



EMORY  
UNIVERSITY

# SORORITY AND FRATERNITY LIFE STRATEGIC PLAN INITIATIVE

distinctive. integrated. sustainable.

---

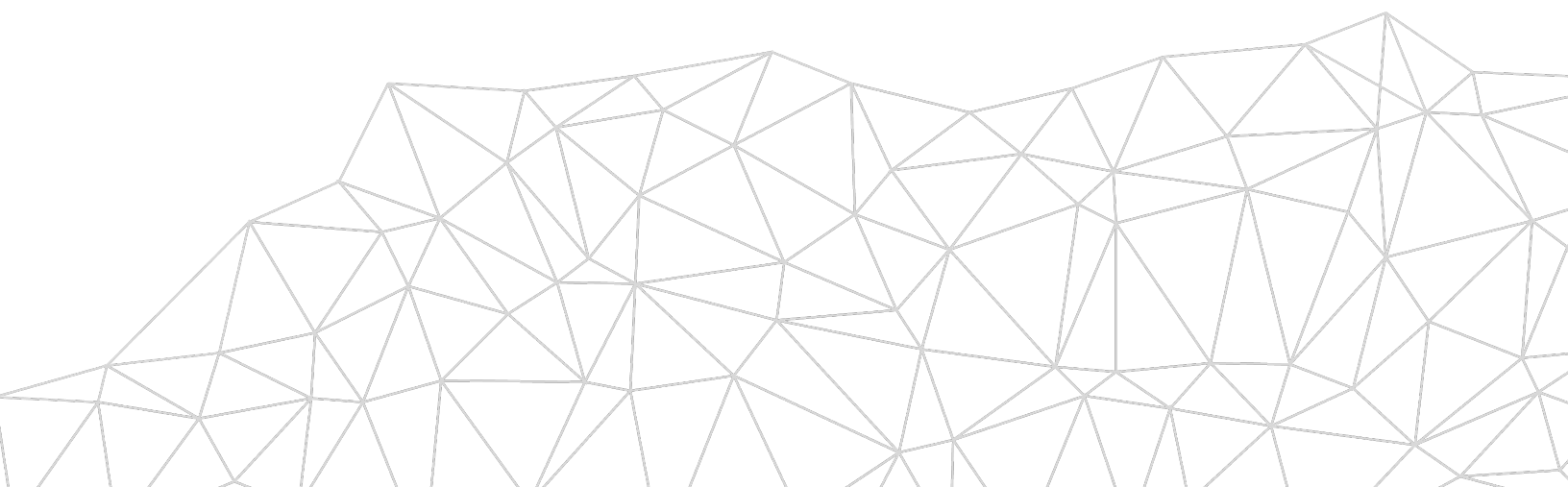
**SUBMITTED BY**

**DAVID CLARK**, Associate Vice President for Finance, Administration and Operations

**SUZANNE ONORATO**, Assistant Vice President for Community

**MARLON GIBSON**, Director of Sorority and Fraternity Life

**MAY 2018**





*The **Sorority and Fraternity Life Strategic Plan Initiative** was undertaken to develop recommendations to enhance and sustain a robust environment for sororities and fraternities, whose members account for nearly one-third of Emory University's undergraduate student body.*

*As such, the strategic plan initiative is an ongoing effort, and this report a living document subject to updating and revision over its lifespan – based on additional input from stakeholders, periodic assessments of its effectiveness, and the dynamic needs of sororities and fraternities and the larger university community.*

*While this report's findings and recommendations represent the best thinking of the working groups that developed them, additional information, including numerous details, necessarily remain to be identified and addressed. In that sense, the process will continue with the vital and ongoing engagement of students, faculty, staff, and alumni representing sororities and fraternities and the broad range of other university constituencies.*

# INTRODUCTION

Emory University – a leader in innovation, academic excellence, and community engagement – is committed to developing a university community that is intellectually, culturally, and socially engaged. The sorority and fraternity community is an important aspect of student life, with a rich history spanning nearly 150 years. The last strategic plan (the Phoenix Plan), initiated in 1996, no longer supports contemporary residential, financial, and student governance needs. The purpose of this strategic planning initiative is to develop a framework to address risk management issues apparent on the national and local landscape, respond to physical asset challenges, and enhance relationships between students, alumni, and staff.

In the summer of 2016, Emory engaged Plaid LLC – a management firm that specializes in sorority and fraternity organizational planning with colleges and universities – to assist with identifying strategies for long-term sorority and fraternity life housing. Plaid collaborated with a group of Emory alumni, students, and staff (referred to as the Housing Roundtable) led by three co-chairs (one student, one staff, one alum) to review past documents, engage in data collections via surveys, focus groups, and individual interviews as part of a listening tour to understand current issues and develop recommendations. An extensive analysis and report was provided to Emory on May 10, 2017. The report suggested that the university engage in a strategic planning initiative and develop action items around the following recommendations:

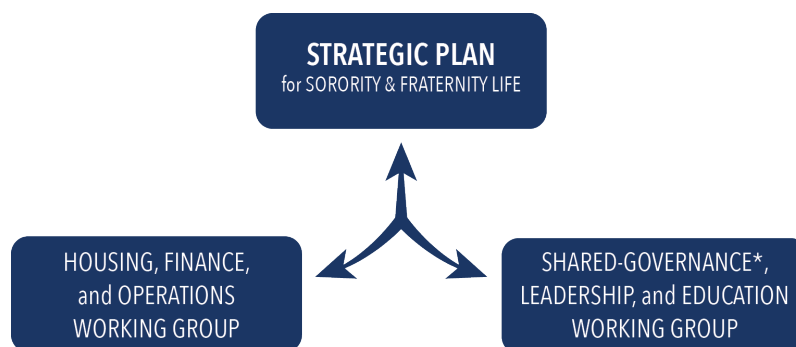
1. Consider providing additional housing to meet student demand.
2. Develop a clear process for return should an organization face suspension.
3. Restructure staff support and shared-governance for sorority and fraternity housing.
4. Review nomenclature used when referring to sorority and fraternity life and its campus environs.
5. Address disparity in quality of housing.
6. Define policy and consistent policy application.
7. Clarify ownership of sorority lodges and fraternity houses and use of reserve funds.
8. Share collected data.

In the summer of 2017, Emory began the next phase – engaging key constituents in the development of a strategic plan for sorority and fraternity life at Emory. Two working groups were formed to address the issues presented in Plaid’s report and the data from the fall 2016 survey. The working groups provided experience and expertise in four critical areas:

1. Financial planning and management.
2. Housing and building facilities management and operational strategy.
3. Relationship building.
4. Organizational shared-governance, accountability, leadership, and membership education.

The working groups shared progress and process with each other to develop an overarching strategic plan for sorority and fraternity life at Emory. As a whole, the strategic plan provides a framework for staff, students, alumni, chapter advisors, and regional, national, and international headquarters to build trusting relationships and enhance the success and sustainability of chapters and sorority and fraternity residential spaces.

The working groups were interdisciplinary in nature, including membership that had a wide range of perspectives, expertise, and experience, and were inclusive of the Emory community.



*\* During the strategic planning process, working groups recognized that “shared governance” rather than self-governance more accurately describes the philosophical direction that governance must take. Shared governance represents a collaborative approach through which responsibility is shared by students, staff, and alumni advisors.*

## HOUSING FINANCE AND OPERATIONS

The first working group, convened by David Clark, associate vice president for Finance, Administration and Operations, and Dawn Watkins Wiese of Plaid LLC., reviewed the recommendations related to housing and operations. Their charge was to develop a financial and operational model that provides clarity and sustainable practice for housing on the west side of campus. The culminating plan represents the collective work and recommendations of the working group, addresses the nuances shared in Plaid’s report, and provides clarity and direction in the following areas:

- Ownership of sorority and fraternity lodges and houses and use of reserve funds.
- Utilization of current residential spaces for sorority and fraternity organizations.
- Disparity in quality of residential spaces on campus.
- Housing agreements.
- Transparency related to financial records.
- Operational and communication model for facility cleaning, repair, bidding process, renovation, and maintenance.
- Model for staff supervision and support of sorority and fraternity housing.
- Alignment of policy and protocol between assignments, facility services, and programming.

### HOUSING, FINANCE AND OPERATIONS WORKING GROUP MEMBERSHIP

**David Clark** – Convener; Assoc. Vice President, Finance, Administration and Operations, Emory Campus Life  
**Tomika DePriest** – Senior Director, Communications, Emory Campus Life  
**Dave Furhman** – Senior Director, Finance, Administration and Operations, Emory Campus Life  
**Ira Golub 19B** – Student Representative; Zeta Beta Tau  
**Gloria Grevas** – Senior Director Campus and Community Engagement, Emory Alumni Association  
**Jon Hart 04C** – Vice President, SunTrust Robinsons Humphrey; Sigma Alpha Epsilon  
**Adrian Jackson** – Office of General Counsel, Emory University  
**Horace Johnson 770x 79B** – Superior Court Judge in the Alcovy Judicial Circuit; Alpha Phi Alpha  
**Todd Kerzie** – Assoc. Vice President, Emory Campus Services  
**Rahul Nair 18G** – Student Representative; Multicultural Greek Council; Sigma Beta Rho  
**William Palmer 18C** – SGA Representative; Speaker of the House  
**Kaelan Saley 18C** – Student Representative; IFC Housing Vice President; Sigma Phi Epsilon  
**Elaine Turner** – Senior Director, Housing Operations, Emory Campus Life; Tri-Chair Housing Roundtable  
**Lina Vargas** – Interim Senior Director of Finance, Emory Campus Life  
**Christian Virgil 18C** – IFC President; Sigma Alpha Epsilon; Tri-Chair Housing Roundtable  
**Dawn Watkins Wiese** – Vice President, Plaid LLC

## SHARED-GOVERNANCE, LEADERSHIP, RELATIONSHIP DEVELOPMENT and MEMBERSHIP EDUCATION

The second working group, convened by Marlon Gibson, director of Sorority and Fraternity Life and Dawn Watkins Wiese of Plaid LLC, reviewed the data from the fall survey and focus groups not related to housing. The group's charge was to develop a programmatic model that provides clarity and sustainable practice for students, staff, and alumni who provide leadership for and within the sorority and fraternity community. The culminating plan represents the collective work and recommendations of the working group and provides clarity and direction in the following areas:

- Development of the sorority and fraternity life narrative (story, purpose and data sharing) via website, social media, etc.
- Relationship and trust building among students, staff, alumni, and headquarters.
- Definition of and expectations for academic engagement in the sorority and fraternity community.
- Definition of and actions for shared-governance and accountability.
- Organizational advising structure that includes faculty, staff, and alumni.
- Expectations for new membership recruitment, intake, and education.
- Definition of and practices that support chapter "good standing."
- Expectations for legitimate recognition of sorority and fraternity chapters.
- Scope, responsibility, and practice of the Sorority and Fraternity Life Review Board (SFLRB) and its relationship with the councils, house/lodge leadership, and the Office of Student Conduct.
- Process to determine organization return to campus and return to residential space.
- Community building within the sorority and fraternity community.
- Review of nomenclatures and recommendations for changes/communication.
- Recommendations for developing a model to support financial stability for sorority and fraternity life initiatives.
- Development and alignment of policy and protocol between assignments, facility services, and programming.

## SHARED GOVERNANCE WORKING GROUP MEMBERSHIP

**Marlon Gibson** – Convener; Director, Sorority and Fraternity Life, Emory Campus Life  
**Jessi Arndis** – Director, Development, Emory Campus Life; Alpha Omicron Pi  
**Claire Barnes 19C** – Student Representative; MGC Representative; Lambda Theta Alpha Latin Sorority, Inc.  
**Brandi Benton**<sup>^</sup> – Health Promotion Specialist, Office of Health Promotion, Emory Campus Life  
**John Baker Brown** – Communications Manager, Emory Campus Life  
**Raphael Coleman**<sup>^</sup> – Assoc. Director, Office of Health Promotion – Community Wellbeing, Emory Campus Life  
**Max Cornely 18C** – Student Representative; NPHC Representative; Alpha Phi Alpha  
**Madeline DeShazer 18C** – Student Representative; EPC President; Gamma Phi Beta  
**Kristan Goldfein 90C** – Alpha Delta Pi  
**Gloria Grevas** – Senior Director, Campus and Community Engagement, Emory Alumni Association  
**Sean Khan 18C** – Student Representative; SGA Vice President for Diversity and Equity  
**Becka Shetty** – Assoc. Director, Student Involvement, Leadership and Transitions, Emory Campus Life  
**Julia Licorish Thompson** – Director, Office of Student Conduct, Emory Campus Life  
**Megan Pendleton** – Assistant Director, Belonging and Community Justice/LGBT Life, Emory Campus Life  
**Jalyn Radziminski 18C** – Student Representative; MGC Representative; Theta Nu Xi Multicultural Sorority, Inc.  
**Scott Rausch** – Senior Director, Residence Life, Emory Campus Life  
**Rus Drew** – Chief of Police, Emory University  
**Ross Warshauer 19B** – Student Representative; IFC Representative; Sigma Alpha Epsilon  
**Dawn Watkins Wiese** – Vice President, Plaid LLC  
**Madelyn Zapata 20C** – Student Representative; SGA; Alpha Delta Pi

<sup>^</sup> Brandi Benton joined group upon the departure of Raphael Coleman.

# HOUSING AND OPERATIONS WORKING GROUP

## FINAL REPORT

### CURRENT STATE: The Phoenix Plan

The Phoenix Plan originated in 1994 as a strategic plan to renovate all fraternity facilities. The goal was to develop a new vision for sorority and fraternity life at Emory. Over time, the plan grew to include the minimum standards required of sorority and fraternity facilities to complement Emory's housing and also to outline the services that each house would receive to operate under university management.

Effective fall 1997, fraternities were required to be either managed by the university under the Agreement for the Provision of Services or maintained independently on a level consistent with the standards for safety established in August 1996 to remain operational.

The Agreement for the Provision of Services offers guidelines for the use of room charges and fees, including routine maintenance, upkeep, and capital improvements. At the end of the year, surpluses and deficits are transferred to the Reserve Account of each House. Under the Phoenix Plan, if a house's reserve account does not have enough funds to meet its obligations, the current members and/or alumni would have to fund the shortfall.

This plan assumed each house would be self-sufficient in the long run, that room charges and fees would cover all repairs and maintenance for the house, and that any funding shortfalls could be covered by its members. After 20 years of this plan, repairs and maintenance on an aging housing stock have increased much faster than the charges and fees alone can cover. Although the university owns the houses and Campus Life has and will continue to cover these maintenance costs, this has led to confusion on the responsibility for funding the large backlog of repairs for houses on Eagle Row and significant deficits in many of the house reserve accounts.

### A NEW WAY FORWARD

Emory Campus Life engaged Plaid LLC, to assist with identifying the long-term strategy for sorority and fraternity housing, including programming, staffing, facilities management, and a variety of other key areas. Through surveys and focus groups in fall 2016 and spring 2017, one of the resulting recommendations was to fully review the current housing model (occupancy, operations, maintenance, capital repairs, reserve funds, etc.), determine what is meeting our collective needs and what is not, and develop a plan to best position sorority and fraternity housing for success moving forward.

The Housing Operations Working Group (HOWG), convened by Campus Life, was created to address these questions. This report represents the collective work and recommendations of the working group. The impact of these recommendations will vary across individual sororities and fraternities, causing varying degrees of disruption to the status quo. This was not taken lightly by our working group. Embedded throughout the recommendations are measures to introduce small scale pilot programs to allow for gradual change, facilitate seamless transition, and introduce opportunities for learning and fine-tuning are embedded throughout these measures to enable sustainable success. It is our belief that implementing

these recommendations will best serve the entire sorority and fraternity community and the larger university community. At the core of our recommendations are three primary changes:

1. Evolving the relationship between Emory and sorority and fraternity groups with respect to facility care and renovations. As it currently stands, the financial and operational model for managing the facilities—in particular with regard to houses on Eagle Row—is not sustainable.
2. Evolving the staff support model for our residential sorority and fraternity community. The current staffing model does not serve the students or the university in an ideal manner and needs a significant overhaul. The suggested model empowers students to appropriately share governance, while enabling the university to ensure it has effective support in place for our students.
3. Formalizing a five-year review cycle for fraternity and sorority housing relationships with the university. This will help to recalibrate the plan/relationship as needed and avoid the pitfalls of waiting 20 years or more between review periods.

---

## FACILITIES REVIEW

---

During the summer of 2017, Emory’s department of Housing Operations, through consultation with Biddison Hier Ltd., conducted an audit of the fraternity facilities on Eagle Row. After review, it was estimated that the costs to bring the fraternity houses to the Emory standard was beyond the current balances in the reserves, leaving large unfunded liabilities. In 2017 dollars, the gap between projected funding and projected capital needs was approximately \$20 million for the fraternity houses. This highlighted the fact that the current financial model of relying on room fees, debt, and reserves to fully fund regular upkeep and major capital improvements is no longer feasible.

As a result of the facilities audit, the Housing Operations Working Group recognizes the need to move to a financial model that better defines the operating and funding partnership between the sorority and fraternity houses and the university.

### Proposal

In the proposed model, the university would fund infrastructure projects, major repairs, and renovations on Eagle Row. An agreed-upon percentage of the room fees from chapter occupants would be allocated to each House to use in the current year for programmatic purchases that align with the house mission. Any unspent funds at the end of the year would be deposited into the reserve account and made available for those same purposes. The percentage could vary based on occupancy, in order to incentivize full occupancy of the houses by chapter members.

The proposed model would ultimately draw clearer lines of responsibility for the university to maintain the houses on Eagle Row and allow the houses to use the reserve balances to fund programmatic needs that would enhance the residential experience in the sorority and fraternity houses. As an incentives-based approach, it would also foster long-term productive partnerships between Housing Operations and the sorority and fraternity organizations.

Finally, from a long-term perspective, a review of the number of houses and their occupancies is needed. As this process developed, two fundamental challenges emerged as this process developed, both of which need additional assessment and coordination with the university's master plan before recommendations can be offered:

1. There are not enough houses/lodges to satisfy the demand of sorority and fraternity groups desiring campus housing.
2. The occupancy thresholds and composition of the current houses does not meet program goals. More plainly, many of the residences on Eagle Row have too many beds and are not organized in a way that ensures the houses remain full.

---

## STAFFING REVIEW

---

After benchmarking fourteen\* sorority and fraternity life programs, many of which are considered to be peer institutions by the university, it became clear that each campus has created a distinct organizational structure for sorority and fraternity life with no two exactly alike. Organizational structures and modes of house supervision vary based on a variety of factors at each institution, including but not limited to:

- a. Institutional culture
- b. Campus geography
- c. Historical and legacy traditions
- d. Size and scope of sorority and fraternity program
- e. Type(s) of sorority and fraternity housing
- f. Ownership and management of sorority and fraternity housing

While no two programs researched were alike, *a commonality of challenges* quickly emerged, most specifically, the issues and challenges created by decentralized, compartmentalized approaches to meeting the unique and diverse needs of sorority and fraternity communities.

This certainly holds true at Emory.

At Emory, this decentralized approach provides programmatic and operational support to sorority and fraternity members through several different departments. Those varying departments include the Office of Sorority and Fraternity Life, Office of Residence Life, Office of Housing Operations, and Office of Student Conduct. The result of this approach manifests in a disjointed system that can be confusing to members of the sorority and fraternity community. As well, a decentralized approach creates and results in a clear lack of institutional continuity in terms of community standards and the application of consistent policies and operational procedures.

\* Duke University, Stanford University, Southern Methodist University, Elon University, University of Pennsylvania, Wake Forest University, Washington University in St. Louis, University of Southern California, Massachusetts Institute of Technology, Vanderbilt University, Northwestern University, College of William and Mary, High Point University, Carnegie Mellon University

## Recommendation

Based on key learnings, we recommend an enhanced centralized staffing model for the comprehensive management and support of sorority and fraternity life at Emory. This model must also include a provision for house staffing and management, better ensuring a seamless and cohesive approach.

Key to the cohesive approach is an enhanced organizational staffing model with a new singular point of contact for members of the sorority and fraternity community, as well as new, focused facilities (maintenance) and administrative (assignments) staff dedicated specifically to Eagle Row housing. This model will further support the centralized organization and is predicated on the creation of several key positions that provide leadership and accountability across key programmatic and operational areas.

## Transition Plan

Simply put, the stakes are far too high to transition the entire sorority and fraternity community to this new staffing model overnight. Far too much foundational work must be accomplished and far too many unknowns exist to responsibly advocate for complete adoption at once. Given the enormous operational and cultural shift that this new staffing model represents, it will be critical to enact this new plan in logical phases—with the first phase being a year to build a strategic implementation plan.

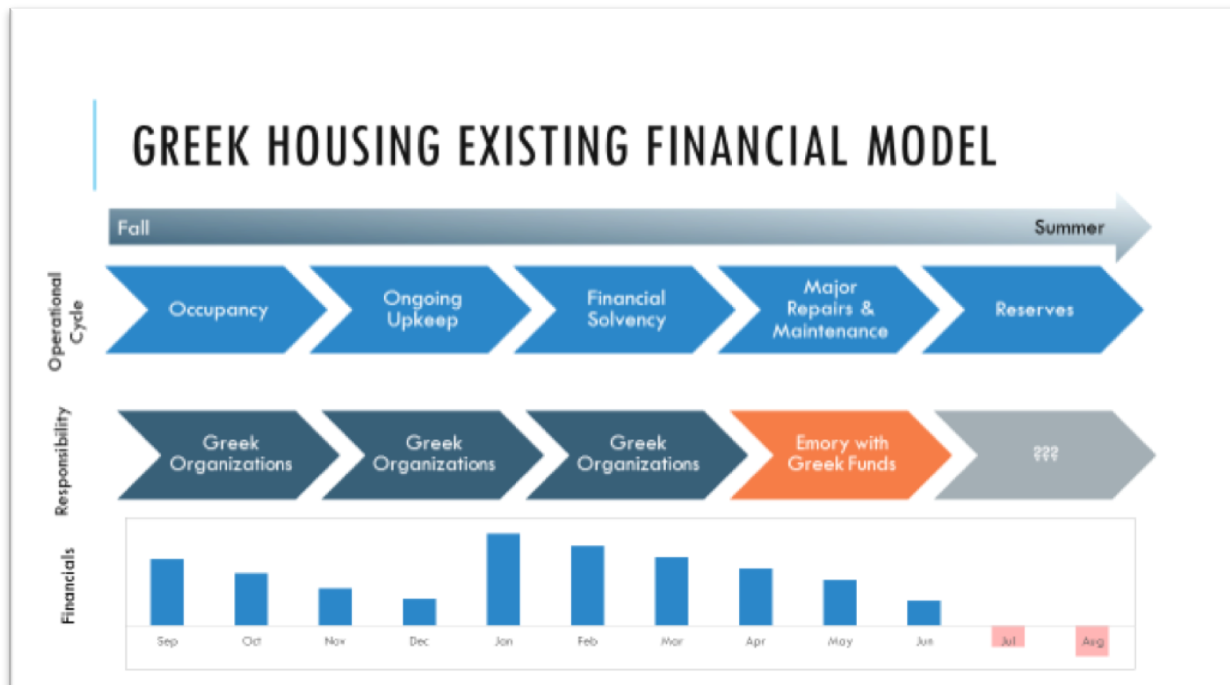
Benefits of this foundational year will include the ability to:

- a. Solicit and incorporate ongoing stakeholder and community guidance and feedback.
- b. Seek additional opportunities for innovation.
- c. Revise and retool concepts as needed.
- d. Recruit and hire staff and invest them in development of the process.
- e. Develop key administrative elements including position descriptions and staff training guides.
- f. Assess, strengthen, and expand pilot program to entire sorority and fraternity community.

Success will rely on strong support from Campus Life leadership. This ongoing support will be essential from a variety of operational perspectives:

- a. Commitment to this plan, including dedicated staff time and backfill where necessary.
- b. Collaborative decision making and accountability.
- c. Cross-functional support.
- d. Development of clearly defined roles, responsibilities, and expectations.
- e. Cultivation of a culture that supports and advances the sorority and fraternity student experience.
- f. Financial support.

The existing financial model for sorority and fraternity Houses was based on the Phoenix Plan, which assumed that chapter houses could be self-sufficient in the long run. This model holds each chapter house financially responsible for routine maintenance, upkeep, custodial services, and capital improvements. Emory collects room rents and fees to fund the required repairs and maintenance for each chapter house. The existing financial model also relies to varying degrees on donations in areas such as capital improvements and basic operational needs.



### Room Rates

- Room rates are established by Emory University.
- Room rates in university-owned sorority and fraternity housing are the same as current residence hall fees.
- Room rates and housing related charges (lockout fees, lock changes, damage fees, etc.) are billed per student, per semester, through their student account.

### Occupancy and Facility Fees

- All chapter members are charged a facility fee which covers:
  - non-revenue spaces, such as chapter rooms and common spaces used by chapter members.
  - room charges for unassigned beds in the houses.
- Base rate: fraternity - \$200; sorority - \$150
- When the house is at required occupancy, the facility fee is charged to all members who do not live in the house and those living in the house are charged only the room rate.
- If there are empty bed spaces in the house, the total cost of the empty beds is divided equally among ALL members, both living in and living out of the house.

## Operating Budget

- Each chapter house's operating budget is established by revenue generated from room rent during the academic year and from the use of the houses and lodges during the summer by the university's Conference Services.
- The operating budget covers items such as support for the Office of Sorority and Fraternity Life, staffing, capital projects, residential custodial services, utilities, internet and cable services, repair and maintenance, grounds care, building insurance, and/or debt service payments.
- Housing Operations, in collaboration with Campus Services, decides what capital improvements will occur annually and oversees the improvements.
- Six percent of the generated semester room rent and the end of year surplus or deficit for each house goes into a reserve account.

## Loans

- If a house cannot afford a capital improvement project with its yearly operating budget, Emory will grant a loan to the chapter to finance the project. The chapter is responsible to repay this loan with future rents and fees over the life of the loan.

## Reserves

- The reserve fund is used for planned and unexpected expenditures and improvements.
- Major renovations and repairs in the houses and lodges typically exceed the room charges for the year, so reserve funds, when available, are used to (partially or completely) cover the necessary expenses.
- Emory heavily subsidizes the major infrastructure repair costs in the fraternity and independent student houses, as the annual cash flow and reserve funds are insufficient to cover the expenses.
- Renovations and upkeep of the houses and lodges are prioritized, with life and safety issues receiving top priority.
- The budget summary and transaction detail for each house and lodge are distributed monthly to the chapter president and advisor.

## Results

The Phoenix Plan was built on the assumption that room charges, fees, and occasional alumni support could cover the short and long-term needs of each house. During the 20 years under this plan, the repairs and maintenance costs of an aging housing stock have risen faster than what can be supported solely with the charges, fees, reserves, and debt. The present situation has left many chapter houses in debt, with decreasing or negative reserves, and a long list of deferred maintenance.

Current challenges of the existing financial model will be exacerbated over time: A 10-year projection of the sorority and fraternity housing reserves compared to their maintenance needs and outstanding loan balances highlights the deteriorating financial position of the houses, with close to \$24 million in estimated maintenance and repairs costs and \$5.5 million in outstanding debt. On the long-term horizon, there will not be sufficient funding in chapter reserves to cover the long list of deferred maintenance or service their debt. This will create large unfunded liabilities of about \$21.6 million for all fraternities and sororities.

House	Actual Balance 08/31/17	Projected Balance 08/31/27	MR&R costs estimates	Debt Outstanding 08/31/27	Potential Liability* 08/31/27
<b>Total Fraternities</b>	<b>696,617</b>	<b>1,599,176</b>	21,514,377	455,000	(20,370,201)
<b>Total Sororities</b>	<b>3,234,301</b>	<b>6,220,078</b>	2,408,681	5,051,164	(1,239,766)
<b>Total All Greek:</b>	<b>3,930,917</b>	<b>7,819,254</b>	<b>23,923,058</b>	<b>5,506,164</b>	(21,609,968)

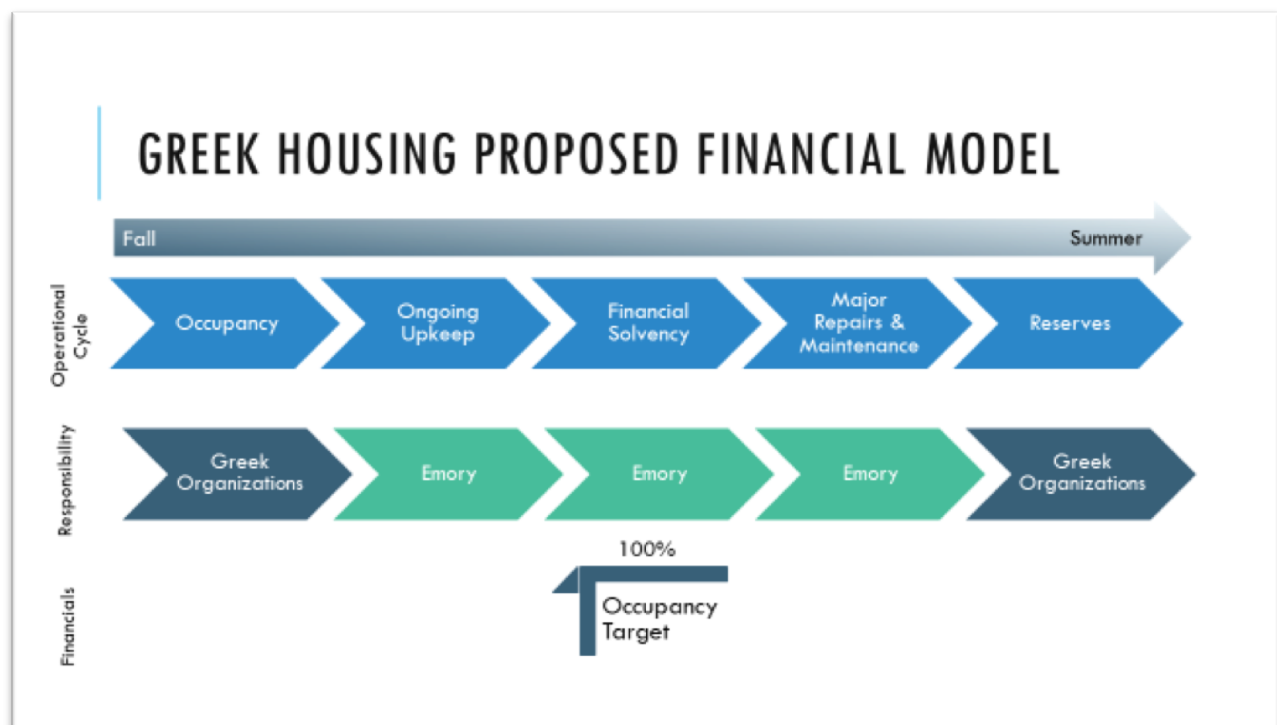
\* Potential liability calculated under the most favorable scenario assuming that MR&R costs stay at 2018 prices, no additional debt is assumed, and existing debt continues to be paid over the next 10 years.

The financial outlook further underscores the need to evolve to a new model that acknowledges the long-term needs of sorority/fraternity houses.

## Recommendation

The proposed financial model has two main objectives:

- To address the immediate and long-term challenges of the chapter houses by clearly defining the responsibility of the university to maintain the infrastructure and operating condition of the chapter houses.
- To foster long-term productive relationships between the university and the chapters by moving to an incentives-based approach that promotes full-house occupancy and creates a sustainable path for the chapters to fund their programmatic needs.



## Operating Budget

- The university intends to assume responsibility to fund infrastructure projects, major repairs, and renovations in Eagle Row.
- To execute this responsibility, Emory would manage the operating budget and financial sustainability of the chapter houses by consolidating both the revenue generated from room charges and summer conferences and the related maintenance and repair expenses into the Emory Housing operating budget. Per this plan, chapter houses would no longer have to manage individual operating budgets for the operation of their houses. A separate programming budget would be provided to the chapters (see reserves section below).
- The university expects to maintain the sorority and fraternity houses at a level comparable to that of other student housing areas on campus.
- According to this proposal, Housing Operations, in collaboration with other Campus Services organizations, would develop capital improvement plans for the houses and lodges. Fraternities, sororities, or independent student living groups occupying the facilities would have opportunities to provide feedback as well.

## Occupancy and Facility Fees

- As a demonstration of support for the sorority and fraternity houses on campus, Emory plans to discontinue the base facility fees (aka, parlor fees) and shift the focus to methods of incentivizing full occupancy in chapter houses.
- Chapters must maintain 100 percent occupancy each fall semester through the start of fall break to receive any financial incentives (see Appendix A).
- By the fifth day of classes, chapters would be charged the total room rent for empty beds.
- The rent for unassigned beds would be divided among all active chapter members.
- Chapters that fall below 90 percent occupancy for two consecutive semesters will be subject to a review for continuing to reside in the house.
- If there are empty chapter houses or lodges, Emory would allow unhoused organizations or non-affiliated sorority and fraternity groups to occupy these houses.
- During the summer, Emory would continue to use houses to provide lodging to conference participants.

## Reserves

- Emory plans to use six percent of the academic year room revenue to incentivize chapters who meet and maintain 100 percent occupancy each fall semester through the start of fall break.
- Funds will be deposited into the chapter's reserve account at the end of each semester.
- The reserve fund would be used by the chapter for additional amenities, furniture, furnishings, artwork, composites, etc. With approval by the Office of Sorority and Fraternity Life, the funds could also be used for activity expenses, such as faculty events, educational speakers, and awards.
- Chapters, in consultation with Emory, would decide on the use of the reserve funds to support their programmatic needs.
- In order to evolve the financial model while recognizing the history of alumni investment in their houses, Emory intends to turn ownership of existing reserve funds back to the chapter houses. In this proposal, chapter houses with current positive (surplus) balances in their reserve accounts would be allowed to keep their funds for programmatic use. The intention is that chapter houses

with current negative (deficit) balances in their reserve accounts would be written off in order to start with a zero balance.

### Loans

- In line with assuming responsibility for repairs and maintenance of the houses, Emory would also expect to assume responsibility for financing future capital projects.
- For the outstanding balances of debt assumed by the chapters, Emory acknowledges that the current model is unsustainable and would seek to release chapter houses from their responsibility to service current debt. Emory would then assume responsibility for settling any legacy debt balances.

By absorbing both the operational and capital costs of the houses on Eagle Row, Emory is demonstrating its commitment to the sorority and fraternity community. As we work to renovate our existing facilities and consider expansion and growth, the support of Emory's benefactors is critical. We look forward to strengthening and enhancing our relationship with alumni, parents, and other stakeholders.

## Appendix A: Semester Occupancy Targets

100% Occupancy			
Capacity of House	Number of Assigned Beds	Number of Unassigned Beds Allowed	6% Incentive (2017-18 Double Room Rate)
49	49	0	\$11,866
48	48	0	\$11,624
42	42	0	\$10,170
40	40	0	\$9,686
34	34	0	\$8,233
32	32	0	\$7,749
29	29	0	\$7,023
24	24	0	\$5,812
23	23	0	\$5,570
20	20	0	\$4,843
11	11	0	\$2,664
6	6	0	\$1,453

## Appendix B: Occupancy Minimums

90% Occupancy Minimums (rounded to the nearest whole number)		
Capacity of House	Minimum Number of Assigned Beds	Number of Unassigned Beds Allowed
49	44	5
48	43	5
42	38	4
40	36	4
34	31	3
32	29	3
29	26	3
24	22	2
23	21	2
20	18	2
11	10	1
6	5	1

# SHARED-GOVERNANCE WORKING GROUP

## FINAL REPORT

### CURRENT STATE

The Office of Sorority and Fraternity Life (OSFL) was developed through the Housing and Residence Life Office in August 1987. Initially, OSFL was established to support the sorority and fraternity community and assist Housing and Residence Life with needs specific to sorority and fraternity housing. Specifically, the OSFL coordinator focused on assignments and billing and the creation of sorority and fraternity councils to serve students. Next, a residential position was created to live and work specifically with sorority and fraternity students.

The needs of the sorority and fraternity community have changed over the years; the focus of the office evolved as well to meet those needs. Specifically, the office developed a more holistic approach of education and advising to support students. Additionally, the Phoenix Plan, which was established in 1994, was created to provide a framework for the sustainable housing in an increasingly complex operational and programmatic area.

Today's OSFL embraces a shared-governance model with students, alumni, advisors, and national headquarters. Together, we provide educational programming and assistance with conduct matters, serve as a resource to families, and function as the primary advocacy arm for sorority/fraternity students on campus, who comprise 31.4 percent of the undergraduate population.

### A NEW WAY FORWARD

The need to expand services and support for sorority and fraternity students and alumni emerged from the Plaid review. At the completion of the Plaid housing review, the university further engaged Plaid to consider other aspects of support for sorority and fraternity students through OSFL. Specifically, the university underscored its interest in encouraging student shared-governance through OSFL programs to create a sorority and fraternity community that is distinctive and highlights the intellectual, cultural, and social realms of student life.

The Shared Governance Working Group (SGWG), convened by Campus Life, was created to address these recommendations. This report represents the collective work and recommendations of the working group. The impact of these recommendations will vary across individual sororities and fraternities, causing varying degrees of disruption to the status quo. This was not taken lightly by our working group. To ensure sustainable success, we have embedded measures in our recommendations to introduce small-scale pilot programs and facilitate gradual change, seamless transition, and opportunities for learning and fine-tuning. It is our belief that implementing these recommendations will best serve the entire sorority and fraternity community and the larger university community. At the core of our recommendations are four primary changes:

1. **Enhancing communications between students, staff, and alumni to demonstrate transparency.** Current communication models are ineffective.
2. **Developing relationships and building trust between/among stakeholders.** While a tremendous amount of trust has been built through this process, we must develop systems that ensure sustainability of close relationships. The suggested recommendations delineate opportunities for continued dialogue and collective support for the sorority and fraternity community.
3. **Evolving student governance.** We have come to a new understanding of governance in the community – one that focuses on shared governance and accountability among students, staff, and alumni. The suggested recommendations empower students to lead while enabling the university to ensure it has effective support in place for our students.
4. **Evolving the staff support model for sorority and fraternity life.** If we expect our sorority and fraternity communities to be distinctive and fully engaged in the intellectual, cultural, and social life of the university community, we must develop systems that support these expectations, which includes opportunities for cross-organizational and council engagement, appropriate financial resources, and congruent policies and protocols across departments.

To address the recommendations, the SGWG developed four subgroups to engage and develop action items around these recommendations. The subgroups were 1) marketing and communications, 2) relationships and trust building, 3) increasing academic engagement, and 4) developing a sustainable financial model and a model to ensure policy and protocol congruence.

---

## MARKETING AND COMMUNICATIONS

---

The Marketing and Communications subgroup was charged with the following:

1. Develop action items to share the sorority and fraternity life narrative.
2. Increase the transparency of communications associated with the Office of Sorority and Fraternity Life.
3. Establish a consistent “brand” for sorority and fraternity life to emphasize the university’s commitment to the community, underscore the good works of students, and affirm standards expected of those participating in sorority and fraternity life at Emory.
4. Review and provide recommendations for communicating correct information regarding truths and myths associated with nomenclature.

### Recommendations

#### I. Develop action items to share the sorority and fraternity life narrative.

Use existing university publications (i.e., Dooley Report and Emory Report, Emory Wheel, alumni publications, OSFL and other Campus Life newsletters) to share positive stories about the accomplishments and impact members of the sorority and fraternity community have on campus, in the Atlanta community, and across the country.

- a. Create a page within the OSFL website to celebrate accomplishments and positive news within the community. Collaborate with communications teams on campus to ensure the page “feeds.”
- b. Develop a process for stories to be shared to each of the aforementioned publications on a monthly basis.
- c. Highlight organizations celebrating anniversaries, awards received, etc.
- d. Share stories from national organizations publications.
- e. Share personal stories about student leaders in the community (i.e., leadership, professional development, and community service.)
- f. Develop messaging around what members gain from their sorority/fraternity experiences (i.e., leadership across campus organizations, university honors).
- g. Conduct a photo shoot and video project with members of the community; use these to develop digital graphics, poster campaigns, etc.
- h. Host public outreach events around campus, like Wonderful Wednesdays, in which organizations provide giveaways and host tables.
- i. Develop a social media campaign to spread a positive image of sorority and fraternity life.

## II. Increase the transparency of communications associated with the Office of Sorority and Fraternity Life.

Currently, there is confusion around why and when organizations have been removed from campus and how an organization remains “in good standing.” It is often unclear whether Emory or the organization’s headquarters have removed a chapter. As a result, people listen to rumors and develop their own narratives. In addition, the data revealed confusion around costs associated with sorority and fraternity life. To address issues of transparency, OSFL will take the following actions:

- a. Post status of chapters on OSFL website at the conclusion of each semester.
- b. Share concrete information on the webpage to demystify costs associated with sorority and fraternity life.
- c. Publish each year’s recruitment numbers.

## III. Establish a consistent “brand” for sorority and fraternity life to emphasize the university’s commitment to the community, underscore the good works of students, and affirm standards expected of those participating in sorority and fraternity life at Emory.

The data demonstrate a desire to celebrate sorority and fraternity life and integrate the community more intentionally in university-wide celebrations. Next year (2019) presents a unique opportunity to do this as the university will celebrate 150 years of sorority and fraternity life at Emory. We recommend the following:

- a. Establish a planning committee to develop and facilitate events throughout the year. The planning committee should include members of the OSFL staff, other Campus Life staff including Parent and Family Programs, Emory Alumni Association staff, two to three students from each council, two to three alumni from each council, a faculty member, and two to three parents. The planning committee will develop a budget, marketing campaign, timeline, and schedule.
- b. Begin an awareness campaign in 2018 and celebrate throughout the entire calendar year of 2019. Programming will be incorporated into the following university events:
  - Founders Day in February
  - Dooley's Week in the spring

- Commencement-related programming in May
- Homecoming, Reunion Weekend, Family Weekend in October
- Emory Cares in November
- c. Craft a series of stories about the mission, history, and challenges of sorority and fraternity life over the history of its existence. The series will incorporate a variety of Emory voices, including affiliated and non-affiliated students and alumni from all councils. Campus Life Communications will lead this initiative.
- d. Work closely with *Emory Report*, *Dooley Report*, and other relevant publications to place as many of these stories as possible for audiences across campus and beyond throughout 2018. Involve the university historian to develop a timeline/history of sorority and fraternity life at Emory.
- e. Ensure that video or publications that we create about sorority and fraternity life represent diversity, include interviews and photos, and highlight sorority and fraternity community service.

#### IV. Provide recommendations for making changes to nomenclature and communicating correct information regarding truths and myths on this issue.

The data revealed a concern that changes in nomenclature and activities diminished the role of sorority and fraternity life at Emory. These issues were particularly sensitive for alumni. We looked at each of the issues below:

- a. **Street formerly was named Fraternity Row; now named Eagle Row.** Our research revealed that with sorority lodges, residence halls, and other buildings now on Eagle Row, it is no longer inclusive or accurate for the name to be “Fraternity” Row.
  - OSFL will work with Campus Services to determine costs and timeline required to install a sign/plaque acknowledging the historical context of this road formerly being named Fraternity Row.
- b. **Houses formerly were referenced by name of chapter; now referenced by house number.** Our research revealed three reasons for the change: 1) many of the houses have been occupied by different organizations over time; 2) outside vendors and contractors are often not familiar with the Greek alphabet; and 3) some houses have been replaced with new construction.
  - It is important to note that Emory ensures the correct Greek letters are presented on the façade of each house. We present three options for OSFL to consider.
    - Consider the approach shared in item “a” above – plaques or signs that share historical overview of organizations that called each house home. We recognize this may not be feasible due to the numerous changes within each house.
    - Create a historical retrospective of each house on Eagle Row on the OSFL website.
    - Develop a list of house numbers and corresponding organizations to share with key staff across the institution at the beginning of each year, i.e., #22 Black Student Alliance House, #18 AEPi house, etc. This would be a good reference for Campus Life, Campus Services, and Emory Alumni Association.
- c. **Sorority and fraternity life formerly was mentioned on campus tours; now not included on tours.** Staff in the Office of Admission confirmed that tour guides include information about sorority and fraternity life as part of the rich variety of extracurricular activities available to incoming students. Should they arise, issues with consistency across tour guides can be addressed via training and follow up to the Office of Admission. Below are the sorority and fraternity life talking points included in the tour guide script:

- There are four Councils: Emory Panhellenic Council has eight groups, Interfraternity Council has eight groups, National Pan-Hellenic Council has eight groups, Multicultural Greek Council has six groups.
  - Information regarding the percentage of Emory students who participate in sorority and fraternity life. *In 2016-17, it was 31.4 percent.*
  - Recruitment (i.e., pledge/rush) is deferred until second semester of a student's first year, giving students time to get acclimated to college and campus life before they decide whether they wish to become involved in sorority and fraternity life.
  - Information on overall fraternity and sorority GPA. *Fall 2017 average GPA was 3.489.*
  - Current chapter philanthropic efforts. *In 2017, chapters donated over \$80,000 to philanthropies and were involved in over 25,000 total hours of community service.*
  - Sorority and fraternity residential spaces are only open to brotherhood and sisterhood events through the first two weeks of fall. This encourages first-year students to spend the first two weeks building their own networks through participation in Weeks of Welcome events.
- d. **Campus maps formerly showed sorority and fraternity residential spaces; now they do not.**
- The [online campus map](http://emap.fmd.emory.edu/website/campus/index.htm) (<http://emap.fmd.emory.edu/website/campus/index.htm>) lists sorority and fraternity residential spaces. In addition, individuals can use the search function to find the specific location of any sorority house or sorority lodge. The Emory University Visitors Guide 2017 provides building shapes and locations; the names of residential buildings (residence halls, houses, and lodges) are not included. This decision was made as the purpose of the publication is to provide guidance to visitors. Page 12 of the guide provides information highlighting sorority and fraternity life.
- e. **In the past, organizations were able to mail information to prospective new members; organizations are no longer allowed to send mailings to newly admitted first-year students.**
- Our research confirmed that communications to new students were centralized between the Office of Admission and the Office of Undergraduate Education (OUE) several years ago so that vital information could be shared without inundating new students. The Office of Admission oversees communications to admitted and enrolling students until May when the orientation team within the Office of Undergraduate Education (OUE) begins coordinating communication.
- OSFL, Admissions, and OUE will jointly determine whether information may be submitted to either Admissions and/or Orientation team for possible inclusion in summer newsletters, etc.

---

## RELATIONSHIP AND TRUST BUILDING

---

The Relationships and Trust Building subgroup was charged with developing action items to:

1. Build relationships and trust among students, staff, alumni, and headquarters.
2. Build community within the sorority and fraternity community.
3. Develop definitions and actions for shared-governance and accountability.
4. Establish organizational advising structure that includes faculty, staff, and alumni.
5. Develop the process to determine how organizations return to campus and return to residential spaces.

### Recommendations

#### I. Build relationships and trust among students, staff, alumni, and headquarters.

- a. Develop quarterly newsletter distributed to the various constituents of OSFL.
- b. Create an annual event inviting alumni back to campus to help students connect with alumni members (social event around homecoming).
- c. Invite sorority and fraternity headquarters staff to campus for continuous relationship building and focus on enhancing relationships across councils.
- d. Enhance transparency regarding Campus Life decisions and actions related to OSFL groups by including students, advisors, and headquarters in processes as early as possible.
- e. Post major updates online, including when groups voluntarily or involuntarily leave community. Include organizational conduct decisions from both the Office of Student Conduct and any council-level peer adjudication decisions. (*A recommendation from Marketing and Communications.*)
- f. Create a semester “report card” for each chapter to be shared with chapter leadership, advisor, and headquarters staff. Report card items would be developed by council leadership and OSFL staff, including recommendations from strategic planning process.

#### II. Build community within the sorority and fraternity community.

- a. Enhance student-to-student relationships and internal communications within the sorority and fraternity life community.
  - Develop a media contacts/publicity person within each council who can communicate with the *Emory Wheel* and *Dooley Report* to convey positive things around sorority and fraternity life. (*A recommendation from Marketing and Communications.*)
  - Focus on each council’s unique processes and needs because there are differences in the ways councils recruit.
  - Develop community-wide opportunities to engage all members of our sorority and fraternity community. Because IFC and EPC chapters are larger than MGC and NPHC, many of the large-scale programs are IFC and EPC-oriented. Building on initiatives that have successfully brought chapters together in the past (i.e., Delta Tau Delta haunted house collaboration) is highly recommended.
  - Facilitate monthly gathering of representatives or presidents from the four councils.
  - Increase OSFL staff support and assistance for culturally-based groups.

- Ensure that there is a session during leadership training that focuses on the history and purpose of the councils. Leadership training should also provide time for participants to plan events that will enhance inter-council relationships, communication, and program building.
- b. Enhance sorority and fraternity student relationships with the Emory community. The perception is that IFC is exclusive. For example, many members of the community are not aware that some events are closed to non-members because of insurance requirements and protocols established by national organizations. The perception of IFC and EPC exclusivity is further complicated by race and culture. Non-affiliated students expressed a number of misunderstandings. We recommend enhancing engagement of sororities and fraternities in the larger Emory community.
  - Use Wonderful Wednesdays as a tool to “table” together and demystify sorority and fraternity life.
  - Use newsletters and website to educate non-affiliated students to processes, via the marketing initiative delineated in Marketing and Communications section of this report.
  - Benchmark other universities to identify successful efforts for building community between sorority and fraternity students and non-Greek students.
- c. Enhance sorority and fraternity community relationships with faculty and staff.
- d. Enhance sorority and fraternity students’ relationships with alumni who are members of sororities and fraternities.
  - OSFL and Alumni Relations will review the 2016-17 survey results to glean ideas for types of activities/interactions for students and alumni.
  - OSFL will identify staff and faculty members who are members of sorority and fraternity organizations to assist with advocacy and advisorship of our current students.

### III. Develop a definition of and actions for shared-governance and accountability.

- a. Each council will develop a leadership position focused on oversight of chapter updates regarding standard board decisions and training.
- b. Executive board within each organization will work with OSFL and Student Conduct to support training and development within each organization’s standard board.
- c. Each council will evaluate need for a council-level accountability board that will address behaviors not addressed by Undergraduate Code of Conduct (i.e., recruitment violations, community-related concerns, etc.).
- d. IFC executive board members are identifying incidents that are community accountability issues that can be managed by their judicial/accountability board. This board is being piloted spring 2018. The board addresses behaviors not addressed by the Undergraduate Code of Conduct.
- e. Determine consistent policies for ensuring safety within residential spaces (i.e., concern on nature, timing, and who conducts walk-throughs).
- f. IFC executive board members collaborated with Campus Life administration to develop a pilot walk-through program in February 2018. This pilot program occurred during spring semester and included student participation in walk-through accountability measures. OSFL, Residence Life, and students will review the program to determine whether alterations are needed for implementation during the 2018-19 academic year.

#### IV. Establish organizational advising structure that includes faculty, staff, and alumni.

- a. OSFL will recruit faculty, staff, and alumni to advise sorority and fraternity students and actively train those new advisers to increase their understanding of sorority and fraternity life at Emory and broaden the overall advising structure.
  - **Faculty/staff advisor:** recommend that every chapter has at least one faculty/staff advisor.
  - **Alumni advisor:** recommend that an advisory board is established and maintained by each chapter. (Number of advisory board members should be scaled to the size of the chapter as well as take into consideration whether chapter has needs identified by OSFL.)

#### V. Determine scope, responsibility, and practice of the Sorority and Fraternity Life Review Board and its relationship with councils/house/lodge leadership and the Office of Student Conduct.

The Sorority and Fraternity Life Review Board (SFLRB) is an informal hearing board under the direction of the Office of Student Conduct (OSC). SFLRB addresses individual or organizational allegations of misconduct outlined in the [Undergraduate Code of Conduct](#). There is conflict in practice as the Interfraternity Council bylaws require that the determination of which cases are heard by SFLRB is made among the council president, OSC, and OSFL staff. There is no statement of collaboration for decisions made about cases required in the Undergraduate Code of Conduct. The OSC will work with IFC leadership to determine resolution of this conflict.

Common Charges from Undergraduate Code of Conduct SFLRB Addresses
▪ 1(g)- Violation of policies established by Housing Operations and Residence Life (drinking games such as beer pong and common containers of alcohol)
▪ 3(a)(1)- Use or possession of alcoholic beverages under the age of 21
▪ 3(a)(2)- Manufacture or distribution of alcoholic beverages (when alcohol is served to underage students)
▪ 3(a)(5)- Use or possession of any illegal drug or controlled substance except as expressly permitted by law

- a. Enhance relationship between SFLRB and councils by appointing a member of each council to SFLRB.
- b. SFLRB chair(s) expected to provide monthly updates to council presidents to share decisions of SFLRB.
- c. Outcomes of SFLRB organizational hearings will be updated online on both [OSFL](#) (<http://osfl.emory.edu>) and [OSC](#) (<http://conduct.emory.edu>) websites.

#### VI. Develop process to determine organizations' return to campus and return to residential spaces.

Currently, there is no defined process for organizations to return to camps after being removed. All return agreements should include the specified headquarters involvement required for the chapter to be successful. This may include a certain number of visits by headquarters/governing organization leadership to campus to assist chapter with recruitment, chapter reestablishment needs, as well as overall chapter leadership development. Full-time presence by headquarters staff will be required, with duration of presence determined via agreement with OSFL, council leadership, chapter advisors, and chapter student

leadership (if student leadership has been established in advance of return to campus). We recommend that OSFL draft a template of each process (headquarters, university, and voluntarily initiated) to share with all 37 organizational headquarters.

- a. Establish a formal process for a chapter to return to campus.
  - **When departure is initiated via headquarters**, headquarters, OSFL, and students will work together to develop a plan for return to campus at least 12 months in advance of date of return.
  - **When departure is initiated via university**, OSFL, headquarters, OSFL and students will work together to develop a plan for return to campus at least 12 months in advance of requested date of return. Prior to initiating process for return, the chapter must demonstrate proof that sanctions were completed as required by OSC. Headquarters is responsible for initiating return.
  - **When departure is initiated voluntarily**, the chapter, OSFL, advisors, and students will work together to develop a plan for return to campus at least six months prior to interest in return. The chapter is responsible for coordinating the meeting.
  - Elements of all processes should include a recruitment plan, list, expected engagement of alumni advisory board, and membership development and education plan.
- b. Return to residential spaces.
  - A document is needed and recommended to be maintained by OSFL to chronicle definition of “historical house,” track which houses have been occupied by chapters identifying a space as “historical house” along with dates of when house was first occupied by the group identifying the space as its historical house.
  - In order to return to chapter residential housing, a chapter must first demonstrate “good standing.” Once good standing is established, OSFL and headquarters will determine the plan to return to residential housing, which will include action steps and timeline.
- c. OSFL will create and manage a committee responsible for conducting annual reviews of chapters that are housed to determine their viability for future housing access. Chapter presidents and advisors would be a part of the review process, possibly presenting to the committee.

## —— INCREASING ACADEMIC ENGAGEMENT IN SORORITY AND FRATERNITY LIFE ——

The increasing Academic Engagement in Sorority and Fraternity Life subgroup was charged with the following:

1. Develop definition and expectations for academic engagement in the sorority and fraternity community.
2. Establish expectations for new membership recruitment, intake, and education.
3. Develop definition of and practices that support chapter in “good standing.”
4. Establish expectations for recognition of legitimate sorority and fraternity chapters.

## Recommendations

### I. Develop definition and expectations for academic engagement in the sorority and fraternity community.

Collaborate with other offices on campus that focus on academic engagement. For example, Residence Life currently has a model of working with faculty members to increase and sustain the knowledge of students within a living learning environment. Specific suggestions include:

- a. Partner with faculty members through presentations and/or programs within the chapter.
- b. Engage with faculty members in research.
- c. Solicit faculty members who are alumni of fraternities/sororities to serve as advisors.
- d. Develop a faculty-in-residence program.
- e. Define and set standards for academic engagement in sorority and fraternity life community.
- f. Connect with students in order to better understand how they view academic engagement.

## II. Establish expectations for new membership recruitment, intake, and education.

Currently each council defines processes and policy for intake and recruitment. In addition, each council understands and practices them differently. For example, Emory Panhellenic Council operates within their formal recruitment practices. Although there is an existing framework for formal recruitment for the Interfraternity Council, a review of current practices and operating procedures for recruitment is needed. Student leaders with the OSFL will also review and operationalize culturally based chapter membership and intake guidelines.

- a. Improve clarity of definitions of intake/recruitment, education, and expectations for each council.
- b. Set clear expectations for new member education and recruitment. Information that can be made public in terms of requirements (GPA, student status, recruitment process) should be made public.
- c. Standardize the timeline for recruitment; this includes a specific window of time when recruitment activities can begin and when they must conclude.
- d. Foster collaborative dialogue surrounding intake and new member education.
- e. Develop a more standardized process for communicating with interested members the structure of sorority and fraternity life, anti-hazing policies, and rush/intake expectations.
- f. Partner with Residence Life as a mediator between council and students during recruitment.
- g. Provide resident advisors and staff with tools in preparation for counseling for students before recruitment begins.

## III. Definition of and practices that support chapter "good standing."

Currently OSFL follows the standards of the Office of Student Conduct to define a chapter in good standing. Policies and expectations are in place for legitimate recognition of sorority and fraternity chapters; however, they are not easily accessible or posted on the OSFL website.

- a. OSFL will facilitate a regular evaluation process for each organization using an assessment tool to determine a chapter's standing. OSFL will develop a schedule for organizations that aligns with other processes such as recruitment and housing selection.

b. Define specifically what outlines a chapter's standing on OSFL's website (suggested standings):

- **Active (Good Standing):** Currently operating, recognized by Emory University, and in good conduct. Active chapters are the only organizations allowed to recruit and host activities.
- **Active (Social Probation Status):** Currently operating, recognized by Emory University but unable to have social functions due to conduct issues.
- **Inactive (In Good Standing):** Temporarily not operating due to conduct or administrative review. This chapter adheres to review process or sanctions and has a scheduled date of return to active status; however, it is currently not endorsed by the university.
- **Inactive (Not in Good Standing):** Not operating due to conduct or administrative review. This chapter disobeys review process or sanctions and is not affiliated with or recognized by the university until further notice.
- Additional standings could include full, provisional, probationary, warning status.

- c. Increase transparency in having an accessible (online) and easy-to-read list of fraternities and sororities and their status with the university.
- d. Develop a recognition program to identify and award chapters that are in good standing and leading in the community.
- e. Provide the community with a statement and list regarding unrecognized sororities and fraternities. Sample statement:

*WARNING: Some organizations that were once recognized fraternities or sororities on campus continue to operate underground despite having lost recognition from the university. These organizations have had their recognition revoked by the institution for various reasons, including such things as hazing, alcohol and drug abuse, risk management violations, and failure to comply with university policies and expectations. These organizations have, in almost all cases, also had their charters suspended by their national or international organizations because they were not upholding the organization's values and/or were engaging in risky behaviors that endangered their members and/or other students.*

- f. Provide a clear framework to guide shared-governance of councils.

#### IV. Establish expectations for legitimate recognition of sorority and fraternity chapters.

The data revealed that stakeholders within the sorority and fraternity community are confused as to what defines recognition of legitimate sorority and fraternity chapters. Policies and expectations for recognition are not clearly outlined and publicized. This lack of clarity and structure can lead to privileging some organizations and not providing a strong framework to guide shared-governance processes.

- a. **Implement a formal process by which the university agrees that a fraternity or sorority may function on the campus,** enroll members from the undergraduate body through recruitment activities, and identify its chapter's standing with the university. They hold the following characteristics:
  - Entitled to single-sex membership under the provisions of section 86.14 of regulations promulgated under Title IX of the US education amendments of 1972.
  - Entitled to be subjectively selective in their membership.
  - Legal corporations external to the university.
  - Chapter and alumni corporations and international/national or local organizations incorporated separately from the university.

- b. **Clearly define what it means to be a recognized versus unrecognized chapter.** As an example:
- **Recognized chapter:** The chapter has full affiliation with the university and an outlined code of rights and responsibilities for social sorority and fraternity organizations, is managed by the university, and can use spaces at the university.
  - **Unrecognized chapter:** The chapter does not have affiliation or supervision by university, does not follow rules, is loosely organized, and illegally uses the national organization's name.
- c. **Outline specific eligibility requirements.** Such requirements could include:
- Identification with active alumni corporation or board.
  - Identification of advisor who is full time faculty or staff member.
  - Expectation of affiliation with existing councils.
  - Boundaries for recruitment (i.e., can only recruit current students).
- d. **Implement goals and standards across the councils.** Chapters must have a purpose and goals, a national body structure and bylaws, chartering documents, formal intake process, acknowledgement by local chapter or national/international organization, financial and housing plans, as well as programs, services, educational plans.
- e. **Develop the goals, expectations, and processes for a recognition review panel.** Include university and sorority and fraternity constituents such as VP appointee, Student Conduct, university administrative council, university faculty senate, student affairs staff, chapter faculty/staff advisor, student senate president-SGA, non-affiliated student designee from student senate, a representative from each council, and the OSFL advisor.
- f. **Sororities or fraternities that attempt to form at Emory without recognition will not be recognized.** Operating outside of recognized processes is a violation of the Student Code of Conduct. Sororities or fraternities that attempt to form without working through the approved university process cannot secure university housing or recognition. While students may have interest in forming new organizations, processes must be followed.

---

## DEVELOPING A MODEL OF FINANCIAL STABILITY FOR OSFL AND ADDRESSING INCONGRUENCES IN POLICY AND PROTOCOL

---

This subgroup was charged with developing a model to support financial stability for OSFL and addressing incongruences with policies/protocols for sorority and fraternity life.

1. Develop a model to support financial stability for sorority and fraternity life initiatives.
2. Develop and align policy and protocol between assignments, facility services, and programming.

## Recommendations

### I. Develop a model to support financial stability for sorority and fraternity life initiatives.

The current OSFL funding model does not adequately support the office's programming needs. This puts an undue burden on the councils and chapters that have missions, goals, and programmatic agendas of their own. The current financial model is unsustainable and unequitable for our community. To resolve this challenge, the following recommendations are offered:

- a. The director of the Office of Sorority and Fraternity Life will create, using a zero-based budgeting model, a programmatic/educational budget amount to sustain OSFL efforts on behalf of the Emory sorority and fraternity community. This will be reviewed by senior Campus Life leadership.
- b. Emory will agree to fund the first five years of the approved amount. This achieves two goals. First, it shows the university's commitment to OFSL and the sorority and fraternity community and, second, it provides seed money to begin the process of recruiting alumni donors to assist in sustaining the office in perpetuity.
- c. Starting with the 2018-19 academic year and the celebration of 150 years of sorority and fraternity life at Emory, the Department of Alumni Relations and the Campus Life organization will begin creating a fund to allow donors to initially provide funding for specific OSFL programs such as the Sorority and Fraternity Student Leaders Retreat. The growth of this fund over time will offset the operating costs of the OSFL provided by the university.

With the above financial framework in place, the chapter and council budgets would be used primarily to serve their specific missions and goals. Overall, it also helps to create an environment where students, the university, and alumni are contributing funds for the betterment of sorority and fraternity life at Emory.

### II. Develop and align policy and protocol between assignments, facility services, and programming.

Currently, Emory Campus Life offices such as Housing Operations, Residence Life, and OSFL come together twice a month to discuss the protocol between assignments, facility services, and programming. This model is a collaborative model; however, it lacks clarity with respect to decision-making. As discussed in the housing operations working group section of this document, a revised staffing model is suggested to better serve students, alumni, and other stakeholders.

#### Creation of new standing committee

It is recommended that a new standing committee be developed to improve communication between Housing Operations, Facilities Services, Office of Fraternity and Sorority Life, fraternity and sorority chapters, and other relevant constituents. The purpose of this committee will be to review a number of topics that will ensure all parties are on the same page as relates to assignments, facilities, and programming in sorority and fraternity spaces. Examples of discussion items for this committee are outlined below.

## Points of discussion during meetings

- a. Assignments
  - Review and discuss occupancy requirements and the ability for chapters to meet those requirements.
  - Review policies regarding non-affiliated students living in fraternity and sorority housing and examine the consequences and benefits of these decisions.
  - Discuss issues of equity regarding filling spaces for larger houses (versus smaller houses).
  - Discuss how to accommodate chapters with occupancy challenges without chapters going into debt.
  - Anticipate foreseeable issues that may affect the Emory experience.
- b. Facilities
  - Review changes to services to the houses (i.e., custodial, maintenance, etc.).
  - Keep everyone up-to-date on large projects, repairs, and renovations.
  - Discuss how to manage houses going offline and anticipating any needs or issues.
  - Discuss which buildings are in need of repair (per student voices and student advocacy).
- c. Programming
  - Review how chapters plan to use their spaces.
  - Review timing of services (i.e., custodial, maintenance, etc.) and how services may interfere or interact with programs being hosted in fraternity and sorority spaces.
- d. Frequency of meetings
  - This standing committee should meet quarterly with ad hoc meetings as necessary.

## Membership<sup>1</sup>

- NPC, NPHC, IFC, and MGC council presidents
- Non-affiliated, upperclassmen, student member(s) (i.e., SGA member, honor council member, college council member, etc.)
- Associate Vice President for Facilities Management
- Senior Director of Housing Operations
- Senior Director for Residence Life
- Director for Sorority and Fraternity Life
- Senior Director for Finance
- Facilities staff member

## Administration of meeting

- a. Items from the existing sorority and fraternity life meeting (mentioned above) would be taken to this new standing committee when necessary and relevant.
- b. Ideas, changes, or considerations coming to this new committee must be developed and finalized.
- c. Meeting notes should be sent to the entire committee post-meeting to ensure those not in attendance are informed of committee activity.
- d. Due to the potentially sensitive nature of these meetings, all committee members should be reminded of confidentiality, particularly student members.

---

<sup>1</sup> The recommendation to include senior staff with “decision-making” authority is to ensure decisions can be made and confirmed in a timely fashion with the highest level of authority present at these meetings. This also prevents notes and discussion items being lost in translation between staff members and their supervisors.