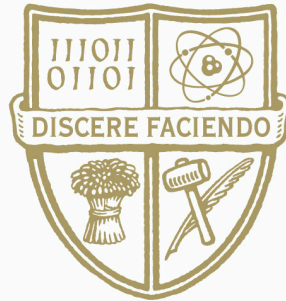


LEAVE A LEGACY



CAL POLY

Student Affairs
Fraternity & Sorority Life

**STANDARDS OF
EXCELLENCE (SOE)**

TERM: WINTER '18- FALL '18

PROGRAM PACKET

STANDARDS OF EXCELLENCE (SOE) PROGRAM

SOE Term: January 2018-December 2018

The following information is provided to assist Chapters in understanding and fulfilling all requirements of the Standards of Excellence Program. Please review all instructions carefully to ensure your chapter is able to earn *Excellence* status and eligibility for community recognition and awards.

PURPOSE: The purpose of the *Standards of Excellence Program* is to:

- Assess chapter performance based on the five pillars of Fraternity & Sorority Life (FSL) at California Polytechnic State University, San Luis Obispo: Scholarship & Learning, Leadership & Values, Philanthropy & Service, Safety & Risk Management and Brotherhood & Sisterhood
- Promote and uphold the expectations and operational standards of the Fraternity & Sorority Life Office
- Provide chapters with a comprehensive guide of best practices that encourage continuous improvement
- Recognize high-performing chapters and identify areas of development for underperforming chapters
- Ensure that students involved in Fraternity & Sorority Life are receiving a well-rounded fraternal experience

OVERVIEW: *Standards of Excellence Program* overview:

- All chapters and colonies affiliated with the Interfraternity Council (IFC), Panhellenic Association (PHA), or United Sorority & Fraternity Council (USFC) are **required** to participate.
- The program will review chapter performance over **one (1) calendar year** through the submission of narratives, event summaries, chapter programs, and other detailed supplemental materials via a link provided by staff.
- Submissions are broken down by the five pillars: Scholarship & Learning, Leadership & Values, Service & Philanthropy, Safety & Risk Management and Brotherhood & Sisterhood.
 - Within each set of pillar, there are two (2) or three (3) subsections (shown below) comprised of 28 total questions and totaling 140 points (5 points per question).
- Each subsection will be comprised of two (2) statements designed to gather relevant information through YES/NO questions and required documentation.
- Submissions will be reviewed and scored by the Fraternity & Sorority Life staff and external evaluators.
- Final scores will be determined and chapters will be given a Standards of Excellence Status based on external evaluators scores, group conduct and council standing as determined by the FSL office.
- All chapters will be reviewed annually based on SOE submissions. Chapter will be reviewed in depth by a committee of campus administrators on a 4-year cycle (9 chapters per year, selected at random) that is separate from SOE results.

OVERVIEW OF FRATERNITY & SORORITY LIFE PILLARS

Pillar 1: Scholarship & Learning	Pillar 2: Leadership & Values	Pillar 3: Community Service & Philanthropy	Pillar 4: Safety & Risk Management	Pillar 5: Brotherhood & Sisterhood
Academic Achievement	Member Development	Community Service	Alcohol Risk Reduction	Chapter Programming
Academic Standards	Chapter Management	Philanthropy	Anti-Hazing Efforts	Interfraternal Relations
Academic Programming	Campus Leadership Involvement		Sexual Assault Prevention Efforts	Alumni Outreach & Programming

INSTRUCTIONS: *Standards of Excellence Program* instructions:

- In response to each statement, select “Yes” or “No” (completed via online link)
- For statements marked “Yes”: provide required and other relevant *Documentation Materials*.
- For statements marked “No”: Chapter may provide an explanation for “No” responses in place of Documentation Materials. Points may still be awarded for sound rationale.
- Detailed *Documentation Materials* must be provided to support answers and gain points. This can include, but is not limited to: written programs, policies and procedures, event summaries and photographs, detailed spreadsheets of relevant statistics, and relevant letters of support.
- *Documentation Material* should be clear, concise, relevant and well formatted.

METHOD OF EVALUATION: *Standards of Excellence Program* method of evaluation:

Standards of Excellence submissions will be reviewed **internally** by the Cal Poly Fraternity & Sorority Life staff, and reviewed **externally** by various campus administrators from Cal Poly, as well as by various fraternity/sorority life professionals from different universities and are affiliated with all three councils: IFC, PHA, and USFC.

- **Internal Evaluation:** Fraternity & Sorority Life Staff will be used to determine the Standards Status of each chapter based on points awarded, conduct review and council standing.
- **External Evaluation:** Volunteer evaluators will award **all points or no points** to each question based upon the documentation materials provided to support the answer. Volunteer evaluators will award points based on their professional opinion of the detail and thought given to the material provided for each subsection. Volunteer evaluators can award 5 points per question.
- **Total Points:** The external evaluators total scores will be added together to determine the total for each pillar. Total points from each pillar will be added together to determine overall score.
- **Cycle Evaluation:** Every 4 years, each chapter will be evaluated by a committee of campus administrators (9 chapters will be reviewed each year). This committee will review all SOE submissions, as well as complete additional processes of evaluation to ensure ongoing compliance from the 9 selected chapters on review that year. Please see Appendix A for the Cycle evaluation cycle.

Tips:

- Utilize assigned Staff Consultant(s) to develop a timeline for completion and ideas for content
- Create a committee tasked to document and record relevant events throughout the year
- Establish chapter goals that align with the *Standards of Excellence* questions
- Submit detailed, concise, relevant, and presentable supplemental materials

TIMELINE: Timeline for 2018:

- Mandatory Standards of Excellence Program workshop: October 26 5:00-7:00 PM
- Two Mandatory SOE meeting with office staff in fall quarter
- The program will review chapter performance from the 2018 calendar year: Jan 1, 2018 – Dec 31, 2018
- Submission portal link will be made available by December 1, 2018
- Final Submission DUE on portal link by February 1st 2019 at 5:00 pm (no late submissions accepted)
- LEAD Awards Ceremony: May 2019 in Chumash Auditorium.

STANDARDS OF EXCELLENCE STATUS

Each chapter will be assigned a status based on points earned and internal evaluations by the Fraternity & Sorority Life office. A chapter will be given 1 of 3 statuses. The following outlines the requirements for chapters to maintain their excellence status:

EXCELLENCE	<i>Requirements/Details</i>
<p>SOE Score: 100-140 points</p> <p>Group Conduct: <i>Clear/Resolved</i></p> <p>Council Standing: <i>Good/Active</i></p>	<p>To earn annual Excellence, chapters are required to:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Earn an SOE score between 100-140 points <input type="checkbox"/> Of the final score, a minimum of 15 points must be earned per section <input type="checkbox"/> Have no outstanding/unresolved group conduct violations <input type="checkbox"/> Be in good judicial standing with the governing council <ul style="list-style-type: none"> • <i>Excellence chapters who meet the above requirements are eligible for awards</i> • <i>Excellence chapters receive all privileges of a Recognized Student Organization (RSO)</i> • <i>Excellence chapters may be provided with recommendations for improvement, however this will not impact a chapter's status.</i>
PROVISIONAL	<i>Requirements/Details</i>
<p>SOE Score: 70-99 points</p> <p>Group Conduct: <i>Violation(S)/Unresolved</i></p> <p>Council Standing: <i>Poor/Inactive</i></p>	<p>Provisional status is a temporary status resulting from:</p> <ul style="list-style-type: none"> <input type="checkbox"/> SOE score between 70-99 points have outstanding group conduct violations, and/or are in poor standing with the governing council <ul style="list-style-type: none"> • <i>Chapters on provisional status will be required to complete provisional assignments as outlined by the Fraternity & Sorority Life office within the term placed on provisional status.</i> • <i>Failure to complete all provisional assignments within the current term will result in the Chapter being placed on "probation" status.</i>
PROBATION	<i>Requirements/Details</i>
<p>SOE Score: Less than 70</p> <p>Level 1: Probation</p>	<p>Probation Level 1: (within first year not excellence status)</p> <ul style="list-style-type: none"> • <i>Chapter will be placed on Probation for the remainder of the year or until provisional assignments are complete.</i> <p>Sanction: mandatory bi-weekly meetings with FSLO.</p>
<p>Level 2: Suspension Or Removal</p>	<p>Probation Level 2: Suspension or Removal (after second year not excellence)</p> <ul style="list-style-type: none"> • <i>Chapter will be placed on Probation Level 2 status if provisional assignments are not completed within provisional period</i> • <i>Extent of unmet requirements will determine which sanction is assigned.</i> <p>Sanction: suspension as RSO, develop/implement chapter Excellence Plan OR Sanction: Removal from campus with no guarantee of approved return</p>

STANDARDS OF EXCELLENCE ANNUAL REPORT

The following pages detail what you will be required to submit via online portal link.

CHAPTER INFORMATION & STATISTICAL SUMMARY

Chapter Name:

Council Affiliation:

Name/Email/Position of Person Submitting:

Chapter Advisor Name/Email:

Current Chapter Size:

Total Number of Members Graduated during SOE term:

Total Number of Bids Given during SOE term:

Number of Service Hours completed during SOE term:

Philanthropy Dollars Raised during SOE term:

Chapter GPA –

- Winter 2018
- Spring 2018
- Fall 2018

New Member GPA

- Winter 2018
- Spring 2018
- Fall 2018

% of Members Involved in Organizations outside FSL office:

of Members on Deans' list during SOE term:

Attach Chapter Roster

Attach Chapter Constitution and/or Bylaws

Attach New Member Program

Attach Risk Management Program

Pillar 1: Scholarship & Learning

ACADEMIC ACHIEVEMENT

1. YES/NO: The chapter has an officer responsible for member academic achievement
DOCUMENTATION: (must include an officer position description)
2. YES/NO: The chapter earned and maintained above the community minimum 2.5 GPA
DOCUMENTATION: (verified by Fraternity & Sorority office)

ACADEMIC STANDARDS

3. YES/NO: The chapter has a GPA requirement for members to maintain active/good standing
DOCUMENTATION: (must include relevant section of written policy or bylaws)
4. YES/NO: The chapter has developmental structures in place for underperforming members
DOCUMENTATION: (must include relevant written policy or bylaws)

ACADEMIC PROGRAMMING

5. YES/NO: The chapter offers member recognition or incentives for academic achievement
DOCUMENTATION: (must include evidence of member recognition program)
6. YES/NO: The chapter has members in academic Honor Societies/professional organizations
DOCUMENTATION: (must include members and list of affiliated organizations)

Pillar 2: Leadership & Values

MEMBER DEVELOPMENT

7. YES/NO: The chapter has an officer responsible for member education and development
DOCUMENTATION: (must include an officer position description)
8. YES/NO: The chapter has a new member education program that lasts no longer than 9 weeks
DOCUMENTATION: (must include written program and calendar of events)

CHAPTER MANAGEMENT

9. YES/NO: The chapter leadership establishes written goals, plans, calendar and transitions for each term
DOCUMENTATION: (must include example of goal, plans and calendar)
10. YES/NO: The chapter leadership follows all guidelines outlined in Staff Consultant Program
DOCUMENTATION: (must include date of meetings with Staff Consultants)

CAMPUS LEADERSHIP INVOLVEMENT

11. YES/NO: The chapter participates in leadership & development programs on campus
DOCUMENTATION: (must include list of relevant programs attended and list of attendees)
12. YES/NO: The chapter has membership in other clubs and organizations on campus
DOCUMENTATION: (must include list of members and involvement)

Pillar 3: Community Service & Philanthropy

COMMUNITY SERVICE

1. YES/NO: The chapter organizes and participates in community service events each quarter
DOCUMENTATION: (must provide evidence of dates and lists of organizations served)
2. YES/NO: The chapter keeps detailed record of service hours completed per member
DOCUMENTATION: (must provide a list of members with hours served)

PHILANTHROPY

3. YES/NO: The chapter organizes and participates in philanthropic events each quarter
DOCUMENTATION: (must provide evidence of dates and lists of organizations served)
4. YES/NO: The chapter maintains detailed records of dollars raised by members/chapter
DOCUMENTATION: (must provide detailed list of dollars earned and organizations donated to)

Pillar 4: Safety & Risk Management

ALCOHOL RISK REDUCTION

5. YES/NO: The chapter has sent at least 5 percent of their members to BACCHUS training
DOCUMENTATION: (must provide evidence such as check-in time sheets and photos)
6. YES/NO: The chapter invites the Thoughtful Lifestyle Choices (TLC) team to facilitate a training for members
DOCUMENTATION: (must provide evidence of event or workshop dates)

ANTI-HAZING EFFORTS

7. YES/NO: The Chapter participates in Hazing Prevention Week programming
DOCUMENTATION: (must provide evidence of programs attended)
8. YES/NO: The chapter has policies related to anti-hazing
DOCUMENTATION: (must include relevant written policies or bylaws)

SEXUAL ASSAULT PREVENTION EFFORTS

9. YES/NO: The chapter sends 5 percent of their members to GASA (Greeks Against Sexual Assault)
DOCUMENTATION: (must provide evidence such as check-in time sheets and photos)
10. YES/NO: The chapter invites the Educational Resources on Sexuality (EROS) team to facilitate a training
DOCUMENTATION: (must provide evidence of event or workshop dates)

Pillar 5: Brotherhood & Sisterhood

CHAPTER PROGRAMMING

1. YES/NO: The chapter hosts bonding activities with more than 50 percent of chapter in attendance
DOCUMENTATION: (must provide evidence of attendance lists and photos)
2. YES/NO: The chapter provides education on the Ritual & Values of the Organization
DOCUMENTATION: (must include evidence of educational efforts)

INTERFRATERNAL RELATIONS

3. YES/NO: The chapter participates in events/programs hosted by their governing councils
DOCUMENTATION: (must provide list of events and programs attended)
4. YES/NO: The chapter participates in events/programs hosted by other governing councils
DOCUMENTATION: (must provide list of events and programs attended)

ALUMNI OUTREACH & PROGRAMMING

5. YES/NO: The chapter hosts programs that encourage alumni involvement and attendance
DOCUMENTATION: (must provide dates of events, attendance lists, photos)
6. YES/NO: The chapter creates and sends an alumni newsletter annually
DOCUMENTATION: (must provide the newsletter sent)

STANDARDS OF EXCELLENCE AWARDS

Eligible chapters will be considered for the following awards. There will be one recipient for each of these awards announced at the Leadership and Engagement Achievements of Distinction (LEAD) Awards Ceremony in May 2019.

Pillar of Excellence Awards	Excellence in Scholarship & Learning Excellence in Leadership & Values Excellence in Community Service and Philanthropy Excellence in Safety & Risk Management Excellence in Brotherhood & Sisterhood
Chapter Awards	Chapter of the Year Most Improved Chapter Cal Poly Pride Award
Individual Awards	Fraternity & Sorority Member of the Year Fraternity President of the Year Sorority President of the Year Fraternity New Member of the Year Sorority New Member of the Year Volunteer of the Year Silent Leader of the Year Founder's Award Advisor of the Year

AWARD ELIGIBILITY:

1. All answers and supplemental material submitted must be legitimate and factual.
2. Chapter (or individual) must be in good standing with the University and their respective council.
3. The chapter with the most points within a given pillar will be awarded the **Pillar of Excellence Award** for that respective pillar.
4. Cover letters and overall points earned will be considered for overall **Chapter of the Year**.

Pillar Awards

Pillar of Excellence Awards

The Chapter that has demonstrated operational excellence and earns the highest point value within a given pillar will be awarded the Pillar of Excellence Award for that pillar. There will be one recipient of the award in each category: Excellence in Scholarship & Learning, Excellence in Leadership & Values, Excellence in Community Service and Philanthropy, Excellence in Safety & Risk Management and Excellence in Brotherhood & Sisterhood.

A finalist from each council (IFC, USFC, and PHA) will be recognized.

Chapter Awards

Chapter of the Year

The Chapter of the Year Award recognizes the Chapter that has demonstrated operational excellence in all five Pillars of Cal Poly Fraternity & Sorority Life. The cumulative score from ALL sections of the Standards of Excellence packet will determine the Chapter of the Year. In addition to the responses to the questions from each pillar, please provide a cover letter detailing the organization's candidacy for this award. *Please keep response to 750 words or less.*

A finalist from each council (IFC, USFC, and PHA) will be recognized.

Most Improved Chapter

The Most Improved Chapter award recognizes the Chapter that has most significantly improved or persevered through adversity. Chapters that wish to apply for the Most Improved Chapter award must submit a cover letter with their *Standards of Excellence* packet detailing how the organization has improved and why in *750 words or less*. The overall score from last year's *Standard of Excellence* packet may be considered in the selection process.

Cal Poly Pride Award

The Cal Poly Pride Award recognizes the Chapter that has demonstrated continual support of the Cal Poly Community. Chapters that wish to apply for the Cal Poly Pride Award must submit a cover letter with their *Standards of Excellence* packet detailing how the organization works to improve Greek community, attendance at university events, school spirit, campus involvement, and why they should be recognized *in 750 words or less*. This award will be determined by the strength of the cover letter and the cumulative score from all questions related to the details of the award.

Individual Awards

Chapters are able to submit one member for each of the following Individual Awards. Submissions should include one (1) letter of nomination and can include up to two (2) additional documents of support such as the individual's resume and/or additional letters of support from advisors, employers, or peers.

Fraternity Member & Sorority Member of the Year

One fraternity member and one sorority member who best represent the ideals and values of Cal Poly Fraternity & Sorority Life will be recognized as the Fraternity Member and Sorority Member of the Year. The award will consider the applicant's character, scholarship, Chapter involvement, Greek Life involvement, university and community involvement, and public service throughout their undergraduate career.

Fraternity & Sorority President of the Year

One fraternity president and one sorority president who exemplified the values of Cal Poly Fraternity & Sorority Life, demonstrated a strong ability to inspire a shared vision as a Chapter leader, promoted a positive image for their Chapter and Cal Poly Fraternity & Sorority Life, and participated in other areas of Cal Poly student life in a given year, will be recognized as the Fraternity and Sorority Presidents of the Year.

Fraternity & Sorority New Member of the Year

One fraternity new member and one sorority new member whom have made an immediate impact on their Chapter, Cal Poly Fraternity & Sorority Life, and/or the Cal Poly community as a new member or new initiate, will be recognized as the Fraternity and Sorority New Members of the Year.

Volunteer of the Year

The Volunteer of the Year award recognizes one outstanding volunteer whom demonstrate a selfless commitment to service through volunteerism, civic engagement, inspiring others to serve, as well as any other charitable work in the community.

Silent Leader of the Year

The Silent Leader of the Year award recognizes an individual whom demonstrates that leadership and an ability to create positive change is not defined or determined by a title or position. This individual leads by example and is a role model within their Chapter and Cal Poly Fraternity & Sorority Life.

Founder's Award

The Founder's Award recognizes an individual whom best exemplifies values congruence within their organization – an individual that clearly lives their values day to day and works to carry out the mission and vision set by their organizations founders.

Advisor of the Year

The Advisor of the Year Award recognizes a volunteer advisor that goes above and beyond to motivate, challenge, and support the undergraduate officers and members. This person demonstrates their commitment by being present at relevant Chapter events and meetings, assists with organizational goal setting and transitions, serves as a role model to the members, mentors individual students, and more.

CHAPTER CYCLE EVALUATION PROGRAM

Review Term: January 2019-December 2019

PURPOSE: The purpose of the *Cycle Evaluation Program* is to:

- Assess chapter performance in depth based on materials submitted in order to gain holistic understanding of chapter operations and culture.
- Provide chapters with a comprehensive view of strengths and areas of development, as well as a customized action plan to be implemented to strengthen chapter operations overall.

OVERVIEW: *Cycle Review Program* overview:

- Each year, 9 or 10 chapters will be selected to be reviewed by a committee of campus administrators. Over the course of 4 years, each chapter will be reviewed once.
- The committee will be comprised of: one Coordinator of Fraternity & Sorority Life, one Fraternity & Sorority Life Graduate Assistant, one staff member in the Dean of Students office, one faculty member, and one student leader involved in either Leadership, Service or the Cultural Centers.
- The committee will review all SOE submissions, and all additional submission requirements outlined below for the Cycle Review.
- Chapters will create a presentation for the review committee that details an overview of their organization.
- Once all materials have been reviewed, the committee will meet with the chapter's governing council to gain perspective on the chapter from a council level.

INSTRUCTIONS: *Cycle Review Program* instructions:

- Each chapter will submit Standards of Excellence materials. The materials for the chapters completing a Cycle Review will be reviewed according to the same protocol as all other chapters, both by a committee of external evaluators and Fraternity and Sorority Life staff members.
- Chapters under review will submit all cycle review documents via online portal. These submissions must contain documents outlining the chapter's mission, vision, values, lists of goals, chapter learning outcomes, and any reports rendered to the chapter from their national headquarters or chapter consultants. If desired, chapters may submit other documentation that provides an accurate depiction of chapter operations (i.e. letters from chapter advisors, submissions for chapter annual reports to national headquarters, etc.)
- Chapter presentations must include chapter structure, position descriptions of executive board and chair positions, advisory board structure and composition, and any other pertinent information related to the chapter.

METHOD OF EVALUATION: *Cycle Review Program* method of evaluation:

- **External Evaluation:** The committee will receive fully scored and evaluated Standards of Excellence materials.
- **Internal Evaluation:** The committee will review all additional documents submitted, and will evaluate chapter presentations and interviews with council members. There will be no scores assigned to additional materials presented or documents submitted. Committee members will consider all documents submitted, presentations and interviews in making determinations for the chapter.
- **Evaluation Determinations:** Based on the chapter's submission, the committee will prepare a list of strengths, areas of development, and an action plan to the chapter. The determinations will be carefully and thoughtfully prepared to enhance and strengthen chapter operations.

- **Evaluation Follow-Up:** Upon presentation of evaluation determinations, the chapter will schedule quarterly meetings with Fraternity and Sorority Life staff to track progress of action plan and provide support where needed or desired.

TIMELINE:

Timeline for **2018** evaluations:

- Final Submission for Standards of Excellence were due on Google Drive to Fraternity & Sorority Life Staff on May 30th, 2017. Materials for Standards of Excellence based on the Fall Quarter 2017 must be submitted by **February 1, 2018 at 5:00pm** (no later submissions accepted).
- Final Submission for the Cycle Review additional materials based on the entire 2017 calendar year are due by **February 28, 2018 at 5:00pm** (no later submissions accepted) .
- The Cycle Review committee will review materials, host chapter presentations and council interviews between March 1, 2018 and April 15, 2018.
- Evaluation Determinations meetings will be schedule with the review committee and the chapter leadership between April 15, 2018 and May 15, 2018.
- The first of the follow-up meetings will take place between May 15, 2018 and June 22, 2018. The subsequent follow-up meeting will be scheduled at this meeting for Fall Quarter 2018.

Timeline for **2019** evaluations (this timeline to be used for subsequent years):

- Final Submission for Standards of Excellence based on the 2018 calendar year must be submitted by **February 1, 2019 at 5:00 pm** (no late submissions accepted)
- Final Submission for the Cycle Review additional materials must be submitted by **February 28, 2019 at 5:00pm** (no later submissions accepted)
- The Cycle Review committee will review materials, host chapter presentations and council interviews between March 1, 2019 and April 15, 2019.
- Evaluation Determinations meetings will be schedule with the review committee and the chapters between April 15, 2019 and May 15, 2019.
- The first of the follow-up meetings will take place between May 15, 2019 and June 22, 2019. The subsequent follow-up meeting will be scheduled at this meeting for Fall Quarter.

CHAPTER CYCLE REVIEW SCHEDULE

Year 1: 2018	Year 2: 2019	Year 3: 2020	Year 4: 2021
Alpha Epsilon Pi	Beta Theta Pi	Lambda Chi Alpha	Sigma Nu
Alpha Gamma Rho	Delta Chi	Nu Alpha Kappa	Zeta Beta Tau
Delta Tau Delta	Delta Upsilon	Phi Kappa Psi	Phi Sigma Kappa
Alpha Gamma Delta	Sigma Nu	Theta Chi	Sigma Pi
Alpha Chi Omega	Alpha Omicron Pi	Chi Omega	Tau Kappa Epsilon
Gamma Phi Beta	Alpha Phi	Delta Gamma	Pi Kappa Phi
Omega Xi Delta	Chi Delta Theta	Lambda Theta Nu	Kappa Kappa Gamma
Simga Omega Nu	Gamma Zeta Alpha	Lambda Theta Phi	Kappa Alpha Theta
Lambda Sigma Gamma	alpha Kappa Delta Phi	Lambda Phi Epsilon	Sigma Kappa
			Alpha Epsilon Phi