# **BUCHANAN OUTSTANDING CHAPTER AWARD APPLICATION**

The Buchanan Outstanding Chapter Award, named in honor of Grand President and Grand Treasurer Edwin Buchanan, Ohio State 1911, is indicative of the highest level of undergraduate achievement in our Fraternity. The "Buc Cup" recognizes the best-of-the-best Sigma Phi Epsilon chapters. Chapters are measured against the accomplishments of their peers at campuses across the country. The data collected in this application strives to prove that the applicant's chapter operations are of the highest quality and supports the mission of Sigma Phi Epsilon – "Building Balanced Men."

# The 2017 Buchanan Cup will measure chapter performance from January 1, 2015 - December 31, 2016.

The completed application and attachments must be received by 11:59 p.m., Monday, March 6, 2017. Please note, any application submitted after this time, will not be accepted.

#### **Supporting Documentation Checklist**

Please contact your regional director with any questions about any of the documents.

- ✓ Chapter bylaws
- ✓ Chapter recruitment plan (*The plan should* address recruitment standards, the structure of the recruiting team, sample events, and future plans)
- ✓ Chapter recruitment standards
- ✓ Chapter financial budgets of operations (January 2015-December 2016)
- ✓ Letter from AVC Treasurer or 3<sup>rd</sup> Party affirming completion of financial audit
- ✓ Chapter-specific membership agreement
- ✓ Chapter's written Balanced Man Program
- ✓ Any other supporting documentation for the chapter's development program (e.g. Mentor Standards/Agreements, Course Information, Chapter calendar of development events, etc.)
- ✓ AVC budget of operations
- ✓ AVC bylaws

# APPLICAT

- ✓ AVC savings statement/balance sheet
- ✓ Recent alumni communication(s) (Newsletters, donor solicitations, email campaigns, event invitation, etc)
- ✓ Four pictures of chapter activities (.jpg format)
- ✓ One picture of chapter house (for housed chapters) (.jpg format)
- ✓ One picture of college/university (preferably a landmark/icon for the institution) (.jpg format)
- ✓ Letter of recommendation from Chapter **Counselor or AVC President**
- ✓ Online assessment from the Office of Greek/Student Life at the host institution (submitted independent of application)
- ✓ Online assessment from District Governor (submitted independent of application)

### **CHAPTER PERFORMANCE DATA**

07/2015-

12/2015

01/2015-

06/2015

#### **Campus Statistics**

Total undergraduate male enrollment # of Fraternities

All Campus Average GPA

All Men's Average GPA

Highest GPA of Fraternities

Lowest GPA of Fraternities

Highest Manpower of Fraternities (#)

Lowest Manpower of Fraternities (#)

#### Academics

I				[	1	
	01/2015-	07/2015-	01/2016-	07/2016-		Average
	06/2015	12/2015	06/2016	12/2016		

01/2016-

06/2016

07/2016-

12/2016

Average

Chapter Semester GPA
New Member GPA
Rank among Fraternities

#### Development

Number of Sigma Rites of Passage Number of Phi Rites of Passage Number of Epsilon Rites of Passage Number of Brother Mentor Rites of Passage Number of Renaissance Brothers Initiated

01/2015- 06/2015	07/2015- 12/2015	01/2016- 06/2016	07/2016- 12/2016	Average

Please complete the table below based on the chapter's current membership. Each cell should have the number of brothers in that year in school within the given challenge.

	Sigma	Phi	Epsilon	Brother Mentor
Freshman				
Sophomore				
Junior				
Senior				
Senior +				

#### **Programs & Events**

# of members who attended EDGE

# of members who attended Carlson # of members who attended Life After College # of members who applied for the Ruck Leadership Institute # of members who attended the Ruck Leadership Institute # of members who applied for the Tragos **Ouest to Greece** # of members who attended the Tragos Quest to Greece # of members who attended the Grand **Chapter Conclave** 

#### **Fraternity Awards**

Has the chapter been awarded the following:

**Talent Power Award** Donald C. McCleary Excellence in Member **Development Award** 

Frank J. Ruck Leadership Award

J. Edward Zollinger Outstanding Senior Award

Chapter Home of the Year Award

**Excelsior Award** 

Average	07/2016-	01/2016-	07/2015-	01/2015-
Average	12/2016	06/2016	12/2015	06/2015

01/2015-	07/2015-	01/2016-	07/2016-
06/2015	12/2015	06/2016	12/2016

#### **Facilities and Housing (if applicable)**

If your chapter has non-residential facilities (lodge, designated campus space, etc.), please complete the following section accordingly.

	01/2015- 06/2015	07/2015- 12/2015	01/2016- 06/2016	07/2016- 12/2016	Average
Chapter House/Facility Capacity					
Chapter House Occupancy					
If residential facility, occupancy at 90% of Capacity? (YES or NO)					
Chapter House Room and Board					
Chapter House Security Deposit					
Average University Room and Board Rate					

#### Manpower

	2012- 2013	2013- 2014	2014- 2015	2015- 2016	Average
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-					
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# of members on the Periodic Membership Report (PMR)- March 1

Manpower rank among Fraternities

# of men recruited

# of men recruited with the Balanced Man Scholarship # of those recruited who are still in the chapter

# of those who left the chapter

# of those who left who graduated

# of those who left who resigned

# of those who left who were expelled for indebtedness

# of those who left who were expelled for grades

# of those who left who were expelled for other reasons

# of those who left who left school (did not graduate/transferred schools)

#### General

Please answer the question below that best applies to your chapter: (500 words or less)

- If the chapter received a Buchanan Cup in 2015, how has the chapter improved over the past two years? or
- If the chapter <u>did not</u> receive a Buchanan Cup but applied, how has the chapter implemented the feedback from the review team and improved its operations over the past two years? **or**
- If the chapter did not apply for a Buchanan Cup in 2015, what led the chapter to apply this year?

What has the chapter done to innovate or "be different" over the course of the review period of January 2015 - December 2016? (250 words or less)

Please list the chapter's top five accomplishments over the course of the review period of January 2015 - December 2016. *(250 words or less)* 

Every Sigma Phi Epsilon chapter strives to uphold the Fraternity's cardinal principles and meet its mission of "Building Balanced Men," and each does so in a unique campus environment with individual opportunities and challenges. What campus-specific factors not covered in this application do you think would be helpful for the review committee to know as they review your application? These can include, but are not limited to: your campus culture, university support for fraternities, alumni and volunteer support, and day-to-day challenges your chapter faces. (500 words or less)

# **MEMBER DEVELOPMENT**

When was the chapter's Balanced Man Program included in this application written?

When was the chapter's Balanced Man Program included in this application first implemented?

When was the chapter's Balanced Man Program included in this application last updated?

On average, how many alumni attend each Rite of Passage?

Explain how new member rights and responsibilities differ from other members? (250 words or less)

What has your chapter done to better align with single-tiered membership? In what ways has the chapter aligned its operations to support single-tiered members? Elaborate on any plans the chapter has to improve its alignment in the future, if necessary. (250 words or less)

The desired outcome of the Sigma Challenge is to help new members adjust and acclimate to the chapter, campus, and community. How does your Sigma Challenge fulfill this outcome? *(250 words or less)* 

The desired outcome of the Phi Challenge is for members to grow and develop as a balanced man. How does your Phi Challenge fulfill this outcome? (250 words or less)

The desired outcome of the Epsilon Challenge is for members to lead and serve as balanced men. How does your Epsilon Challege fulfill this outcome? (250 words or less)

The desired outcome of the Brother Mentor Challenge is to prepare members and the chapter for the future. How does your Brother Mentor Challenge fulfill this outcome? (250 words or less)

#### What is the current status of the chapter's Balanced Man Program:

Challenge	Meeting Frequency (i.e. weekly, biweekly, etc.)	Meeting Participation (Estimated participation in percentage, i.e. 70%)	Date of most recent update	Is participation in this challenge required?
Sigma				
Phi				
Epsilon				
Brother Mentor				

Does the cha	pter have s	et timeframes	for members	to complete	each challenge?
YES	NO				-

#### If so, what are the timeframes for each challenge? (e.g. 6-8 weeks)

Sigma	Phi	Epsilon	Brother Mentor

How does the chapter intend to continue to improve its Balanced Man Program? (250 words or less)

Briefly describe the chapter's structure for mentoring members throughout their time in the chapter. *(250 words or less)* 

Please list each of the positions on the chapter's development committee and briefly describe the responsibilities of each. *Include whether each position is currently filled or unfilled. (250 words or less)* 

What role do alumni and volunteers play in supporting the chapter's Balanced Man Program? (250 words or less)

What role does the university play in supporting the chapter's Balanced Man Program? (250 words or less)

# **PHYSICAL HEALTH & WELLNESS**

Physical Health & Wellness is one of the five programming areas of the Balanced Man Program and a core component in the Balanced Man Ideal. Below are questions that are important to upholding this area, but not necessarily covered in other parts of the chapter's Balanced Man Program

2015:	FALL	SPRING
2016:	2015:	
2016:		
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2016:		
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List the chapter's intramural participation.

# of						
Sport	Date/academic term	participants	Record/result			
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If extra space is required please complete the Appendix named "Appendix: Intramural Participation"

#### Member Development Supporting Documentation Included in Attachments

- Chapter's four-year written Balanced Man Program
- Any other supporting documentation for the chapter's development program.
   (e.g. Mentor Standards/Agreements, RLC Course Information, Chapter calendar of development events, etc.)

# **COMMUNITY IMPACT & PHILANTHROPY**

Serving and improving the local community is a transformational part of the chapter experience.

*Chapters positively impact their communities through the following ways:* 

- Community Service: The act of volunteering time to an organization or cause.
- Service-Learning<sup>1</sup>: A teaching and learning strategy that integrates community service with instruction and reflection to enrich the learning experience, teach civic responsibility, and strengthen the community.
- Philanthropy: The act of raising or donating monetary resources for an organization or cause.

Service-learning engages members in deep learning experiences that blend acts of service and reflection to better the community and personally develop skills and knowledge. Does the chapter have an on-going service-learning partnership?

YES NO

If so, with what organization? \_\_\_\_\_

What activities do your chapter members engage in to further the service-learning experience? (i.e. reflection, journaling, internships with service organizations, etc.)

<sup>&</sup>lt;sup>1</sup> Bandy, J. (2016). *What is Service Learning or Community Engagement*. Vanderbilt University Center for Teaching. Retrieved from https://cft.vanderbilt.edu/guides-sub-pages/teaching-through-community-engagement/#what.

Please describe all chapter community service activities:

	Sponsor			
Organization	Sponsor (chapter/other)	Date	Hours	Impact

If extra space is required please complete the Appendix named "Appendix: Service Learning"

Philanthropic activities raise monetary resources for an organization or cause. Does the chapter have a philanthropic partnership? YES NO

If so, with what organization? \_\_\_\_\_

Please describe the extent of the partnership. (Hours contributed, dollars raised, etc.) (250 words or less)

In the area below, please describe all chapter philanthropy activities:

Organization	Activity	Date	<b>Dollars Contributed</b>

If extra space is required please complete the Appendix named "Appendix: Philanthropic Partnership"

# ACADEMICS

How is this academic standard enforced? (250 words or less) Policy included in the chapter bylaws.

Does the chapter have an academic support program for ALL members?

Does the chapter conduct academic seminars, activities, lectures, etc. for ALL members?

List the academic programs the chapter provided to members for each year of the review period.

2015:

2016:		
Doos the chapter have a	n incontive / award system for academic achievem	ont?
	n incentive/award system for academic achievem	
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if yes, briefly describe tr	nis program. <i>(250 words or less)</i>	

# **RECRUITMENT, MANPOWER AND RETENTION**

Does the chapter have a written recruitment plan?
Does the chapter have written recruitment standards (addressing minimum requirements for academics, previous/current leadership activities, athletic activities, and character)?
Does the chapter review its optimal size and assess manpower needs every semester to determine its recruitment goal?
Does the chapter host at least one recruitment workshop per year facilitated by a volunteer or regional director?          YES       NO
Does the chapter maintain a potential new member list that is updated weekly by the recruitment team?
Does the chapter empower a recruitment team to extend bids for membership to men who meet the chapter's recruitment standards?
Does the chapter recruit year round? (Year-round recruitment is when a chapter is recruiting members in all quarters of the year they are able: Jul-Sep, Oct-Dec, Jan-Mar, Apr-Jun) YES INO
Does the chapter conduct sorority presentations to collect names of potential new members?
Does the chapter utilize member development events as recruitment events?
Does the chapter conduct an annual Balanced Man Scholarship (BMS)?

YES NO

What is the chapter's mutually agreed upon, optimal size? \_\_\_\_\_\_ This number is agreed upon by the chapter, alumni volunteers, and the national organization. If you have any questions, please contact your regional director.

How did you arrive at this number? (250 words or less)

If the chapter is below its optimal size, what is its plan to reach that size and on what timeline? (250 words or less)

If the chapter's March 2016 Periodic Membership Review (PMR) is below the five year average, please explain below. *Referenced on Page 4 of this application (250 words or less)* 

#### Recruitment, Manpower and Retention Supporting Documentation Included in Attachments

- Chapter recruitment plan (*This should address all the necessary components for the chapter to successfully recruit each year*)
- Chapter recruitment standards summary (one page)
- Chapter specific recruitment events

# **RITUAL, STANDARDS, AND ACCOUNTABILITY**

Culture, Standards, and Accountability

Does the	chapter have	a membership	agreement?
YES	<b>NO</b>		

If yes, how frequently do members sign the agreement? \_\_\_\_\_ Annually \_\_\_\_\_6]Ubbi U`m Ch\Yf SSSSSSSSSSSSSSSSS

Has the chapter been investigated and/or sanctioned by the university during the review period of January 2015 and December 2016)?

If the chapter has been investigated and/or sanctioned by the university between January 2015 and December 2016, please explain the reasoning and outcome(s) and all actions taken by the chapter in response. *(250 words or less)* 

How do you ensure a safe and healthy experience is provided by your chapter? Please describe any risk management education provided to chapter members. *(250 words or less)* 

What are the minimum standards for members to remain in good standing with the chapter? (GPA, involvement, behavior, etc) (250 words or less)

How are members held accountable to these standards? (250 words or less)

Ritual
Does the chapter conduct a formal Ritual meeting monthly?
Does the chapter hold a Ritual study as part of its Balanced Man Program?
Does the chapter openly discuss the values of Sigma Phi Epsilon at chapter meetings and during member development programming?
Does the chapter perform the interpretation after each Ritual Rite?
Does an alumnus perform the interpretation/charge for the members completing each Rite of Passage?
Does the chapter's Ritual team practice the Ritual ceremony prior to performing the activity?
Is the chapter's Ritual equipment clean and complete with all items unbroken?
What was the percentage of brothers present at the last three Rites of Passage? Which ROP? (Sigma, Phi, Loss than

	Date	Epsilon, or Brother Mentor)	Less than 25%	25-50%	50-75%	Over 75%
ROP 1						
ROP 2						
ROP 3						

List the Renaissance Brothers initiated by the chapter in the past two years.

Where does the chapter conduct Ritual Rites of Passage ceremonies?

Ritual, Standards and Accountability Supporting Documentation Included in Attachments

- Chapter Bylaws
- Chapter specific membership agreement

# **CHAPTER LEADERSHIP**

List chapter leadership programming (officer transition retreats, leadership workshops, speakers, etc.).

Date	# Participants
	Date

Of the leadership programs listed above which were the most impactful and why? (250 words or less)

Describe how the chapter contributed to the Grand Chapter (Carlson host chapter, regional director candidates, National Board of Director candidates, Ritual team at national event, etc.). If not applicable, enter N/A. *(250 words or less)* 

List the campus leadership roles held by members of the chapter (student body president, etc.).

Member's name	Organization	Leadership role

If extra space is required please complete the Appendix named "Appendix: Campus Leadership Roles"

# **UNIVERSITY PARTNERSHIP**

Describe your relationship with your host institution. How does your chapter proactively seek out opportunities to foster a relationship with your host institution? (250 words or less)

Does the chapter hold university events/discussions?

Are there any classes offered exclusively for chapter members? (If yes, please complete information below.)

Course Description	Location	Schedule	Instructor	University credit?

Does the chapter have a faculty fellow?

A faculty fellow is a SigEp volunteer role and not required. Faculty fellows differ from a faculty advisor, which are normally mandated by universities for student organization recognition

 YES
 NO

Does the faculty fellow attend chapter and AVC meetings?  $\hfill YES$   $\hfill NO$ 

Does the faculty fellow conduct weekly office hours, meetings, seminars?

How is the faculty fellow involved with the chapter? (250 words or less)

Does the chapter have a resident scholar?

Does the resident scholar attend chapter and AVC meetings?  $\square$  YES  $\square$  NO

How is the resident scholar involved with the chapter? (250 words or less)

What compensation, stipend, or benefits are offered to the resident scholar? (250 words or less)

#### University/college/community awards

Please enter the applicable option for each of the awards below. (received; application under review; applied - not received; did not apply; not applicable/offered)

	2015 Calendar Year	2016 Calendar Year
Student organization of the year		
Fraternity/Greek organization of the year		
All-university intramural trophy		
IFC intramural trophy		
Member development award		
Academic award		
Philanthropy/community service/service learning award		

Describe any other awards received. (250 words or less)

#### Additional chapter recognition

List any other recognition the chapter received (newspaper, TV, radio, etc.)

### HOUSING

Who owns title to the chapter house (university/AVC/landlord/other/no house)? *If the chapter does not have housing, document where the chapter lives, holds meetings, and hosts social events.* 

What are the top three needs of the chapter facility? (250 words or less)

What is the plan to address these needs? (250 words or less)

What has the AVC done to improve the chapter facility over the course of the review period? (250 words or less)

What percentage of the AVCs annual budget is contributed to savings for deferred maintenance? *(250 words or less)* 

What is the term of the lease signed by tenants?

Year

Semester

Month

Does the cha	pter have a system	to ensure the	cleanliness	of the facility k	by ALL members?
YES [				-	-

Do all members have access to the internet at the facility?  $\Box$  YES  $\Box$  NO

Does the	chapter enforce	quiet hours	at certain	times of	the week?
YES	<b>NO</b>	-			

Is there dedicated study space in the chapter house?

Is the facility	fully insured in the event of theft, natural disaster, etc.?
YES	

Please list insurance company information below.

Company:	
Address:	
Policy #:	

# **RESIDENTIAL LEARNING COMMUNITY (RLC)**

Non-RLC chapters should answer all applicable questions in this section.

If applicable, what has the chapter done to integrate RLC programming into the Balanced Man Program? *(250 words or less)* 

If applicable, how does the chapter facility structure and regulations support the Residential Learning Community? (250 words or less)

If applicable, what has the chapter done in the past two years to improve the Residential Learning Community? *(250 words or less)* 

Is the chapter currently seeking to become accredited as a Residential Learning Community? If yes, please briefly explain where the chapter is in the process and future plans for becoming accredited. If no, please tell us why. *(250 words or less)* 

### **FINANCES**

What was the chapter's cash on hand (checking) at time of this application?
What is the balance of the chapter's savings account?
What bank or financial institution are the chapter savings on deposit?
Does the AVC approve withdrawal from chapter savings?
What were the chapter's current accounts receivables that are 30 days past due as of January 1, 2015?
What were the chapter's current accounts receivables that are 60 days past due as of January 1, 2015?
What were the chapter's current accounts payable at the end of the most recent academic term?
Does the chapter have any outstanding loans?
How much does the chapter charge for dues per term?
How much does the chapter charge a new member above the Grand Chapter's lifetime membership fee during his first semester in the chapter?
What is the current amount owed to the Grand Chapter?
During the past four payment periods, how many times did the chapter pay late fees to the Grand Chapter because of inability to pay their chapter bill on time?
If the chapter has a past debt with the Grand Chapter that is covered by a payment plan, is the chapter current on the payments under that plan?
Does the chapter utilize services provided by Legacy Financial (LegFi)?
What was the chapter's cash on hand (checking) at the start of the academic year before any collections?
September 2015
September 2016
Does the chapter have at least a 95% collection rate of chapter dues every semester <i>(documented in chapter financial statement audited by AVC Treasurer)</i> ?
Do the VP Finance and AVC Treasurer or VP of Finance Mentor meet monthly? YES NO
Has the chapter filed tax reports with the IRS?

Does the chapter save at least five percent of its annual budget?

Are chapter finances audited annually by AVC Treasurer and is the budget approved by the AVC?

What were the chapter's most important expenditures in the past calendar year? (250 words or less)

#### Finances Supporting Documentation Included in Attachments

- Financial audit by AVC treasurer (letter from AVC treasurer or representative affirming completion)
- Chapter financial budgets/statement of operations for past two years

## **ALUMNI AND VOLUNTEERS**

Please describe the work of up to three individuals who are most involved with the AVC or mentoring committee.

Volunteer 1	
1	
Maluster 0	
Volunteer 2	
Malana A	
Volunteer 3	
1	
1	
1	

Is the AVC incorporated and current with the State Corporation Commission or equivalent state agency?
Does the AVC have current bylaws?
Does the AVC have an annual budget of operations?
How is the AVC structured with the IRS? 501 (c) 3 501 (c) 7 Other
Does the AVC submit an annual Form 990? If no, please detail reasons why below.
What percentage of gross income does the AVC save annually?%
Does the AVC meet at least monthly during the school year and are meetings open to undergraduate members to attend?
Does the AVC host at least two alumni events annually?
Does the AVC review undergraduate operations at each AVC meeting? (undergraduate executive officers report at the AVC meeting)
Do the AVC members regularly attend chapter and executive board meetings?
Does an alumni volunteer facilitate a chapter officer transition or goal setting retreat each semester?
Does the AVC recruit parents and faculty to serve as AVC directors and volunteers?
Does the AVC communicate with alumni through a regular newsletter program?
Has the AVC executed an Asset Protection and Trust Agreement with the Grand Chapter?
Does the AVC maintain an alumni database?

Please list the alumni relations events held within the review period. *You may attach a copy of a calendar reflecting these events.* 

Event	Date	Attendance

How does the AVC engage graduating seniors and recent alumni to keep them engaged? (250 words or less)

Please list those alumni and volunteers who currently serve on the **Alumni and Volunteer Corporation** for the chapter.

Volunteer Position	Volunteer's name	Years as SigEp Volunteer	Years in this position
Chapter Counselor			
Balance Man Steward			
Recruitment Mentor			
Faculty Fellow			
Faculty Advisor**			
Resident Scholar			
AVC President			
AVC Treasurer			
AVC VP of Housing			
AVC VP of Relations			
AVC Secretary			
AVC Director/Trustee			

\*\*A faculty fellow is a SigEp specific volunteer role. Faculty advisors are often mandated by universities for student organization recognition. These positions are not required to be filled by the same individual, but certainly can be.

If extra space is required please complete the Appendix named "Appendix: AVC Roster"

#### Alumni and Volunteers Supporting Documentation Included in Attachments

- AVC Bylaws
- AVC budget of operations
- AVC savings statement/balance sheet
- Recent alumni communication(s) (Newsletters, donor solicitations, email campaigns, event invitation, etc)

## Appendix: Intramural Participation

List the chapter's intramural participation.

# of				
Sport	Date/academic term	participants	Record/result	

#### Appendix: Service Learning

Please describe all chapter community service activities:

Organization	Sponsor (chapter/other)	Date	Hours	Impact

## Appendix: Philanthropic Partnership

In the area below, please describe all chapter philanthropy activities:

Organization	Activity	Date	Dollars Contributed

#### Appendix: Campus Leadership Roles

List the campus leadership roles held by members of the chapter (student body president, etc.).

Member's name	Organization	Leadership role
	4	

#### Appendix: AVC Roster

Please list those alumni and volunteers who currently serve on the **Alumni and Volunteer Corporation** for the chapter.

Volunteer Position	Volunteer's name	Years as SigEp Volunteer	Years in this position