

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 2019 Buchanan Cup will measure chapter performance from
January 1, 2017 - December 31, 2018.**

The completed application and attachments must be received by 11:59 p.m., Monday, March 11, 2019.

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.

- | | |
|--|---|
| <ul style="list-style-type: none"> ✓ Chapter bylaws ✓ Chapter recruitment components (<i>The document should include the chapter's potential new member list, recruitment standards, the recruitment committee roster and meeting agendas, recruitment events, and future plans</i>) ✓ Chapter financial budgets of operations (January 2017-December 2018) ✓ Letter from AVC Treasurer or 3rd Party affirming completion of financial audit ✓ Chapter-specific membership agreement ✓ Any other supporting documentation for the chapter's development program (<i>e.g. Mentor Standards/Agreements, Course Information, Chapter calendar of development events, etc.</i>) ✓ AVC budget of operations | <ul style="list-style-type: none"> ✓ AVC Bylaws ✓ AVC savings statement/balance sheet ✓ Recent alumni communication(s) (<i>Newsletters, donor solicitations, email campaigns, event invitation, etc</i>) ✓ 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 APPLYING	
APPLICATION CONTACT NAME	
CELL	
EMAIL	
ROLE	

CHAPTER PERFORMANCE DATA

Campus Statistics

	01/2017-06/2017	07/2017-12/2017	01/2018-06/2018	07/2018-12/2018	Average
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

	01/2017-06/2017	07/2017-12/2017	01/2018-06/2018	07/2018-12/2018	Average
Chapter Semester GPA					
New Member GPA					
Chapter Rank among Fraternities					

Development

	01/2017-06/2017	07/2017-12/2017	01/2018-06/2018	07/2018-12/2018
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				

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

	01/2017-06/2017	07/2017-12/2017	01/2018-06/2018	07/2018-12/2018	Average
# of members who attended Rising Leaders track at Carlson					
# 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 Quest 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:

	01/2017-06/2017	07/2017-12/2017	01/2018-06/2018	07/2018-12/2018
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				
SigEp Fellow				

Facilities and Housing (if applicable)

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

	01/2017-06/2017	07/2017-12/2017	01/2018-06/2018	07/2018-12/2018	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, Accountability and Retention

	2014-2015	2015-2016	2016-2017	2017-2018	FALL 2018	Average
# of members on the Periodic Membership Report (PMR)- March 1						
Manpower rank among Fraternities						
# of men recruited						
# of those recruited who are still in the chapter as of 12/31/2018						
Total # of members expelled this academic year:						
Expelled for grades						
Expelled for indebtedness						
Expelled for other reasons						
Total # of members who left the chapter this academic year:						
Left school						
Resigned						
Graduated						

Below, please show the number of new members who joined the chapter each month of the review period.

	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sept	Oct.	Nov.	Dec.
2017												
2018												

Balanced Man Scholarship

Does the chapter operate the Balanced Man Scholarship? Yes No

If yes, please fill out the statistics below:

	2017	2018
Total Number of Applications		
Interviews Conducted		
Dollars Distributed		
Total Number of Scholarships Given		
Number of New Members Recruited through BMS		

General

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

- If the chapter received a Buchanan Cup in 2017, how has the chapter improved over the past two years by implementing reviewer feedback? **or**
- If the chapter did not 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 2017, 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 2017 - December 2018? *(250 words or less)*

Please list the chapter's top five accomplishments over the course of the review period of January 2017 - December 2018. *(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

With the implementation of the Balanced Man Program App as the tool for all chapters to use to document and track their BMP, the review committee will review the challenges, activities and meetings of the chapter as they are in the BMP App. Please fill out the below essay questions to give us more context about the chapter's membership experience.

Please describe the average chapter experience of a new member and how it differs from all other members of the chapter? (250 words or less)

What has your chapter done to ensure alignment 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 Challenge 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 steps has the chapter taken to improve the Balanced Man Program over the past two years? *(250 words or less)*

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

How are members held accountable if they do not participate in or complete development activities?
(250 words or less)

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

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

Does your chapter have an active mentor committee? Yes No

Does the chapter utilize the Balanced Man Program App for all four challenges? Yes No

How has the chapter utilized the Balanced Man Program App to better operate each of the challenges in their Balanced Man Program? (250 words or less)

Please list the names of each of the chapter's challenges in the BMP App Challenge Database that should be pulled for the Buchanan Cup committee to review. The chapter should submit one name for each challenge (Sigma, Phi, Epsilon, Brother Mentor) that reflects the BMP on December 31, 2018.

CHAPTER-WIDE ACTIVITIES

In addition to the activities that take place within Balanced Man Program challenges, there also activities that are put on for the whole chapter that support the Balanced Man Program and Residential Learning Community. Below are questions that are important to upholding this area, but are not necessarily covered in other parts of the Balanced Man Program.

List all chapter-wide programs the chapter provided to members for each semester of review period. Include speakers, large group seminars, fitness and nutrition programs, etc.

FALL

SPRING

2017:

2018:

COMMUNITY IMPACT & SERVICE LEARNING

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-Learning¹: 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.*

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? _____

Please describe the extent of the service learning partnership. (Hours contributed, activities participated in, etc.)
(250 words or less)

¹ 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 the extent of the service learning partnership. (Hours contributed, activities participated in, etc.)
(250 words or less)

Please describe all chapter service learning activities:

Organization	Sponsor (chapter/other)	Date	Hours	Impact

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

ACADEMICS

What is the minimum semester GPA to remain in good standing as a member of the chapter? _____

Noted in the chapter bylaws.

How does the chapter enforce and support the academic standard above? Is the policy included in the chapter bylaws? (250 words or less)

RECRUITMENT AND BALANCED MAN SCHOLARSHIP

Does the chapter have a written recruitment plan?

YES NO

Does the chapter have written recruitment standards (addressing minimum requirements for academics, previous/current leadership activities, athletic activities, and character)?

YES NO

Does the chapter review its optimal size and assess manpower needs every semester to determine its recruitment goal?

YES NO

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 committee?

YES NO

Does a recruitment committee meet regularly and extend bids for membership to men who meet the chapter's recruitment standards?

YES NO

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 NO

Does the chapter have and utilize a recruitment mentor?

YES NO

Does the chapter utilize member development events as recruitment events?

YES NO

Does the chapter conduct an annual Balanced Man Scholarship (BMS)?

YES NO

Please summarize the chapter's "pitch" to potential new members. (250 words or less)

What is the chapter's optimal manpower range? _____

This number range is agreed upon by the chapter, alumni volunteers, and the national organization. If you have any questions, please contact your regional director.

What factors did you consider when determining optimal range and how did you utilize optimal range to affect semesterly recruitment goals? (250 words or less)

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

What are the different sources of recruitment the chapter utilizes (formal recruitment, 365, Balanced Man Scholarship, etc.) and which have been the most effective for the chapter? *(250 words or less)*

Please describe how the chapter utilizes the Balanced Man Scholarship as a recruitment tool. Please address marketing, interviewing and the recognition of recipients. (500 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 NO

If yes, how frequently do members sign the agreement? _____

Has the chapter been investigated and/or sanctioned by the university during the review period of January 2017 and December 2018)?

YES NO

If the chapter has been investigated and/or sanctioned by the university between January 2017 and December 2018, 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?

YES NO

Does the chapter hold a Ritual study as part of its Balanced Man Program?

YES NO

Does the chapter openly discuss the values of Sigma Phi Epsilon at chapter meetings and during member development programming?

YES NO

Does the chapter perform the interpretation after each Ritual Rite?

YES NO

Does an alumnus perform the interpretation/charge for the members completing each Rite of Passage?

YES NO

Does the chapter's Ritual team practice the Ritual ceremony prior to performing the activity?

YES NO

Is the chapter's Ritual equipment clean and complete with all items unbroken?

YES NO

What was the percentage of brothers present at the last three Rites of Passage?

	Date	Which ROP? (Sigma, Phi, Epsilon, or Brother Mentor)	Less than 25%	25-50%	50-75%	Over 75%
ROP 1			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ROP 2			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ROP 3			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

SUBSTANCE-FREE FACILITIES

At the 2017 Conclave, the undergraduate grand chapter passed a resolution transitioning all SigEp chapters to be substance-free facilities policy by August 1, 2020. As our chapters adjust to this updated expectation, all SigEp chapter facilities became substance-free in common spaces on August 1, 2018.

Is the chapter housed? Yes No

If yes, how much of the chapter facility is substance-free, as of December 31, 2018?

Completely Substance-Free Substance-Free Common Areas

After the substance-free facility resolution passed in August of 2017, how did chapter leadership educate members and gain buy-in around the substance-free policy? *(250 words or less)*

How has the chapter redeveloped and enhanced chapter programming to align with the substance-free facility? *(250 words or less)*

How has the chapter utilized a substance-free facility in recruiting top talent at your college/university? If at all, how has the substance-free facility shifted the process of recruitment? *(250 words or less)*

UNIVERSITY PARTNERSHIP

Describe your relationship with your host institution. *(250 words or less)*

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

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?

YES NO

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

YES NO

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

Does the chapter have a resident scholar?

YES NO

Does the resident scholar attend chapter and AVC meetings?

YES 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)

	2017 Calendar Year	2018 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 live-in requirement to attain maximum occupancy? (250 words or less)

What is the term of the lease signed by tenants?

- Year
- Semester
- Month

Does the chapter have a system to ensure the cleanliness of the facility by ALL members?

- YES NO

Do all members have access to the internet at the facility?

- YES NO

Does the chapter enforce quiet hours at certain times of the week?

- YES NO

Is there dedicated study space in the chapter house?

- YES NO

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

- YES NO

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 housed, what areas of the chapter facility are dedicated as "learning space"? What function do these learning spaces have in the facility?
If unhoused, does the chapter have access to a consistent space on/off campus for RLC programming?
(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 undergraduate chapter's savings account? _____

What bank or financial institution are the chapter savings on deposit? _____

Does the AVC approve withdrawal from chapter savings?

YES NO

What were the chapter's current accounts receivables that are 30 days past due as of January 1, 2017?

What were the chapter's current accounts receivables that are 60 days past due as of January 1, 2017?

What were the chapter's current accounts payable at the end of the most recent academic term?

Does the chapter have any outstanding loans?

YES Balance: _____ NO

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) or a similar financial service?

YES NO

What was the chapter's cash on hand (checking) at the start of the academic year before any collections?

September 2017	
September 2018	

Does the chapter have at least a 95% collection rate of chapter dues every semester (*documented in chapter financial statement audited by AVC Treasurer*)?

YES NO

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?

YES NO

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

YES NO

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

YES NO

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	
Volunteer 2	
Volunteer 3	

Is the AVC incorporated and current with the State Corporation Commission or equivalent state agency?

YES NO

Does the AVC have current bylaws?

YES NO

Does the AVC have an annual budget of operations?

YES NO

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.

YES NO

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?

YES NO

Does the AVC host at least two alumni events annually?

YES NO

Does the AVC review undergraduate operations at each AVC meeting?

(undergraduate executive officers report at the AVC meeting)

YES NO

Do the AVC members regularly attend chapter and executive board meetings?

YES NO

Does an alumni volunteer facilitate a chapter officer transition or goal setting retreat each semester?

YES NO

Does the AVC recruit parents and faculty to serve as AVC directors and volunteers?

YES NO

Does the AVC communicate with alumni through a regular newsletter program?

YES NO

Has the AVC executed an Asset Protection and Trust Agreement with the Grand Chapter?

YES NO

Does the AVC maintain an alumni database?

YES NO

What training has the AVC received or participated in over the last two years?

Please include when, who hosted, approximate number of volunteers from your chapter who attended, and a brief description of the training. (250 words or less)

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

What is the AVC doing to improve its collection and management of contact information for its alumni?
(250 words or less)

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 **Mentor Committee** for the chapter.

Volunteer Position	Volunteer's name	Years as SigEp Volunteer	Years in this position
Chapter Counselor			
Balance Man Steward			
Recruitment Mentor			
Programming Mentor			
Finance Mentor			
Communications Mentor			
Chaplain Mentor			
Sigma Challenge Mentor			
Phi Challenge Mentor			
Epsilon Challenge Mentor			
Brother Mentor Challenge Mentor			
Balanced Man Scholarship Mentor			
Faculty Fellow			
Other Mentor			
Other Mentor			

***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.*

To include all members of the chapter's Alumni and Volunteer Corporation, please go to "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*)

