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**Expectations for Excellence**

**2015**

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| **Fraternity/Sorority Name:** |
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| **Number of Undergraduate Chapter Members:** |
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| **Number of Members Joining Spring 2014:** |
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| **Number of Members Joining Fall 2014:** |
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| **Organization Mission/Creed:** |
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| **Organization Vision:** |
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**Expectations for Excellence: Organization Self-Assessment**

*Please assess your organization’s accomplishments in each standard of the Expectations for Excellence in order to reflect on your strengths and challenges in fulfilling each of the 12 standards. Complete this section after writing your report and plan.*

**1** - We did not accomplish our goals in this area and had difficulty fulfilling this standard.

**2** - We met some of our goals in this area. Some of our priorities may have shifted during the year, and we need to focus more on this area in the future.

**3** - We accomplished our goals in this area.

**4** - We exceeded our goals in this area and believe we are a model student organization in this standard.

**Character and Values**

1. **VALUES & PRINCIPLES**: We enact and reinforce our organization’s values and the Communal Principles of the College, and we develop these values in our members.

2. **HEALTH & SAFETY**: We educate our members on strategies to enhance health & safety and reduce harm, utilizing risk management systems that support college, inter/national organization, and legal expectations.

3. **EXEMPLARY CONDUCT**: We employ strategies to resolve issues of inappropriate conduct, including violations of college or inter/national organization policy and we hold members accountable to our stated values.

**Leadership and Organizational Management**

4. **LEADERSHIP**: We encourage the development of strong leaders within our chapter by promoting leadership training opportunities for our officers and our members.

5. **CHAPTER OPERATIONS**: We have systems in place to ensure effectiveness within our leadership roles, including purposeful transition of our officers and the timely recording and reporting of important decisions, events, and transactions.

6. **COMMUNICATION**: We demonstrate effective internal and external communication systems and have clear and fair guidelines for decision making.

**Scholarship**

7. **ACADEMIC SUPPORT**: We respect and support the academic goals of our new and initiated members and encourage them to pursue a full range of educational opportunities.

8. **ACADEMIC PROGRAMMING**: We support learning within the chapter by encouraging and supporting sponsorship with College programs, academic resources, and faculty, as well as the development of educational opportunities that include the broader campus community and our members.

**Community Building and Programming**

9. **CO-CURRICULAR INVOLVEMENT**: We support our members’ multiple identities and interests outside the chapter and integrate these passions into our organization’s programming and activities.

10. **COMMUNITY SERVICE & PHILANTHROPY**: We support philanthropy and community service through fundraising and active participation in service programming.

11. **INTERNAL PROGRAMMING**: We create and participate in programming that exemplifies the history and traditions of our organization and enhances the membership experience.

12. **EXTERNAL PROGRAMMING**: We offer and participate in programs designed to enrich the intellectual, social, and cultural interests of the campus and Rochester communities by promoting co-sponsorship and planning of programs with a variety of groups.

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| CHARACTER AND VALUES |
| We demonstrate our commitment to the communal principles of fairness, freedom, honesty, inclusion, responsibility, and respect through proactive approaches to student conduct. Each individual in our chapter strives to exemplify the values and standards of our organization and of the College, and we support them in developing and aligning their own values and commitment to integrity with those of the organization. Our policies and expectations reflect the highest ethical standards of good citizenship, honesty, propriety, and regard for the rights of others. |
| First Standard - Values & Principles |
| We enact and reinforce our organization’s values and the Communal Principles of the College, and we develop these values in our members.  *Examples: new member orientation, discussing creed/values at chapter meetings, values workshop, ongoing member education, membership retreat, applying for national fraternity/sorority awards, recognizing/rewarding exemplary members, written material (such as a newsletter), etc.*  *Note: discuss the mission/creed/principles of your organization and how your group embodies them.* |
| Plan for the Year (2014) |
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| Did you achieve your plan?  How did you achieve your plan? Note any changes and reason. |
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| Plan for Upcoming Year (2015) |
| New Goals |
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| Plan for Upcoming Year (2015) |
| Recurring Goals |
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| **Second Standard - Health & Safety** |
| We educate our members on strategies to enhance health & safety and reduce harm, utilizing risk management systems that support college, inter/national organization, and legal expectations.  *Examples: Programs on dating and relationships, diversity and inclusion, sexual assault awareness, sexual health education, alcohol education and other drug awareness, social justice, hazing prevention, risk management, fiscal responsibility, etc.; plan to assist a member in crisis using resources like University Counseling Center and the CARE Network; Utilizing a risk management plan for events****.*** |
| **Plan for Year (2014)** |
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| **Did you achieve your plan?**  **How did you achieve your plan? Note any changes and reasons.** |
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| **Plan for Upcoming Year (2015)** |
| **New** **Goals** |
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| **Plan for Upcoming Year (2015)** |
| **Recurring Goals** |
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| **Third Standard - Exemplary Conduct** |
| We employ strategies to resolve issues of inappropriate conduct, including violations of college or inter/national organization policy and we hold members accountable to our stated values.  *Examples: utilizing an internal standards process, working with university resources to improve standards process, creating bylaws that address member expectations, reviewing past incidents to develop stronger procedures, training a standards officer, having a predetermined list of possible consequences for misconduct, etc.*  *Note: Discuss any conduct issues that occurred for the organization and how they were resolved. The discussion of conduct issues is meant to highlight chapters’ communication, resiliency, and dedication to living their values.* |
| **Plan for Year (2014)** |
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| **Did you achieve your plan?**  **How did you achieve your plan? Note any changes and reasons.** |
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| **Plan for Upcoming Year (2015)** |
| **New** **Goals** |
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| **Plan for Upcoming Year (2015)** |
| **Recurring Goals** |
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| **LEADERSHIP AND ORGANIZATIONAL MANAGEMENT** |
| We actively recruit and prepare leaders within a global society. We manage our organization responsibly, acknowledging that our current decisions and actions affect the future of our organization. To that end, we develop systems and policies that are clear and productive and train members to effectively sustain these structures. When making decisions as a group, we do so in a manner that is fair, consistent, value-oriented, and based upon available and verifiable data. |
| **Fourth Standard - Leadership** |
| We encourage the development of strong leaders within our chapter by promoting leadership training opportunities for our officers and our members.  *Examples: attendance and participation in the College’s and/or FSA sponsored leadership development programs; regular meetings with Fraternity and Sorority Affairs staff; actively seeking various outside national, local, and campus training and conference opportunities; etc.* |
| **Plan for Year (2014)** |
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| **Did you achieve your plan?**  **How did you achieve your plan? Note any changes and reasons.** |
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| **Plan for Upcoming Year (2015)** |
| **New** **Goals** |
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| **Plan for Upcoming Year (2015)** |
| **Recurring Goals** |
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| **Fifth Standard – Chapter Operations** |
| We have systems in place to ensure effectiveness within our leadership roles, including purposeful transition of our officers and the timely recording and reporting of important decisions, events, and transactions.  *Examples: position descriptions, transition plans, clear expectations in charters/constitution/by-laws, organizational tree, officer handbooks, manuals or guidebooks, reports from programming and philanthropic efforts, financial materials, annual reports, housing assignments, use of CCC, reports to (inter)nationals, record keeping within the chapter, etc.*  *Note: A list of officer positions and responsibilities may be included as an appendix.* |
| **Plan for Year (2014)** |
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| **Did you achieve your plan?**  **How did you achieve your plan? Note any changes and reasons.** |
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| **Plan for Upcoming Year (2015)** |
| **New** **Goals** |
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| **Plan for Upcoming Year (2015)** |
| **Recurring Goals** |
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| **Sixth Standard - Communication** |
| We demonstrate effective internal and external communication systems and have clear and fair guidelines for decision making.  *Examples: running effective chapter meetings; use of technology; voting rules; communicating with campus staff, advisors, and advocate; etc.* |
| **Plan for Year (2014)** |
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| **Did you achieve your plan?**  **How did you achieve your plan? Note any changes and reasons.** |
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| **Plan for Upcoming Year (2015)** |
| **New** **Goals** |
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| **Plan for Upcoming Year (2015)** |
| **Recurring Goals** |
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| **SCHOLARSHIP** |
| Scholarship within the fraternity and sorority community is not measured simply by grade point average, but by the accomplishment of goals through exploration, information gathering, reflection, discussion, evaluation, and informed decision making. We recognize individuals own their education, and our organization assists individuals in gaining and using knowledge and applying learning to their daily lives. We approach issues with an open, critical, and searching mind and engage others within and outside our organization to promote learning. |
| **Seventh Standard – Academic Support** |
| We respect and support the academic goals of our new and initiated members and encourage them to pursue a full range of educational opportunities.  *Examples: Utilizing Writing Fellows, workshop leaders, Center for Excellence in Teaching and Learning, the College Center for Advising Services, informing members of important academic dates, providing a chapter library/study space, etc.* |
| **Plan for Year (2014)** |
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| **Did you achieve your plan?**  **How did you achieve your plan? Note any changes and reasons.** |
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| **Plan for Upcoming Year (2015)** |
| **New** **Goals** |
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| **Plan for Upcoming Year (2015)** |
| **Recurring Goals** |
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| **Eight Standard – Academic Programming** |
| We support learning within the chapter by encouraging and supporting sponsorship with College programs, academic resources, and faculty, as well as the development of educational opportunities that include the broader campus community and our members.  *Examples: community discussions on academic topics of interest, workshops on applying for internships and fellowships, programs preparing for graduate and medical school, etc.* |
| **Plan for Year (2014)** |
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| **Did you achieve your plan?**  **How did you achieve your plan? Note any changes and reasons.** |
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| **Plan for Upcoming Year (2015)** |
| **New Goals** |
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| **Plan for Upcoming Year (2015)** |
| **Recurring Goals** |
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| **Community Building and Programming** |
| The University of Rochester is a community that welcomes, encourages, and supports individuals who desire to contribute to and benefit from the institution’s mission. Our chapter builds a strong, inclusive community through relationships and partnerships with diverse student groups and community organizations, both in the College and beyond campus, in an atmosphere of trust, cooperation, and respect. As part of a global society, we understand and appreciate cultural and human differences, social responsibility, and civic responsibility, reflecting those values in our service to others. |
| **Ninth Standard – Co-Curricular Involvement** |
| We support our members’ multiple identities and interests outside the chapter and integrate these passions into our organization’s programming and activities.  *Examples: nurturing multiple identities such as being a resident advisor, an athlete, or a student government officer; creating programs which address individual members’ interests; building relationships with other groups/organizations; monitoring and modifying fraternity/sorority time commitments which prohibit interference with academic pursuits, etc.*  *Note: Feel free to include a separate list of members and their involvement in an appendix.* |
| **Plan for Year (2014)** |
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| **Did you achieve your plan?**  **How did you achieve your plan? Note any changes and reasons.** |
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| **Plan for Upcoming Year (2015)** |
| **New Goals** |
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| **Plan for Upcoming Year (2015)** |
| **Recurring Goals** |
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| **Tenth Standard – Community Service & Philanthropy** |
| We support philanthropy and community service through fundraising and active participation in service programming. |
| **Plan for Year (2014)** |
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| **Did you achieve your plan?**  **How did you achieve your plan? Note any changes and reasons.** |
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| **Plan for Upcoming Year (2015)** |
| **New Goals** |
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| **Plan for Upcoming Year (2015)** |
| **Recurring Goals** |
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| **Eleventh Standard – Internal Programming** |
| We create and participate in programming that exemplifies the history and traditions of our organization and enhances the membership experience.  *Examples: brotherhood/sisterhood events, Meliora Weekend and reunion events, Founder’s Day, speakers/workshops to the chapter, etc.*  *Note: Please evaluate the quality of your programs and how you would change them in the future.* |
| **Plan for Year (2014)** |
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| **Did you achieve your plan?**  **How did you achieve your plan? Note any changes and reasons.** |
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| **Plan for Upcoming Year (2015)** |
| **New Goals** |
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| **Plan for Upcoming Year (2015)** |
| **Recurring Goals** |
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| **Twelfth Standard – External Programming** |
| We offer and participate in programs designed to enrich the intellectual, social, and cultural interests of the campus and Rochester communities by promoting co-sponsorship and planning of programs with a variety of groups.  *Examples: participation/sponsorship of religious or cultural programs, programming for your residential community, working with diverse student organizations, participation in College Community Weekends and Orientation Programs, signature events*  *Note: Please evaluate the quality of your programs and how you would change them in the future. Also indicate the nature of your organization’s involvement in each program (ex. participating in another organization’s event, co-sponsoring an event with other groups, being the primary sponsor of a program).* |
| **Plan for Year (2014)** |
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| **Did you achieve your plan?**  **How did you achieve your plan? Note any changes and reasons.** |
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| **Plan for Upcoming Year (2015)** |
| **New Goals** |
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| **Plan for Upcoming Year (2015)** |
| **Recurring Goals** |
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| **Final Reflection** |
| Having completed the report and plan for the 12 standards of the Expectations for Excellence, please provide this final reflection on your organization’s overall performance and future direction. Please limit your response to 300 words per prompt. |
| **Strengths & Challenges** |
| Based on the standards of the Expectations for Excellence, please reflect on your organization’s greatest strengths and weaknesses from the previous year. |
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| **Organization Priorities** |
| Please describe your top three priorities for chapter improvement in your Plan for the Upcoming Year. |
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