

BALANCED MAN SCHOLARSHIP

The Balanced Man Scholarship is the most successful program in the fraternity world at improving a chapter's manpower and academic performance concurrently. The program provides your chapter with an opportunity to preview the most outstanding Balanced Men attending your college or university. The Balanced Man Scholarship is a program that, when implemented correctly, works.

HISTORY & RESULTS

The program originally began in the Summer of 1990 with eight participating chapters. In the years since implementing the Balanced Man Scholarship, those eight chapters saw dramatic results. Within five years, the size of these eight chapters increased by 12% over a period when chapter size for SigEp chapters in general decreased. Even more impressive is the fact that the average grade point average of these eight chapters rose 13% over the same time period. Imagine what a jump of 13% would do to your chapter's overall GPA ranking on your campus. It's the difference between a 3.0 and 3.4 chapter GPA!

CHALLENGE & BENEFITS

Many Greek systems face the difficult challenge of attracting students with the wrong motivation for joining a fraternity—those only interested in parties and an “Animal House” experience. The Balanced Man Scholarship is an effective way to identify top caliber students. Past performance is the best indicator of future performance, and with the Balanced Man Scholarship, the chapter will have a better way of choosing who it recruits. Experience shows that students who perform better academically and are involved on campus are more likely to be financially responsible and have fewer behavioral problems. That makes your job on the alumni and volunteer corporation easier and more fun. Consider the advantage of having members who pay their bills on time, respect the chapter facility, and are more likely to behave responsibly.

With the Balanced Man Scholarship, your chapter will attract better students, build a better perception about the meaning of being a SigEp, and improve chapter operations—academically, financially, and behaviorally. Running the Balanced Man Scholarship is a win-win-win prospect.

ALUMNI AND VOLUNTEER CORPORATION SUPPORT

The Balanced Man Scholarship is not an easy program to implement. However, with the guidance of the alumni and volunteer corporation, your chapter can achieve the benefits of this program. The greatest challenge a chapter faces is not having the money available to offer the scholarship. A sure way of helping your chapter is for the alumni and volunteer corporation to endow the chapter's Balanced Man Scholarship. Many chapters do this through the Sigma Phi Epsilon Educational Foundation. After that, it's simply a matter of implementation. Your help and guidance are important here, too.

BALANCED MAN SCHOLARSHIP DISK

SigEp Headquarters has created the Balanced Man Scholarship Disk. The disk has information on just about everything you should need to run a successful Balanced Man Scholarship. Simply refer to the table of contents and go to work. Everything from sample letters to helpful hints on planning your program, interviews, and awards reception is included.

Of course, every chapter is different, and each campus presents certain needs. The information on this disk presents the key elements of the scholarship. You may customize the program as needed. The closer you get to following the outline on the disk, the more successful the balanced Man Scholarship will be. Your suggestions on improving this information are welcomed, and additions/improvements to the enclosed information can always be made. The information on this disk, however, is a compilation of the best aspects of the best Balanced Man Scholarship programs across the country.

Home Interviews

If there is one “must” in using the BMS, it is the importance of Section V on conducting interviews, particularly in the home of applicants. Home interviews are essential to the success of the Balanced Man Scholarship, and it is in this area that the program usually stumbles. The alumni and volunteer corporation can help ensure home interviews take place.

It is impressive to applicants, parents, and even the undergraduate members to see an alumnus participating in the interview process. Typically, after an interview is complete, the applicant (or more likely the parents) will ask questions about SigEp. This is the magic of the Balanced Man Scholarship. With your experience, you and other alumni and volunteer corporation members can help overcome many of the concerns the applicant or parents may have about joining a fraternity. It is not uncommon for parents to turn to their son and say, “If you decide to join a fraternity, I want you to join SigEp.”

GETTING STARTED

- ❑ When selecting a chairman, pick someone who is very organized, who delegates responsibility well, and who is a member that people will listen to. The primary role of the Balanced Man Scholarship chairman is to make sure the time line is followed; applications are thorough, sent, received, and reviewed in a timely manner; and he is the person who ensures that the interview teams actually conduct the interviews. The Balanced Man Scholarship chairmanship is a great one for a younger member of the chapter looking to get involved, and the program also provides an excellent training ground for an up-and-coming recruitment chairman or vice president of recruitment.
- ❑ Recruit an alumnus to advise the Balanced Man Scholarship chairman. This could be someone already involved with the chapter, i.e., on the alumni and volunteer corporation, or a new person. The most successful programs in the Fraternity are those that have an alumnus working with them. The Balanced Man Scholarship chairman needs someone to be accountable to, and many times, having an alumnus involved with ensure that deadlines are met.
- ❑ Many alumni and volunteer corporations will help sponsor part of the Balanced Man Scholarship if they are able to do so. If you are interested in getting the alumni and volunteer corporation's financial support, be sure that you speak with members of the board well in advance of needing the money, and submit a written proposal to the board at one of their monthly meetings. Alumni and volunteer corporations often pick up the cost of part of the program, if possible, such as the mailing costs, banquet costs, or scholarship costs.
- ❑ Many chapters choose to run the Balanced Man Scholarship twice during the year—once during the summer and then again during the fall. While this of course increases the program's cost, it also increases efficiency. Should you be interested in this, simply implement both time lines.
- ❑ Many chapters are setting up endowment plans with Sigma Phi Epsilon's Educational Foundation to fund their Balanced Man Scholarship programs. Many of your chapter's alumni would be willing to give to your program, as alumni always see this to be a very worthy cause. Consult your alumni and volunteer corporation on starting a fund raiser among your alumni, possibly advertising the scholarship in your alumni newsletter.

GETTING THE APPLICATION TO STUDENTS

DIRECT MAIL

If you are running your Balanced Man Scholarship over the summer, there are really two ways to get your application into the hands of quality high school seniors. The first is to obtain a list of incoming freshmen from your college or university. Many colleges and universities can provide you with this information and will even supply you with labels with the names and addresses of incoming freshmen.

HIGH SCHOOL COUNSELORS

Should your college or university not make this information available, your second option is to mail a copy of your application with a cover letter to all of the high school guidance counselors in a state or certain geographic area. Both can be tremendously successful. What will determine your success is the quality and professionalism of the materials you send, the timeliness with which you send out your materials, proper explanation of the Balanced Man Scholarship, and thorough follow-up.

CAMPUS MAIL

For those chapters that run their Balanced Man Scholarship during the fall, the best method for application distribution is to use campus mail. This can be very cost effective. Since your applicants are already away from home, be sure to send a copy of whatever they are receiving to their parents. You can get labels of their parents' addresses from the admissions department on campus. This is an important step—if the parents know you are offering a scholarship, you have a much greater chance of getting their son to apply. Again, professionalism, timeliness, and follow-up will be the keys to your success.

The following pages contain sample applications and cover letters for you to use in running your Balanced Man Scholarship. Of course, you are free to make any adaptations you feel necessary, but keep in mind that this material is a compilation of the best programs throughout the country.

APPLICATION AND SAMPLE LETTER

- Include a promotional flyer about the scholarship in the new student orientation materials.
- Many colleges and universities will give or sell you the labels of names and addresses of all incoming freshmen. Many times, you can ask them to somehow limit the labels they give you, i.e., incoming students with a G.P.A. above 3.5 or incoming students in a certain zip code range. Acquiring labels will save you a lot of time.
- When sending the applications, be sure to send them in envelopes on which **“Important Scholarship Information Enclosed”** is printed. Incoming college freshmen get a lot of mail. You want to be sure that your scholarship envelope has something written on it to ensure that it gets opened. Or as an alternative, send the application marked **“To the Parents of...”**
- If sending the applications to guidance counselors, you may want to follow up by phone to ensure that each guidance counselor received the scholarship application, has posted the flyer on the bulletin board, and is promoting the scholarship.

- Many schools will allow you to sanction the Balanced Man Scholarship as an official university/college sanctioned scholarship. Doing this will enable you to promote the scholarship in the school's scholarship mailings, and may help you reduce some of your mailing costs.
- If mailing to the guidance counselors, you may want to have local members meet with certain guidance counselors when they are home for their vacations. Some guidance counselors may need to be sold on the scholarship in person.
- Keep the application simple—one page.
- As a non-profit organization, it is possible for you to get a special bulk rate mailing permit from the post office. You need to set up a meeting with your local post office to find out what you need to do to make this happen.
- Do not require a photograph of the applicants. For many potential applicants, having to include a photograph could be a turnoff, especially if someone is conscious about some type of discrimination.
- Laser print all written materials. The Balanced Man Scholarship must be as professional looking as possible. The extra money is worth it.
- If mailing to the high schools in the state, get the list of names and addresses of all high schools from headquarters and then transfer this information to computer so that you do not need to reinvent the wheel each year. Once you have the information, you can photocopy printed pages right onto labels. That way, you are not re-addressing envelopes every year.
- There is no magic number for the amount of applications you send out. Obviously the more applications you send, the more you will receive.
- Piggyback your scholarship mailings with those mailings being sent to incoming freshmen from the Admissions Office or Financial Aid Office. Many times, the school's administration will provide this service for free.

SCREENING THE APPLICANT

Hopefully, your quality materials will result in a large number of applications. Now you have the task of screening the applicants to select those semi-finalists you plan on interviewing. The key here is to have an unbiased method to pick your semi-finalists. Simply assign point values to certain G.P.A. ranges and activities such as athletics, student government positions, volunteer work, etc. By assigning point values you are making the process as objective as possible. If an applicant has a certain number of points, he should be a semi-finalist. If he does not have a certain number of points, he is not a semi-finalist.

SELECTION POOL

A key in the screening process is to simply select a large number of semi-finalists. While this will increase the work load in the interview process, it will only further help guarantee the success of your program. A good rule of thumb is that for every 100 applicants, 50 semi-finalists should be selected and interviewed. From there, you can select 25 finalists, interview them again, and then select your three winners. The more semi-finalists you have, the more personal interviews you need to conduct. The more personal interviews you conduct, the better chance you have of recruiting more quality men through the Balanced Man Scholarship. More will be said on this subject in the section on interviews.

FOLLOW-UP AND RECRUITMENT

Be sure that you send a conciliatory letter to everyone not selected as a semi-finalist, in addition to those who have been selected as a semi-finalist. There is nothing worse you can do in your Balanced Man Scholarship program than fail to follow up on these potential members. Remember, just because someone is not eligible to become a semi-finalist or finalist does not mean he is ineligible to be a member. Many applicants would make good members, and by applying for the scholarship, they demonstrate an interest in achievement. The recruitment chairman should be following up with every person who has applied for the Balanced Man Scholarship. This gives your recruitment chairman a tremendous jump on all of the other fraternities on campus.

CONDUCTING HOME INTERVIEWS

WHY HOME INTERVIEWS ARE ESSENTIAL

Without a doubt, the home interview of semi-finalists during the summer months for summer Balanced Man Scholarship chapters or the on-campus interview during the fall for fall Balanced Man Scholarship chapters is the most critical part of the Balanced Man Scholarship. From here on in, it will be referred to simply as the interview whether it is in the applicant's home or on campus. Much of this information in the following section will be primarily for chapters conducting home interviews over the summer, as on-campus interviews simply do not require as much organization. ***Whether you are doing the interviews in the homes or on campus, interviewing the semi-finalists to determine your finalist group is absolutely the key to the program's success.***

Why are the interviews so vitally important? Because the benefits far outweigh the costs:

- ❑ Interviewing a semi-finalist will impress the applicant's parents. What better way to impress parents than to show up at their home, dressed in jacket and tie, to interview their son for a possible scholarship? Nine times out of 10, doing this will greatly improve the parents' attitude toward Greek life and Sigma Phi Epsilon. Conducting the interview in this manner will probably contradict most parents' perceptions of "fraternity."
- ❑ Interviewing the semi-finalist, particularly in his home, makes him feel more comfortable. Having to come to the fraternity house or another site to interview could be very intimidating for an entering-college freshman. We want to make the candidates feel as comfortable as possible.
- ❑ There is a selfish reason for conducting interviews of semi-finalists, particularly in their homes. You will find out more about the candidate in 20 minutes by going to his home than you may learn about some of the chapter members you have known for the past three years. Getting to see someone in his natural environment will be very helpful in determining if you think he is someone that would fit well in your chapter. You may get to meet some of his friends and begin recruiting them, too.
- ❑ Conducting the interviews of semi-finalists assures that every finalist has been recommended by several brothers of your chapter. This will increase the quality of your finalists, and therefore, every finalist should be nothing less than the top quality Balanced Man your chapter is seeking.
- ❑ Conducting the interviews for semi-finalists is just good recruiting. If you don't do it, you are wasting your time with the whole program. Do you think Lou Holtz, Bobby Bowden, or Gene Keady sit back on their respective campuses, wishing that the top quality athletes just happen to decide to enroll in their programs? The top coaches of the top programs are the top recruiters, and a major part of their recruitment is traveling to the homes of their prospective players. These men spend months out of their year traveling to the homes of players, getting to know them and their families, and determining whether or not they would be right for their respective programs.

ORGANIZING THE HOME INTERVIEW

The first step to organizing a successful home interview is to narrow down your applicant pool to select your semi-finalists. Again, remember, the general rule of thumb that for every 100 applications you receive, you should plan to interview 50 semi-finalists. If you only receive 50 applications, you should

still plan to interview 50 semi-finalists. If you get less than 50 applications, plan to interview all of your applicants.

Once you have determined your semi-finalists, you need to determine from what geographic areas they come. Population demographics for incoming freshmen do not change dramatically from year to year. Let's say you are at a large state school such as Pennsylvania State University. Each year, the incoming freshmen at Penn State come from roughly the same places:

- 25% from Philadelphia
- 25% from Pittsburgh
- 10% from Harrisburg
- 10% from Allentown
- 10% from New Jersey
- 10% from New York
- 10% from Washington, D.C./Northern Virginia

The demographics may change a little bit from year to year, but for the most part, they are the same. If 25% of your incoming freshmen are from Pittsburgh, then that means approximately 25% of the members of your chapter are from Pittsburgh. It also means that a heavy concentration of your alumni have moved back to Pittsburgh after graduating. Therefore, you should have more than enough undergraduates and alumni in the Pittsburgh area to interview the applicants from the Pittsburgh area.

The same is true for a school that draws from a national pool, for instance Stanford University. For example, if the demographics for Stanford University's incoming freshman class are the following, chances are that you have members in your chapter from near those places.

- 20% from Northern California
- 20% from Southern California
- 15% from New York/New Jersey/Pennsylvania
- 10% from Washington, D.C./Northern Virginia
- 10% from Midwest
- 10% from New England
- 10% from Southeast
- 5% from Northwest

While interviewing in home may present more of a challenge, it is still feasible for the members of your chapter to blanket the country conducting home interviews. All you have to do is figure out where your semi-finalists live and organize your interview teams around the demographics. Let's say you are attending a commuter school, where most of the incoming freshmen are all from the same city. Perhaps you will divide up into eight interview teams, each consisting of three undergraduates and one alumnus. You will have two interview teams for the north side of the city, two interview teams for the west side of the city, two interview teams for the south side of the city, and two interview teams for the east side of the city.

INTERVIEW TEAMS

Interview teams should ideally consist of two to three undergraduates and one alumnus. If possible, it would be an outstanding idea to get a faculty member involved on the interview teams, although it is often difficult to get faculty members to travel long distances from campus. Parents of local undergraduate members are good substitutes for faculty members.

Organize your interview teams before you leave school for the summer, so that everyone knows his responsibility. Select only undergraduates that you know will follow up over the summer months to be on your interview teams. Each interview team should have a captain that you appoint. It is your responsibility to contact the captain over the summer months. It is the captain's responsibility to contact his undergraduate and alumni members and also contact the semi-finalists to set up their interviews.

TIME LINE & PLANNING

For chapters running a summer program, on approximately April 25 (remember to add four to six weeks for chapters on the quarter system), you will have received all of your Balanced Man Scholarship applications. Now you can begin to whittle this group down into the semi-finalist class and determine from which geographic areas your semi-finalists are coming. By May 5, you should have your selection of first-round semi-finalists completed. Therefore, you can assign your interview teams with their captains and undergraduate members to the semi-finalists they will be interviewing before the undergraduate members leave for the summer. Survey your alumni and volunteer corporation members and chapter counselor to find out who some good alumni would be to participate on the interview teams in the various geographic areas. You should at least have the interview teams finalized with their captains and have a written list of names and home telephone numbers for all brothers who will be participating in the interviews as soon after selecting the semi-finalists as possible. If you were not able to assign semi-finalists to interview teams before people left for the summer, you will need to send copies of the applications to the captains. By May 15, you should send the follow-up letter so that all captains, undergraduates, and alumni team members have their team members' telephone numbers.

From the middle of May until approximately July 1, the Balanced Man Scholarship Chairman should follow up with all captains to ensure that their teams are conducting the interviews in the homes of the semi-finalists. Hopefully, you have allotted funds in your budget to reimburse people for their traveling expenses. Since interview team members should be relatively close geographically to semi-finalists, these costs should be minimal. **Be sure that each team member is filling out a written interview evaluation form and that the captains are sending these back to you over the summer. It is from these interview evaluation forms that the selection committee will determine who the finalists are to be.** By July 1, the first round of interviews should be completed, and you should have all of the interview evaluation forms returned to you. The captains and interview team members have now fulfilled their responsibility. It is up to you to get the selection committee together to determine who the finalists should be and contact those selected and not selected as finalists.

The second round interviews for all finalists should be much easier to conduct. The best way to do this is to conduct the second-round interviews when the finalists are on campus, either for freshman orientation or during the first few days of the school year. This is a good opportunity to get the finalists a little more familiar with where your chapter facility may be, and hopefully, you can include their parents in the second interview as well. Once you have conducted the second round of interviews, your selection committee can then determine the three winners.

AWARDS RECEPTION/BANQUET TIPS

- Be sure your speakers are lined up well in advance of the event—six months is not too soon.
- Invite the school newspaper to the banquet for positive PR.
- Give a \$25 book certificate to all finalists.
- Be sure to invite parents, alumni, and school officials to the banquet.
- Recognize all finalists with at least a certificate at the banquet. No one should leave empty-handed.
- Pre-assign brothers to certain tables with certain finalists at the banquet. Assign people who you know will have things in common with the finalists and their parents. Perhaps you may want to have those members that initially interviewed the finalist sit with him at dinner. The banquet is a key part in the recruitment process, and the finalist needs to feel comfortable with whomever he is sitting at the banquet.
- Invite past scholarship winners to the banquet whether they have joined the chapter or not, so that they can give their testimonial to the strength of the program.
- Make sure the banquet is well decorated with lots of SigEp stuff—purple and red flowers on tables, etc.
- Print the finalists and winners in the newspaper.
- Videotape the banquet to incorporate it into a recruitment video.
- Make sure that the winners' awards go straight to the college or university bursar's office. This looks better than giving cash, and then you are sure that the winner is using his scholarship for educational purposes.
- Give out substantial scholarships—to a certain extent, you get what you pay for.
- Many colleges or universities will provide you with an excellent banquet facility at a reduced cost. Look into this possibility.
- Use heavy bond paper for the certificates.

BUILDING CHAPTER SCHOLARSHIP

The following are suggestions to help you evaluate the academic program and emphasis of your chapter. Academic success is closely linked to other concerns for the alumni and volunteer corporation. Typically, students who achieve academically are responsible in other aspects of chapter life such as fulfilling financial obligations, respecting the chapter facility, following risk management guidelines, and contributing as future volunteers.

- Ensure quiet hours are enforced in the facility Sunday-Thursday, 7:00 p.m.-8:00 a.m.
- Ensure that the chapter sets a chapter GPA goal each term, and that the goal is posted.
- Ensure that the chapter posts an honor roll of members achieving a 3.0 or better each term.
- Ensure that each member posts a personal GPA goal and class schedule each term.
- Ensure grade requirements to join are enforced.
- Ensure grade standards for membership are enforced.
- Ensure grade standards to hold executive board positions are enforced.
- Review with each executive board the importance of academic performance.
- Ensure the chapter places emphasis on academic success in membership development.
- Endow the Balanced Man Scholarship to help the chapter recruit quality members.
- Select a member of the alumni and volunteer corporation to mentor the Balanced Man Scholarship chairman.
- Invite faculty and alumni to discuss the role of scholarship.
- Develop career guidance programs.
- Review the chapter's academic performance each term.
- Establish scholarship awards given by the alumni and volunteer corporation and undergraduate chapter.
- Ensure that each study room has sufficient space and facilities to study—lighting, desks, etc.
- Establish a chapter study room or library.
- Develop rewards for the chapter when improving scholarship.
- Encourage the chapter to use the U. G. Dubach and Scott Key Awards.
- Encourage the chapter to win the Grand Chapter Scholarship Cup and Winner's Circle.

FUND-RAISING FOR YOUR CHAPTER

Each chapter has a scholarship fund which consists of gifts from alumni and friends held by the Sigma Phi Epsilon Educational Foundation. A scholarship fund is a tremendous resource for your chapter.

Goals

- To involve alumni with the undergraduate chapter.
- To provide the chapter with flexible scholarship resources that the alumni and volunteer corporation can utilize for varied and changing needs of the chapter.
- To provide alumni with a tax deductible investment program to help the chapter.
- To establish the chapter's scholarship fund at the minimum level of \$2,500 as soon as possible.

Steps

- Have a chapter newsletter published three times a year. Include alumni news—at least 60% of the newsletter should be devoted to alumni. Include an explanation of the chapter fund in the Sigma Phi Epsilon Educational Foundation in each newsletter. Include benefits and current status. Include a photograph of the undergraduate scholarship recipient and how the scholarship helped him.
- Solicit a commitment from each alumnus who is actively involved. The goal for alumni commitments should be \$100 per year for a five-year period.
- Identify one alumnus from each class year as a key alumnus or class agent and ask him to become informed, make his commitment, and ask his classmates to make their commitment.

Procedure

- Conduct the various contact programs that you feel will work at your chapter. Have alumni send their pledge directly to the Educational Foundation at SigEp Headquarters. The pledge will be acknowledged by letter, added to the brother's giving record, and entered on your chapter's file. Pledge reminders are sent automatically to the alumnus from the Educational Foundation, and as he makes his pledge payments, the money is deposited in your chapter scholarship fund with the Foundation.
- Alumni can earmark gifts for a specific program, for a chapter's fund, or can make it unrestricted to be used where the Trustees feel it will have the most impact this year. They simply make a notation of their intention at the time of the gift, and the Educational Foundation will send a tax receipt confirming how the gift has been designated.

SUGGESTED USE OF SCHOLARSHIP FUND

UNIVERSITY OF KANSAS (KANSAS GAMMA)

The Kansas Gamma Chapter has three funds. Why wasn't one enough? Because the alumni and volunteer corporation wanted to honor their housemother, a brother who died while in school, and to provide a large resource in the name of their alumni.

UNIVERSITY OF PENNSYLVANIA (PENNSYLVANIA DELTA)

The Pennsylvania Delta Alumni and volunteer corporation decided to use their fund for the Balanced Man Scholarship program and sold the idea to a few key alumni who have now funded an endowment of more than \$10,000. Penn Delta also has the Quinn Scholarship to honor a deceased alumnus. This is a triple play...honoring their alumnus, keeping his wife involved, and recognizing an outstanding undergraduate with a scholarship award.

UNIVERSITY OF NEW HAMPSHIRE (NEW HAMPSHIRE GAMMA)

New Hampshire Gamma has a memorial fund for Jason MacConkey, an undergraduate brother who was killed in a canoeing accident. His family and friends have been very active and generous in funding this annual scholarship through a restricted memorial endowment. The benefit to Jason's family and to the chapter is enormous. Jason is remembered on campus, his family maintains contact with his chapter, and the loss everyone experienced when Jason died is memorialized in a positive way that keeps him alive in everyone's mind. Jason didn't fade away after his death. He is still with New Hampshire Gamma and that relationship will last forever for Jason's family and for the chapter.

Named funds are not just for deceased brothers. The minimum balance for a named fund is \$5,000.

DARTMOUTH COLLEGE (NEW HAMPSHIRE ALPHA)

The New Hampshire Alpha Chapter has two funds established by alumni who were Grand Presidents of Sigma Phi Epsilon. The Whitney Eastman Award provides annual funding for leadership recognition, and the Savage Fund, established by Bruce Hasenkamp, assures that there is funding available for chapter officers to attend Grand Chapter Conclaves.

SAMPLE LETTER

This letter can go from a class leader, the alumni and volunteer corporation president, the vice president of relations, chapter counselor, the most well-known alumnus, or a national SigEp leader.

Dear Brother _____:

<Your Chapter> is providing a wonderful experience with opportunities for personal and leadership development.

Sustained by our strong alumni and volunteer corporation, the undergraduate members stand head and shoulders above the competition.

Their strong leadership this year has produced a positive new focus on the balanced experience we believe today's fraternity must provide.

You can help members of <Your Chapter> build an even greater Sigma Phi Epsilon chapter at <Campus Name>. First, by participating in alumni programs. Second, by investing in the chapter's endowment fund managed by the Sigma Phi Epsilon Educational Foundation.

Participation in person and as an investor will make a difference. First, you will have fun, and second, you will see your support grow over the years. You don't need to break the bank to invest (although generosity is encouraged). Your participation is what is important and your investment is tax deductible.

The <Your Chapter> fund will support scholarship and leadership programs year after year. It will enhance every aspect of chapter life. It will influence lives and develop balanced leaders for America's communities.

Your legacy at <Your Chapter> is distinctive! Your ongoing support is essential to its continued growth and success.

Fraternally,

<Signature>

P.S. Wouldn't it have been a great feeling when you were in the chapter to know that alumni supported you in this way?

SAMPLE PLEDGE AGREEMENT

I, _____, accept the invitation to join with others in support of <Your Chapter> Chapter's Scholarship Fund to further its mission of brotherhood, scholarship, and leadership at <Campus Name> and do hereby pledge and agree to contribute the sum of \$_____ monthly/quarterly/annually/one time. My gift will be paid to the Sigma Phi Epsilon Educational Foundation earmarked for the <Name of Your Scholarship Fund>. This gift is being made to a 501(c)(3) Charitable Foundation qualifying my gift as a deduction for income tax purposes to the full extent of the law.

Special instructions regarding my gift:

Name _____

Address _____

City/State/Zip _____

Phone (____) _____

Email _____

Class Year _____

Date _____

Signature:

Sigma Phi Epsilon Educational Foundation
CHAPTER RESTRICTED FUNDS
P.O. Box 1901
Richmond, Virginia 23218

SIGMA PHI EPSILON EDUCATIONAL FOUNDATION

ALUMNI AND VOLUNTEER CORPORATION & CHAPTER RESTRICTED FUNDS

The Sigma Phi Epsilon Educational Foundation enters into a “business” relationship with the alumni and volunteer corporation for long-term scholarship and leadership needs.

This relationship is based on a “working agreement” that sets forth purpose of fund(s), and the process for selecting award recipients and/or making grants from the fund.

This agreement can be amended by letter from the alumni and volunteer corporation providing amended purpose/process meets exempt purposes (scholarship/leadership) of the Sigma Phi Epsilon Educational Foundation.

Chapter restricted funds accumulate through gifts until at the \$2,500 level at which point they become vested and participate in the pooled fund.

Amount available for award is determined annually based on a “rate of return” set by the Foundation Trustees.

Amount is determined by applying this rate to market value of the chapter’s fund(s) at December 31 of the year for the year going forward. The Sigma Phi Epsilon Educational Foundation operates on a calendar year.

This rate of return is not income. It is a total return. It is not “taken out” unless used by the alumni and volunteer corporation for award. It otherwise stays in the fund and grows.

An exception to the “return” concept is the **Balanced Man Scholarship awards**.

In the case of the **Balanced Man Scholarship**, the alumni and volunteer corporation may raise money that is contributed to the chapter restricted fund and, with the donors’ instructions, is to be available during the current calendar year (only the current year) to make the **Balanced Man Scholarship awards**.

Balanced Man Scholarship awards are made to the recipient(s) so the Foundation needs names, addresses, and social security numbers ahead of time in order to have ready to present at the awards dinner. When the Foundation has that information, it can turn around the awards in 24 hours (same day). The Foundation will include a pro-fraternity letter from the Foundation chairman with the award presentation.

SAMPLE SCHOLARSHIP PROGRAM

UNIVERSITY OF KANSAS (KANSAS GAMMA)

SCHOLARSHIP AWARD CRITERIA

- To qualify for scholarship, a member must be in good standing, with no outstanding debts to SigEp.
- To qualify for a GPA scholarship, a member's GPA must be listed on the campus grade release and must have at least 12 credit hours. Please note that "pass/fail" classes do not register as credit hours. Up to three "pass/fail" hours will be allowed, only if a grade report copy is submitted to the scholarship chairman seven days prior to the scholarship dinner. Highest hours will beat a tie for "Top New Member GPA" scholarship. If this fails, the award will be split.
- A scholarship team member must have at least a 2.3 and nine hours to receive an award, but would not disqualify the balance of the team.
- Value of "shares" is based on available scholarship funds from annual fund raising.
- Alumni and volunteer corporation Scholarship, Top New Member GPA, and Outstanding Committee Chairman Scholarship checks are paid through endowed funds with the Sigma Phi Epsilon Educational Foundation.

ALUMNI AND VOLUNTEER CORPORATION SCHOLARSHIP

- \$150 awarded to the most improved GPA (over 2.3) over the previous semester. Awarded both semesters.

TIM FINDLEY "OUTSTANDING NEW MEMBER" MEMORIAL SCHOLARSHIP

- \$1,500 awarded to the Outstanding Fall New Member as voted by the undergraduate chapter. Announced at the Spring Formal and awarded at the Tim Findley Dinner.

MOM COURTNEY "TOP NEW MEMBER GPAS" MEMORIAL SCHOLARSHIPS

- \$100 awarded to the five highest fall new member GPAs.

OUTSTANDING SENIOR SCHOLARSHIP

- \$200 awarded as voted by the undergraduate chapter. Awarded at the Senior Dinner.

OUTSTANDING JUNIOR SCHOLARSHIP

- \$200 awarded as voted by the undergraduate chapter. Awarded at the Senior Dinner.

OUTSTANDING COMMITTEE CHAIRMAN SCHOLARSHIP

- \$150 awarded as selected by the chapter president. Awarded at the Senior Dinner.

“TEAM” SCHOLARSHIP AWARDS (AWARDED BOTH SEMESTERS)

- \$75 awarded to each member of the TOP GPA winning team
- \$25 awarded to each member of the second place team.
- \$15 awarded to each member of the third place team.
- \$10 awarded to each member of the fourth place team.

GPA SCHOLARSHIP AWARDS (AWARDED BOTH SEMESTERS)

- 2.80 - 3.00 = \$10
- 3.00 – 3.24 = \$50
- 3.25 – 3.49 = \$50 plus one share
- 3.50 – 3.74 = \$40 plus two shares
- 3.75 – 3.99 = \$50 plus three shares
- = \$50 plus four shares

Senior Scholarship

The Kansas Gamma Alumni and volunteer corporation, in an effort to reward continued academic excellence and to encourage senior leadership, offers the following scholarship for the upcoming academic year.

Free Second Semester Room & Board

The Senior Scholarship will be awarded based on the following criteria:

- Cumulative GPA, through first semester of junior year, must be a 3.0 or greater.
- Winner(s) must be a junior and a live-in member of Sigma Phi Epsilon.
- Winner(s) must be in good standing with Sigma Phi Epsilon.
- Winner(s) must live in the chapter house their senior year.
- Applicants must apply with valid transcript to the alumni and volunteer corporation president by March 15.
- The two applicants with the top two cumulative GPAs will win.
- In case of a tie, the highest number of credit hours will win.

LEADERSHIP READING

Immediate Impact

- Byham. (1989). ZAPP: The Lightening of Empowerment. DDI Press.
- Blanchard, K. & Johnson, S. (1983). The One Minute Manager. Berkeley: Berkeley Books.
- Carlson, J. (1987). Moments of Truth. New York: Harper and row.
- Carnegie, Dale (1936). How to Win Friends & Influence People. New York: Simon & Shuster.
- Covey, S. R. (1989). The Seven Habits of Highly Effective People. New York: Fireside.
- Durst, G. Michael, Ph.D. (1988). Napkin Notes: On the Art of Living. Evanston, IL: Training Systems, Inc.
- Fisher, R., Ury, W., and Patton, B. (1991). Getting to Yes (Second Edition). Penguin.
- Kouzes, J. M. & Posner, B. Z. (2002). The Leadership Challenge; How to Get Extraordinary Things Done in Organizations. San Francisco: Jossey-Bass.
- Kouzes, J. M. & Posner, B. Z. (1993). Credibility. San Francisco: Jossey-Bass.
- Kouzes, J. M. & Posner, B. Z. (1999). Encouraging the Heart. San Francisco: Jossey-Bass.

Long-term Impact

- Bennis, W. (1989). On Becoming a Leader. Massachusetts: Addison-Wesley Publishing co.
- Blanchard, K. (1997). Gung Ho! Turn on the People in Any Organization. New York: William Morrow & Co.
- Block, P. (1987). The Empowered Manager. San Francisco: Jossey-Bass.
- Bradford, D. L. & Cohen, A. R. (1984). Managing for Excellence: The Guide to Developing High Performance in Contemporary Organizations. New York: John Wiley.
- Collins, J. C. & Porrs, J. I. (1994). Built to Last. New York: Harper Collins.
- Collins, J. C. (2001). Good to Great. New York: Harper Collins
- Deal, T. E. & Kennedy, A. A. Corporate Cultures: The Rites and Rituals of Corporate Life. New York: Addison-Wesley Publishing Company.
- DePree, M. (1989). Leadership Is an Art. New York: Doubleday.
- Drucker, P. F. (1989). The New Realities. New York: Harper & Row.
- Freiberg, K. & J. (1996). Nuts! Southwest Airlines Crazy Recipe for Business and Personal Success. New York: Broadway Books.
- Gardner, J. (1990). On Leadership. New York: The Free Press.
- Giuliani, R. (2002). Leadership. New York: Miramax Books.
- Goleman, D., McKee, A. & Boyatzis, R. E. (2002). Primal Leadership. Boston: Harvard Business School Press.
- Greenleaf, R. (1977). Servant Leadership. New York: Paulist Press.
- Kotter, J. P. (1990). A Force for Change: How Leadership Differs from Management. New York: Free Press.
- Nanus, B. (1992). Visionary Leadership. San Francisco: Jossey-Bass.
- Tichy, N. M. & Sherman, S. (1993). Control Your Own Destiny or Someone Else Will. New York: Doubleday.
- Vaill, P. B. (1991). Permanent White Water: The Realities, Myths, Paradoxes and Dilemmas of Managing Organizations. San Francisco: Jossey-Bass.
- Yukl, G. A. (1989). Leadership in Organizations. Englewood Cliffs, NJ: Prentice-Hall.