



MAXIMIZING OFFICER ELECTIONS

SELECTING AND TRAINING YOUR CHAPTER LEADERS

SigEp

INTRODUCTION

Elected chapter officers have a huge responsibility throughout their terms. They are responsible for delivering the day-to-day membership experience, which directly impacts the lives of your brothers and determines SigEp's reputation on your campus and across the country. Chapter leaders also set the direction and priorities of the chapter. For these reasons, electing the **right** chapter officers is one of the most important decisions a chapter will make each year.

THERE ARE FOUR PHASES OF THE ELECTION PROCESS...

1. **Cultivating Leaders** – The best chapter officers have the relevant skills and experience to do their jobs well. It's the chapter's job to cultivate strong leaders through delegation, committee assignments and chairmanships, and other leadership opportunities.
2. **Preparation** – Elections start long before your brothers cast their ballots. You must ensure interested candidates know the expectations, required experience and benefits of each position.
3. **Execution** – An organized and codified approach to elections is crucial to your chapter's success. There must be a fair and transparent process for all interested candidates. Without this fair process, chapter officers will lack credibility and fail to garner "buy-in" from their brothers.
4. **Transition Preparation** – Preparation drives the success of the transition process. With proper organization and thoughtful reflection, outgoing officers will provide a strong foundation for their successors.

The sections below provide tangible, easy-to-use steps to be successful in these four phases. These steps ensure that the top candidates run, are elected, are prepared to take office, and are successful as they take on new responsibilities in the service to brothers.

CULTIVATING LEADERS

Cultivating strong leaders starts with identification. Each executive board member should have a committee allowing rising leaders to gain valuable, hands-on experience. These committees should be a breeding ground for future leaders.

Three to six months prior to the election, chapter officers should take the following steps:



Drive interest.

- Capable chapter leaders often times turn away from SigEp for involvement because they don't understand the personal and professional benefits of holding an position on the Fraternity's executive board. Make sure your best leaders understand the benefits of holding a leadership position in SigEp.
- Use the Professional Experience Translator to educate potential chapter leaders on how officer positions translate to the professional world.

Identify potential successors.

- Look for members who show a significant amount of **passion** or excitement. Often times, the best successors are the ones that approach you. In many cases, however, the best candidate will hang back and will need encouragement to run.
- In addition to excitement, a good officer needs to have **experience and skills** suited to the role. An executive officer should have previous experience with the committee that he will now be leading. Chapter members who have not shown significant involvement prior to running typically have a very steep learning curve and aren't able to adapt to the role as quickly as someone with prior exposure.
- Chapter officers are the **cultural and moral leaders** of our chapters. The best candidates should not have a history of behavioral issues with the university or chapter standards. Setting a good example is of utmost importance.

Encourage potential successors to apply for and attend SigEp's leadership events.

- Carlson Leadership Academy will give potential officer candidates training on a specific position that they choose to follow for the duration of a weekend program.
- Ruck Leadership Institute will hone individual leadership skills building vision and confidence for rising leaders.
- EDGE provides potential officer candidates great experience with public speaking and leading groups of younger chapter members. By attending the program as an EDGE group leader or

facilitator, these members can interact with Headquarters staff members and experienced volunteers and receive feedback on their leadership and speaking skills.

Meet with potential successors one-on-one.

- Take a deep dive into the role! Outline your day-to-day responsibilities and walk them through your goals and accomplishments. Show them tangible skills and experience you've gained through this position and how it will benefit you in the future.
- Gauge their interest in the role. Ask them to articulate their reasons for wanting to pursue the position and see if they have any questions or concerns. Have them outline their priorities and goals if they were elected.
- Based on these conversations, keep a prioritized list of potential successors.

Ensure your top candidates find opportunities to develop the skill sets necessary for their desired role.

- Engage potential candidates in committees if they aren't already serving in this capacity. Delegating work to potential candidates will allow them to learn the role in a low-risk environment, while also allowing the officer (you) to get more done by sharing the workload.
- Have potential successors accompany the incumbent officer to any meetings with external stakeholders. Relationships are key to a successful term as an officer. Potential successors should be having conversations with individuals such as:
 - Key chapter volunteers or AVC members.
 - The Fraternity and Sorority Life Director or IFC Adviser for your campus.
 - Your chapter's regional director.
- Have potential successors meet with Alumni and Volunteer Corporation (AVC) mentors to better understand their roles and how they support this position.

Taking these steps will ensure the chapter has a pool of quality candidates from which to select during elections. Additionally, this approach will help newly elected leaders be successful early in their term of office.

PREPARING FOR ELECTIONS

There are several key elements that help establish a smooth and effective elections process. These include:

1-2 MONTHS BEFORE ELECTIONS

- Chapter officers set the date of elections and announce it to the chapter.
- Chapter officers develop an application to gauge interest. This application can include basic information on experience, skills and vision for the position. Use the Template Officer Application or tweak it to fit your chapter.
- Interested brothers complete an officer application.
- Applications are shared with chapter members, your chapter counselor and other AVC mentors.

1-2 WEEKS BEFORE ELECTIONS

- The chapter holds nominations for each office at the chapter meeting from the brothers submitting applications
- The standards board should confirm all candidates are in good standing with the chapter to ensure they are eligible to run.

EXECUTING ELECTIONS

ACCORDING TO THE BYLAWS

The elections process is outlined on page 58 of *SigEp's Administrative Policies and Procedures* in Section 2, Article A. This section states:

- *The officers of an undergraduate chapter shall be elected annually by secret ballot provided, however, that they may be elected by an alternate calendar cycle if two-thirds of the undergraduate members of the chapter vote in its favor, and the cycle is approved by the district governor. These officers shall be installed according to the manner prescribed in the Ritual.*
- *In the event that one or more of the elected officers is unable to complete their term of office, the undergraduate chapter shall hold a special election to fill any or all vacancies with members who shall serve until the next annual election.*
- *Only a member in good standing shall be eligible to hold an office or position of trust in any undergraduate chapter.*
- *A chapter shall have the power, by majority vote, to declare void the election of an officer who, without satisfactory cause, fails to present himself for installation.*

Directly after or the week following elections, the chapter should hold a formal officer installation from the Fraternity's *Public Ceremonies Guide*.

ADDITIONAL BEST PRACTICES:

- Chapter officers should be elected on a calendar year basis (Spring Semester – Fall Semester term). This will allow new officers to get training at the Carlson Leadership Academy before getting too far into their terms.
- Prior to elections, outline the responsibilities, skills and experience needed to excel in each role. This provides voting members a clear picture of the ideal candidate.
- Ask your chapter counselor to attend elections and have him/her oversee the process and count votes.
- Allow each nominated candidate to give a two-three minute speech prior to the election for that office.
- Consider holding standards board elections at a different time than executive board elections:
 - Hold standards board elections the week following officer elections to permit voting members time to adequately assess the best candidates for these important roles.
 - Adjust your local chapter bylaws and elect standards board members on an academic year term. While graduating seniors are not eligible to run for executive board positions on a calendar year basis, many successful standards boards have graduating seniors as members.
 - Ensure that your chapter elects at least one alternate for the standards board, as noted in the Grand Chapter Bylaws: “Additionally, the chapter shall elect at least one alternate to serve in the event that any member of the standards board is unable to fulfill his responsibility due to his involvement or another conflict of interest.”

OUTGOING OFFICERS PREPARE FOR TRANSITION

Implementing the steps in this section will maximize the impact and effectiveness of the remaining transition process.

OUTGOING OFFICER CHECKLIST

- Organize all notebooks, binders, files and electronic documents.
- Finish all necessary correspondence (letters, e-mails, phone calls, etc.).
- Develop action plans and timelines for new officer transition, including but not limited to:
 - Necessary meetings attended and chaired by the officer.
 - Important tasks.
 - Introductions to key people/staff (relationship building).
- Complete the Outgoing Officer Worksheet .
- Create/prepare/update Officer Manual.

OFFICER MANUAL – WHAT TO INCLUDE:

A binder/electronic copies of the following recommended resources should be compiled and given to the incoming officer:

PEOPLE

- Outgoing executive board contact information.
- Volunteer contact information.
- Committee members and contact information.
- University staff contacts (fraternity/sorority life advisor, individual responsible for room reservations, etc.).
- Regional director and other Headquarters staff contact information.
- If applicable, vendor contacts (third-party vendors, t-shirt companies, etc.).

DOCUMENTATION

- Relevant resources from sigep.org, leadership events and other training programs.
- Position responsibilities (from Grand Chapter and local Bylaws).
- Electronic copies of all important documents (i.e. SMART goals, policies, procedures, Bylaws, chapter strategic plan, etc.).
- Calendars/timelines.
- Written programs.

- Electronic copies of posters/flyers/t-shirt designs/newsletters.
- Committee meeting agendas.
- Committee meeting minutes.
- Templates for forms/letters/e-mails.
- If applicable:
 - Any login information or passwords (i.e. officer-specific email account).
 - Budgets from prior years.
 - Financial documents (i.e. receipts, invoices, etc.).
 - Asset list (i.e. Ritual equipment/supplies, t-shirts, brochures, etc.).
 - Chapter checking and savings account information.

KEY ACTIVITIES, INITIATIVES AND EVENTS

- Information for any past vendors used (i.e. caterers, hotels, transportation services, printers, t-shirt companies, etc.).
- Descriptions of past events, planning checklists, risk management plans, etc.
- Status update and next steps on current projects and initiatives.

WORDS OF WISDOM

- Mistakes you made that could have been avoided.
- Advice you wish you had before assuming office last year.
- Questions the new officer may have.

You should leverage technology to make the transition process seamless. Using the Gmail platform allows you to utilize several important features:

1. **Officer emails** – Every officer should have an email that does not change (ex. americanalphapresident@gmail.com) This allows for emails that are intended for that position to remain year after year. Additionally, the continuity and contact information will make it easier for outside groups and organizations to contact officers and provide them with information and opportunities.
2. **Google Drive** – Creating folders for each officer position makes it easy to pass on important documents and resources year after year.

Outgoing officers should provide login/password information to their successors during the transition process.

APPENDIX A

PROFESSIONAL EXPERIENCE TRANSLATOR

SigEp Office	Sample Job Titles	Job Description
President	<ul style="list-style-type: none"> Chief Executive Officer President Executive Director 	<ul style="list-style-type: none"> Overall management of the strategic direction/vision of the organization. Management of the executive team. Primary liaison between employees and Board of Directors.
Vice President of Programming	<ul style="list-style-type: none"> Director of Special Events Corporate Events Manager 	<ul style="list-style-type: none"> Oversight of all corporate events- including management of event staff and budget. Design and host engaging and enjoyable events for stakeholders. Ensure safety
Vice President of Finance	<ul style="list-style-type: none"> Chief Financial Officer 	<ul style="list-style-type: none"> Ensure financial stability of the organization. Oversight of all incoming and outgoing funds. Plan for long-term financial stability of the organization. Oversight of all budget related activities.
Vice President of Recruitment	<ul style="list-style-type: none"> Director of Sales 	<ul style="list-style-type: none"> Establishing regular sales goals for the organization. Identifying, developing, managing and nurturing new clients and potential client pools. Develop and implement regular sales events.
Vice President of Member Development	<ul style="list-style-type: none"> Chief Learning Officer 	<ul style="list-style-type: none"> Ensure employees have skills necessary to perform job functions. Design and/or offer training opportunities for employees to develop new skills or enhance existing skills.
Vice President of Communications	<ul style="list-style-type: none"> Communications Director Chief Marketing Officer Brand Manager 	<ul style="list-style-type: none"> Ensure the integrity of the organizational brand. Proactively market the organization to existing and potential stakeholders. Provide regular communication to all stakeholders.
Chaplain	<ul style="list-style-type: none"> Director of Ethics General Counsel Chief Compliance Officer 	<ul style="list-style-type: none"> Ensuring employees adhere to employee ethics and compliance standards. Investigates complaints brought forward regarding unethical behavior.

APPENDIX B

TEMPLATE OFFICER APPLICATION

INSTRUCTIONS

After completing the “candidate information” you must answer all the general questions as well as any specific questions listed for each position you are interested in. There is no specific length requirement for any section.

APPLICATION QUESTIONS

Candidate Information:

Name:

Year in school:

Anticipated graduation semester/year:

Positions you are applying for:

General

1. How will you make the chapter experience better during your time as an executive officer?
2. How does the Balanced Man Program benefit our members? What can we do to help it succeed on campus?
3. What will be the biggest opportunity for our chapter?

President

1. Explain how you will act as a role model to other brothers and external entities like the university, alumni, and Headquarters staff.
2. Describe a time when you had to make a tough decision, the outcome, and what you learned from it.
3. Describe your vision for the chapter and how you plan on leading the chapter to get to that vision.

Vice President of Programming

1. How are you prepared to be in charge of risk management for the entire Fraternity? When was a time that you exemplified good risk management?
2. What do you want to accomplish during your time as Vice President of Programming?
3. How do you intend to use university resources to plan events?

Vice President of Finance

1. How has your finance/accounting background prepared you for this position?
2. How do you plan on collecting dues? How do you approach a situation where someone keeps neglecting to pay their dues?
3. How would you go about constructing your budget and allocating money to the other vice presidents?

Vice President of Recruitment

1. Define the qualities and attributes that you believe a SigEp potential new member should possess to receive membership?
2. Explain your recruitment strategy for the upcoming year. Discuss how you will use the chapter in maximizing recruitment efforts.
3. You are asked to put on your best recruitment event. What is the event? Why did you choose that event? How will it help us as an organization?

Vice President of Member Development

1. How and why is SigEp different when it comes to our member development?
2. What is the role and purpose of mentoring in the Balanced Man Program?
3. How do you plan to foster a culture of single-tiered membership?

Vice President of Communications

1. What is the responsibility of the Vice President of Communications and how will you handle these responsibilities?
2. How do you plan on promoting SigEp in the community to increase our exposure?
3. What are some of the best ways on campus to market our events?

Chaplain and Standards Board

1. Please explain, as concisely as possible, a moment in your life where you had to make a tough decision regarding a friendship, relationship or general life experience that you feel has strengthened you or prepared you to serve this Fraternity as Chaplain / Standards Board.
2. What do you feel is your greatest personal attribute that you can bring to the position of Chaplain / Standards Board, and how do you plan to use that to help the brothers in this Fraternity?
3. The Chaplain / Standards Board should stand as the moral compass of the chapter, someone that guides others to do what is right through action. How do you feel that you will be able to accomplish this task?
4. Have you had any positions in the past (within or outside of the Fraternity) that deal with holding your peers accountable?

APPENDIX C

OUTGOING OFFICER WORKSHEET

INSTRUCTIONS

Please carefully consider and thoughtfully respond to the questions in the sections below. Feel free to type these answers in a separate document.

REFLECTING ON MY TERM

1. What I liked most about my position ...
2. What I liked least about my position ...
3. What could I have done to make the experience better?
4. What were my goals and priorities when I began this position? Where do they stand now?
5. The top three obstacles to performing my position responsibilities were ...
6. The top three people or resources that supported me in my position were ...
7. The top three things I wish I'd know before I took officer were ...
8. What skills did I develop in this position that I will use in other leadership positions and my career after college?

LOOKING FORWARD

1. If you had 60 more days in this position, on what would you focus?
2. What problems or areas of operation will require the most attention within the next 60 days?
Next year?
3. What should be done immediately in the next 30 days?