

SigEp



BALANCED MAN PROGRAM (BMP) Facilitator Guide



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(NAME)

(CHAPTER)

Program Schedule

This is a general schedule for all programs. Session locations will be listed in the program specific schedule available at check-in on-site.

| Friday | |
|--|--------------------|
| <i>Session</i> | <i>Time</i> |
| Carlson kick-off <i>(For all undergraduates, regardless of track)</i> | 8:00 -- 10:00 p.m. |
| Undergraduate breakout tracks | 10:00 – 10:30 p.m. |

| Saturday | |
|--|--------------------|
| <i>Session</i> | <i>Time</i> |
| Chapter excellence breakfast | 8:00 - 9:00 a.m. |
| Undergraduate breakout tracks | 9:00 - 11:50 a.m. |
| <i>Between 10:00 - 10:45 a.m., please give your group a 10 min. break. Snacks will be available in the pre-function area.</i> | |
| Awards luncheon and presentation | Noon - 1:45 p.m. |
| <i>Member safety presentation for president and programming tracks</i> | 1:45 – 3:00 p.m. |
| Undergraduate breakout tracks | 1:45 - 6:50 p.m. |
| <i>Between 4:00 - 4:45 p.m., please give your group a 10 min. break. Snacks will be available in the pre-function area.</i> | |
| Closing awards banquet | 7:00 - 9:30 p.m. |
| Alumni and volunteer appreciation reception | 9:30 - 10:30 p.m. |

Table of Contents

| <u>Session</u> | <u>Time Allotted</u> | <u>Should Take Place</u> |
|--|-----------------------------|---------------------------------|
| Program preparation and overview | Pre-program | Prior to arrival |
| Introductions, overview and paradigm setting | 30 minutes | Friday, 10:00 – 10:30 p.m. |
| Session: Responsibilities of the Development Committee and Engaging with External Stakeholders | 60 minutes | Saturday, 9:00am -- 10:00 a.m. |
| BMP Framework | 10 minutes | Saturday, 10:00 - 10:10 a.m. |
| BMP Overview | 1 hour, 20 minutes | Saturday, 10:10 - 11:40 a.m. |
| <i>Break (snacks available in pre-function area)</i> | 10 minutes | Saturday, 10:30 - 10:40 a.m. |
| Lunch | 1 hour, 45 minutes | Saturday, Noon – 1:45 p.m. |
| Articulating the BMP | 1 hour, 10 minutes | Saturday, 1:45 - 2:55 a.m. |
| BMP App Training | 1 hour | Saturday, 2:55pm - 3:55 p.m. |
| Building and Coordinating Challenges in the BMP App | 1 hour, 10 minutes | Saturday, 3:55 - 5:05 p.m. |
| <i>Break (snacks available in pre-function area)</i> | 10 minutes | Saturday, 4:00 - 4:10 p.m. |
| Frequently Asked Questions | 1 hour | Saturday, 5:05 - 6:05 p.m. |
| Action planning | 40 minutes | Saturday, : 6:05 - 6:45 p.m. |
| Wrap-up | 5 minutes | Saturday, 6:45 - 6:50 p.m. |

Learning Outcomes

The Carlson Leadership Academy exists to prepare officers and chapter leaders to elevate their chapters and perform the duties of their role to foster an ideal SigEp experience that promotes a safe and developmental chapter experience.

As a result of participating in the Balanced Man Program track at the Carlson Leadership Academy, participants will:

- **Have a complete understanding of officer job descriptions and responsibilities.**
 - Measurable action: Feel energized to improve their chapter's operations and Balanced Man Program.
- **Understand how they can assess and build their skills as an organizational leader on the topics of:**
 - Strategic thinking and planning.
 - Critical assessment.
 - Development of an action plan.
 - Managing a team.
 - Building a coalition of people to help achieve goals.
- **Learn best practices in chapter operations in relation to their position.**
 - Measurable action: Understand how to articulate the BMP to various stakeholders.
 - Measurable action: Determine how to plan, implement, and manage BMP challenges.
 - Measurable action: Have an increased understanding of how to delegate to the member development committee.
 - Measurable action: Have an increased likelihood to follow through on goals for their position and chapter.
- **Become more aware of resources provided by volunteers and the Headquarters staff.**
 - Measurable action: Utilize resources provided by volunteers and the Headquarters staff to achieve goals while in office.
 - Measurable action: Have an increased pride in SigEp because of the people they met and the things they have learned.

Session: Introductions, overview and paradigm setting

| | |
|---------------------------------|---|
| Time: | 30 minutes |
| Purpose: | <ul style="list-style-type: none"> ● Introduce participants and facilitators. ● Provide an overview of the program and position tracks. |
| Session Objectives: | <ul style="list-style-type: none"> ● Participants will form relationships with facilitators and other participants. ● Participants will understand the session plan and how they can grow through the weekend at Carlson. |
| Materials and Equipment: | <ul style="list-style-type: none"> ● Flip charts. ● Post-it notes. ● Masking tape. ● Participant guides. |
| Session Outline: | <ul style="list-style-type: none"> ● Introductions (15 minutes). ● Program Overview (10 minutes). ● Wrap-up (5 minutes). |
| Pre-Session Prep: | <ul style="list-style-type: none"> ● Review session curriculum to ensure you have a thorough understanding. |

Introductions (15 minutes)

- Facilitator Introductions (5 minutes)
 - Facilitators will introduce themselves and cover the following items:
 - Who are you?
 - What do you do professionally?
 - Undergraduate institution?
 - Where do you volunteer? Or what is your involvement with SigEp?
 - Why are Carlson and this session important to you?
- Participant introductions (10 minutes)
 - **Facilitator note (optional):** *If you have a favorite name game or ice breaker, please feel free to facilitate it here. It is highly encouraged to use your own ice breaker.*
 - A big part of Carlson is networking and participants should start now. Have participants pair up with another participant and discuss what their chapter does well with development. Participants can then introduce their partners to the group.

Program Overview (10 minutes)

- Provide an overview of the program including the overall program schedule and the specific track schedule.
 - While we will cover some of the basics, most of our time will be spent covering challenges they will face in their positions.
 - Explain that the success of this track depends on them to be prepared (more on this later when we get to SMART goals) and engaged.
- Walk participants through their materials and explain how they will use them throughout the session.
 - Make sure you highlight that the officer guide provides a comprehensive look at how to succeed at their position.
- After they understand what will be covered in this track, lead a group discussion on their expectations for their session. Ask the group these questions and record their answers on a flip chart.
 - What do you want to gain by tomorrow night?
 - What topics do you want to make sure we cover?
- Create a "parking lot" flipchart and hang it in the back of the room. Explain that if questions come up that aren't directly related to the topic at hand, we'll put them in the "parking lot" and revisit them later. Let them know they should feel free to add to this list as ideas come to their mind.

Wrap-up (5 minutes)

- As a facilitator, share your favorite memory from Carlson and why you personally believe it was beneficial to your undergraduate experience to get the group excited for tomorrow.
- Ask the participants to share their biggest takeaways from tonight's session. Also capture any lightbulb moments, if there were any.

Session: Responsibilities of the Development Committee and Engaging with External Stakeholders

| | |
|--------------------------|--|
| Time: | 60 minutes |
| Purpose: | <ul style="list-style-type: none"> ● Provide an overview of the Development Committee job responsibilities. ● Discuss engaging with external stakeholders. ● Understand difference between coordinate and facilitate. |
| Session Objectives: | <ul style="list-style-type: none"> ● Participants will understand each of the responsibilities of their role. |
| Materials and Equipment: | <ul style="list-style-type: none"> ● Flip charts. ● Post-it notes. ● Masking tape. ● Participant guides. ● PowerPoint slides. ● A/V equipment. |
| Session Outline: | <ul style="list-style-type: none"> ● Responsibilities of the Development Committee (10 minutes) ● External Stakeholders (25 minutes) ● Coordinate v facilitate (25 minutes) |
| Pre-Session Prep: | <ul style="list-style-type: none"> ● Prepare any necessary flipchart content. ● Ensure all A/V equipment is properly functioning. ● Review session content and pages used in the participant guide. |

Responsibilities of the Development Committee (10 minutes)

- **Facilitator's Note:** Have a flip chart prepared to discuss and capture their thoughts - make sure you're recording these on flipchart.
- Lead them to the ultimate list that's in their officer guide.
- "You all stepped up and took this job under some pretense of what you expected the position to be like. You had an idea of what the roles and responsibilities of the position would be. Let's outline what the five main responsibilities of the development committee are."
- Ideally, the group arrives at some version of the points below:
 - Responsible for the development and growth of members of the chapter

- Members grow throughout their time in the chapter because of the BMP. Without your guidance, the BMP will not be successful and members won't grow as much as they could have.
 - Evaluate and improve the challenges
 - The challenges should be evaluated every year to ensure that they remain relevant and engaging.
 - Coordinate with external stakeholders
 - It is vital that some challenge meetings are led by outside experts. The development committee is responsible for finding these experts and communicating with them.
 - Hold brothers accountable for completing challenges
 - The development committee is largely in charge of the challenges and all brothers in them. They must work with the standards board to ensure that brothers are completing the challenges on time and attending all programming.
 - Implement the Balanced Man Program through the BMP app
 - Provide a relevant and easy to understand experience for all chapter members.

External Engagement (25 minutes) (Slide 2)

- Most of the participants will be coordinators. As coordinators, they will have to interact with external stakeholders. Examples include university administrators and volunteers.
- A lot of undergraduates are hesitant to approach these stakeholders and the chapter's BMP suffers because of it.
- This session will go over best practices for engaging external stakeholders and following through.

Initial Contact (Slide 3)

- Best practices include:
 - Initial contact should be made at least three weeks in advance of an event. These are busy individuals and coordinators need to respect their time.
 - Set up an in-person meeting, when possible, to go over logistics and desired outcomes of the program.
 - All logistics (time, place, etc) for the program should be finalized two weeks in advance.
- Some participants will feel uncomfortable approaching stakeholders because they fear rejection. Hesitation may come from:
 - The thought that administrators or faculty won't work with fraternities.
 - Many faculty and administrators are willing to work with fraternities if the right opportunity presents itself.

- Align the meeting w/ the administrator's passion or expertise and they are likely to help.
- Powerful and important alumni don't want to be bothered by undergraduates.
 - Alumni are willing to help out their chapters. Most of them have had great chapter experiences and want to give back, even if they haven't in the past.
- Sometimes, all it takes is an ask to get a great volunteer involved. The worst that can happen is the external stakeholder says no. Best case scenario- the chapter has a great facilitator and advocate.

Preparing for the meeting (Slide 4)

- Inform the whole chapter. This event does not need to be closed off to particular chapter members-- it should be open to everyone.
- Ensure that the facilitator feels comfortable with the topic. If possible, create a deck of pre-made slides that they can edit to customize their presentation.
- Make sure the house/ chapter space is clean. First impressions are everything and a messy facility will not make a good impression.

Following-up (Slide 5)

- Write a thank you note. Handwritten thank you notes go a long way because people don't write them anymore. This is one last way to make a great impression.
- Invite them to future chapter events. If the chapter is hosting interesting events in the future, invite the external facilitators to keep them engaged.

Coordinate v Facilitate (25 minutes)

- As many of the participants will likely be challenge coordinators, it is important to have the discussion about what it means to be a coordinator.
- Ask how many are familiar with the role of a head football coach? A head coach's job is to organize all of the elements of the team to make sure the team is successful.
- Does a head coach:
 - Recruit every player by themselves?
 - Call all offensive and defensive plays?
 - Schedule every game?
 - No-- they find the best person to fulfill those duties.
- Head coaches are focused on managing the game plan, details and logistics and ensuring all intended plans are fulfilled.
- Ask the group how their role as a challenge coordinator or member of the development committee is similar to a head coach.
- **Facilitator note:** *Ensure that participants understand that they are a coordinator of a challenge, not a facilitator or content expert. Like a head coach, challenge coordinators manage the schedule, details and logistics to ensure all challenge purposes and learning outcomes are achieved.*

- As a coordinator, participants are not expected to be knowledgeable in every topic in a challenge. They do need to be knowledgeable and skillful in identifying and engaging content experts. If they are a content expert in an area (i.e. SigEp and chapter information), they can serve as a facilitator or at least assist as a facilitator.
- Divide participants into three groups. Within their group they should determine their role in the situation (coordinate vs. facilitate).
- **Give groups 10 minutes to go through and discuss each of the scenarios on page 3 in their participant guide.** Groups will address the following scenarios:
 - Scenario 1: You currently serve as the Phi Challenge Coordinator. Within your chapter's Phi Challenge programming, you should be holding a meeting that focuses on cultural and spiritual awareness. Based on the Phi Challenge Guide, this meeting should be a discussion and activity. Address the following questions about this scenario:
 - Who should lead this meeting?
 - Are they a credible content expert? Why?
 - Will they provide an engaging experience for attendees? What role do you play in organizing this meeting?
 - Scenario 2: You currently serve as the Epsilon Challenge Coordinator. Based on your chapter's Epsilon Challenge programming, the last meeting in this challenge includes challenge reflection and preparation for the Brother Mentor Rite of Passage. Address the following questions about this scenario:
 - Who should lead this meeting?
 - Are they a credible content expert? Why?
 - Will they provide an engaging experience for attendees? What role do you play in organizing this meeting?
 - Scenario 3: You currently serve as the Sigma Challenge Coordinator. Based on your chapter's Sigma Challenge programming, you should be holding a meeting to focus on mental health practice and available mental health resources on campus to assist students. Address the following questions about this scenario:
 - Who should lead this meeting?
 - Are they a credible content expert? Why?
 - Will they provide an engaging experience for attendees? What role do you play in organizing this meeting?
- Debrief the case studies with the following questions:
 - Why did we complete these case scenarios?
 - What can we take back to our chapter from this activity?
 - What role do we play as challenge coordinators in organizing meetings?
 - What are some of the topics that challenge coordinators could serve as facilitators for meetings?

- Explain that now that participants have practiced identifying when to include a content expert as a facilitator, tomorrow's sessions will focus on how to articulate the BMP to engage content experts.

Session: BMP Framework

Session Overview (5 minutes)

- Now that we understand our roles and engaging with external stakeholders, we will focus on successful programming and implementation of the BMP and BMP app. **(Slide 6)**
 - Explain that most of today will focus on two very important things:
 - Understanding all of the main program elements of the Balanced Man Program, and
 - Tackling the tough issues they will face through experiential learning.

BMP framework overview (5 minutes)

- Provide an overview of the BMP framework. Some of this may be review for you, but it's essential to build a foundation for good member development." **(Slide 7)**
- The Balanced Man Program Framework. **(Slide 8)**
 - **Explain:** The Balanced Man Program has a reputation for being complex and difficult to implement. This is not the case if you understand the program framework and how each piece fits together to create the ultimate undergraduate experience. The diagram below outlines the Balanced Man Program at its most basic level outlined along "4 Ps."
 - Explain that this will guide our time and that we will discuss each in the framework.
 - Before moving to the next slide, ask the group the question: "Now that we've looked back at the framework, let's answer the basic question: Why is the BMP valuable?" **(Slide 9)**
 - Have a few participants answer the question before providing the answers.
- Why is the BMP valuable? **(Slide 10)**
 - Creates positive chapter environment.
 - Provides a continuous development experience. Teaches the value of accountability.
 - Provides quality mentor support.
 - Develops a deeper Ritual understanding.
 - **Facilitator's Note:** Participants likely won't offer this last one on their own. It will take prompting.
- Remind participants to remember these benefits as we go throughout the day.
- **Session Format (Slide 11)**
 - Use the framework as a guide – We will walk through each of the "4 Ps" in order.
 - Discussion and experience based – To be successful everyone needs to be engaged, and willing to learn and help teach one another.

Session: BMP Overview

| | |
|---------------------------------|--|
| Time: | 1 hour, 20 minutes total |
| Purpose: | <ul style="list-style-type: none"> ● Provide an overview of each section of the BMP framework. |
| Session Objectives: | <ul style="list-style-type: none"> ● Participants will understand each area of the Philosophy, People, Process, and Programming of the BMP. |
| Materials and Equipment: | <ul style="list-style-type: none"> ● Flip charts. ● Post-it notes. ● Masking tape. ● Participant guides. ● PowerPoint slides. ● A/V equipment. |
| Session Outline: | <ul style="list-style-type: none"> ● Philosophy (15 minutes). ● People (15 minutes) ● Process (20 minutes) ● Programming (25 minutes) ● BMP Overview Wrap-up (5 minutes) |
| Pre-Session Prep: | <ul style="list-style-type: none"> ● Prepare any necessary flipchart content. ● Ensure all A/V equipment is properly functioning. ● Review session content and pages used in the participant guide. |

Philosophy (15 minutes)

- **Introduction (10 minutes)**

- View the Simon Sinek TED Talk "Start with Why" and discuss (**Slide 12**).
 - Start at 1:30; End at 4:45
 - https://www.youtube.com/watch?v=u4ZoJKF_VuA
- *Facilitator Note: The intended outcome is that participants understand the value of starting with the purpose for doing something.*
 - Ask the group: how does this connect to the philosophy of the BMP?
 - "Everyone knows what they do, some know how they do it, and very few people know why they do what they do. This explains why some organizations are able to inspire and others are not."
 - "People don't buy what you do, people buy why you do it."
 - Talk about how this plays into getting chapter members bought into what you do with the BMP.
 - The BMP is SigEp's product. The philosophy is why we do it.
 - Without buy-in to the philosophy, members won't do the BMP.

- History of the philosophical tenets **(Slide 13)**
 - The philosophical tenets came from the top 10 percent of our chapters at the time of the creation of the BMP and are rooted in our Founder's mission.
- BMP Framework: Philosophy **(Slide 14)**
 - What are the five philosophical tenets?
 - Why is philosophy important?

Overview (5 minutes) (Slide 15)

- Walk through each of the philosophical tenets and ask the group:
 - Explain each tenet in your own words.
 - Why is this included in the "why" for the BMP?
 - Equal Rights and Responsibilities. **(Slide 16)**
 - Continuous Development. **(Slide 17)**
 - Accountability. **(Slide 18)**
 - Living the Ritual. **(Slide 19)**
 - Mentoring. **(Slide 20)**

***Facilitator Note:** The group should already have a good understanding of the philosophy. Lean on them to explain the content. Ensure that you do not spend too much time on these. You will have the opportunity to provide further clarification to individuals throughout the activities later in the day. Also, please note that there are pages in the participant guide for attendees to jot down notes on each of the 4 "P's" (pages 4-7 in participant guide.)*

People (15 minutes)

Quick Review (Slide 21)

BMP Framework: People

- Note that we will not be spending a lot of time on the "people" portion of the BMP during our session. The reasons being: overall, the roles are relatively straight-forward, the BMP guide provides in-depth information on each position, and we spent a good amount of time on the "people" last night.
- Walk through each role
 - *Facilitator Note: Participants can use either the BMP Guide or VPMD Officer guide to find answer quickly.*
 - VP of Member Development **(Slide 22)**: This key chapter role needs to be a strong leader with skills in delegation, management and good judgement. Ask the group: What are his main roles? What are some of his key responsibilities?
 - Development Committee **(Slide 23)**: Made up of challenge coordinators, Sound Mind and Sound Body Chairmen. Note that the number of coordinators per challenge can vary depending on the size of the chapter.

- Standards Board (**Slide 24**): Their main roles are holding members accountable for their development and carrying out Rites of Passages/ Rituals.
- Volunteers (**Slide 25**): Our local supporters who work with and mentor undergraduate leaders... including the balanced man steward, challenge coordinator mentors, and the faculty fellow.
- Mentors (**Slide 26**): These are mentors within the BMP and different from volunteers. These roles include new member mentors, chapter mentors, and community mentors.
- Ask participants to raise their hands if they have:
 - New member mentors?
 - Chapter mentors/ big brothers?
 - Community/ career mentors?
 - Defined roles for each of these mentors?
- Review structure of mentoring program (**Slide 27**)
 - Discussion on the purpose of each mentor role and the benefits that the mentors can bring.
 - Examples of benefits include:
 - New member mentors: Help new members feel welcome, improve new member GPA, improve retention of new members, increase engagement of older brothers serving as mentors.
 - Chapter mentors/ big brothers: Build lifelong relationships that extend beyond college, create a network of support between older and younger members.
 - Community/ career mentors: Provide valuable insights and experience that another current college student couldn't, provide opportunity for alumni to engage with the local chapter in a positive way, network and support transition to the workforce.

Activity-- Creating Mentor Programs (10 minutes) (Slide 28)

- Have participants split into 3 groups. If the groups are too large, you may have to create additional groups and have multiple groups create programs for a type of mentoring program.
 - Assign each group one of the mentoring roles and give them flipchart paper and markers.
 - Have each group pick a recorder. Writing needs to be neat because these will be presented.
 - Have each group work together to answer these questions on their flipchart. Facilitator should leave slide with questions up on PowerPoint.

- What type of person should serve as this mentor? What qualities should they have? What are the expectations of the mentor?
 - What are the expectations of the mentee?
 - What are some suggested activities that the mentor and mentee can do together?
- After each group finishes, have them present to the group. Allow others to give feedback and have them add to their chart as they make suggestions.
- At the end, hammer home that participants can use this material to create mentor programs at their chapter. Hang flip charts in the back of the room and encourage participants to take pictures with their cell phones.

Process (20 minutes) (Slide 29)

- Introduce the process as the "how" and note that it aligns directly with the philosophy. The five processes of the program embody how the philosophy is executed on a day-to-day basis. **(Slides 30-31)**
- Walk through each of the components of the process using the slides. This is A LOT of information so do not be afraid to move quickly. The goal is to expose participants to this information once. Remind them that everything that is covered in the *Balanced Man Program Guide*.
 - Single-tiered membership; no pledging, no hazing **(Slides 32-33)**
 - Facilitator Note: Put the definition of hazing (or a bulleted definition) on a flipchart and keep it at the front of the room for the remainder of the program.
 - As participants develop challenges later in the program, remind them of this definition. If they have questions, about if a meeting or activity is hazing, have them compare it to the definition of hazing posted in the front of the room. Simply ask "is it hazing?" and compare the definition with the proposed meeting or activity.
 - Self paced challenges with defined minimum and maximum timeframes **(Slides 34-36)**
 - Membership lapsing **(Slide 37)**
 - *Facilitator's Note: Most participants likely won't know what membership lapsing is or will not have it implemented at their chapter. Explaining the benefits of membership lapsing now will help participants later in the track.*
 - Benefits include:
 - Older members are engaged.

- Everyone committed to continuous development and they aren't following through on their commitment.
- Have to earn your letters everyday. It's not just a one/two year thing.
- Provides an avenue to keep the typically 'uninvolved' members accountable.
- Ritual experience through rites of passage **(Slide 38)**
- Formal/ emphasized mentoring program **(Slide 39)**
 - This was already covered in the last section
- **Facilitator Note:** *You may have to explain these concepts to participants that are unfamiliar. Don't be afraid to take time to answer those questions during this session. Rely on participants with a working knowledge of the philosophy and process to drive the session forward.*
- Wrap up process: questions, comments, takeaways **(Slide 40)**

Programming (25 minutes) (Slide 41)

- Why is programming last? (If necessary, remind them to think back to the "golden circle" that was mentioned during the "Start with Why" video... it's the "what" of the BMP)
- Development themes (5 minutes) **(Slide 42-43)**
 - Areas of Development:
 - SigEp
 - Leadership
 - Professional
 - Physical Health and Wellness
 - Intellectual
 - Sub-topic areas within each area of development **(Slide 44)**. Categorizes programming within each area of development. Each challenge should have programming from each area of development. Every element of programming (meetings and activities) should have an associated development theme.
 - Example: Within the leadership area of development, a chapter could hold a meeting about how to participate in service and service learning. This meeting would fall under the area of leadership and fulfill the development area of service.
- Breakdown of development per challenge (10 minutes)
 - The breakdown of development areas per challenge is different. For example, the amount of SigEp development in the Sigma Challenge is more than the amount of SigEp development in the Brother Mentor Challenge.
 - Ask participants to breakdown the development areas for each challenge. The breakdowns should come close to the following:

- **Facilitator's Note:** *There is no hard and fast answer to this breakdown. This should be a discussion between participants.*
 - Sigma Challenge
 - SigEp: 35%
 - Leadership: 10%
 - Professional: 10%
 - Personal Health and Wellness: 20%
 - Intellectual: 25%
 - Phi Challenge
 - SigEp: 15%
 - Leadership: 20%
 - Professional: 15%
 - Personal Health and Wellness: 25%
 - Intellectual: 25%
 - Epsilon Challenge
 - SigEp: 10%
 - Leadership: 30%
 - Professional: 30%
 - Personal Health and Wellness: 15%
 - Intellectual: 15%
 - Brother Mentor Challenge
 - SigEp: 10%
 - Leadership: 25%
 - Professional: 35%
 - Personal Health and Wellness: 10%
 - Intellectual: 20%
- Resources and Program Structure (10 minutes)
 - This section will walk through how programming events fit into the larger scheme of challenges and discuss best practices for planning meetings and activities for BMP programming.
 - All challenges should have: **(Slide 45)**
 - Purpose: High level overview of what the challenge should accomplish.
 - Learning outcomes: Specific things that each challenge participant should come away with after completing the challenge.
 - Expectations: Minimum requirements and standards for each member in the challenge.
 - To accomplish challenges, members should complete: **(Slide 46)**

- Meetings: These are group gatherings that should fulfill the learning outcomes of the challenge. Content experts should be engaged as facilitators.
 - Activities: These are requirements that members should complete during the challenge but are not necessarily a part of a specific meeting. They should be completed by each participant within the given timeframe for a challenge.
- **Slide 47:** provides an overview of the purpose of each challenge. Challenge programming should ultimately strive to fulfill the intended outcomes.
- **Slide 48:** provides an overview of the intended learning outcomes. The example shown is for the Phi Challenge, but each challenge will have a designated set of learning outcomes. Learning outcomes can be found in the challenge templates and on the BMP App.
- Meetings and activities should also have a consistent structure to ensure continuity and quality programming. **(Slide 49-52)**
- Each meeting should be organized ahead of time and should take into consideration the following:
 - Theme.
 - Learning outcomes.
 - Session outline/ agenda.
 - Facilitator.
 - Any necessary materials.
- Programming should be coordinated and planned through the BMP app.

BMP Overview Wrap-up (5 minutes)

BMP Resources

- Remind participants that resources can be found on the SigEp website on the BMP implementation page or at bmpapp.com. **(Slide 53)** Also remind them that the materials they received at Carlson (BMP Guide and Participant's Guide) should be used throughout their time in their position.
- At this point, let participants know that we have completed the content heavy portion of the morning and they will be problem solving and generating ideas through activities to address issues going into the afternoon.

What did you learn? **(Slide 54)**

- Have participants record two things they took away from this BMP overview session. Have them record these thoughts on two sticky notes and place them onto pre-made flipcharts. Have participants share their takeaways.

Session: Articulating the BMP

| | |
|---------------------------------|---|
| Time: | 1 hour, 10 minutes total |
| Purpose: | <ul style="list-style-type: none"> ● Develop skills necessary to effectively and clearly articulate the BMP to external audiences. |
| Session Objectives: | <ul style="list-style-type: none"> ● Participants will practice articulating what the BMP is and its benefits to external audiences. ● Participants will develop skills in articulating the BMP as a strategy for coordinating strong challenges. |
| Materials and Equipment: | <ul style="list-style-type: none"> ● Flip charts. ● Post-it notes. ● Masking tape. ● Participant guides. |
| Session Outline: | <ul style="list-style-type: none"> ● Introduction and Issue Description (5 minutes). ● Perfect Pitch (15 minutes) ● Articulating the BMP (45 minutes) ● Wrap-up (5 minutes) |
| Pre-Session Prep: | <ul style="list-style-type: none"> ● None |

Introduction and Issue Description (5 minutes)

- The BMP was the first fraternity development program of its kind. While it has been around for over 20 years, undergraduates and volunteers still have a hard time articulating what it is and its impact. For this session, we will be focusing on how to articulate the BMP.
- If the BMP is well articulated, the following will occur:
 - All stakeholders of the chapter will understand the BMP and how it serves the SigEp experience.
 - The BMP is supported by all chapter stakeholders.
- However, most stakeholders do not understand the BMP because of a lack of BMP why, knowledge or buy-in.
- This issue impact all of the following stakeholders:
 - Chapter members.
 - Alumni and volunteers.
 - Campus professionals.
 - Potential new members.
 - The member development committee.
- Explain that for the rest of the session, they will be learning how to effectively address the issue.

Pitch Perfect (15 minutes)

- Ask how many participants have been asked to explain the BMP to someone other than a fellow chapter brother. Ask how many have struggled to provide a concise, informative, but comprehensive explanation.
- Explain that often times we are put on the spot in having to explain the BMP. It is important that we are prepared to explain what the BMP is.
- Ask the group how many have heard of an elevator pitch or given an elevator pitch?
- Explain that an elevator pitch is a quick, concise, informative explanation about a topic. It gets its name from the idea that you should be able to provide an informative and concise explanation in the time it takes you to ride an elevator with someone.
- It is a tool often used in networking and job searching, but can be applied to other concepts.
- Explain that American Express developed "The 4 Laws to A Perfect Elevator Pitch" While American Express wrote with the focus of engaging financial investors, we can use these laws in a similar way as our audiences and stakeholders are investing in the BMP in some capacity.
- On a flipchart, write American Express' 4 Laws to A Perfect Pitch:
 - Short.
 - Easy to Understand.
 - Greed Inducing.
 - Irrefutable.
- **Facilitator note: Participants can reference this on page 8 of their participant guide.**
- Discuss each law a bit further:
 - Short–Must convey the basic idea in a small time frame.
 - Easy to Understand– Shouldn't confuse the listener, needs to be clear.
 - Greed Inducing– People will want to invest time or money to whatever you're pitching. People should want to be a part of whatever is being pitched.
 - Irrefutable– Listeners should have little to no questions after your pitch.They should simply just say "That makes sense."
- Explain that businesses use the concept to engage investors and we will be doing the same thing to engage stakeholders for the BMP.
- Have a few participants practice an elevator pitch on something other than the BMP in front of the whole group. Proposed topics include:
 - Selling themselves for a job.
 - Selling their university to a potential student.
 - Convincing someone to move to their hometown.

Articulating the BMP (45 minutes)

- Divide participants into small groups of 4-5 people. Assign each group an audience they will focus on:
 - Potential new members.
 - New members.
 - Campus professionals.
 - Faculty members.
 - Other Greek organizations on their campus.
 - Non-Greek student.
 - Parents and family members.
 - Volunteers.
 - Alumni who have been disconnected from SigEp for a while/ might not understand what the BMP is.
- Utilizing the BMP One-Pager on page 2 in their participant guide, groups will focus on specific messaging on how they would teach this audience about the BMP. They should turn to their participant guide (page 8) to complete part 1 of Articulating the BMP worksheet.
- Utilizing the BMP app to visually show the flow of a member through the BMP from challenge to challenge and what activities and meetings they need to attend to complete the challenge.
- Give groups 15 minutes to develop a strategy for how they would teach this audience the BMP. Things for the groups to consider:
 - What does their audience care about?
 - Is there a portion of the BMP that their audience would particularly relate to?
 - How does their audience interact with the BMP?
 - What pre-existing thoughts does their audience potentially have about the BMP or fraternities in general?
- Have each group give a 1-minute explanation of their plan to teach this audience about the BMP. Have a member of each group give their pitch.
- As a large group, focus on what will be necessary to utilize skills in articulating the BMP to engage a content expert as a facilitator.
 - Feedback should focus on clarity of the message and how convincing (greet inducing) it is.
- What is the necessary information that a content expert will need to know?
- What are the steps to articulating the BMP to a content expert?
- ***Facilitator's Note:*** *Being prepared will be key in getting a content expert to facilitate with the chapter. Be sure to emphasize the importance of preparedness.*

Wrap-up (5 minutes)

- Why is it important to understand how to articulate the BMP?
- What are the benefits of being able to articulate the BMP to some of these audiences?
 - ***Facilitator's Note:*** *Be sure to reinforce that this skill is necessary when it comes to coordinating and planning for challenge meetings as you will be working with outside facilitators who will need to learn about the BMP.*
- How does articulating the BMP impact your role?
- What benefit does this new skill provide in your role?

Session: BMP App Training

| | |
|---------------------------------|---|
| Time: | 1 hour |
| Purpose: | <ul style="list-style-type: none"> ● Ensure that participants are able to use and explain the BMP App. |
| Session Objectives: | <ul style="list-style-type: none"> ● Participants will have a working knowledge of how to use the BMP App. ● Participants will create a project plan for implementing the BMP App at their chapter. |
| Materials and Equipment: | <ul style="list-style-type: none"> ● Participant laptops ● A/V Equipment |
| Session Outline: | <ul style="list-style-type: none"> ● Using the BMP App (55 hour) ● Wrap-up (5 minutes) |
| Pre-Session Prep: | <ul style="list-style-type: none"> ● Ensure participants bring their laptops and participant guides. |

Using the BMP App (55 minutes)

- **Facilitator's Note:** The section below walks through an overview of the content that will be delivered by a Headquarters staff member.
- After years of development, the app debuted in Spring 2017. During this session, we will be teaching you, how development committees can leverage this powerful new tool, to help you better implement the BMP app. Every feature of the app is designed to alleviate the administrative burden of your role, so you can better focus on making the content of your program more engaging, more fun and more impactful for you chapter brothers.
- Our goal is to give you hands-on experience and training in the app this session, so you can begin incorporating it into your goal setting and strategic planning for the year.
- The headquarters staff member(s) will walk through the following presentation framework:
 - The download and login process
 - An overview of the benefits of the BMP app
 - A demo walk through of the mobile app's core features and functions
- To start, participants will log-in to the app via computer via bmpapp.com.
- Participants will get a guided tour through the app. Highlights include:
 - Home page
 - Progress chart
 - Chapter Roster
 - Community Feed
 - Challenge participants
 - Database Challenges

- Database Meetings
- Database Activities
- Following the guided tour, participants will be shown how to upload and change challenges on the app. Steps are below:
 1. Clone a database challenge.
 - a. Once a challenge is cloned, VPMDs can make edits to it.
 2. Creating database activities.
 - a. Go to Database Activities.
 - b. Click on "New Database Activity".
 - c. Fill out all of the necessary information (boxed in red) and any other pertinent information.
 3. Adding an activity to a challenge.
 - a. Go into the challenge that was created.
 - b. Scroll to the bottom to see the Database Activities section.
 - c. Click on the red plus button.
 - d. Use the magnifying glass to find the activity that was created.
 - e. Fill out the necessary information (boxed in red).
 4. Creating and adding database meetings.
 - a. Follow the same steps for an activity for meetings.
 5. Deploying a challenge.
 - a. Once a challenge is ready to be sent to the members in the challenge, click on the "Deploy" button about halfway up the challenge page.
 - b. Select a start date and select all members that are receiving a challenge.
 6. Meeting updates.
 - a. Using the meeting updates tab, VPMDs or challenge coordinators can update meetings after the challenge is deployed.
- Participants will then be encouraged to create their own challenge, activities, and meetings while Headquarters staff is there to address any bugs or questions.
 - If their VPMDs have already created a challenge, they will be encouraged to edit that challenge.
- Best practices for chapter use:
 - Take five minutes at each challenge meeting to have members update their status on the app.
 - Encourage applicants to set aside a day each week to update progress.
 - Discuss value of articulating what they've accomplished, items left to complete in their challenge and competition among challenge members
 - Have BMP app usage as a session in the Sigma Challenge

Wrap-up (5 minutes)

- Have a participant walk everyone through creating a challenge, meeting, activity, and deploying a challenge.
- The BMP App is the "how" to SigEp's "why" (back to the golden circle). Executing the app will make their jobs easier and allow them to focus on the actual programming in the BMP.
- Have participants walk through best practices for use at their local chapter.

Session: Building and Coordinating Challenges in the BMP App

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|---------------------------------|--|
| Time: | 1 hour, 10 minutes |
| Purpose: | <ul style="list-style-type: none"> ● Allow participants to practice developing meaningful meetings and challenges utilizing resources. ● Ensure that participants understand the importance of truly coordinating a challenge. |
| Session Objectives: | <ul style="list-style-type: none"> ● Participants will feel comfortable going back to their chapters and building out full challenges. ● Participants will generate creative ideas for challenge meetings and activities. ● Participants will understand how to run challenge meetings. |
| Materials and Equipment: | <ul style="list-style-type: none"> ● Flip charts. ● Calendars. ● Markers. ● Masking tape. ● Participant guides. ● Challenge templates. |
| Session Outline: | <ul style="list-style-type: none"> ● Introduction (5 minutes) ● Challenge Development (40 minutes) ● Challenge presentations (20 minutes) ● Wrap-up (5 minutes) |
| Pre-Session Prep: | <ul style="list-style-type: none"> ● Prepare any necessary flipchart content. ● Review challenge templates and databases. |

Introduction (5 minutes) (Slide 55)

- This session is meant to show participants how to build out full challenges. They will be broken into four groups (one for each challenge) and will come up with activities and meetings for that challenge.
- Recap programming from the previous session. Emphasize the following:
 - The purpose of each challenge (**Slide 56**)
 - Sigma Challenge- Adjusting and acclimating to the chapter, campus and community.
 - Phi Challenge- Growing and developing as a balanced man.
 - Epsilon Challenge- Leading and serving as a balanced man.
 - Brother Mentor Challenge- Preparing yourself and your chapter for the future.

- The different areas of development:
 - SigEp
 - Leadership
 - Professional
 - Personal Health and Wellness
 - Intellectual
- The breakdown of development area by challenge that the participants already came up with.

Challenge Development in the BMP App (40 minutes)

- Split into four groups and assign a challenge to each group.
- Each group should do the following:
 - Determine how many meetings the challenge should have.
 - Sigma Challenge-- 8 weeks, one meeting per week
 - Phi Challenge-- 12-52 weeks, one meeting every other week
 - Epsilon Challenge-- 28-80 weeks, one meeting every other week
 - Brother Mentor Challenge-- Until graduation, one meeting per month
 - Take into account breaks... for example:
 - Phi Challenge: 52 weeks - 20 weeks (for breaks) = 32 weeks
 - One meeting every other week means 16 meetings.
 - Come up with a list of meetings for the challenge.
 - Participants should keep in mind the development breakdown per challenge.
 - As participants create meetings, they should plot them on the calendar provided.
 - Encourage participants to come up with out-of-the-box meetings that would be attractive to members and accomplish the learning outcomes for the challenge.
 - Each group should build out one full meeting for their challenge in the BMP app. They should address the following:
 - Theme/ areas of development.
 - Learning outcomes.
 - Session outline/ agenda.
 - Facilitator.
 - Any necessary materials.
 - Come up with a list of potential activities for the challenge.
 - The groups should create a list of two activities per development area.
 - As mentioned in the last session, activities are not necessarily a part of meetings and need to be completed by individuals before the challenge is over.

- These activities should be built in the BMP app.
- **Participants have resources for meeting and activity development in their guide (page 12-16).**

Challenge Presentations (20 minutes)

- Each group should take five minutes to present the challenge that they created to the rest of the participants.
- Other participants should give feedback on the challenges and add any meetings or activities that are effective at their chapters.
- ***Facilitator's Note:*** ensure that the meetings and activities, especially in the Sigma Challenge, are not hazing.

Wrap-up (5 minutes)

What activities and meetings will you take back to your chapter?

- This session should allow participants to interact with each other and come up with activities or meetings to take back to their chapter.

What takeaways do you have from the challenge building process?

- Participants should walk away with the understanding that challenge building is not as complicated as it first appears.

Session: Frequently Asked Questions

| | |
|---------------------------------|---|
| Time: | 1 hour |
| Purpose: | <ul style="list-style-type: none"> ● Allow participants to feel comfortable with BMP FAQs and how to answer them. |
| Session Objectives: | <ul style="list-style-type: none"> ● Participants will have any concerns about the BMP sufficiently addressed. ● Participants will be able to answer BMP FAQs in their chapter. |
| Materials and Equipment: | <ul style="list-style-type: none"> ● Flip charts. ● Markers. ● Tape. |
| Session Outline: | <ul style="list-style-type: none"> ● Introduction (5 minutes) ● Benefits and Obstacles (25 minutes) ● Overcoming Objection Techniques (15 minutes) ● Practice (10 minutes) ● Wrap-up (5 minutes) |
| Pre-Session Prep: | <ul style="list-style-type: none"> ● Prepare flip charts. |

Introduction (5 minutes)

- Why are we discussing this?
 - After getting a few answers, drive home the following points:
 - To be successful, we must know what's going to stand in our way and how to overcome it.
 - We are always looking to improve and get closer to the ideal, but no one is there yet.
- The following FAQs will be addressed during the session:
 - Why have equal rights and responsibilities?
 - Why is continuous development throughout college necessary?
 - Why is membership lapsing necessary?
 - Why should we hold members accountable for living the Ritual?
 - How do we do year-round recruitment with the BMP?
 - **Facilitator's Note:** Many chapters see the BMP as a big obstacle to implementing year-round recruitment because people don't join with a "class." They should begin to emphasize the individual aspect of the BMP.

Benefits and Obstacles (25 minutes)

Activity:

- Split participants into two groups per FAQ (e.g. four FAQs→ eight groups) and assign each group one of the FAQs.
 - Two groups should be assigned per FAQ and given a flip chart divided into two columns. Give groups about five minutes to fill out their flip charts.
 - One group should be discussing the benefits of each FAQ (e.g. the benefits of equal rights and responsibilities) and under each column:
 - Benefits to the individual.
 - Benefits to the chapter.
 - One group should be discussing the obstacles that they may face. Under each column:
 - Obstacles to the FAQ.
 - Ways to overcome the obstacles.
- Allow each group to present their findings to the large group. Other participants should be able to contribute to the flipcharts during the presentations.
 - ***Facilitator's Note:*** *There's a corresponding worksheet on **page 17-18** in the participant guide where attendees can take notes either on their FAQ or others.*

Overcoming Objections Techniques (15 minutes)

- ***Facilitator's Note:*** *These techniques are sales techniques and can be applied to anything outside of the BMP. They are also helpful for anyone looking to pursue a career in sales.*
- Before implementing any strategy, you ALWAYS start by validating the person.
- ***Facilitator's Note:*** *Give an example of techniques 1-3 with another facilitator or with a participant. You can use an example objection related to the BMP or another objection that you're comfortable with.*
- Strategy 1- Feel, felt, found, find
 - "I understand how you feel..."
 - "I felt the same way..." or "I know someone who felt the same way..."
 - "I have found that..."
 - "You'll find that..."
 - This strategy forces you to exhibit empathy, not sympathy.
 - Serves as a basic framework and safety net.
- Strategy 2- Problem Isolation
 - Validate then...
 - If "x" wasn't a problem, do you have any other concerns?
 - The goal of this strategy is to get to the heart of the issue. Once you have isolated the problem, use the first strategy.

- Strategy 3- Getting to 'Yes'
 - People are more likely to agree if they agree to smaller things first
 - Instead of giving them an option of 'no', give people two options-- they have to say yes to one of them.
 - Example: "does a call on Tuesday or Wednesday work better for you?"
- Strategy 4- Building a coalition
 - Participants can't do things by themselves in their chapters.
 - They must find like-minded individuals in their chapters to support them.
 - Use this coalition to influence a larger portion of the chapter than just one person can influence.

Practice (10 minutes)

- Split the participants into two groups- one led by each facilitator.
- Facilitators should act as a member of the chapter that objects to one of the FAQs on the flip charts. Use the FAQs that participants already listed.
- Participants should use the strategies that you went over to overcome the objection.
 - ***Facilitator's Note:*** *It is important for you to nail the examples in the previous section to get participants active. Be prepared to prompt the group and give help.*
- Other participants should give feedback on how effective the person was at overcoming the objection.

Wrap-up (5 minutes)

- What were the main takeaways from the session?
- What FAQs will be the toughest to address?
- How can the participants apply the lessons learned in this session to their chapter?

Session: Action planning

| | |
|-----------------------------------|---|
| Time: | 40 minutes |
| Purpose: | <ul style="list-style-type: none"> ● Create or refine goals and action plans for this calendar year. ● Receive feedback on goals and action plans from their peers. |
| Session objectives: | <ul style="list-style-type: none"> ● Participants have well developed goals and corresponding action plans relevant to their position. ● Participants network with other officers to gather best practices. |
| Materials & equipment: | <ul style="list-style-type: none"> ● Flip charts. ● Masking tape. ● Participant guides. |
| Session outline: | <ul style="list-style-type: none"> ● Creating an action plan. (20 minutes) ● Action plan creation. (20 minutes) |
| Pre-session prep: | <ul style="list-style-type: none"> ● Prepare flipcharts. |

Creating an action plan (20 minutes):

- By this point, all of the participants should have their goals written and reviewed, as they should have brought them with them to Carlson. Reinforce that if they walk away without concrete and tangible goals, they haven't maximized their Carlson experience.
- Lead a discussion on what makes some goals successful and what causes other fail.
 - Have the participants reflect on goals that they've set in the past, either for themselves or their chapter that they didn't accomplish. Why didn't they accomplish their goals?
 - Remind the participants of what makes a goal SMART and the importance of having written goals.
 - A goal without a plan is nothing more than a wish. Hope is a poor strategy for success. To achieve any goal, you need to have a plan of how you're going to get there.

- Getting buy-in to your goals is not always easy, but it can be if you can articulate the clear path to achieving those goals and be open to feedback.
 - You might have excellent goals that can lead to positive change for your chapter, but if you try to tackle them alone, you will fail. Build a coalition, set expectations with them and ensure they have direction to help you tackle your goals.
 - Work the halls within the chapter, and get guys bought into your goals.
- When leading a team, you need to regularly check-in with your team members to ensure they are following up on their commitments. This follow-up will ensure the progress you expect is being made.
- With the rest of our time this afternoon, we'll be creating action plans for the participants to take back to their chapters to get feedback on, build consensus around, and ultimately implement.
- At its simplest, an action plan is just "how do I get stuff done to accomplish my goal?". The plan outlines all the steps necessary to accomplish the goal and serves a project management tool to track progress.
- The following are elements of a basic action plan which we will be using shortly. Walk participants through each aspect:
 - Deadline: when does this task need to be accomplished to stay on track?
 - Task: what exactly needs to get done?
 - Owner: who is responsible for getting this task done? Remind participants that they should not be the owner of every task. What can or should a committee member own?
 - Who is involved?: whose help is needed to complete this task? Also remind participants that this is super important to build a coalition of support. They need to be involving these individuals in the process and giving them plenty of advance notice of when they need their help and for what.

Action plan creation (20 minutes) (page 19-25):

- You're now going to have participants begin creating action plans for the goals they set. First, instruct participants to go back and review their SMART goals. Do they want to make any adjustments based on what they learned today? Do they want to create a new goal(s) based on what they learned?
- Have participants work alone on their action plans using the worksheets found in their participant guide. Announce to all of them that you will be roaming around the room to help and answer any questions that they have while they're working.
- Challenge participants to view the BMP app as a critical and efficient way to deliver each challenge to chapter members -- have them include the app as a part of their goals and goal implementation plan.
- Once they finish, have everyone find a partner to share their action plans and get feedback.

- If time allows, let several participants present their SMART goal(s) and corresponding action plan(s) to the group.
- Ask the group for their thoughts on the time they spent formulating their plans. Was this easy or pretty difficult? Did they have any big revelations? Was there something else they came across that they thought was important to include in their plan?
- Have each participant commit to the following things:
 - Share their action plans and goals with their fellow executive board members
 - Present their goals to the chapter
 - Share their goals with chapter volunteers and the Regional Director for support and accountability

Session: Track Wrap-up

| | |
|---------------------------------|---|
| Time: | 5 minutes |
| Purpose: | <ul style="list-style-type: none"> ● Wrap-up the Carlson weekend. |
| Session Objectives: | <ul style="list-style-type: none"> ● Participants will feel energized to implement topics at their chapters. |
| Materials and Equipment: | <ul style="list-style-type: none"> ● Flip charts. ● Markers. ● Tape. |
| Session Outline: | <ul style="list-style-type: none"> ● Wrap-up (10 minutes) |
| Pre-Session Prep: | <ul style="list-style-type: none"> ● None |

- Give participants time to walk around and take note of the information posted on the help wanted boards. Encourage participants to share contact information with one another, remind them to revisit their participant materials with their chapter and volunteers.
- Introduce the three keys to improving your chapter's membership experience (Slide 58):
 - Be confident– We need to be confident and able to resist negative pressure to be most effective.
 - Build a coalition– You can't do this alone.
 - Follow through– None of this matters if you do nothing.
- Leave them with some inspiring words about leaving a legacy and the impact of when it's done right (Slide 59).
 - Remind participants of the importance of their role. When they do their job correctly, what is the impact they can make?
 - As you go back to your schools where many chapters look like animal house... and there are pressures to fulfill the stereotype.
 - Remember, the BMP is the true traditional fraternity experience... thank you for making our Founder's dream a reality.
- Thank participants for attending the track and provide your contact info as an additional resource.

SigEp

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