believes Theta Chi is **exceptional** in 'demonstrated effort toward ability to adapt and implement creative and innovative methods', aligning with the chapter's self-evaluation.

Chapter Development Questions:

- How will the chapter continue some of its adaptations from the past year as in-person operations resume?
- In what ways does Theta Chi plan to connect with potential new members beginning in the fall semester?

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## **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.***

Our new member education program is something that we have been very proud of over the last few years. This program emphasises many valuable lessons to our new members, the most important of which is scholastic responsibility. We feel that this is the top priority of our brotherhood, and instilling the value of education and academics to our new members is something very important to the culture of the Chapter. We also strongly teach our new members about their own personal responsibility, as helping them understand that they represent not only themselves, but a larger organization leads to deeper thought about their individual actions. This sense of responsibility helps our new members understand that their actions can have deeper consequences, and in turn leads to our members having both a good moral conduct as well as a good school conduct. We also highlight the importance of leadership roles in the Chapter, and how these opportunities to lead are good experiences to take into life even after graduating. By having each of our Chapter leaders come to talk to our new members, we enable them to start thinking about how they can lead from an early standpoint, and help them understand what each elected official does to improve our Chapter.

Our Chapter has worked tirelessly to get a virtual initiation done. This has been a challenge in many ways, as our international governing body of over 160 chapters does not allow for a virtual initiation. However, last semester they made a special exception for our Chapter due to our excellent reputation and standing within Theta Chi. This included a member of the Grand Chapter (the Theta Chi term for the board of directors) participating in our virtual initiation in October for our Spring 2020 new members. We are currently awaiting another special exception for our current new members, and look forward to initiating them once this permission is granted.

Our Chapter has kept every effort to meet the schedule we have set for both new member education and in keeping the school updated with PNMs. We filled all forms for the school before the deadlines, and made sure that when there were any updates that OFSA were notified in a timely manner.

Keeping in touch with our new members is something that initially seemed like it could be a problem. Without being able to meet our new members in person, all of our contact with them has been through either zoom meetings, texting, GroupMe, and snapchat. While these are not as fulfilling ways to connect with our new members as in person events would be, we did our utmost to make the most of the situation. This system did have many positives however, as it allowed our brothers who are not in the Bethlehem area to have just as many experiences with our new members as the brothers who are off-campus. This helped create a larger sense of brotherhood, as those who are home felt that they were truly still a part of our Chapter's social life.

Through these virtual means of communication, our new members have been able to meet the brothers of the chapter. Our new members were mentored and taught how to create a LinkedIn account, enabling them to connect to our Chapter's LinkedIn group, which has over 300 alumni. By emphasizing early on the importance of our alumni network, we have given our new members a connection to our brothers that have graduated, as well as giving them a head start in professional connections.

While both the Spring 2020 and Spring 2021 new members have not had the full experience of in-person brotherhood both last spring and this year as a whole, our Chapter plans on having as many members as possible go to our national convention this summer, titled as a “School of Fraternity Practices”. This will allow our members to bond as a Chapter, while also meeting brothers of Theta Chi who go to different schools. This experience will open our members to a new way of thinking about our Chapter and will encourage open discussion about further ways to positively improve our Chapter. The trip has been fully endorsed by our Chapter’s alumni network, and they have pledged financial support for every single brother who would like to attend.

Our brothers who were recruited in Spring 2020 have been fully integrated into our Chapter this year. We held a virtual initiation event for them in the Fall, and since then they have become the leaders of our Chapter. To help them with this process, our Chapter decided to do a multi-month transition process, where the old and new leaders of our Chapter worked side by side to navigate the pandemic. This process has passed on valuable information to our new leaders, as they learn to lead our Chapter as both role models and as brothers. By having our Spring 2020 new members learn alongside the old executive board of our Chapter, we have allowed them to see how the decisions of our Chapter are made, and set them up to be ready to in turn lead our brothers and Chapter into the future.

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

Exceptional

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

Theta Chi has a comprehensive new member education program that sets new members up for success in the chapter. The program is based on the chapter’s core values of scholastic and personal responsibility. With their new member classes from 2020 and 2021, the chapter was initially worried about the connection with/between new members but found it easy utilizing tools like Zoom, GroupMe, Snapchat, and other brotherhood activities. Theta Chi created numerous opportunities for new members to meet with current brothers and put a great emphasis on leadership development. The chapter integrates a sense of responsibility to the chapter through their new member education process and highlights the importance of leadership roles in the chapters and how the more engaged members are, the better their experience will be. Executive board members meet with new members to talk about their roles, how they benefit the chapter, and how the new members can begin to lead from the beginning of their experience. The panel believes the emphasis on leadership for new members is “integral into the chapter’s ongoing success on campus”. The chapter intentionally connects new members to alumni from the beginning through their 300+ member LinkedIn group and mentoring program. Additionally, their alumni are sponsoring as many spring 2020 and 2021 new members that want to go to Theta Chi’s convention this summer - which is absolutely phenomenal. Of Theta Chi’s 160+ chapters nationally, HQ made an exception to their chapter being able to host two initiations virtually which “speaks to Theta Chi being well regarded both on campus and by their headquarters”.

The panel believes Theta Chi is **exceptional** in ‘demonstrated effort toward emphasis on new member education and the onboarding of Spring 2020, Fall 2020 and Spring 2021 new members’, aligning with the chapter’s self-evaluation.

Chapter Development Questions:

- How can the chapter continue to support new members as they step into formal leadership roles?

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## **Chapter SWOT Analysis**

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

Chapter's provided response in text boxes below:

<p>Strengths:</p> <ul style="list-style-type: none"> <li>● Academics <ul style="list-style-type: none"> <li>○ While our cumulative GPA average did drop slightly this last semester, we feel that our Chapter's culture of academic success remains one of our greatest strengths, and we will ensure that it continues.</li> </ul> </li> <li>● Internal governance <ul style="list-style-type: none"> <li>○ Our members overall have done an excellent job in following all school and state laws regarding covid.</li> </ul> </li> <li>● Virtual recruitment <ul style="list-style-type: none"> <li>○ Our Chapter did a great job in getting our members involved in meeting PNMs virtually.</li> </ul> </li> </ul>	<p>Weaknesses:</p> <ul style="list-style-type: none"> <li>● Keeping seniors involved <ul style="list-style-type: none"> <li>○ We are looking for ways to incentivize seniors to continue being engaged in our Chapter.</li> </ul> </li> <li>● Philanthropy <ul style="list-style-type: none"> <li>○ As we look to a return to normalcy next semester, we will have a particularly strong emphasis on increasing our philanthropy events to help out the Bethlehem community.</li> </ul> </li> </ul>
<p>Opportunities:</p> <ul style="list-style-type: none"> <li>● Community service <ul style="list-style-type: none"> <li>○ Community service is something that we have not been able to achieve nearly as much due to the pandemic, however next year provides some excellent opportunities to give back to the community as we all come out of these economically challenging times.</li> </ul> </li> <li>● Brotherhood connections <ul style="list-style-type: none"> <li>○ Coming out of this pandemic, we see a large opportunity to strengthen our bonds with our new members as we finally get to have in person connections with them.</li> </ul> </li> <li>● Continuing positive changes to culture <ul style="list-style-type: none"> <li>○ This pandemic has given us a sort of "cultural reset", where our new members, along with our current sophomores, will be able to really make a positive change to the culture of our Chapter.</li> </ul> </li> </ul>	<p>Threats:</p> <ul style="list-style-type: none"> <li>● Recruitment <ul style="list-style-type: none"> <li>○ It was extremely difficult to gain personal connections with PNMs due to all contact being virtual.</li> </ul> </li> <li>● Other Chapters' and their Actions <ul style="list-style-type: none"> <li>○ It can sometimes be frustrating to see how the actions of a few Chapters can impact the standing of the Greek community in the eyes of both the school as well as Bethlehem. We hope that we can help in educating other Chapters in the future about how their actions impact others.</li> </ul> </li> </ul>

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

Theta Chi gave an impressive SWOT analysis, showing critical thinking and reflection on their chapter operations and membership experience. The panelists provided meaningful feedback on their analysis:

- "The chapter highlighted their struggles with recruitment based on following the rules while other chapters did not. I commend them on their ethics and recognize how frustrating that must be for them. I concur that the chapter does seem to do a nice job with connecting current members with

alumni and thinking about useful education that will benefit them long after they leave Lehigh.”

- “I was impressed by their points of pride with members engaged in various on campus leadership roles. I was also impressed with their plans for the future and their realistic understanding of holding members accountable when life returns to 'normal.'”
- “Theta Chi highlighted weaknesses of senior involvement and recruiting that spoke the awareness they had for areas of potential improvement. Despite these challenges, they talked about how due to COVID, the virtual option for certain events helps means that brothers not on campus or who may not be as physically present/involved can still attend chapter and other chapter activities. Post-COVID, they may look to incorporate a hybrid option because they see this as an opportunity for their chapter and to increase involvement.”

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## Concluding Summary

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

Exceptional

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

One of Theta Chi's responses during their Year End Report Interview speaks to the character of the chapter: "I like to think regardless of COVID that our chapter is always evolving and changing to be a better organization". Theta Chi has shown a clear demonstration of and commitment to adapting and changing the fraternity experience to provide the best possible membership experience to its brothers. The chapter is not only committed to improving their own chapter on campus, but the IFC and Greek community as a whole - they continuously take on leadership roles in the community and challenge other chapters to be better. I'd like to challenge the organization to collaborate with Lehigh offices to bring educational programming to its chapter and to utilize their newfound DEI chair to create an action plan for their chapter - OFSA is happy to help you with this. When asked what the Lehigh Greek community would be missing without Theta Chi the chapter answered "some really great leaders and advocates - not just in Greek life but in all areas of campus". This chapter is a leader on campus and in the community and I am proud to rate Theta Chi **exceptional** for the 2020-2021 academic year.