



SUBSTANCE-FREE FACILITIES

IMPLEMENTATION PLAYBOOK

SigEp

INTRODUCTION

At the 2017 Conclave in Orlando, the Grand Chapter passed a resolution mandating that all SigEp chapters adopt policies banning alcohol and other substances from all common spaces by Aug. 1, 2018, and that they completely ban alcohol and other substances from chapter facilities by Aug. 1, 2020. Read the full resolution online [here](#), and read a one-page summary online [here](#).

Implementing a substance-free facilities policy will challenge some chapters to change their practices. The policy should be adopted well before the deadline, but it should be approached carefully and thoroughly. This playbook is intended to guide chapters through the various steps of developing, implementing and maintaining a substance-free facilities policy.



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1. BEFORE: PREPARATION

As with any policy change, adopting a substance-free facilities policy should begin with careful preparation to educate membership and ensure the policy's success. This section focuses on education, timeline development, how to conduct an environmental audit and chapter orientation.

LEADERSHIP EDUCATION - Educate chapter leaders and other stakeholders on the basics of the new policy and the benefits it will bring to your chapter.

1. The Grand Chapter voted to adopt a substance-free facilities policies for three main reasons: to better align our actions with our values, to keep members safe and to improve the SigEp experience.
2. Distribute the resources below to help orient members to the policy:
 - Substance-free Facilities One-page Guide - A brief overview of the substance-free resolution, the reasoning behind it and its implications on social events with alcohol. This resource will be helpful to anyone who wants a surface-level description of the policy.
 - Substance-free Facilities Frequently Asked Questions - A compilation of common questions about the policy. This will be helpful for leaders who will be asked questions about the policy, as well as any chapter member or alumnus who has more questions about it.
3. Hold a town hall meeting:
 - Hold a chapter-wide “town hall”-style meeting with your regional director so a policy expert can answer every one of the chapter’s questions.

TIMELINE - Discuss and set a timeline of steps needed to implement the policy on the local chapter level.

1. Resolution 2 mandates that all SigEp chapters adopt, at minimum, a substance-free common areas policy by Aug. 1, 2018, and adopt a complete substance-free facilities policy by Aug. 1, 2020.
2. Some chapters will be ready to adopt the complete substance-free facilities policy immediately, before the deadlines. If this is the case, feel free to adopt those policies and see here for sample bylaw language to use.
3. Others chapters may benefit from making incremental changes over time to prepare the chapter for the change. See below for a sample transition timeline:
 - December 2017 - No more parties held within the chapter facility; all events must be held off site and alcohol served through a third-party vendor or a BYOB system.
 - February 2018 - No more alcohol in common spaces of the chapter facility.
 - April 2018 - Chapter facility will be completely substance-free.
4. Make sure to develop your chapter's timeline in conjunction with alumni and volunteers.

ENVIRONMENTAL AUDIT - Before publicizing a proposed change, identify current chapter behaviors that will violate future policy and review the physical chapter environment.

1. Behaviors
 - Which annual events held at the chapter house involving alcohol will need to be modified? Can these events be held without alcohol, or do they need to be moved off-site?
 - Best practice: If an event needs to be moved off-site, consult with your university's Greek life office for help finding local venues that will comply with the university and Fraternity's risk management policies for third-party vendors.
 - What events involving alcohol happen informally at the chapter house, especially in common spaces (e.g. tailgates, sporting event watch parties)?
 - Best practice: Identify all events, behaviors and traditions that will not comply with the new policy, and create alternative plans for each one before bringing up the implementation plan with the rest of the chapter. Doing so will ensure chapter leaders approach the process thoughtfully and anticipate many obstacles.
 - While developing alternative plans, consider working with your campus Greek life director, who will be familiar with local venues and best practices of other local organizations.
2. Physical Environment
 - Do any physical structures provide barriers, literal or figurative, to implementing this policy?
 - Bars, large open basements with tile floors and other structures built to accommodate and facilitate consumption of alcohol may seem to be "permanent" fixtures that will hinder substance-free facilities

implementation. However, there are usually funds available to renovate spaces in chapter homes (see “Housing Changes” section below).

- Early in the implementation process, it can be helpful to identify all of these structures and involve alumni as well as SigEp National Housing to develop alternative uses of the space.
- Simple fixes, such as installing new carpet, new lighting or repainting a room can dramatically improve an environment and give a space a purpose other than hosting events with alcohol.

CHAPTER ORIENTATION - After you’ve prepared a detailed plan for implementation and planned various changes in chapter environment, it is important to discuss the timeline with the entire chapter membership.

1. Meet with alumni and volunteers, including well-respected former chapter leaders, to explain the chapter’s proposed plan. They can begin communicating the plan to other alumni and volunteers.
2. Hold a chapter meeting to discuss the timeline and gain input from members. Publicizing the change well in advance will maximize awareness of the coming change and minimize chances that any members misunderstand expectations.
 - Come prepared with resources on substance-free facilities to answer any questions members ask.
 - Be ready to explain the chapter’s planned sanctions for individual members who violate the new policy.



2. DURING: IMPLEMENTATION

After the chapter is educated on the reasoning behind substance-free facilities policies, a chapter timeline has been set in coordination with alumni, the chapter's environment has been assessed, and expectations have been set with the membership, it is time to implement the policy. This section will focus on how to document the change in chapter documents and with the Fraternity Headquarters, how to get assistance for making changes to the chapter house, and how to adjust chapter social events and finances.

BYLAW CHANGES - The substance-free facilities policy must be voted on, passed and codified in the chapter's local bylaws in order to be officially adopted.

1. Article V, Section 31 of SigEp's Grand Chapter Bylaws gives each chapter the authority to "enact bylaws for its government." Those bylaws reflect a chapter's standards and operating procedures — and will need to be updated to reflect the substance-free facilities policy.
 - Best practice: If your chapter doesn't have local bylaws, contact your regional director for help drafting them.
2. When your chapter votes to implement the substance-free facilities policy, they'll be voting to adopt a new chapter bylaw. See this [template](#) for an example that your chapter can personalize.

DOCUMENTATION WITH HEADQUARTERS - The National Fraternity Headquarters office needs a record of your chapter's transition.

1. After your chapter adopts the policy by voting on the proposed bylaw change, please email the following to substance.free.facilities@sigep.net:
 - An updated copy of your chapter's bylaws
 - A copy of the minutes from the chapter meeting at which the bylaw passed

UPDATING THE MEMBERSHIP AGREEMENT - A membership agreement — essentially a contract of chapter expectations that all members sign each semester — makes chapter standards clear and easy to communicate to all members. Membership agreements should be updated to reflect the new substance-free facilities policy.

1. This [sample membership agreement](#) contains substance-free facilities clauses that can be used as template.

MAKING CHANGES TO THE CHAPTER FACILITY

1. As discussed above, some chapters will want to renovate their facilities to remove bars, large open basements with tile floors and other structures built around the consumption of alcohol.
2. The goal for all SigEp chapters is to actively shift the paradigm in our facilities to promote an environment that is focused on academic success and away from the stereotypical fraternity environment.
3. Many chapters who house members in their facilities will want to make changes to their

leases to mention the substance-free policy. [See here for a sample lease that contains substance-free facilities language.](#)

4. [SigEp National Housing](#) (SENH), a wholly owned subsidiary of Sigma Phi Epsilon Fraternity that exists to support the housing initiatives and needs of the Fraternity, will be able to support chapters that want to make changes to their facilities. In fact, many chapters have fund balances in the [Chapter Investment Fund](#) that can be used to finance these changes through short-term loans.
5. For any questions related to housing changes, or to inquire about Chapter Investment Fund uses, please contact SENH Managing Director Zach Stull at zach.stull@sigep.net.

SOCIAL EVENTS

1. The substance-free facilities policy did not change SigEp's event management policies; all that changed is where chapters can host social events with alcohol.
2. Under the substance-free facilities policy, all chapter events with alcohol must be held outside of the chapter facility. Alcohol can be provided at those events either through a bring-your-own-beverage (BYOB) system or through a third-party vendor. See below for information on both of these types of events:
 - [Third-party Vendor Event Checklist](#) - An easy-to-use checklist to plan your chapter's third-party vendor event.
 - [BYOB Event Checklist](#) - An easy-to-use checklist to plan your chapter's BYOB event.
 - [Member Safety](#) - As always, all events must be in compliance with SigEp's risk management policies. Visit the member safety homepage to learn more.
3. Best practice: Meet with your university's Greek life staff and ask for a list of local businesses (bars, restaurants, country clubs, hotels and other venues) that can serve as third-party vendors for chapter social events.

FINANCES

1. Chapters that previously hosted most of their social events in the chapter facility may need to restructure their budgets to account for additional line items for social events hosted by third-party vendors.
2. While restructuring a budget may seem daunting at first, SigEp has several helpful resources [available online here](#).
3. Your chapter's [regional director](#) will also be able to help restructure your budget.

3. AFTER: MAINTENANCE

As with any policy change, after a chapter adopts and implements a substance-free facilities policy there are more steps to take to ensure the policy's success — from recruitment messaging to accountability and more. This section will focus on how to recruit new members on a substance-free facilities message, how to debrief social events and incidents, how to enforce the policy and hold members accountable, and how to prepare future leadership.

RECRUITMENT

1. When recruiting potential new members, every SigEp chapter should focus on what sets SigEp apart — the Balanced Man Program, Residential Learning Community accreditation (if applicable), campus leadership opportunities and professional development — in addition to brotherhood, finding a home on campus and other messages.
2. A substance-free facility provides unique benefits to many potential new members: a more attractive facility; an environment that is conducive to studying and holding internships, not counterproductive to either of them; and a clean house to return to after social events.
3. It is important to teach chapter members how to recruit with a substance-free facilities message. To help, [see this resource online](#).
4. Your chapter's [regional director](#) will also be able to help a chapter practice a personalized, persuasive substance-free facilities recruitment message.

DEBRIEFING SOCIAL EVENTS INVOLVING ALCOHOL & INCIDENTS

1. After implementing a substance-free facilities policy, some chapters will hold social events involving alcohol in new and different venues, including third-party vendors. It is important to discuss and debrief those events, especially if they are new for a chapter, by asking questions afterward, including:
 - Did members enjoy themselves?
 - How did the event compare to our expectations?
 - What went well in planning and implementing the event?
 - What could have gone better?
 - Were members and guests safe?
 - Did the event follow SigEp's risk management and member safety policies?
2. Any incidents at these events should be referred to the chapter's standards board, and members involved in those incidents should be held accountable.

POLICY ENFORCEMENT & ACCOUNTABILITY

It is an expectation of all SigEp chapters to hold members accountable to national and chapter policies. With a new policy like substance-free facilities, it is especially important to clearly set expectations and consistently hold members accountable, beginning immediately.

1. The chapter's [substance-free facilities bylaw](#) should state that members who violate the policy will be held accountable through the chapter's standards board.

- Best practice: List standard sanctions in the bylaw, (e.g. “social probation for at least one month and up to one year”) to remove ambiguity and empower the standards board to hold members accountable.
- 2. To further set the expectation, remember to incorporate the policy into the chapter’s membership agreement, as discussed above. See here for a [sample membership agreement](#) with substance-free facilities language included.
- 3. Since this will be a new policy for many chapters, it may be helpful to train the standards board — either through a general mock standards board workshop to practice the trial procedures or through a discussion of how the board would handle various possible violations of the substance-free facilities policy.
 - As always, your chapter’s [regional director](#) will also be able to help train the standards board.

PREPARING FUTURE LEADERSHIP

1. Since the substance-free facilities resolution outlines two separate deadlines for the policy — Aug. 1, 2018, for substance-free common spaces and Aug. 1, 2020, for completely substance-free facilities — it may require several different executive boards to fully implement the substance-free facilities policy. As a result, chapters should prepare future leadership to lead during this transition.
2. To prepare future executive board members, consider:
 - Encouraging involvement in committees - The more that newer members are involved in chapter operations, the more experienced and talented executive board members they will become. In regard to substance-free facilities in particular, consider encouraging talented newer members to get involved in substance-free programming and any housing renovations.
 - Implementing executive board applications - Requiring executive board members to [submit applications](#) for their positions prior to elections provides the rest of the chapter with a thorough explanation of their intentions for the role. Chapters can personalize the application to include questions about candidates’ plans for substance-free facilities.
 - Executive board transition retreats - Holding formal transition retreats between executive boards, facilitated by alumni volunteers or regional directors, gives structure to the transition and prevents best practices from being lost.

CONCLUSION

Implementing any change to a chapter's culture, whether it be around member development, brotherhood programming or substance-free facilities, can be simultaneously challenging and very rewarding. Every SigEp chapter is surrounded by a network of support — alumni, volunteers, numerous online resources, Headquarters staff and university administration — who want to help chapters make this important transition. Use this guide as a starting point to make this transition for your chapter, and take advantage of your brothers and support network.

The nationwide substance-free facilities policy is bringing SigEp into a bright future for fraternities. As U.G. Dubach once said, SigEp chapters must create an environment in which it is easy to do right and hard to do wrong. By transitioning your chapter home to a substance-free facility, you are bringing that century-old vision to life and providing a safe and healthy environment for your brothers.

