



CHAPLAIN
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 (For all undergraduates, regardless of track)	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 am, 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

Session	Time Allotted	When should this take place in the program?
Program preparation and overview	Pre-program	Prior to arrival
Introductions and overview	30 minutes	Friday, 10:00– 10:30 p.m.
The Chaplain Role and Paradigm Setting	40 minutes	Saturday, 9:00 - 9:40 a.m.
Ritual implementation	80 minutes	Saturday, 9:40 – 11:10 p.m. <i>(take 10 min. break before 10:45 a.m. - snacks available in pre-function area)</i>
Developing and defining standards	40 minutes	Saturday, 11:10 – 11:50 a.m.
Lunch		Saturday, 12:00-1:45 p.m.
Difficult situations with HQ staff	20 minutes	Saturday, 1:45-2:05 p.m.
Enforcing standards, making unpopular decisions and navigating relationships	105 minutes	Saturday, 2:05 – 3:50 p.m.
Leveraging positive reinforcement and incentives	40 minutes	Saturday, 3:50 – 4:40p.m. <i>(take 10 min. break before 4:45 p.m. - snacks available in pre-function area)</i>
Training and managing a standards board	30 minutes	Saturday, 4:40 – 5:10 p.m.
Action planning	65 minutes	Saturday, 5:10 - 6:15 p.m.
Wrap up	35 minutes	Saturday, 6:15 – 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 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.
 - *Measurable action:* Have an increased likelihood to follow through on goals for their executive position and chapter.
- Have an increased understanding, commitment and are empowered to uphold SigEp's risk management policies and procedures.
 - *Measurable action:* Feel energized to improve their chapter's operations.
- Understand how to assess the chapter experience and execute strategic goals as a chapter leader to improve that experience.
 - *Measurable action:* Develop SMART goals and action plans related to their position.
 - *Measurable action:* Have an increased pride in SigEp because of the people they met and the things they have learned.
- 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.
- *Measurable action:* Foster strong team dynamics through organic interactions and time together.
- *Measurable action:* Feel energized to improve their chapter's operations.
- *Measurable action:* Develop SMART goals and action plans related to their position.
- Learn best practices in chapter operations in relation to their position.
 - *Measurable action:* Feel motivated to improve from awareness of successful operations through awards and recognition.
 - *Measurable action:* Have an increased likelihood to follow through on goals for their executive 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.

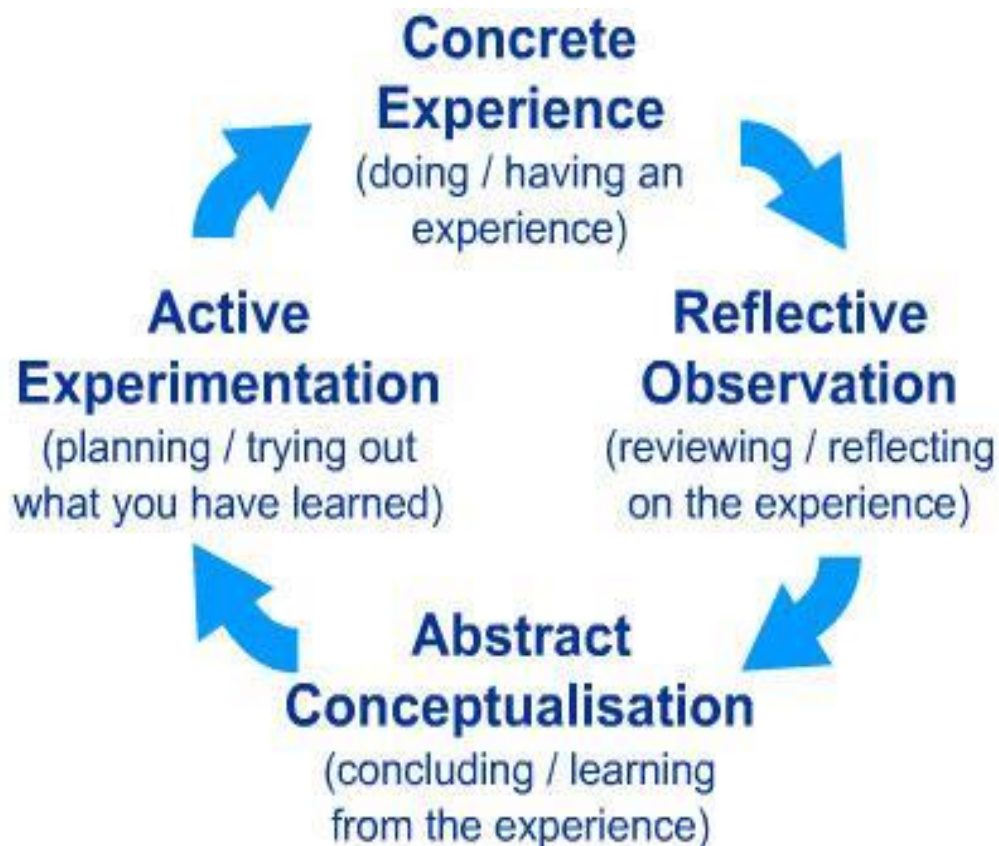
Thank you again for your involvement and the positive impact you will be making on undergraduates. Should you have any questions about the curriculum, please contact [Alex Stepanek](#) (804-971-7875).

Curricular Underpinnings

Overall, the curriculum is rooted in the concept of challenge and support to help participants reason through potential obstacles, but to do so in a safe space to practice. This is intended to highlight for participants what they don't know while helping them overcome this shortcoming.

Friday night is intended to set the paradigm for the program and discuss the importance of each officer's role. Officers should come with baseline knowledge of their role and responsibilities associated with their position. Saturday will focus on addressing issues officers will face and developing the necessary knowledge and skills to do so.

Saturday's sessions are rooted in Kolb's Experiential Learning Model to provide a more experiential learning opportunity for officers and rising leaders to gain knowledge and skills to address real issues they will face in their tenure. The curriculum guides participants through each issue as follows:



Issue Session Elements

Saturday's sessions will use the same four elements of curriculum to break down each issue the officers will be addressing:

<i>Issue overview & description</i>	<i>Application activity</i>	<i>Issue reflection & action planning</i>	<i>Reference to resources</i>
This portion guides participants to recognition of the issue, what causes the issue, who and what is affected by the issue, etc.	This is a hands-on and engaging approach to addressing the issue. This portion of the curriculum focuses on engaging participants to reason through and address the issue hands-on.	It is important to give them time to unpack the issue and start to apply the learning to their position in the chapter.	This directs participants back to resources that will help them overcome these obstacles and issues. This is primarily contents of the officer guide, but there may be additional outside resources that are applicable to addressing the given issue.

Content Sessions Structure Overview

The following are notes for the facilitator on the overall structure of the sessions and content.

The structure of the chaplain track is structured in a way that each component builds on one another and utilizes the work from the prior sessions. This is done to mirror the sequence in which officers are likely to come across these issues, to demonstrate priority and to enable as much interaction and participation as possible.

Session Format

Each session is best thought of as a phase. The content of each phase is related to an issue or set of issues that a chaplain will face during his term and an activity is paired with each to provide the opportunity for participants to gain practice working through issues. The phases/sessions will be a little bit fluid, but rest assured, there will be clear delineations that enable you to transition from one session to the next.

Group participation

Many undergraduates share in their feedback to Carlson that they wish they had more time to spend with other undergraduates to share ideas and build relationships. There are intentional times throughout the curriculum that call for group breakouts to brainstorm and share ideas. Prioritize these times and help stoke great conversation between participants. This can be the most impactful time when we take the curriculum and make it relevant to the challenges undergraduates are facing in their chapters.

Session: Introductions and overview

Time:	30 minutes total
Purpose:	Introduce participants and facilitators Provide an overview of the program and schedule
Session objectives:	Participants will have an understanding of who is in the room and be prepared for their full Saturday session in this breakout.
Materials & equipment:	Flip charts Masking tape Participant guides.
Session outline:	Introductions (15 minutes) Program overview (10 minutes) Wrap up (5 minutes)
Pre-session prep:	Review the materials focusing on the Golden Circle

Introductions (15 minutes):

- Facilitator introductions (5 minutes)
 - Facilitators will introduce themselves and cover the following items:
 - Who are you?
 - What do you do professionally? How does that relate directly to this session (if applicable)?
 - Undergraduate institution?
 - Where do you volunteer, or what is your involvement with SigEp?
 - Why are the Carlsons and this particular 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 that here.
 - Have participants get into groups of six.
 - Within these groups, have participants introduce themselves:
 - Name
 - Chapter
 - Biggest thing they're looking forward to during the Carlson program
 - What is one specific action or choice that members in your chapter take/make that you wish they didn't?

Program overview (10 minutes):

- Ask the participants the following question: Why did you all choose to spend your weekend here at Carlson?
 - To better understand your position
 - To become a better officer

- To network and get ideas from other chapters
- To be set up for success for the upcoming year
- Maybe your Regional Director or chapter volunteer wouldn't leave you alone about coming...
- Now that we know what brought you all here, let's talk about how we're going to ensure that you all get everything that you want out of this experience.
 - While we will cover some of the basics pertaining to your position, most of our time will be spent tackling tough issues that you're going to face this year. We surveyed outgoing chapter officers and asked them: "What do you wish you'd known, or been taught, prior to your time in office?", and developed the curriculum for this weekend based on what your peers and predecessors told us.
 - Highlight the materials (participant/officer guide) that they have received and explain how they will use them throughout the weekend. Don't lose this participant guide!
 - Create and set up the "parking lot" flip-chart and hang it in the back of the room. Explain that if questions come up that aren't directly relevant to the topic being addressed at that time, then you'll put them in the parking lot and revisit them later. Let them know that they should feel free to add to this list as ideas come to mind.
 - Create and set up a "lightbulb" flip chart. Explain that this should be utilized whenever the group comes to a collective realization about a new idea or exciting concept. This serves as a place to capture moments when the lightbulb goes off for the group and will be easy to garner more takeaways at the end of the weekend.
- We need to set some ground rules for the weekend to ensure that we can make the most of our time together. What expectations do you all have of us and of each other?
 - Be prepared.
 - Bring paper/your participant guide, and a pen
 - Have your goals ready to discuss
 - Have questions, and ask them
 - Be engaged.
 - While you're here, spend your time with brothers from other chapters, particularly the guys in this room holding the same position as you. Don't spend all your time with chapter brothers - you can see them at home.
 - Network with your peers and share ideas
 - Keep your cell phones away

- Contribute to the group
 - Be respectful of each other.
 - Don't be afraid to ask tough questions. We're here to ensure that you walk away ready to tackle the next year head on and we need to leave no stone unturned.
- What types of topics do you definitely want to cover this weekend? Be sure to record their answers on a flip chart, so that you may check the topics off as you go through the weekend and visually show the progress of your conversations. Examples of topics the Chaplains might want to cover are:
 - Holding brothers accountable
 - Positive reinforcements and awards for exemplary behavior
 - How to execute the Ritual
 - How to make unpopular decisions

Wrap-up (5 minutes):

- Provide an overview of what will be covered in this track (throughout the day tomorrow).
- If there are any topics they identified above that aren't covered in the curriculum, add them to your "parking lot" to revisit later.
 - Overview of the role
 - Ritual
 - Developing standards
 - Enforcing standards
 - Positive reinforcement of standards
 - Managing a standards board
- 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.
- Remind them one more time to complete their homework regarding SMART goals (they should have discussed goal setting in their all Carlson kick off).
 - Walk through the areas of goals that they will likely work to achieve, namely:
 - Standards board process/outcomes
 - Ritual scheduling/execution
 - Expectation setting/documentation
 - Ask if others have ideas of goal areas?
 - Explain that tomorrow's session relies on them having completed their SMART goals so it is imperative to have their goals complete. These need to be completed TONIGHT.

- Remind them that breakfast will start promptly at 8:00 am, to be sure to have their participant materials ready for the day, and to bring their nametags with them to breakfast. Their nametags will be scanned into breakfast - they need to ensure that they get scanned in so they are not assessed a \$25 no-show fee for missing breakfast. If they are late, they will not get scanned and will be charged.

Session: The Chaplain Role and Paradigm Setting

Time:	40 minutes total
Purpose:	Provide an overview of the position roles and responsibilities Provide an overview of the paradigms of the day
Session objectives:	Participants will have a better understanding of their role and how their responsibilities will make an impact on their chapter. Participants will begin discussing issues they will face during their tenure
Materials & equipment:	Flip charts Masking tape Participant guides.
Session outline:	Responsibilities of the Chaplain (10 minutes) Culture Change Paradigm (15 minutes) Behavior Action One-pager (10 minutes) Wrap up (5 minutes)
Pre-session prep:	Review the materials focusing on the Golden Circle

The Responsibilities of the Chaplain (10 minutes)

- Prepare a flip chart labeled "Responsibilities of the Chaplain". During the following discussion, capture their thoughts on the flipchart.
- Direct them to the list of responsibilities in their officer guide
- Ask the group: "You all ran for this job under some pretense of what you expected the position to be like and the corresponding roles and responsibilities. What do you think are the 5 main responsibilities of the Chaplain?."
- Ideally, you arrive at some version of the following points below:
 - Standards Board chairman
 - Chief Ritual officer
 - Expert on Local and Grand Chapter Bylaws and Policies
 - Moral Compass and culture-preserver of the chapter
 - Mediator for chapter brothers
- Let them know this list of responsibilities can be found in their officer guide.

Culture Change Paradigm (15 minutes)

- Explain that the Chaplain is in one of the best positions to improve the chapter culture.

- Write the quote: *"Culture is a by-product of consistent behavior."*
- Ask the group these processing questions:
 - *What are some examples of consistent behavior in your chapter that are a part of your culture?*
 - *How can you control consistent behavior?*
- Explain that consistent behavior is built on expectations and accountability. Write up the equation:
 - **Clear expectations + consistent accountability = positive culture**
- Ask the group these processing questions?
 - *Do you buy that you can control behavior?*
 - *How does this play out in your chapter?*
 - *What other ways can you control culture?*
 - *Why else is it important to have clear expectations and accountability?*
- Outline the rest of the day as a session focused on setting clear expectations and consistent accountability. On two flip charts outline the things chaplains should know how to do for **clear expectations** on one flip chart and **consistent accountability** on the other flip chart. Lead them to outline parts of the rest of the day.
 - Clear expectations
 - Developing and defining standards
 - Ritual implementation
 - Training and managing a standards board
 - Consistent accountability
 - Difficult situations
 - Enforcing standards, making unpopular decisions and navigating relationships
 - Leveraging positive reinforcement and incentives

Behavior Action One-pager (10 minutes)

- While the chaplain should still have SMART goals like other members of the executive board, the goal of this breakout is that the chaplain walks away with clear action steps to improve behavior in the chapter that in turn will improve chapter culture
- You have already gone over that *"culture is a byproduct of consistent behavior"*
- Have each person think about a behavior that they'd like members to start or stop doing
- Break out into groups to share/brainstorm behaviors
- Have each chaplain identify the one behavior that they think, if impacted, will most improve chapter culture

- Each chaplain should detail that behavior in the first box on the one-pager in the participant guide on **page 3**
- We will return to this one-pager throughout the day to update how the chaplains will impact the chosen behavior

Session Overview (5 minutes)

- Provide an overview of the Saturday's schedule and what will be accomplished during this session.
 - Explain that most of today will be tackling expectations and accountability through experiential learning.
 - Provide the framework for the session: for each issue, participants go through the following steps to better understand the issue:
- Provide a review of the framework for each issue they will explore:
 - Experience the issue through an activity.
 - Reflect on the experience addressing the issue.
 - Conceptualize what they have learned.
 - Plan for how they will use the information in the future to address the issue.
 - Make sure participants completed their tasks from last night and brought SMART Goals and action plans to the session.
 - If they have not completed this, ask them to do so before the afternoon session.

Session: Ritual implementation

Time:	80 minutes
Purpose:	<ul style="list-style-type: none"> ▪ Provide participants an opportunity to practice performing the Epsilon Rite of Passage correctly. ▪ Prepare participants to identify and overcome common pitfalls. ▪ Prepare participants to lead or coordinate an impactful Ritual study for chapter members.
Program Objectives:	<ul style="list-style-type: none"> ▪ Participants learn the correct way to perform the Epsilon Rite of Passage. ▪ Participants will understand common Ritual pitfalls and how to overcome them. ▪ Participants draft topics for a Ritual study discussion. ▪ Participants gain an accurate understanding of the minimum expectations of members and the commitments made by taking the oath of obligation.
Materials & Equipment:	<ul style="list-style-type: none"> ▪ Tables and chairs set up for Ritual performance. ▪ Ritual books. ▪ Flip charts. ▪ Markers.
Session Outline:	<ul style="list-style-type: none"> ▪ Issue Overview & Description (10 minutes). ▪ Split Application Activity (35 minutes). ▪ Joint Application Activity/Discussion (25 minutes) ▪ Issue Reflection & Action Planning (5 minutes). ▪ Reference to Resources (5 minutes).
Pre-Session Prep:	<ul style="list-style-type: none"> ▪ Facilitators should review and be familiar with <u>The Ritual and Guide of Sigma Phi Epsilon</u>. ▪ Prepare flip charts for the "issue over and description" and the "application activity."

Issue Overview & Description (10 minutes)

- Introduce the issue: **Chapters fail to properly implement the Ritual ceremonies and teach their brothers how to incorporate the teachings of the Ritual into their daily lives.**
 - With over 200 SigEp chapters in the country and approximately 15,000 undergraduate brothers, how can we ensure our organization and experience is truly the same across the board?
 - The Ritual is what ties our Fraternity together and provides our shared experience. From chapter to chapter, however, there have been variations in how the Ritual is performed and experienced.
 - In this session, we'll be reviewing the importance of implementing the Ritual correctly and overcoming obstacles that may be standing in the way of that. We will also be training the chaplains to perform the Ritual themselves.
- Use the questions below to facilitate a group discussion. Record the answers on a flip chart. Sample answers are provided below.
 - Why is this topic important for us to discuss and **why is it the first part of the day?** (*connect back to the culture change paradigm*)
 - For many chapters, the Epsilon Rite of Passage, or the others, are only performed once or twice a year, which leads to inexperienced members performing the Ritual Rites of Passage for their chapter brothers.
 - When this happens, it is easy for mistakes to creep into how a chapter performs the Ritual.
 - Chapters may not review or discuss the Ritual on a regular basis, and attendance at the Rites of Passage may be low and inconsistent, meaning many members may never think of the Ritual past when they go through a Rite of Passage.
 - Chapters may consider "local rituals" more important than SigEp's Ritual
 - The Ritual holds the baseline of values and our expectations of brothers in SigEp through the Oath of Obligation.
 - What does the ideal look like if the Chaplain is ensuring the Ritual is performed properly and is incorporated into the members daily lives?
 - Every chapter performs the Ritual consistently and the Fraternity ensures a consistent experience for our members.
 - Nationwide, members have a consistent understanding of what the SigEp experience should be and a shared set of values and expectations, based on the oath of obligation and Ritual.

- Each chapter provides an opportunity for Ritual study after members participate in each Rite of Passage to help them process and understand the commitments made during the Rite of Passage they experienced.
- Members walk away from experiencing and watching the Ritual with a memorable and meaningful interpretation of SigEp's Ritual and a deeper understanding of SigEp's values
- What are the implications to the chapter if the Chaplain doesn't do this?
 - Members do not understand the core purpose of SigEp and the meaning of the Fraternity's Ritual and oath.
 - Members do not understand what is expected from them as members of SigEp, and therefore are not prepared to meet the Fraternity's expectations.
 - Risk and member safety concerns that could stem from unsafe practices in a chapter's performance of the Ritual.
 - Members experience the Ritual without actually taking anything memorable or meaningful away to guide them during their time in the chapter
- What are the potential obstacles to reaching this ideal?
 - Incomplete/damaged ritual equipment.
 - Lost/outdated Ritual books.
 - Low/no attendance at the Rites of Passage.
 - Older members who do not take the Ritual seriously and set the wrong tone for newer members.
 - "Local rituals" or traditions that have deviated from SigEp's Ritual, but are deeply ingrained in a chapter's experience

SigEp's Ritual is at the core of why our Fraternity exists. Explain that we start with this session to lay a foundation and remind us all of what is expected of us as members.

Application Activity: SPLIT ACTIVITY Implementing the Ritual & Reflecting on the Ritual

For this activity, confirm which chaplains in the room have completed the Epsilon Rite of Passage. Those that have should stay in the room with one facilitator. Those that haven't should head outside the room with the other facilitator with a flip chart and a couple markers. Take approx. 35 minutes to complete each activity. Plan to come back together with three major take-aways that each group can share with each other.

GROUP 1: Implementing the Ritual (35 minutes)**Instructions**

- Revisit the points discussed above outlining the importance of putting on a quality Ritual performance.
 - Having just discussed this with the group, ask the participants to speak up with their understanding.
- Performing the Epsilon Rite of Passage.
 - Without the performance of the Epsilon Rite of Passage for everyone at Carlson, it is still important for our chaplains to become familiar with the Epsilon Rite of Passage, how to perform it properly, and why it is an essential part of the chapter experience.
 - Ask for 8 volunteers to fill each role on the Ritual Team (president, vice president of programming, chaplain, senior marshal, junior marshal, guard and guide) and one candidate.
 - The facilitator should guide this practice, stopping along the way to ensure participants understand the instructions and WHY it should be performed that way.
 - There will most likely be several opportunities in this activity to dispel rumors such as that the chain should be chilled in ice beforehand, or that the candidate should be pushed aggressively to the floor, or raised off the floor at any point. These are important conversations to have.
 - The practice should also include the interpretation.
- Ritual Reflection
 - What stands out to you from what you just watched?
 - What did you see performed differently than what you do at your chapter?

Facilitators should help bridge the gap.

GROUP 2: Reflecting on the Ritual (35 minutes)

Instructions

- Discuss the purpose and importance of Ritual studies.
 - We've already discussed the importance of the Ritual and why it's important for our members to maintain a strong understanding of our oath and the teachings of the Ritual.
 - During each Rite of Passage, however, it can be difficult to understand everything that you are experiencing or hearing throughout the ceremony.
 - One way that chapters successfully overcome that obstacle is to provide each member with a Ritual study after they go through each Rite of Passage, at which time they review what occurred during it, discuss the oath of obligation, symbolism and interpretation.
- Discuss what makes a great Ritual study.
 - Direct participants to look in the Chaplain Officer Guide for information about why it is important to host Ritual studies.
 - Ask for participants to share examples of what their chapter currently does for a Ritual study, and record the key components on a flip chart at the front of the room. Some key parts may include:
 - Review what they remember and took away on their own.
 - Reading of the Rite of Passage.
 - Review of interpretation.
 - Understanding key messages.
 - Understanding commitments.
- Lead a Phi Rite of Passage Ritual study with the group based on the template within the participant guide and based on above conversation.
 - Pause throughout to give tips on facilitation

BOTH GROUPS COME BACK TOGETHER IN THE ROOM

Overcoming Common Pitfalls (25 minutes)

- Group activity – Split participants into groups. Write out the list of common pitfalls below. In their groups, they have to build a list of solutions to address these:
 - Incomplete/damaged Ritual equipment.
 - Lost/outdated Ritual books.
 - Low/no attendance at the Rites of Passage.
 - Older members who do not take the Ritual seriously and set the wrong tone for newer members.
 - "Local rituals" or traditions that have deviated from SigEp's Ritual, but are deeply engrained in a chapter's experience.
- Have groups present their solutions to the large group. The facilitator should build a list of solutions for each issue on a flip chart as they are presented.
- Have each participant identify the top 3-5 pitfalls he needs to overcome at his chapter. Have them work individually and write these in his participant guide on a blank notes page.
- Discuss the obstacles of selling these changes to their chapter. Help arm them with the information they need to make the sell. Some of the obstacles might include:
 - **Pushback from chapter members.**
 - Change is scary, and they're bound to get pushback from members who have gone through the Rites of Passage incorrectly in the past.
 - Helpful talking points:
 - Build a team first and avoid going into conversations alone.
 - Focus on what you can control and who makes the decisions. If the Ritual team is bought into doing things the right way, they can choose to perform it the right way and make the improvement.
 - Walk through the development of how things go wrong. One minor deviation might seem insignificant, but if it continues to evolve over time, chapters find themselves with severe hazing, potential injury or harm, potential legal liabilities, chapter closures or membership reviews.

- **Tradition.**
 - For chapters that have been doing things incorrectly for some time, it can be tough to change to the way things should be done.
 - Helpful talking points:
 - The Ritual pulls on people's emotions. Members oppose changing tradition because it offers a shared experience and makes them "SigEp."
 - The Ritual is the longest standing tradition we have. If we are truly honoring our tradition, then we will do it by the book.
 - Help participants realize that if they really are SigEp, then doing things as they are written in the book opens them up to a much greater shared experience with our brothers across the country and throughout the years.
- **Ritual as entertainment.**
 - One common obstacle to overcome is the idea that the Ritual as written in the book isn't entertaining for members to watch. Things like taking off your shoes or clothes below the waist, drinking alcohol instead of water, freezing the chain, or shoving the candidate to the floor aggressively make the Ritual entertaining for those watching, not for the candidate participating.
- Helpful talking points:
 - The Ritual is meant to be a lifelong experience for the candidate participating.
 - Understand, watching the Ritual is not about you, it's about supporting our brothers along their path with SigEp.
 - The purpose of the Ritual is to impress upon our brothers the teachings and expectations of SigEp in a way that they will stay with them beyond their time in college. These types of behavior only distract the candidate from what the Ritual team is telling him throughout the Rite of Passage.
- Point out the flyer in their participant guides on **page 16** advertising the new Ritual equipment. For now, draw their attention to the flyer and discuss the option to purchase Ritual equipment with funds in their chapter's Chapter Investment Fund (CIF).
 - The CIF is a fund specific to each chapter which can be used for limited purposes, one of which is the purchase of new Ritual equipment.
 - The CIF is a great resource for this type of big ticket item that can then be repaid back overtime, instead of spending hundreds all at once from the pockets of only the current members.

Debrief Questions

- Why are these pitfalls cause for concern if they aren't addressed appropriately?
- What/who stands in the way of us overcoming these pitfalls?
- What/who can we use to help us be successful?
- Why is it important to have a complete and quality set of Ritual equipment? Remember this can be purchased with the use of the CIF.
- When you reach a point where you don't know what to do, where can you look for the answer? ("It's in the book." Advise participants to refer back to their Ritual books and follow the instructions exactly as they're written.)

Issue Reflection and Action Planning (5 minutes)

- Have participants open to the *Planning for my chapter's Ritual worksheet on page 12* in their participant guide and answer the questions listed here individually:
 - *What are the pitfalls of the Ritual my chapter currently falls into?*
 - *How will I address those pitfalls and gain chapter buy-in into correctly performing the Ritual?*
 - *What are the date(s) that my chapter will perform the Ritual this semester? Year?*
 - *Who will lead the Ritual studies for my chapter this year, and what are the date(s) for those studies? Where will they be?*

Reference to Resources (5 Minutes)

- Direct participants to the following sections of the officer guide (combined at end of participant guide):
 - Key Roles and Responsibilities.
 - Important Skills and Concepts.
 - Ritual Studies.
- Also, direct participants to the following resources that will be helpful in addressing this issue:
 - Updated Ritual books that were voted in at the 2015 Grand Chapter Conclave.
 - SigEp Ritual Study Agenda Template. (**page 14** in their participant guide)
- Finally, provide the information of people who would be helpful resources in addressing this issue.
 - Alumni/Volunteers – Chapter counselor, balanced man steward or chaplain mentor, if applicable.
 - Regional director.
 - Former chaplains, vice presidents of member development or challenge coordinators who have found success with Ritual performance or Ritual studies.

Session: Developing and Defining Standards

Time:	40 minutes
Purpose:	<ul style="list-style-type: none"> Participants learn the basis of and purpose for developing and defining standards
Program Objectives:	<ul style="list-style-type: none"> Participants will learn the areas of standards most relevant to their position. Participants will understand how to best define the standards of their chapter. Participants will understand how expectations relate to accountability
Materials & Equipment:	<ul style="list-style-type: none"> Flip charts. Markers. Participants have computers.
Session Outline:	<ul style="list-style-type: none"> Developing and Defining Standards (10 minutes). Membership Agreement Activity (25 minutes). Debrief (5 minutes).
Pre-Session Prep:	<ul style="list-style-type: none"> Hang up four blank flip charts around the room for the four areas of standards. Review the template membership agreement in the participant guide to become familiar with what our best chapters expect from their members.

Developing and Defining Standards (10 Minutes)

- Introduce how standards fit into the expectations + accountability = culture equation:
Chapter standards should be clear, mutually agreed upon expectations that are effectively communicated.
 - Standards act as a guide for us and help us maintain success as a chapter and individuals. When standards are communicated clearly, we know what is expected of us, as well as what we can expect from our brothers. Standards serve as a tool for your chapter and the standards board to track your improvements, build a reputation of excellence and maintain success over time.

- Use the questions below to facilitate a group discussion. Record the answers on a flip chart. Sample answers are provided below.
 - Why is this topic important for us to discuss? (*connect back to the culture equation*)
 - Most members are inexperienced with building standards and haven't had an opportunity to learn how before.
 - Chapter leaders with good intentions can ruin their progress by trying to simply force standards on their chapter without understanding how to gain buy-in.
 - Chapters don't successfully communicate chapter standards to potential new members before they join the chapter.
 - Chapters don't regularly communicate or reinforce chapter standards and encourage and support chapter members to meet them.
 - What behaviors are most often displayed when there are unclear expectations or standards?
 - **The analogy of the hand in the cookie jar:** as a kid, when your parents said not to eat a cookie before dinner, how many of you ate a cookie just to see what would happen?
 - Clear expectations and standards ensure that people know what will happen if they put their hand in the cookie jar.
 - What does the ideal look like if the Chaplain has clearly defined standards that are effectively communicated to members?
 - Chapters have minimum standards set in place for each of the four areas of chapter standards.
 - Chapters regularly communicate their standards to their members so they are well-known.
 - Chapter members know what is expected of them ahead of time and are included in the process of building new standards or creating those that already exist.
 - What are the implications to the chapter if the Chaplain doesn't have clearly defined standards and effectively communicate them?
 - Members will be confused about what is expected of them and underprepared to meet and exceed chapter standards.
 - Members will not be bought into chapter standards which makes implementation of standards more difficult.
 - Chapters that don't build and implement standards have nothing to guide their performance in a productive direction.
 - What are the potential obstacles to reaching this ideal?
 - Many people see standards as synonymous with rules, and rules aren't a popular topic of conversation with many members.
 - Members may feel standards are created without their input, which leads to lack of buy-in and a more difficult time enforcing standards when they are not met.

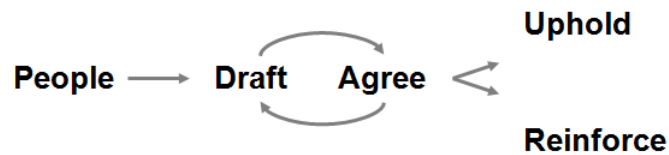
Before we can dive into building and implementing standards, the group should understand exactly what the definition is. This majority of the content will be covered in more of a lecture or guided discussion with a rotating flipchart activity to draft standards. The framework is below.

Application Activity: Defining, Building and Implementing Chapter Standards (25 Minutes)

Instructions

- Use this framework to lead a discussion on defining, building and implementing chapter standards. Be open to questions and encourage participants to share their experiences with building standards or improving existing standards. Discussion is extremely helpful in this exercise.
- Defining Standards
 - Start the conversation by asking the group what areas of standards they can think of. Lead them to these four and write each on the top of a flip chart.
 - Finance
 - Academics
 - Behavior
 - Member development
 - A standard is something that is universally accepted as the baseline level for a group of people. It differs from a rule because it requires the group to accept it and strive to meet the standard.
 - Call on participants to share the purpose and definition for each of the four areas of standards. Record a short description of each standard on the top of the corresponding flip chart from above:
 - **Financial** – Your chapter requires you to pay dues. Upon joining the chapter, you agree to do so and are expected to fulfill your obligation.
 - **Academic** – Minimum academic standards are voted on by the undergraduate legislation of the Grand Chapter Conclave every two years. Chapters, however, may choose set a higher academic standard than the Grand Chapter prescribes.
 - The current national minimum GPA is a 2.6 out of a 4.0 scale, or its equivalent for other grading systems.
 - **Behavior** – How we conduct ourselves as fraternity men affects not only each of us as individuals, but our chapter and national organization. Standards help us understand what is expected of us in terms of behavior.

- **Development** – SigEp’s mission is to “Build Balanced Men.” We achieve that mission through the Balanced Man Program and our development programming, but are only successful when our brothers take advantages of the resources and opportunities available to them.
- Building standards.
 - Draw this image on a flipchart for the participants to see:



- The image details the five keys to successfully building a standard. *Facilitators should engage participants in discussion as they explain each part of the diagram.*
- You’ll notice that the process of building a standard begins with an initiative from the people in your group. This could be the standards board or executive team, or it could be a group of general chapter members, but building a standard comes from those who are within the group.
- Drafting rules and mutually agreeing upon them is a living process. The rules should be periodically evaluated and always understood/agreed upon. Once you have the first three, you’re prepared to uphold and reinforce your chapter’s rules to create your standard.
- Because the process of building a standard is driven by the people, it’s important to understand your role as well as the role of your standards board, executive board and chapter members. The diagram above illustrates the relationships among the people involved in this process.

- The executive board, standards board and alternate each play a role in upholding and reinforcing the rules to become standards. To help them do so most effectively, it's important that your officers and members of the standards board, including the alternate, are elected. Your chapter members are then involved in this part of the process also.
 - **Executive board** – The executive board oversees **chapter operations** at the will of the chapter that elected them.
 - **Standards board** – The standards board is responsible for monitoring, upholding and reinforcing standards, as well as overseeing **chapter membership**, at the will of the chapter that elected them.
 - **The chaplain** chairs the standards board and should sit on the executive board, serving as a bridge between the two boards, keeping transparent communication. The chaplain is the key culture setter and keeper in the chapter.
 - **The alternate** should be trained with the standards board and exists to fill in when a member of the standards board is unable to make a hearing.
 - When all of these positions are elected, the authority behind a standard remains with the chapter.
- To begin drafting a policy for your standards, you can begin with the Grand Chapter Bylaws. The Grand Chapter Bylaws serve as a guideline for the minimum expectations of all SigEp chapters. In the illustration above, your local bylaws are built around the Grand Chapter Bylaws. The policies within them must be included in your local bylaws; however, your local bylaws can expand and add to them in a way that raises the expectations of members.
- A membership agreement should be used as a written affirmation that your brothers understand what is expected of them and commit to meeting those expectations. These documents get their validity from the entire chapter, who must agree on them.
 - Grand Chapter Bylaws.
 - Local bylaws.
 - Membership agreement.

- **ACTIVITY:** Drafting standards
 - Rotating flip-charts with the four standards (finance, behavior, academics, development) discussed above
 - Split the participants into four groups and assign them a flipchart with a standard on it to start. Tell them to spend 2 minutes thinking and writing up what standards they could include in a membership agreement. After 2 minutes, have them rotate to the next and spend 1 minute adding onto the other groups. Continue with 1 minute rotations until each group has been to each flip chart.
 - After the final rotation have each group go back to where they began and read off what ideas they had for potential standards they could draft in their membership agreements.
- Implementing standards
 - There are two keys to successfully implementing a standard in your chapter and maintaining it. It's important to both enforce and reinforce your standards.
 - **Enforcing standards**
 - Communicate standards.
 - Gain commitment.
 - Hold members accountable when they are not met.
 - **Reinforcing standards**
 - Awards.
 - Recognition.
 - Educational presentations.
 - Public postings.
- Have participants pair off and discuss:
 - What topics or points stood out the most from the discussion?
 - How can you apply this information to improve your chapter?
- As a large group, discuss their answers. Help participants connect the dots to how this information should be translated into implementation. Key points include:
 - Make sure you have written standards in all four areas.
 - Ensure your membership agreement is discussed and signed by the chapter regularly.
 - Balancing supportive and punitive measures, and using supportive measures to prevent the need for punitive ones.
 - Standards only matter if they are upheld and enforced.

Debrief Questions

- Why are standards important to the chapter?
- Which of the four areas of chapter standards does your chapter struggle with?
- What experiences have you had with building or improving chapter standards at your home chapter? What lessons can you share with the group?
- What obstacles have you experienced at your home chapter when trying to implement new standards?

Issue Reflection and Action Planning (5 minutes)

- Have participants open to the *Building, Defining, and Implementing Chapter Standards Action Plan* on **page 17** in their participant guide and create their action plan for returning home and assessing their chapter standards.
 - Which of the four areas of chapter standards does your chapter struggle with?
 - What best practices or ideas did you hear about at Carlson that you will take back to your chapter to improve your chapter's standards?
 - What resources will you utilize to set yourself up for success in trying to improve your chapter's standards?
 - What elements of your chapter's standards will you go back and improve?
 - How do you plan to build buy-in from the chapter on your standards?
- Have participants add their takeaways to the behavior one-pager on page 3 of the participant guide
 - Remind them that the officer guide has sections related directly to this session.

Session: Difficult Situations with HQ Staff (20 min)

Issue Overview and Description:

- Our standards boards and chaplains are often faced with difficult situations that involve university investigations and law enforcement investigations. In cases like these our chaplains must understand how to navigate these situations and how to communicate effectively while in them.
- An HQ staff member will join the chaplain track for this 20 minute session to go over the expectations particularly regarding allegations of sexual assault.
- At this same time, the president and VP programming tracks are learning the expectations of their positions as it relates to member safety and risk management. They will also briefly discuss the steps expected in cases of allegations of sexual assault.
- An HQ staff member will articulate:
 - When you receive a sexual assault allegation you must:
 - **Call your regional director**
 - Immediately suspend the member in question and schedule a standards board hearing following the Grand Chapter Bylaws
 - Inform your Fraternity and Sorority Life Office
 - Inform your Title IX office
 - During the standards board meeting:
 - Do not provide details of the allegation
 - Do not attempt to investigate the allegation
 - Inform the brother that our procedure is:
 - A 365 day suspension pending a university/law enforcement investigation
- The most important thing for a chaplain to understand is that they are not to **investigate** an allegation and they are not to take membership action based on whether or not they think a sexual assault occurred.
 - This protects the standards board, the chapter, the alleged survivor and alleged perpetrator (or brother)

After this session, if questions persist please have them reach out to their regional director or a chapter services director in attendance. **While this policy is important for our chaplains to understand, it should not take up any more of the chaplain track.**

Session: Enforcing standards, making unpopular decisions and navigating relationships

Time:	105 minutes
Purpose:	<ul style="list-style-type: none"> Provide participants an opportunity to practice having tough conversations in different settings.
Program Objectives:	<ul style="list-style-type: none"> Participants will learn important skills about navigating relationships through difficult conversations. Participants will understand how to run a standards board trial. Participants will gain experience thinking critically about when a trial is necessary, and when a conversation is enough.
Materials & Equipment:	<ul style="list-style-type: none"> Flip charts. Markers. Prompts for Navigating Tough Conversations activity. "Getting Great at Conversation." Case study folders.
Session Outline:	<ul style="list-style-type: none"> Issue Overview & Description (10 minutes). Application Activity (85 minutes). Issue Reflection & Action Planning (5 minutes). Reference to Resources (5 minutes).
Pre-Session Prep:	<ul style="list-style-type: none"> Create flip charts for "issue overview and description." Read "Getting Great at Conversation" and prepare your main takeaways to share with the participants. Be familiar with the main talking points listed below from the article. Review the prompts from the Navigating Tough Conversations activity and be familiar with their task. Review the case study prompts to become familiar with each group's content to help answer questions and guide conversation if necessary.

Issue Overview & Description (10 Minutes)

- Introduce the issue: **Navigating relationships while making tough decisions and enforcing standards.**
 - In an ideal world, reinforcing chapter standards helps members meet and exceed those standards, however, when members still fail to meet chapter standards, it's important that our chaplains are trained on how to have difficult conversations with their brothers. We'll be using a few case studies and role play scenarios to give participants practice in this area.
 - You are the culture keeper of the chapter, and that sometimes means that you're not a friend keeper. You were elected to uphold the values and expectations of the chapter, and that at times means you'll have to hold your friends accountable, even when that isn't easy.
- Use the questions below to facilitate a group discussion. Record the answers on a flip chart. Sample answers are provided below.
 - Why is this topic important for us to discuss?
 - If chapters haven't enforced standards before, it is tough to begin doing so.
 - Personal relationships can affect judgment and decision making.
 - Members often look to other chapters on their campus to justify their behavior – "We're not nearly as bad as (insert other fraternity)."
 - What does the ideal look like if the Chaplain is able to enforce standards while maintaining relationships?
 - Chaplains and standards boards are able to think critically and find an appropriate course to address underperformance.
 - Chaplains are trained to have difficult conversations with their brothers.
 - Chaplains understand what types of sanctions they are able to assign to members through the trial procedures.
 - What are the implications to the chapter if the Chaplain doesn't enforce standards or manage relationships while doing so?
 - Chapter standards don't exist if they are not enforced.
 - Chapter members don't take any standards seriously if some aren't enforced – "Consistency breeds credibility."
 - Member misconduct can escalate from an individual issue to a chapter issue if members are not held accountable for their actions.

- What are the potential obstacles to resolving this issue?
 - Inexperience
 - Fear of personal relationships being affected by the outcome of standards trials
 - Chapter opinions disagreeing with the decision of the standards board.

Application Activity (85 minutes)

Getting Great at Conversation (15 Minutes)

- Have each participant read the "Getting Great at Conversation," resource on **page 28** in their participant guide.
- Ask them to discuss their major takeaways from the article with a partner, and how it applies to being chaplain. Some might include:
 - We have the ability to determine based, on our communication, if it will be a good or bad conversation.
 - Good conversations give clarity for both parties.
 - The hallmark of a bad conversation is that it shuts people down.
 - It starts with you, but it's not all about you (intention, conversation and assessment).
 - Intention – Should be predetermined to help you organize your message and avoid letting emotion guide your statements.
 - Conversation – Telling, asking and listening all take place here, but the order and time spent doing each will vary with each conversation.
 - Assessment – You need to make a call how to best move forward (three options listed in article).
- Have a few participants share their takeaways to the large group.

Navigating Tough Conversations (30 Minutes)

Instructions

- Ask participants to break into pairs. Ask them to select one partner to play the role of Robin Hood and one to play Little John.
- Hand each partner their corresponding prompts found in your facilitator materials.
- Instruct participants to read their prompts carefully before engaging in dialogue with his partner. They are not allowed to show their prompts to their partners.
- It will be up to Robin Hood to make a decision about the consequences for Little John.
- The activity will go until Robin Hood communicates a consequence for Little John.
- **For your reference:** Intended outcomes and takeaways for the activity are:
 - Robin Hood should remove Little John from the Merry Men and show what accountability looks like for the safety/security of all of the men. Ultimately one person could impact the entire organization's future in a very negative way because he doesn't align with the purpose.
 - This activity should spark conversation around what other stakeholders are impacted by Little John's decision to raid and Robin Hood's decision to hold Little John accountable.
 - The conversation should focus on Robin Hood's responsibility to the Merry Men to explain his decision to remove Little John from the band, and to get the rest of the band to see the value in accountability and the importance of holding everyone to the same high standard regardless of the popularity of the individual
 - Ultimately, the question is: What is more important, Little John as an individual or the future of all of the Merry Men and ensuring that standards are consistent and constantly upheld and discussed?

Debrief Questions

- What consequences did Robin Hood decide? What led Robin Hood to those?
- How did Little John respond to those consequences?
- How could Robin Hood better explain the reason for his decisions?
- What were some great questions that were asked?
- What could Little John have done to have his concerns heard before breaking the rule?
- What could Robin Hood have done to address his concerns before Little John broke the rule?
- Who were some of the stakeholders impacted by Robin Hood's decision?
- How does this apply to our standards boards and chapters?
- What lessons did you learn from this exercise?

Case Study - Mock Standards Trial (40 Minutes)

Instructions

- Split the participants up into the four small groups. They will be tasked with performing a mock standards trial.
- Explain that the groups will get practice in this activity making decisions based on our standards, the Grand Chapter Bylaws, Ritual, oath of obligation and other policies.
- Go to **page 32** of the participant guide
 - A case study prompt and sample charge letter.
- Let them know they should also use the flips charts that outline the four areas of a membership agreement that they created together in session 4 even though it is not in this folder.
- Based on the information provided to each group, they are tasked with making a decision for the appropriate course of action and completing the SigEp template decision letter to record their decision (**page 34** of the participant guide)
- When each group has finished, bring the group back together and discuss debrief questions below.

Debrief Questions

- Explain your situation to the large group. What was the challenge you were trying to address? What was the final decision you reached?
- What information led you to that decision?
- What role did the materials you were provided play in your decision?
- What role did the Ritual and oath of obligation play in your decision?

Issue Reflection and Action Planning (5 minutes)

- Have the participants complete the *Enforcing chapter standards worksheet* on **page 3** in their participant guide. Have them answer the following questions.
 - *What needs to be done so that my standards board and I can enforce our chapter standards?*
 - *What chapter members do I need to have an honest crucial conversation with about their behavior, and who do I need to support me in that conversation?*
 - *What standards do we currently have that we don't enforce? How will I begin enforcing those without completely burning all credibility the chapter?*
 - *How will I present the new enforcement policies and plans to the chapter?*
- Have participants add their takeaways to the behavior one-pager on **page 3** of the participant guide

Reference to Resources (5 Minutes)

- Direct participants to the following sections of the officer guide that specifically address this topic:
 - Important Skills and Concepts.
 - Additional Resources.
- Also, direct participants to the following resource that will be helpful in addressing this issue:
 - SigEp Template Decision Letter. (**page 35** in their participant guide)
 - *[Sigep.org/resources/chapter-officers/chaplain](https://sigep.org/resources/chapter-officers/chaplain)*
- Remind participants who can support them as they work to hold members accountable.
 - Alumni/volunteers.
 - Regional director.
 - University professional in the Greek life office (What resources are available through the university?).

Session: Leveraging positive reinforcement and incentives

Time:	40 Minutes
Purpose:	<ul style="list-style-type: none"> ▪ Provide participants an opportunity to brainstorm positive and supportive measures they can take to drive success instead of assign sanctions. ▪ Support participant's value by making the role more enjoyable and viewed as positive to chapter brothers.
Program Objectives:	<ul style="list-style-type: none"> ▪ Participants will understand the importance of positive reinforcement, not just punitive actions. ▪ Participants will leave with ideas to incentivize positive performance through rewards, recognitions, etc.
Materials & Equipment:	<ul style="list-style-type: none"> ▪ Flip charts ▪ Markers
Session Outline:	<ul style="list-style-type: none"> ▪ Issue Overview & Description (10 minutes). ▪ Application Activity (20 minutes). ▪ Issue Reflection & Action Planning (5 minutes). ▪ Reference to Resources (5 minutes).
Pre-Session Prep:	<ul style="list-style-type: none"> ▪ Prepare flip charts for "issue overview and description" and the activity. ▪ Familiarize yourself with some examples of how to reinforce chapter standards. Some examples are provided below, but you can add to these examples from your personal knowledge as well.

Issue Overview & Description (10 Minutes)

- Introduce the issue: ***Chapters miss opportunities to reinforce standards and positive behavior.***
 - Now that everyone has drafted their chapter's standards, it's important to remember the two methods of implementing standards: reinforcement and enforcement. In this session, we'll focus on sharing ideas and brainstorming ways to positively reinforce member conduct. In the end, the hope is that these measures prevent the standards board from ever having to serve as a punitive body.

- Use the questions below to facilitate a group discussion. Record the answers on a flip chart. Sample answers are provided below.
 - Why is this topic important for us to discuss?
 - Some chapters haven't seen the standards board used positively, and only know how to operate in a trial situation.
 - The standards board often operates only in punitive ways.
 - The standards board is seen as the bad guys whenever they do the job they were elected to do.
 - Our governing documents talk a lot about rules, but don't lay out ways for chapters to recognize members throughout the year other than awards and leadership events.
 - Standards boards are asked to enforce standards, but don't often operate in a way that supports members to be successful in meeting those standards.
 - Members are informed when they fail to meet standards, but are rarely shown positive examples of what meeting and exceeding expectations looks like.
 - What does the ideal look like if the Chaplain is enforcing positive standards?
 - Chapters regularly recognize members for meeting and exceeding chapter standards.
 - Chapter members regularly have a clear example of what being an ideal member looks like in each area of chapter standards.
 - Chapter members know what is expected of them simply by seeing what behaviors receive recognition and awards
 - What are the implications to the chapter if the Chaplain isn't enforcing positive standards?
 - Standards board is viewed as strictly punitive.
 - No example of positive conduct leads to more cases of negative conduct and failure to meet standards.
 - What are the potential obstacles to achieving this ideal?
 - Inexperience.
 - Trying to find effective ways for reinforcement to motivate members.
 - College males don't always have the maturity and confidence to recognize their peers in a positive way

Application Activity (20 minutes)

Rotating Flipcharts - Reinforcing Chapter Standards (15 Minutes)

Instructions

- Set up four flip charts around the room and split the participants up into four groups.
- On the top of each flip chart, write one means of reinforcing chapter standards.
(Examples are provided in the sub-bullets below if participants don't understand what they mean.)
 - Awards.
 - Brother of the week/month/year, most improved GPA, highest GPA.
 - Recognition.
 - Dinner for members with 4.0 each semester, an academic success wall, featured in the chapter's newsletter.
 - Public postings.
 - Posting the alcohol policy in bathrooms and bedroom doors, posting a notice of dry/food-free areas of the chapter house where food and drink shouldn't be consumed.
 - Educational programming.
 - Presentations from SigEp staff, campus professionals or third party groups on hazing, consent, substance use/abuse or other high priority topics.
- Each group will have two minutes at the flip chart they begin at to write down as many ideas as they can think of to reinforce chapter standards through that means.
- At the end of the two minutes, the groups should rotate to the next flip chart and build from the list the group created before them.
- After each group has been to every flip chart, have all the groups present a final list to the entire group.
- As each group presents, remind participants to take notes on great ideas so they can use them at their chapter.

Debrief Questions

- What idea did you hear in this activity that you think would be most helpful at your home chapter?
- What obstacles stand in the way of you bringing this back to your chapter? This could be: resources available for things like discounted dues, buy-in from chapter members for things like keeping the house presentable or chores, etc.
- What behaviors do we want to reinforce?

Discussion - Reinforcing the wrong behavior (5 Minutes)

- Some chapters, in an effort to make chapter meetings more fun, have "jackass of the week awards", or similarly named recognitions of inappropriate behavior. Pictures might be shown or stories told, but this weekly activity is actually reinforcing that negative behavior.
- Some brothers enjoy the attention we give them for this inappropriate behavior.
- Challenge the group to discuss the validity of these awards and what that reinforces to the chapter.

Issue Reflection and Action Planning (5 minutes)

- Have the participants complete the questions on *Reinforcing Behavior Action Plan* **page 37** in their participant guides.
 - *What new way will I reinforce positive behavior in my chapter?*
 - *What do I need to get rid of in my chapter that reinforces negative behavior?*
 - *What will I do to better celebrate the accomplishments and successes of my chapter brothers?*
- Have participants add their takeaways to the behavior one-pager on **page 3** of the participant guide

Reference to Resources (5 Minutes)

- Direct participants to the following sections of the officer guide:
 - Implementing Standards.
 - Important Concepts.
- Remind participants of who can support them as they work to reinforce behaviors.
 - Alumni/volunteers.
 - Regional director.
 - University professional in the Greek life office. (What are the university's minimum standards?)
 - Other chaplains with experience reinforcing positive behavior.

Session: Training and managing a standards board

Time:	30 minutes.
Purpose:	Review the roles and responsibilities of the standards board. Understand best practices for training and managing the standards board. Understand trials and appeals procedures.
Program Objectives:	Participants understand the roles and responsibilities of chaplain and each member of the standards board. Participants understand best practices for training and managing the standards board. Participants understand trials and appeals procedures and what resources are available to them.
Materials & Equipment:	Flip chart. Markers. Participant guides (standards board training, trials and appeals).
Session Outline:	Issue overview and description (5 minutes) Application Activity (15 minutes). Issue Reflection & Action Planning (5 minutes). Reference to Resources (5 minutes).
Pre-Session Prep:	Create flip charts for the "issue overview and description" section and the application activity. Facilitators should review the trial and appeals procedures from the Grand Chapter Bylaws. Facilitators should become familiar with the chaplain one-pager and other relevant resources available on the chaplain's resource page.

Issue Overview & Description (5 Minutes)

- Introduce the issue: ***The standards board hasn't yet received the training or management they need to be successful.***
 - Too often, the standards board is seen as simply a punitive body, but the roles and responsibilities of the standards board should be positive and supportive as well. In this session, you'll address how best to train and manage your standards board to operate as a resource for your chapter and a driving force of your chapter's success. You'll discuss the roles and responsibilities of the chaplain and standards board, supportive and punitive actions and partnership with other chapter officers.
- Use the questions below to facilitate a group discussion. Record the answers on a flip chart. Sample answers are provided below.
 - Why is this topic important for us to discuss? (*connect back to the culture change paradigm*)
 - For many chaplains, this is their first time managing a group of their peers, where peer pressure and public opinion can play a large role in decision making.

- Few standards boards operate in the ideal, which means they have not seen a strong example set forth before.
- It's easy to see the standards board as a strictly punitive body, and implementing incentives can be a tough process to start
- What does the ideal look like?
 - Chapters have clearly defined standards, chapter buy-in and effective means of accountability.
 - Chapters have systems of support in place to help members achieve the chapter's standards.
 - Standards boards meet regularly and act as a guide for the chapter, rather than only a punitive body – implementing incentives to reinforce positive behavior regularly.
 - Ritual Rites of Passage are performed correctly to provide a lasting, life-long experience for each chapter member.
 - Chaplain, as a member of executive committee, has a strong partnership with vice president of member development
- What are the implications of not reaching the ideal?
 - Chapter standards are not clear to chapter members.
 - Chapter members fail to meet standards due to lack of support or knowledge of them.
 - Unclear direction for the chapter or complacency.
 - Standards board is viewed as unhelpful or strictly punitive instead of as a valuable resource to the chapter.
 - Weakened accountability measures.
 - Incorrect, potentially risky, performance of the Rites of Passage.
 - Misunderstanding of roles and responsibilities, as well as potential impact lead to less interest in filling the standards board
- What are the obstacles could Chaplains face in trying to reach this ideal?
 - The chaplain is often inexperienced with training and managing a group.
 - Training and managing the standards board takes work.
 - The habit of only meeting in response to misconduct isn't easily broken.
 - Shifting chapter members' perspective of the standards board to gain the credibility as a supportive body.
 - Gaining buy in for new chapter standards initiated by the standards board.
 - Difficulty of having tough conversations with peers/brothers

Explain that for the rest of the session they will be learning how to effectively fulfill the roles and responsibilities of the chaplain by training and managing the standards board.

Application Activity: Standards Board Training (15 Minutes)

Instructions

- Revisit the issue you started with – too many chapters lack well-trained and managed standards board.

- Have participants break into groups. Give them a flip chart page and a marker. Give them 10 minutes to design a retreat for a standards board. They should include (list these out on a flip chart at the front of the room):
 - Who should attend?
 - Ideally, they arrive at a list that includes: all members of the standards board, chaplain mentor, Vice President of Member Development, the Regional Director, etc.
 - What topics should be covered (using the resources you just discussed)?
 - Roles and responsibilities of the standards board, trial and appeal procedures
 - What materials should be used?
 - What follow-up should happen post-retreat?
 - How long they should schedule to accomplish this agenda?
- After time is up, have a few groups share what they developed as a large group. As you go, tell participants to take notes on a blank notes page in the back of their participant materials to capture great ideas.
- Direct participants to review the "Standards Board Training Agenda" in their participants guide on **page 39**. Give participants 5 minutes to build their own standards board training agenda by adding topics they feel are relevant to their chapter.

Debrief Questions

- Why is the standards board so important to a chapter's success?
- What are the main roles and responsibilities associated with the standards board?
- What impact does the standards board have on the chapter when the job is done well?
- What potential risks are associated if certain responsibilities of the standards board are ignored?
- How will a properly trained standards board affect the membership experience and chapter performance?
- What outside resources and people can you use to assist in training your standards board?
- What type of follow up do you think is most helpful to this type of training?

Action Planning (5 Minutes)

- Have the participants complete the questions on the *Standards Board Training worksheet*, and review the Standards Board Training Agenda found in their participant guides.

Reference to Resources (5 Minutes)

- Direct participants to the following sections of the officer guide:
 - Key Roles and Responsibilities

- Audiences
- Committee Structure
- Important Skills and Concepts
- A Year in the Life
- Also, direct participants to the following resources that will be helpful in addressing this issue:
 - Chaplain One-Pager
 - Trial and Appeal Procedures
 - Standards Board Training Agenda – Make sure participants know they should take this back and immediately use it with their standards board
- Finally, provide the information of people who would be helpful resources in addressing this issue.
 - Alumni/volunteers – Chapter counselor, balanced man steward, chaplain mentor.
 - Regional director.
 - Former successful chaplains or presidents

Session: Action planning

Time:	65 minutes
Purpose:	Create or refine goals and action plans for this calendar year Receive feedback on goals and action plans from their peers
Session objectives:	Participants have well developed goals and corresponding action plans relevant to their position. Participants network with other officers to gather best practices.
Materials & equipment:	Flip charts Masking tape
Session outline:	<ul style="list-style-type: none"> ● Behavior Action One-pager (20 minutes) ● Creating an action plan (10 minutes) ● Action plan creation (30 minutes) ● Discussion and brainstorming (5 minutes)
Pre-session prep:	

Behavior Action One-pager Wrap-up (20 minutes)

- By this point, the majority of the behavior action one-pager should be filled out.
- Now, have them address what are resources they need in order to be successful
 - Share out the people that could involved, resources on the website, ways to maximize their regional director/volunteers/university, etc.
- Then, have them address the one action item they should leave with to attack that one behavior
 - What do they need to do, by when?
- Have them split up into groups and share their outcomes and plans to address the behavior – this should be about 15 of the 20 minutes
 - Chaplains want the opportunity to talk with other chapters through action opportunities to improve chapter culture

SMART Goal action planning (10 minutes):

- By this point, all of the participants should have their goals written and reviewed, whether they brought those goals with them to Carlson or created them Friday night post-session. Reinforce that if they walk away without concrete and tangible goals, they haven't maximized their Carlson experience.
- Also reinforce that they have started to create action plans throughout the day today.
 - Defined the chapter's standards and planned to improve enforcement and accountability.

- Planned to improve how the chapter reinforces behavior and celebrates accomplishments.
- Determined which aspects of the Ritual the chapter can work to improve on.
- Planned the year's Ritual dates and studies.
- Planned a standards board training workshop.
- 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? EX: if the SMART goal is to plan and execute Ritual studies, perhaps a task would be "Recruit the Ritual discussion facilitator and Ritual expert".

- 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 (30 minutes):

- 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?
 - One of their SMART goals should be straight from the behavior one-pager
- 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.
- Once they finish, have everyone find a partner to share their action plans and get feedback.

Action plan discussion and review (5 minutes)

- 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: Wrap up

Time:	35 minutes
Purpose:	Participants have the opportunity to discuss any final questions or concerns they have about their positions and term in office. Participants leave the officer tracks excited to accomplish their goals.
Session objectives:	Wrap up the weekend by closing on a positive note and completing all conversations and talking points from the session.
Materials & equipment:	Flip charts Masking tape
Session outline:	<ul style="list-style-type: none">• Facilitator's choice activity(s) (25 minutes)• Final thoughts (10 minutes)
Pre-session prep:	Review the "facilitator's choice" facilitation options and choose which of the wrap up activities you'd like to lead the group through.

Facilitator's Choice (25 minutes)

At the end of the weekend, we want to give you the freedom to end your session in any way you see fit based on how your conversations have gone with your group. Below are a few options you can utilize to wrap-up your time. If you have an idea separate of what's listed below, feel free to use that too.

Parking Lot Debrief

- Throughout the course of the weekend, the participants will likely bring up many topics that could've derailed conversation and you put them in the parking lot to revisit them. This is your opportunity to go back to those topics and ensure that the participants don't leave with any lingering questions.
- End the conversation by asking the group if there is anything else that wasn't in the parking lot that they still want to discuss.

Further discussion on hot-button issues

- Give the participants the opportunity to continue asking questions about any major issues that they are facing in their chapter.
- Address any and all questions for which you feel comfortable. If something comes up that you don't feel like you can answer (or don't feel comfortable answering), please find a staff member and they can help the participant with the question.
 - Potential issues:
 - Substance-free housing: The chapter doesn't support and thinks that implementing it will kill their chapter.
 - As a fraternity, we need to ensure that our focus isn't solely on alcohol and that we're offering beneficial developmental opportunities. The chapter house should be conducive to learning and fostering meaningful relationships, rather than a bar. Removing alcohol from our facilities sets the expectation that SigEp is focused on our values and providing valuable developmental programming through the BMP.
 - Over 90% of men living in fraternity facilities are under 21 years old. Our chapter facilities must be spaces where it is easy to do right and hard to do wrong, and we should be creating spaces where our younger members have the opportunity to make healthy lifestyle decisions and are in a positive atmosphere, not a negative environment where it's easier to do wrong.
 - Social events with alcohol can certainly still be held, just not at the chapter facility. Our VPs of Programming have learned how to host fun third-party venue events this weekend. Your chapter will still have the opportunity to hold social events, just not at the house. Which is easier for you - you don't have to clean up after the party and you don't assume any of the liability for the social.
 - Substance free facilities will be cleaner and more conducive to a positive living environment - which will lead to more brothers being willing to live-in, and therefore create a better environment for brothers to relax without the fear of living in a dirty environment.
 - BMP: The BMP just hasn't been working at their chapter and it seems more like another class than a fraternity.
 - Open the discussion up to the group about exciting things that other chapters do in their programs to make it less academic.
 - BMP App: It seems like the BMP app is just another way for Headquarters to spy on us and get us in trouble.

- Headquarters isn't in the business of getting chapters in trouble. They're there to help and support chapters and the BMP app is one way of doing that.
- Headquarters doesn't have the time to look at every chapter's BMP in the app. They trust that you will use the way that it's intended.
- Chapters asked for the app at the 2015 Conclave when the BMP was made mandatory. It is designed with chapter needs in mind-- not the needs of Headquarters.
- The BMP app is designed to make your jobs easier. If it's not - tell us what we need to improve!
- The up-front, manual entry may be time consuming, but the long term value added to your members and time you save is worth the up-front investment.

Rotating flip charts for best practices

- Setup flipcharts at all corners of the room with the major points that were discussed in your track throughout the weekend
- Break everyone into groups and have them write out what their chapters do in each of the areas. After 2-3 minutes at the flipchart, have the groups rotate to the next flipchart. After each group has visited each flipchart and contributed, finish the activity by having the groups read out everything on the flipcharts to the group.
 - How to have crucial conversations
 - This gives you the opportunity to give your participants a crash course in how to have crucial conversations with the other leaders in their chapter or chapter members. Cover the main points below and have participants get up and practice in front of the group.
 - Start with heart: Go into each interaction with goodwill for the other person. Your fellow chapter leaders have to know you care before they care what you know.
 - Stay on topic: It's easy to get off track when emotions flare but it's imperative to stay in the dialogue of the conversation and leave emotion out of it.
 - Make it safe: State your purpose and intent clearly to the other person and be up front that you're not trying to attack the other person. Validate their concerns and advance the conversation.
 - Find common ground: Find an area that you can both agree on first to build to a solution that you can both ultimately be happy with.

- Separate facts from story: When it comes time to make your case, only articulate irrefutable facts so as to not let your own bias enter the conversation.
- Agree to a clear action plan: Thank the person for being so open to your conversation and your points and be sure to set next steps so you can follow up.
- How to give and receive feedback
 - This gives you the opportunity to give your participants a crash course in how to deliver and receive feedback with the other leaders in their chapter or chapter members. Cover the main points below and have participants get up and practice in front of the group.
 - Explain that the ability to both give and receive feedback is an important quality of a leader. Provide a brief framework and explanation of feedback:
 - Feedback should always be solution oriented - if you don't provide a solution, you're just complaining or catching someone losing
 - If and when the feedback will be difficult for the other person to hear - consider using a "compliment sandwich".
 - First, begin by talking about the project or progress and about the great things they've done. Remind them of the value they bring to the chapter or the project
 - Next, make them aware of the issue you're addressing. This has to be in a supportive, helpful tone - don't blame them. Bring up the issue or situation, point out what went wrong, and provide a suggestion or recommendation on how to improve and do better next time.
 - Close the conversation on a positive and encouraging note. Remind them of the value they bring to the chapter or project, get them excited about the progress made and the future of the project.
 - Remember to make yourself available at any time to discuss the project with them
 - After the conversation - if you notice a change in behavior - catch them winning! Make sure to congratulate them on the completion of the project, the progress they made, and thank them for their contribution.

- Additionally, it's important as a leader to be able to receive feedback. Remember a few key points:
 - When people bring their feedback to you - they're doing it because they want to help you and see you succeed. Be open to their thoughts and criticisms - and don't react negatively to them.
 - Feedback conversations aren't your opportunity to argue with their perspective. If you have a different opinion, feel free to respectfully share your side of things, but don't become defensive or argumentative.
 - Make sure to say "thank you" to them for having the courage to bring their feedback to you, commit to considering their feedback and implementing/changing behavior as needed.
 - Don't forget to follow-up with them, and ask for continued support and feedback.
- Ask one participant to volunteer to walk the whole group through their action plan and provide feedback to them as an example of how they should do it in their small groups.
 - Make sure they walk away from the group feedback session knowing that they should always be providing constructive feedback with potential solutions or recommendations for change.

"Wanted" boards

- Introduce the concept of the "Help Wanted" board: A place to allow participants to continue networking and maximizing their strengths
- Create several flip charts around the room with areas where a Chaplain may need help: awards/reinforcement of positive behavior, Ritual attendance, accountability, etc
- Officers who feel that they have a best practice to share to help other chapters overcome the issue, should share the following information on a post-it note and have them post on that flip chart:
 - Name.
 - Chapter.
 - Email address.
- After everyone has added their post it to any appropriate flip charts, instruct participants to take pictures of anywhere they need help. EX: if the participant struggles with design, take a picture of the post-its on that flip chart. They should use those brothers as a resource over the coming year.

- Facilitator topic
 - If you have any final leadership lessons, or life lessons, you want to share that you believe would be of value to the participants in your session - use this time to tell your story

Final Thoughts (10 minutes)

- Wrap up the weekend with any takeaways that the participants have.
- Walk through any final "lightbulb" moments that the participants had.
- Give your final thoughts on the weekend as a call to action to take back to their chapters.



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