

# SigEp



## PHILLIP A. COX VOLUNTEER INSTITUTE

Facilitator Guide



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# **Phillip A Cox. Volunteer Institute**

## **Who was Philip A. Cox?**

Late Grand President Phillip A. Cox was a 1984 graduate of Indiana University and a brother of the Indiana Beta chapter. He served the fraternity as a regional director, and then as director of housing on the Headquarters staff. Following his time on staff, served as a volunteer -- a chapter counselor, a president, and a treasurer for the Indiana Beta AVC, before becoming District Governor for 5 years before being elected to the National Board of Directors. Phil was passionate about volunteers. In his address at the 2013 Grand Chapter Conclave, he touched on the critical need for volunteer support at the local level, and volunteer training to help volunteers understand their role. He addressed the Grand Chapter by stating, "We know that behind every great chapter are great volunteers..." and this statement has been the vision for how SigEp continues to serve and train volunteers.

## **How did this Institute start?**

The Cox Volunteer Institute serves as a training for SigEp's volunteers who have served in their volunteer role for less than two years. The program was endowed in 2015 and initially served as a drive-in, daylong conference experience for any volunteer, five times annually. In August 2018 the program shifted from the drive-in model, to a one and a half day institute at our Carlson Leadership Academies each spring.

## **What are the objectives of the Philip A. Cox Volunteer Institute?**

The program focus is volunteer skill development around mentoring and communicating with undergraduates today. This allows for both volunteers to be successful and confident in their roles mentoring undergraduates, and understand how to approach the mentor/mentee relationship with their chapter officer.

## **What is the role of facilitators in the Cox Volunteer Institute?**

Our facilitators are essential to the success of the Institute. They come from a wide range of professional backgrounds but all share a passion for SigEp as volunteers. They will serve as a guide during discussions and also support your development as a volunteer long after the Institute is over.

## **As a participant, what should I expect from this program?**

You will be asked, and ask, challenging questions about who you are as a mentor and what legacy you want to leave as a volunteer. Conversations will go far beyond policies and procedures as this Institute is focused upon how you can become the best mentor to undergraduate leaders.

## Program Schedule

*This is a general schedule for the Cox Volunteer Institute. Session locations will be listed in the program specific schedule available at check-in on-site.*

<b>Friday</b>	
<i>Session</i>	<i>Time</i>
Registration	6:00 - 10:00 pm
Cox Volunteer Institute Kick-Off	7:30 - 8:50 pm
Volunteer Role Reflection & Priorities/Impact	9:00 - 10:00 pm
Wrap Up	10:00 - 10:15 pm

<b>Saturday</b>	
<i>Session</i>	<i>Time</i>
Chapter excellence breakfast	8:00 - 9:00 am
Building Relationships/Mentoring	9:00 - 10:15 am
Break	10:15 - 10:25 am
Communication	10:30 - 11:50 am
Awards luncheon and presentation	Noon - 1:45 pm
<i>Member safety presentation for chapter counselors</i>	2:00 - 3:15 pm

Creating the Premier Student Experience	2:00 - 3:00 pm
Building a Coalition	3:00 - 3:30 pm
Overcoming Obstacles	3:30 - 4:15 pm
Commitments & Wrap Up	4:15 - 4:45 pm
Volunteer Awards Ceremony	5:00 - 5:45 pm
Closing awards banquet	7:00 - 9:30 pm
Donor and volunteer reception	9:30 - 10:30 pm

**Session One: Cox Volunteer Institute Kick-Off**  
**Friday: 7:30 - 8:50**

Time:	80 minutes
Purpose:	Introduce attendees and facilitators Provide an overview of the program Set expectations for the weekend
Session Objectives:	<ul style="list-style-type: none"> <li>• Orient participants to the structure and agenda for the Institute to allow participants to understand what they will achieve</li> <li>• Build cohort comradery and unity</li> <li>• Identify, create, and commit to personal and group expectations for the weekend</li> </ul>
Materials & Equipment:	Flip charts Post-it note Masking tape Participant guides Phil Cox Program Video
Session Outline:	<p><b>Large Group:</b> Program welcome, Phil's Legacy, Introductions: National Board, District Governors, Attendees</p> <p><b>Large Group:</b> Program overview &amp; purpose</p> <p><b>Small Group:</b> Intro's &amp; Expectations</p> <p><b>Small Group:</b> Debrief pre-work</p> <p><b>Large Group:</b> Share Expectations &amp; pre-work</p>
Pre-Session Prep:	<ul style="list-style-type: none"> <li>• A/V set-up and Cox Program video queued</li> <li>• Expectation flip chart</li> </ul>

<p>7:30 - 8:15 pm</p>	<p><b>Session Opening &amp; NBD and DG Introductions (Large Group)</b></p>
	<p><i>Lead Facilitators introduce themselves and welcome everyone to the Phillip A. Cox Volunteer Institute and thank everyone for being at the program.</i></p> <p><b>I want to take a moment to not only introduce some wonderful people in the room with us, but also discuss the reason we're all able to be together for this training today – Late Grand President, Phillip A. Cox.</b></p> <p><i>Share Phillip A Cox Video.</i>  <a href="https://www.youtube.com/watch?v=l_AquSp3BFg&amp;t=154s">https://www.youtube.com/watch?v=l_AquSp3BFg&amp;t=154s</a>(5:40)</p> <p><i>Share parts of Phil's SigEp story:</i></p> <ul style="list-style-type: none"> <li>• <b>Phil Cox was a 1984 graduate of Indiana University and a brother of the Indiana Beta chapter.</b></li> <li>• <b>Served as a regional director, and then a director of housing on the Headquarters staff.</b></li> <li>• <b>He then served as a volunteer -- a chapter counselor, a president, and a treasurer for the Indiana Beta AVC. He then served as district governor for the state of Indiana for 5 years.</b></li> <li>• <b>Elected as the Grand President of the National Board of Directors at the 2003 Grand Chapter Conclave in San Antonio, TX.</b></li> <li>• <b>Phil was committed to providing support and training to SigEp's Volunteers. His leadership led to the creation of the Fraternity's first educational program intended for volunteers.</b></li> </ul> <p><b>To honor Phil's legacy and commitment to SigEp's volunteers, his friends and brothers endowed the program he made possible so that it could continue Phil's dream in perpetuity. Today, the Phillip A. Cox Volunteer Institute provides critical support to volunteers all across the country.</b></p> <p><b>We have a packed schedule for the weekend, and before we dive into the logistics and our first session, let's do some introductions.</b></p> <p><i>Walk-up National Board Introductions:</i></p> <p><b>We have a couple of National Board of Directors in the room with us, as well as District Governors. National Board members are volunteers who ensure the operations and initiatives of the fraternity run seamlessly. They are selected because of their devotion to the Fraternity, their ability to lead, and a proven track record of setting and achieving strategic goals.</b></p>

**I'd like for our members of the National Board to quickly introduce themselves to you. Board members, if you'd share:**

- Your name
- Your home chapter
- Your role on the National Board
- Share with us why volunteering is so important to you.

National Board members one by one, introduce themselves and any additional context they'd like to the program.

**Thank you**

*Walk-up District Governor Intro:*

**Now, I'd like to introduce our district governors who are able to be here this evening. District governors oversee the volunteer recruitment and engagement in their district. They work with Alumni and Volunteer Corporations to ensure that all of you have the best volunteer experience possible.**

District Governor Introductions

- Name
- Home Chapter
- Your district
- Share with us why volunteering is so important to you.

**Thank you all for introducing yourselves. Attendees, please be sure to connect with the district governors and National Board members throughout the weekend.**

*Instruct National Board Members and District Governors that they may leave and head to the faculty meeting.*

*Walk-up attendee intro's:*

**Now, facilitators and attendees, please share with us, brief introductions before we kick things off with our first session. Please stand, and one by one introduce yourself with the following prompts.**

**Volunteer Introductions**

- Name
- Home Chapter (if applicable)
- Volunteer Role and chapter

**We're going to spend more time getting to know one another over the next session and throughout the weekend. Thank you for providing us with a simple introduction before we kick things off.**



	<p><i>Introduce Large Group v Small Group paradigm:</i></p> <p><b>Over the course of the weekend we will spend a lot of time introducing topics in the large group, but practicing, implementing, and reflecting in small groups. We will be getting into our small groups later this evening.</b></p> <p><i>Provide a Schedule Overview:</i></p> <p><b>Let's quickly take a look at the schedule you received at registration. We start tonight by having small group time, going over your volunteer roles and your pre-work. We will discuss the impact you want to make. Tomorrow, we will spend all morning going over building relationships, mentoring, and communication skills. Then, in the afternoon, we will go over chapter operations, goal setting, and common obstacles volunteers face in their roles.</b></p> <p><i>Release into Small Groups</i></p>
<p>8:15 – 8:50 pm</p>	<p><b>Introductions and Expectations (Small Group)</b></p>
	<p><i>*Facilitate a brief intro now that you are in your small groups*</i></p> <p><i>Once intros are completed facilitator explains the importance of starting with expectations and considering what everyone wants to get out of the program by creating a list of expectations, we have for ourselves and others in this space.</i></p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>• <i>Allowing space to discuss</i></li> <li>• <i>Being open and honest with one another</i></li> <li>• <i>Lessons leave stories stay, etc.</i></li> </ul> <p>Facilitator prompts the group with:</p> <ul style="list-style-type: none"> <li>• <b>What expectations do you have for yourself and for the group for this weekend? What are the 'ground rules' you hope you and others might abide by this weekend? (Write 5).</b></li> </ul> <p><i>Lead facilitator records expectations on the flip chart. Debrief and discuss expectations. Leave them up all weekend and come back to them.</i></p> <p><i>To open up the next activity, the lead facilitator then asks the group</i></p> <ul style="list-style-type: none"> <li>• <b>How can volunteers impact a chapter?</b></li> </ul> <p><i>Collect overall responses and notes on a flip chart.</i></p>

	<p><i>After a few are discussed Facilitator prompts attendees to write their own desired impacts:</i></p> <ul style="list-style-type: none"><li>● <b>Let's write down an impact you want to make this year on the chapter. Maybe it's relative to chapter operations, a way to move the needle at the local level, setting up a framework or process for your chapter. Take a few minutes and write down the impact you want to make in your participant guide pg. ____.</b></li></ul> <p><b>Our impact will be a theme we come back to all weekend long – we will consider the impact we want to make, think through if that's a short term impact, if that's a long term impact, and what the difference is between those. We're going to make some goals around our impact, and understand how to create a map to get there.</b></p> <p>I want you to consider the following question:</p> <ul style="list-style-type: none"><li>● <b>What do you need to learn to make the impact that you just wrote down actually happen?</b></li></ul> <p><i>Use answers to questions above to begin creating a Parking Lot Flip Chart for the small group and to transition to Role Reflections and Pre-work</i></p> <p><i>Release Participants for a Break (5-10 minutes depending on time)</i></p>
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**Session Two: Volunteer Role Reflections and Priorities/Impact**  
**Friday: 9:00 - 10:00 pm**

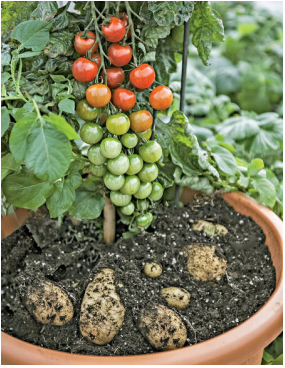
Time:	60 minutes
Purpose:	Discuss volunteer roles and right-size expectations of what is expected of them. Discuss the impact attendees want to make in their roles this year and consider how to make that tangible and measurable.
Session Objectives:	<ul style="list-style-type: none"> <li>● Recognize responsibilities in role description through group discussion</li> <li>● Recognize at least 1 individual impact attendees would like to have on the chapter through individual reflection</li> </ul>
Materials & Equipment:	Flip charts Post-it note Masking tape Participant guides Role Descriptions for each role Responsibilities and Impact Worksheet
Session Outline:	Session Opening Role Review & Role Reflection Responsibilities and Impact Large Group Share
Pre-Session Prep:	Hand out printed role description Hand out Responsibilities and Impact Worksheet

<p>9:00 – 9:30 pm</p>	<p><b>Role Review &amp; Role Reflection</b></p>
	<p><i>Thank the group for working on their impacts. It's vulnerable and personal, and sharing thanks will help them continue to feel comfortable in the small groups.</i></p> <p>We're going to continue to discuss and potential refine our impacts over the evening and tomorrow. To consider how we get there, let's talk about what we need to be successful, and what our strengths are. This helps us identify a pathway to our impact.</p> <p><i>In small groups, small group facilitator has attendees complete pg __ in participant guide which will pose the following questions:</i></p> <ol style="list-style-type: none"> <li><b>1. What are self-identified strengths as it relates to mentoring, or your volunteer role?</b></li> <li><b>2. What are self-identified gaps or challenges you're experiencing as it relates to mentoring and your volunteer role?</b></li> <li><b>3. What are self-identified areas of opportunity for you personally in this volunteer role in your work to support the chapter?</b></li> <li><b>4. What are self-identified some challenges you foresee that you may personally face in this volunteer role?</b></li> </ol> <p><i>Wait 15/20 minutes then ask folks to share some of their responses. After some folks share, debrief using the following:</i></p> <ul style="list-style-type: none"> <li>● <b>What similarities did you hear as you were sharing, and listening to other members share their answers?</b></li> <li>● <b>What are some ways you might be able to overcome some of the challenges you've described?</b></li> <li>● <b>What are some ways to ensure you or the chapter capitalizes on the opportunities you shared?</b></li> </ul>
<p>9:30 – 9:50 pm</p>	<p><b>Responsibilities and Impact</b></p>

	<p><i>Small group facilitator shares:</i></p> <p><b>Now that you've shared the ways you've reflected on your role as a volunteer with the chapter, let's come back to the impact you want to make this year, and what you have self-identified as a need or an area you need to learn about to make your impact come to life.</b></p> <p><b>Let's start to consider how we make our dream vision a reality. This is going to be important for us to revisit and consider as we continue to go through the program this weekend.</b></p> <p><i>Small group facilitator passes out the Vision and Impact Worksheet and explains that to our impact is important. We want to start with the end in mind for us to understand how to get there.</i></p> <p><b>As you look at this worksheet, consider the vision that you have, then tie Make not of where that vision aligns with your responsibilities. Then, consider how this will be measured, and how you know what success looks like in this role. Let's get specific and consider ways our impact can be measured and matched. This will help us with goal setting later on in the weekend.</b></p> <p><i>Allow attendees time to work individually on their impact worksheet, sharing with them that as a small group, you'll share and debrief afterward. Ask them to be honest, and thoughtful about their answers, considering the chapter operations they know need to be changed, or ways they can impact the chapter.</i></p> <p><i>Before you begin the group share, tell them that after the person speaking shares their impact, that the rest of the group can either add a way to make their impact measurable or help them connect their impact to another responsibility of their role. This isn't necessarily feedback, but a way to allow for each small group facilitator to affirm or provide more guidance on their impact.</i></p> <p><i>After everyone shares, debrief with the small group – example questions below:.</i></p> <ul style="list-style-type: none"> <li>● <b>Was this challenging for you to complete? Why</b></li> <li>● <b>Was this easy for you to complete? Why?</b></li> <li>● <b>Were you able to get specific when considering how you make your impact measurable?</b></li> <li>● <b>What did you learn in this process? What surprised you?</b></li> </ul>
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<p>9:50 - 10:00 pm</p>	<p><b>Impact Sharing (Large Group)</b></p>
	<p>Bring folks back into the large group</p> <p><i>Ask for one person from each group to share an impact they want to make, how it connects to one of their responsibilities in their role description, and how it can be measured this year for success.</i></p>
<p>10:00 - 10:05 pm</p>	<p><b>Wrap Up &amp; 'Aha' Moments (Large Group)</b></p>
	<p><i>Ask:</i></p> <p><b>Does anyone know what an 'aha' moment is? 'Aha' moments are moments of sudden insight or discovery.</b></p> <p><b>Can anyone share an 'aha' moments they've had today? -- we need to have at least 2 before we leave for the evening.</b></p> <p><i>Lead facilitator shares schedule for tomorrow, ensuring that the group knows that breakfast is at 8:00 am and they'll meet back in this room at 9:00 am for the first session.</i></p>
<p>10:10 - 10:30 pm</p>	<p><i>Facilitator and HQ Staff point of contact debrief.</i></p>

**Session Three: Mentoring Building Relationship and Coaching**  
**Saturday: 9:00 - 10:15 am**

Time:	75 minutes
Purpose:	Volunteers will discuss how to build relationships with college students today, and SigEp's Coaching style mentoring.
Session Objectives:	<ul style="list-style-type: none"> <li>● Identify at least 5 effective personal mentoring characteristics through personal reflection</li> <li>● Identify at least effective 10 mentoring characteristics through small group discussion</li> <li>● Recognize 3 ways relationship building leads to a strong mentor relationship</li> <li>● Recognize 3 ways to communicate with undergraduates today through group discussion</li> </ul>
Materials & Equipment:	<p>Flip charts                  Post-it note                  Masking tape                  Participant guides                  Mentoring Slide deck</p> <p>Tomato plant on the screen in slide deck</p> 
Session Outline:	<p>Opening                  Building Relationships                  Coaching Style Mentoring                  Mentoring Characteristics</p>

Pre-Session Prep:	College Students (Males) Today Flip Chart Post Its - Small Group Mentor Characteristics Flip Chart - Small Group
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9:00 - 9:15 am	<b>Session Opening (Large Group)</b>
	<p>Seek to start the morning with a brief recap of introductions since folks may have come in late last night.</p> <p><i>Introduce the rest of the day:</i></p> <ul style="list-style-type: none"> <li>● <b>This morning, we will be talking about building relationships, mentoring, and college student experience.</b></li> <li>● <b>In the afternoon, we will discuss how to co-create the premier student experience, we will do goal setting, we will discuss overcoming common obstacles</b></li> </ul> <p><i>Share a few notes about the morning:</i></p> <ul style="list-style-type: none"> <li>● <b>A break between sessions</b></li> <li>● <b>If coffee is available somewhere, share where (HQ staff will let you know where this will be located and when)</b></li> <li>● <b>Share where the bathrooms are, and etiquette for leaving</b></li> <li>● <b>Ask questions throughout the day</b></li> <li>● <b>Lunch is at 12 noon - sit together if you're able to or want to</b></li> <li>● <b>Volunteer Awards Ceremony</b></li> </ul>
9:15 - 9:45 am	<b>Understanding College Students (Large Group)</b>
	<p>Transition to first topic of the day – College students and their characteristics. During this session conversation can go down a rabbit holes or become "Us vs Them". The goal is to have attendees realize that it's different and in some ways more difficult to be a college student today.</p> <p><b>What do we know about students on college campuses today?</b>  <b>Let's specifically consider college males, and assume they're anywhere from 17-23 years old for this. Take 5 minutes and record all of your answers on your notes page – let's consider the characteristics we've seen, the assumptions we know about the generation, and how we think we will need to support them.</b></p>



*After a few minutes have group share. Collect answers on flip chart. Look to prevent rabbit holes or erroneous opinions using the facts below. As you debrief the list, have participants fill in the graphic on pg \_\_\_*

**Generation Z Characteristics:**

- Born in the 2000s, or late 1990s. After millennials. Generation Z is also considered the iGen.
- Technology-driven
  - One of the first generations to have technology at a young age
  - They use the internet to find answers and interact with others
  - Social Media - connecting online, but also a way to decrease human interaction
    - Social Media as an identity creator and tool
    - There is a mixed sense of Generation Z craving in-person interactions and avoiding them
    - This generation could suffer from loneliness, anxiety, and fragility due to less in-person interactions
- Immediacy Demanding Consumer (Think: Amazon Prime)
  - Gen Z is already on track to become the largest generation of consumers by the year 2020, and they account for \$29 to \$143 billion in direct spending
- Have experienced 9/11, Iraq and Afghanistan wars, market crash
- Mistrust in the political system, always connected, multitaskers

**Education:**

- Women are outnumbering men in enrollment data at higher education institutions
- Over 80% of this generation believes obtaining a degree is necessary for their career goals
- The primary concern is college debt ( $\frac{2}{3}$  are concerned with college cost,  $\frac{1}{3}$  is applying for grants and scholarships,  $\frac{1}{4}$  hope/do have parents or guardians covering the costs)
- 65% say the benefits of graduating college exceed the costs
- Fascinated with entrepreneurship and can use technology or social media to leverage that
- Generation Z no longer wants just a job: they seek more than that. They want a feeling of fulfillment and excitement in their job that helps move the world forward
- They do seek face to face, one-to-one interaction, though we've seen and heard that it's easier to hide behind technology, text, message
- Strong multitaskers due to growing up with technology or the access to it.

## Social:

- 11% of college freshmen are looking to join a social fraternity in college
- 89% that are not looking for the typical college fraternity experience they've seen on TV or in movies, or have heard about from friends, family members

*Debrief example questions below:*

- **Why does all of this matter?**
- **Why should we start here?**
- **What does this mean for the college males we support?**
- **Do we see this play out in certain ways in our chapters?**
  - **Crucial Conversations**
  - **Standards boards**
  - **Regular interactions**
- **How do we build relationships and create buy-in with undergraduate students who might not think they need us, or might not want to work with us?**

Transition to establishing relationships.

**Before we understand how to mentor, especially this generation, we have to consider how we build a relationship with Generation Z, and college males today.**

**Let's consider a tomato plant for a second.**

*Reveal tomato plant on screen.*

**Has anyone here gardened before?**

*Pause for response.*

**If you have never gardened before, you're likely aware at least that gardening takes work, and you typically will not see the fruits of your labor right away. How long does it take to see tomatoes after you've planted them? 60 days, typically. That's an incredibly long time to wait. You have to be patient. What do you have to do every day? Water your plant, ensure it has sunlight, make sure animals are not eating the plant.**

**As we talk about building relationships with undergraduates, I want you to consider gardening, and specifically, this tomato plant. It takes a long time to see the tomatoes on the vines, and it might take time for you to build a relationship with your undergraduate to get to a place where he is having**

**'aha' moments with you in every meeting. But, when taken care of effectively and thoughtfully, the relationship with your mentee will blossom and form. But you have to be diligent, and careful, to ensure you can get there. It is your responsibility.**

**Let's talk about building relationships. Keep thinking about this tomato plant as we discuss how to build relationships with undergraduates today.**

**Building Relationships:**

- **Listen**
  - They're not afraid to express their individuality and voice their opinion. Again, they've never really known a world without technology, and they know how to make their voice heard.
  - How do we do this as mentors?
- **Build Trust**
  - Build long term relationships by creating seamless experiences relevant to them as individuals
  - How do we do this as mentors?
- **Resonate with Their Values**
  - Generation Z is far more likely to trust an endorsement from a friend or a family than a marketing ad
  - How do we do this as mentors?
- **Meet Them Where They are at**
  - Generation Z students use technology to solve problems, help them think deeply about issues related to economy and ecology, and want to participate through the use of technology to provide answers for world issues.
  - Generation Z students want to shape their own journey with you as a guide
  - Technology
  - How do we do this as mentors?

**Coaching Style Mentoring:**

*Transition to the concept of Coaching. Begin by sharing the two video clips and having participants fill in the good coach / bad coach diagram on pg \_\_\_\_ of participant guide.*

*Debrief the two videos and what some of the differences are between the two. Use some of the questions below to debrief:*

- What does a coach do?
  - A coach teaches and trains, and helps you refine your skills.
- Does the coach play the game for you?
  - No. The coach stays on the sidelines, guides the player along, and helps correct when necessary, but s/he doesn't play for

	<p>the player. The player plays the game. As a mentor, you're the coach. You guide, support, and challenge. But you're not playing the game for them. You're not doing their tasks for them. But you're helping them consider how to lead effectively and consider things they haven't before.</p> <p><b>SigEp uses Eric Parsloe's definition of mentoring from the Oxford School of Coaching and Mentoring. (Slide)</b></p> <p><b>Mentoring is to support and encourage our undergraduates to manage their own learning in order that they may maximize their potential, develop their skills, improve their performance, and become the person they want to be. There is a defined beginning and end to the mentoring relationship with agreed upon communication and operational expectations from both parties and a clear set of working goals to drive the relationship.</b></p> <p><b>Let's break this down. That was a long definition with a lot of information.</b></p> <ul style="list-style-type: none"> <li>● <b>What does it mean to encourage and support undergraduates to manage their own learning?</b> <ul style="list-style-type: none"> <li>○ They're in charge. They have to meet you where they're at. They have to lean into learning moments and experiences.</li> </ul> </li> <li>● <b>What does it mean to become the person they want to be?</b> <ul style="list-style-type: none"> <li>○ At college and post-college, because of their SigEp leadership position</li> </ul> </li> <li>● <b>What does a defined beginning and end mean?</b> <ul style="list-style-type: none"> <li>○ Start of their term, and end of their term</li> </ul> </li> <li>● <b>Agreed upon communication</b> <ul style="list-style-type: none"> <li>○ You should have an agreed-upon method, time, and place for your mentor/mentee meetings.</li> </ul> </li> <li>● <b>Operational Expectations</b> <ul style="list-style-type: none"> <li>○ Using the mentor/mentee agreement, you should discuss what you both want out of a mentor/mentee relationship to help you best operate and know what each other's expectations are.</li> </ul> </li> <li>● <b>Working Goals</b> <ul style="list-style-type: none"> <li>○ Drive's the relationship and every meeting - meetings should always be relative to goal progress.</li> </ul> </li> </ul> <p><b>Now that we've discussed college students today (Generation Z) and coaching style mentoring, let's discuss how to mentor these individuals.</b></p> <p>Have everyone get into their small groups.</p>
<p>9:45 - 10:00 am</p>	<p><b>Mentoring Characteristics (Small Group)</b></p>
	<p><b>Let's talk about mentor relationships that succeed, and relationships that fail.</b></p> <ul style="list-style-type: none"> <li>● <b>Why do you think mentor relationships succeed?</b></li> </ul>

	<ul style="list-style-type: none"> <li>● <b>What is it about mentor relationships that allow for success?</b></li> <li>● <b>What does the mentor do to ensure success?</b></li> </ul> <p><b>How about the flip side...let's talk about why mentor relationships fail.</b></p> <ul style="list-style-type: none"> <li>● <b>Why do mentor relationships fail?</b></li> <li>● <b>What do mentors do, or not do, to allow failure?</b></li> <li>● <b>What should we avoid as mentors, with undergraduates leaders?</b></li> </ul> <p><i>Small group facilitator gives everyone a handful of post-it notes.</i></p> <p><b>We're going to consider what are mentoring characteristics or examples that you've seen be effective. This doesn't necessarily have to relate to being between or with a member of Generation Z, but we will discuss how to make any characteristic potentially relevant to a Generation Z mentoring relationship.</b></p> <p><b>Take a few minutes, and on each post-it note, write a characteristic, quality or example of mentoring that you think is effective.</b></p> <p><i>Questions to consider if you'd like to prompt them more:</i></p> <ul style="list-style-type: none"> <li>● <b>What makes a strong mentor to today's college student?</b></li> <li>● <b>What are those qualities you want in a mentor?</b></li> <li>● <b>How do you want to serve as a mentor especially working with young people?</b></li> </ul> <p><i>Each person shares their post-it notes and then puts them on the flip chart after everyone has shared so there is one flip chart with all of the post-it notes. Try and group the ones that are similar or in a theme.</i></p> <p><i>In your small group, debrief the themes and what the group considers effective mentoring. Use the following questions to guide your conversation:</i></p> <ul style="list-style-type: none"> <li>● <b>What themes did you hear about as people were sharing their effective mentoring characteristics?</b></li> <li>● <b>How can you make mentoring seem valuable to an undergraduate that doesn't want to engage?</b></li> <li>● <b>Where are places we see mentoring outside of SigEp? How can we always make it apparent to undergraduates so they realize mentoring outside of SigEp is valuable?</b></li> <li>● <b>What are commitments you can make as a mentor and a volunteer to ensure you create a mentoring relationship that is strong and effective?</b></li> </ul>
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10:00 - 10:15	<b>Sharing (Large Group)</b>
	<p><b>Now we will share so we have one large list of mentoring characteristics that we can consider when working with our mentees. This will be helpful as we shape the mentors we want to be and how we are effective.</b></p> <p><i>Small groups should prepare to share their comprehensive list to the larger group in a round robin activity – each group shares a quality they've come up with, and no group can duplicate what has been shared. One at a time, small groups share one quality until the lists have been exhausted. Have participants write characteristics in their participant guide pg ____</i></p> <p><i>Large group wrap up –Facilitator asks attendees to write down 1 personal take away from the morning so far on a post-it note and turn in to facilitator. (Please keep these and give to HQ staffer at the end of program)</i></p> <p><i>Release for a 10-15 minute break.</i></p>

**Session Four: Mentoring: Communication**  
**Saturday: 10:30 - 11:50**

Time:	80 minutes
Purpose:	Volunteers will discuss communication methods and tactics for working with undergraduates today, including asking questions, listening skills, and delivering feedback.
Session Objectives:	<ul style="list-style-type: none"> <li>● Describe open-ended questions in mentor relationships through a group discussion</li> <li>● Demonstrate how to create open-ended questions for mentoring using an application activity</li> <li>● Demonstrate delivering feedback to undergraduates using an application activity</li> <li>● Identify at least 5 questions for each month of the academic calendar that they can use to support mentees in small group discussion</li> </ul>
Materials & Equipment:	<p>Flip charts                      Post-it note                      Masking tape                      Participant guides</p> <p>Month by month calendar prompt for each role (x amount of people in session)</p> <ul style="list-style-type: none"> <li>● Chapter Counselor</li> <li>● Balanced Man Steward</li> <li>● Recruitment Mentor</li> </ul> <p>Application Activity Prompts:</p> <ul style="list-style-type: none"> <li>● Activity 1: Questions</li> <li>● Activity 2: Feedback</li> </ul>
Session Outline:	<p>Communicating with Undergraduates</p> <ul style="list-style-type: none"> <li>● Open-Ended Questions</li> <li>● Listening</li> <li>● Delivering Feedback</li> </ul> <p>Small Group Application Activities (1 and 2)</p>

	Month by Month Question Prompts
Pre-Session Prep:	Provide small group facilitators application activities (1 and 2) Provide small group facilitator month by month documents (for all roles)

10:30 - 11:00	<p><b>Communicating with Undergraduates (Large Group)</b></p> <p><i>Once folks are back from their break, ask for takeaways from the morning – without the use of their sticky note from earlier. After one or two transition folks into their small groups.</i></p> <p><b>We discussed Generation Z characteristics earlier that have led us to understand a bit more about how to communicate with undergraduates today.</b></p> <p><b>We're going to specifically discuss how to ask the right kinds of questions to inspire and encourage growth, how to listen, and how to deliver feedback in this session. Both of these topics will help you work with all types of people - not just Generation z.</b></p> <p><b>When we're with mentees and any set of undergraduates, how do we listen to them? How do they know that they have our undivided attention? And how do we ask great questions</b></p> <p><i>Introduce" 3-minute vacation" activity feels free to make the intro fun as they will be describing their ideal vacations in the middle of winter/busy time of year:</i></p> <p>Split your small group into pairs. In each pair, one will be the "questioner" while the other will be the "talker" The questioner has 3 minutes to start a conversation with the "talker" and find out as much as they can about their dream vacation without explicitly revealing the location which this vacation would be taking place.</p> <p>After the 3-minutes the "questioner" has to present a 30-second holiday sales pitch to the small group. The small group will then provide a guess to the location where this vacation is going to take place. After the sales-pitch the "talker" will rate its accuracy. **Depending on the number of groups &amp; time available have multiple questioners present their sales pitch and go through the guessing process**</p>
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	<p><i>After the first round debrief using the following:</i></p> <ul style="list-style-type: none"> <li>• <b>What traits were revealed about the dream vacation? (location, activity, people, food, etc.)</b></li> <li>• <b>What else could have been asked to reveal more information?</b></li> </ul> <p>Reset the activity and have the "questioner" and "talker" switch roles. After the 3-minutes the "questioner" has to present a 30-second holiday sales pitch to the small group. The small group will then provide a guess to the location where this vacation is going to take place. After the sales-pitch the "talker" will rate its accuracy. **Depending on the number of groups &amp; time available have multiple questioners present their sales pitch and go through the guessing process**</p> <p><i>After the final round debrief using the following:</i></p> <ul style="list-style-type: none"> <li>• <b>What made this activity difficult as the questioner?</b></li> <li>• <b>What made you feel/know that the questioner was listening and invested in learning more?</b></li> <li>• <b>When might we have to serve as the questioner when working with our undergraduates? How does the final "pitch" come into the equation?</b></li> </ul> <p><i>Use this debrief to refer back to the good characteristics of coaches and the need to listen effectively to build trust. Without trust any advice, perspective, or feedback that we may provide will not be taken into account.</i></p> <p><b>Tips to deliver feedback with undergraduates:</b></p> <ul style="list-style-type: none"> <li>• <b>Stay on topic:</b> 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.</li> <li>• <b>Find common ground:</b> Find an area that you can both agree on first to build to a solution that you can both ultimately be happy with.</li> <li>• <b>Separate facts from a story:</b> When it comes time to make your case, only articulate irrefutable facts so as to not let your own bias enter the conversation.</li> <li>• <b>Agree to a clear action plan:</b> 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.</li> </ul>
<p>11:00 - 11:45</p>	<p><b>Application Activity #2 (Small Group)</b></p>
	<p><b><u>Activity 1: Helping Convert Complaints into Feedback (10 minutes)</u></b></p> <p><b>Sometimes in your work with undergraduates you may uncover a major "pain-point" that they are experiencing. These may be delivered in the form</b></p>

**or rants or disjointed comments which make it hard to understand what the important aspects or of what they are describing.**

*Split group into pairs – different pairs than in other activities.*

One participant has 60-seconds to rant about something that irks them (slow-walkers, not using turn signals, mouth-breathers, complainers, etc.).

The second participants must listen to the rant fully and provide a synopsis after the 60-seconds using the following framework:

- **You value...**
- **You care about...**
- **You believe that ... matters a lot**

Once the rant is debriefed, switch roles.

*After 2 rounds, debrief using the following:*

- **What made diagnosing the true issue in the rant difficult?**
- **What are some "rants" that we know that our undergraduates feel?**
- **How can we incorporate venting into helping provide and collect feedback?**

**Application Activity #2: Tough Conversations (30 minutes)**

*\*Based on the size of your group, and timing, work with the lead facilitator to figure out if you'll be using Example 1 or Example 2 for the activities. This helps you figure out if you should get your small group into smaller groups of three, or have two people role play with the rest of the group as observers. Either way, it's done, everyone has a role and is responsible for role-playing or providing feedback.*

**Example 1:**

*Split volunteers into pairs, different pairs than in the earlier activities.*

**Assign roles:**

- Undergraduate (receives feedback)
- Volunteer (has the tough conversation)

**Walk up for the scenarios:**

**You've built a relationship with your undergraduate mentee. It's month four of working with him in his role. You have not yet encountered any issues in the relationship, and he enjoys working with you. This is the first time you have to have a tough conversation with him and provide feedback.**

**Scenarios:**

	<ul style="list-style-type: none"> <li>● The undergraduate is experiencing burnout and not getting his tasks done on time. This month, he didn't prepare deliverables he typically does and missed the meeting you have regularly scheduled. You drove 60 minutes to this meeting, and he didn't show up. You give him a call and he picks up, and you're able to chat.</li> <li>● The undergraduate missed a deadline. He's aloof and uninterested in his leadership role right now. You are meeting for your regular scheduled weekly check in.</li> <li>● The undergraduates are super excited about his role after the Carlson Leadership Academy and have so many ideas to bring back to the chapter. He has a list of ten goals he wants to accomplish over the next three months. He plans on getting to work right away without sharing his goals with the executive board. You are meeting for your regular scheduled weekly check in.</li> </ul> <p><i>Allow the application activity to go on for about 3-4 minutes, or wait for a natural stopping point. You (or the observer) can jump in and call time when appropriate. Before the observer(s) provide feedback, ask the individual who was playing the volunteer to provide any self-feedback for the activity. Once the self-feedback is over, ask the 1 observer or group observer to consider:</i></p> <ul style="list-style-type: none"> <li>● <b>What did the volunteer do well?</b></li> <li>● <b>What could the volunteer have done instead or do next time?</b></li> </ul> <p><b>Consider the following feedback suggestions:</b></p> <ul style="list-style-type: none"> <li>● Did the volunteer use open-ended questions to ask the undergraduate what is going on in his life?</li> <li>● Did the volunteer be a sounding board for the mentee?</li> <li>● Did the volunteer create a safe space that allows the undergraduate to share how he is feeling and what is going on?</li> <li>● Did the volunteer use active listening skills?</li> </ul> <ul style="list-style-type: none"> <li>● <b>How did those activities feel?</b></li> <li>● <b>What are you now aware of in how you approach conversations like that?</b></li> <li>● <b>What was challenging?</b></li> <li>● <b>What was easy?</b></li> <li>● <b>What will you do in the future?</b></li> <li>● <b>What might your next meeting with your undergraduate look like to ensure accountability on anything accomplished, or not completed?</b></li> </ul>
11:45 - 11:50	<b>Wrap Up</b>
	If time permits, use this time to begin to address Parking lot items with your small group

	<p><i>Facilitator shares that lunch is at 12, and we will meet back in this room at 2 pm.</i></p> <p><i>Announcement: Chapter counselors will stay in the lunchroom for the post-lunch member safety session. Chapter counselors please immediately join us back in this room when your session lets out.</i></p> <p><i>If you do not have another place to sit for lunch, we can sit together. If you are sitting with your chapter or AVC, no problem!</i></p> <p><i>If there is time, have attendees share questions they came up with.</i></p>
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**Session Five: Creating the Premier Student Experience**  
**Saturday: 2:00 - 3:00 pm**

Time:	60 minutes
Purpose:	Volunteers will discuss how to co-create the premier student experience for their local chapter, with their undergraduate mentee. The session will overview the following initiatives: <ul style="list-style-type: none"> <li>● Fraternity Today</li> <li>● Substance Free Facilities</li> <li>● The Balanced Man Program</li> <li>● Recruitment and the Balanced Man Scholarship</li> </ul>
Session Objectives:	<ul style="list-style-type: none"> <li>● Identify how to co-create the premier student experience through a large group presentation</li> </ul>
Materials & Equipment:	Creating the Premier Student Experience Presentation Participant guides
Session Outline:	<ul style="list-style-type: none"> <li>● Fraternity Today</li> <li>● Substance Free Facilities</li> <li>● The Balanced Man Program</li> <li>● Recruitment and the Balanced Man Scholarship</li> </ul>
Pre-Session Prep:	N/A

2:00 - 3:00 pm	<b>Creating the Premier Student Experience (Large Group)</b>
	<p><b>We're going to dive into what makes the SigEp experience. It's important to note that you help create that. You are a driver of this experience. You are the person who the undergraduate will look to for advice, to be a sounding board, and to coach them.</b></p> <p><b>When you were 15 or 16, did you have to take a drivers ed class or drivers ed test? Typically, you have to pass a driving test, right? Your instructor in the passenger seat, you in the driver's seat. You're nervous, but you know that he's there to help you if things go wrong. But you want to show him that you know what you're doing. He's going to help you, guide you, let you</b></p>

**know if you're on track, or if you're starting to veer off. I want you to think about your role as a volunteer like that driver's ed instructor.**

**He has a break, right? Just in case that driver veers off too far and almost crashes. He's able to put his foot down and say that wasn't correct. He's going to let the driver drive and make the right moves because the driver knows the right moves. But the instructor is there just in case he has to course correct. You are that instructor. You are along for the ride. You are there in case something happens. You're there through the planning, execution, implementation. You're able to guide when there is uncertainty. But you are not doing it for them. You're letting them drive. You're a part of the process, a co-creator, but you're not doing it for them.**

**Please consider this as we talk through the important topics. You're helping create the SigEp experience. We're all moving these important pieces forward, and helping the undergraduates reach new heights. We're setting the bar high and helping them figure out how to exceed expectations.**

**As we walk through this content, please know we will do goal setting after this. Please consider what you know your chapter does, and what they should strive for. That will help you figure out what goals to set. Consider what you want your impact to be, and how you can help them reach their goals simultaneously.**

**Substance Free Facilities:**

- The Grand Chapter passed a resolution in 2017 mandating substance-free housing for all SigEp chapter facilities by August 1, 2020, and substance-free common spaces by August 1, 2018. The resolution passed by a 2-1 ratio.
  - The resolution passed because the fraternity wanted to ensure that our focus is on what really matters--development, values, and brotherhood--and not solely on alcohol. The chapter house should be conducive to learning and fostering meaningful relationships, not 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.
- 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.
- The substance-free policy doesn't ban drinking; it just bans drinking *at the chapter facility*. The policy does not make SigEp a dry fraternity. Social events with alcohol can still be held. Our VPs of Programming have learned how to host fun events hosted at third-party venues this weekend. They have also been provided with more information on how to hold fun events without alcohol. Vice presidents of recruitment have also been taught how to recruit on a substance-free message. Your chapter will still have the opportunity to hold social events, just not at

	<p>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 event.</p> <ul style="list-style-type: none"> <li>● <b>Transition to completely substance-free:</b> <ul style="list-style-type: none"> <li>○ Update local chapter bylaws with a completely substance-free policy -- from common spaces to the whole facility</li> <li>○ Send updated chapter bylaws to their regional director or chapter services director</li> <li>○ Educate and train chapters on how to operate with a completely substance-free facility</li> <li>○ Resources to support: substance-free facility playbook</li> </ul> </li> </ul> <p><b>Follow Up Questions:</b></p> <ul style="list-style-type: none"> <li>● How do you see this playing out in your chapter?</li> <li>● What has been challenging around this?</li> <li>● What has been successful?</li> <li>● What are ways you can ensure success with substance-free facilities in your volunteer role?</li> <li>● What do you need in order to make this successful with your chapter?</li> </ul> <p><b><u>Balanced Man Program:</u></b></p> <ul style="list-style-type: none"> <li>● The best SigEp Chapters run all 4 challenges on the BMP App. To do this successfully, they: <ul style="list-style-type: none"> <li>○ recruit on the BMP and integrate new members into the BMP</li> <li>○ Create meaningful activities and meetings for all five areas of development</li> <li>○ Utilize external facilitators and content experts to run BMP challenge meetings</li> <li>○ Hold members accountable for continuous development and participation</li> </ul> </li> <li>● <b>Philosophy</b> <ul style="list-style-type: none"> <li>○ Five tenants: <ul style="list-style-type: none"> <li>■ Equal rights and responsibilities (single tiered membership) <ul style="list-style-type: none"> <li>● Lived out through new members taking on leadership roles from day 1</li> </ul> </li> <li>■ Continuous development <ul style="list-style-type: none"> <li>● Lived out through first-year students to seniors completing all four challenges</li> </ul> </li> <li>■ Accountability <ul style="list-style-type: none"> <li>● Lived out through membership lapsing</li> </ul> </li> <li>■ Living the Ritual <ul style="list-style-type: none"> <li>● Lived out through utilizing Rites of Passage</li> </ul> </li> <li>■ Mentorship <ul style="list-style-type: none"> <li>● Lived out through using undergraduates, volunteers, and university partners</li> </ul> </li> </ul> </li> </ul> </li> <li>● <b>BMP in Action</b></li> </ul>
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	<ul style="list-style-type: none"> <li>○ <b>Time frame:</b> Clear time frames of minimum and maximum challenge times</li> <li>○ <b>Consistency:</b> Consistent meetings on a weekly, bi-weekly or monthly basis</li> <li>○ <b>External Facilitators:</b> Utilize external facilitators, content experts to teach these meetings</li> <li>○ <b>Mentors:</b> Undergraduates, volunteers and university partners engaged on a monthly basis</li> <li>○ <b>Areas of Development:</b> SigEp, Intellectual, Physical Health and Wellness, Professional, Leadership</li> <li>● <b>BMP App</b> <ul style="list-style-type: none"> <li>○ The vehicle all of our chapters use to successfully run the BMP</li> <li>○ BMP App was officially rolled out to chapters in Spring 2017.</li> <li>○ Deployment vs. usage           <ul style="list-style-type: none"> <li>■ Who has received challenges</li> <li>■ Monthly log in of unique individuals               <ul style="list-style-type: none"> <li>● If a chapter has 50 members, ideally each member is logging into the app at least 1x month</li> </ul> </li> </ul> </li> </ul> </li> </ul> <p><b>Follow Up Questions:</b></p> <ul style="list-style-type: none"> <li>● What are the areas that your chapter really succeeds in the BMP?</li> <li>● What are the areas for growth or opportunity?</li> <li>● Do you see a focus area this year that you'd like to help the chapter really hone in on?</li> <li>● What does the chapter see as a focus this year?</li> </ul> <p><b><u>Recruitment:</u></b></p> <ul style="list-style-type: none"> <li>● <b>Recruitment should be well organized with all of the basics covered</b> <ul style="list-style-type: none"> <li>○ 5 Core Components of successful recruitment. Without these components, chapters fail to implement values-based recruitment and strategy.           <ul style="list-style-type: none"> <li>■ Recruitment goals relevant to the optimal size</li> <li>■ Written recruitment standards communicated to the entire chapter</li> <li>■ Recruitment committee established and meeting regularly</li> <li>■ Active potential new member list</li> <li>■ Engaged recruitment mentor to support VP Recruitment</li> </ul> </li> </ul> </li> <li>● <b>Recruitment should happen 365 days a year</b> <ul style="list-style-type: none"> <li>○ Active year-round recruitment - does the chapter recruit in every month of the year? 4+ months out of the year</li> </ul> </li> <li>● <b>Recruitment should bring in people in ways other than just formal recruitment: Balanced Man Scholarship</b> <ul style="list-style-type: none"> <li>● Use the BMS to find potential new members on campus</li> <li>● Proficient: An average BMS has 90 applications, interviews at least 50% of those applications and has 5 new members join from the BMS</li> </ul> </li> </ul>
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	<ul style="list-style-type: none"><li>● Buchanan cup level chapters: 5x the recruitment goal in applications, interviewing 50% of those applicants, and 25% of new members coming from the BMS</li><li>● Scholarship: funded by the AVC, or part of dues</li><li>● Formal and professional BMS Banquet</li><li>● <b>Recruitment message should be aligned with SigEp</b><ul style="list-style-type: none"><li>○ Recruiting with a message of the Balanced Man Program, Substance Free Facilities, and SigEp Learning Communities. Not recruiting on a stereotypical fraternity message.</li><li>○ Resources: Recruiting on a substance-free message</li></ul></li></ul> <p><b>Follow Up Questions:</b></p> <ul style="list-style-type: none"><li>● What are the areas that your chapter really succeeds in the recruitment, and the BMS?</li><li>● What are the areas for growth or opportunity?</li><li>● Do you see a focus area this year that you'd like to help the chapter really hone in on?</li><li>● What does the chapter see as a focus this year?</li></ul> <p><i>Close session and move to goal setting.</i></p>
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**Session Six: Building a Coalition**  
**Saturday: 3:00 - 3:30 pm**

Time:	60 minutes
Purpose:	Volunteers will create goals along with their District Governors.
Session Objectives:	<ul style="list-style-type: none"> <li>Formulate 3 goals relating to the vision that was identified on Friday night.</li> </ul>
Materials & Equipment:	Flip charts Post-it note Masking tape Participant guides SMART Goals Prompt
Session Outline:	Goal Setting Feedback from small group facilitators if applicable
Pre-Session Prep:	N/A

3:00 - 3:30 pm	<b>Building a Coalition (Large Group)</b>
	<p>During this session, District Governors will work with volunteers from their district on creating goals to achieve once they leave the program. Spend 5 or so minutes introducing SMART goals which will be on pg ___ of their participant guide. Then split them off by DG (a slide will list the breakdown)</p> <p><i>Allow 25-30 minutes for goal setting. Each goal can be set on one of the SMART goal worksheets, that includes the goal, tasks associated with the goal, the network needed and time.</i></p> <p><i>Allow volunteers to get ideas and feedback from small group facilitators during this time.</i></p>

**Session Seven: Overcoming Obstacles**  
**Saturday: 3:30 - 4:15 pm**

Time:	45 minutes
Purpose:	Attendees will understand common obstacles that they may encounter that could prevent them from achieving their goal and impact.
Session Objectives:	<ul style="list-style-type: none"> <li>● Identify at least 3 obstacles volunteers face through group conversation</li> <li>● Identify at least 3 tactics to overcome 3 obstacles through group conversation</li> </ul>
Materials & Equipment:	Flip charts Post-it note Masking tape Participant guides
Session Outline:	Discuss potential personal volunteer obstacles Discuss potential chapter or community obstacles Discuss potential student and undergraduate obstacles  Discuss tactics to approach potential personal volunteer obstacles Discuss tactics to approach potential chapter or community obstacles Discuss tactics to approach potential student and undergraduate obstacles  Debrief
Pre-Session Prep:	Flip Chart: Personal Obstacles Flip Chart: Chapter Obstacles Flip Chart: Student Obstacles

<p>3:30 - 4:15 pm</p>	<p><b>Overcoming Obstacles (Large Group)</b></p>
	<p><i>Have group circle back up after goal setting. You can have the group do some goal sharing to open the session up depending on time before transitioning to Obstacles.</i></p> <p><b>As a volunteer, you're going to experience obstacles, whether it's a personal obstacle, like management of time to support the chapter, or personal burn out or fatigue, or a chapter-wide obstacle, We're going to take some time to consider what obstacles we might anticipate as people and volunteers, and the obstacles we might anticipate around the chapter. All of this will help us get in front of some of these obstacles, so we can still have a clear path to the impact we want to make in our role.</b></p> <p><i>Ask the group</i></p> <ul style="list-style-type: none"> <li>● <b>what obstacles, you as a volunteer and person might face in your role?</b></li> </ul> <p><i>Wait for responses. Collect answers on the flip chart. If the group struggles to come up with answers, prompt them with some of the following ideas:</i></p> <ul style="list-style-type: none"> <li>● Personal time management with other life events, family, career, hobbies, etc.</li> <li>● Emotions</li> <li>● Personal burn-out:</li> <li>● Geography</li> <li>● Volunteering with a chapter when you're not from that chapter</li> <li>● A non SigEp volunteering with the chapter</li> </ul> <p><i>Collect answers. Move to the next flip chart.</i></p> <p><b>What obstacles, you as a volunteer might face as it relates to your specific chapter or a chapter operation?</b></p> <p><i>Wait for responses. Collect answers on the flip chart. If the group struggles to come up with answers, prompt them with some of the following ideas:</i></p> <ul style="list-style-type: none"> <li>● No buy-in with the Balanced Man Program, 365 Recruitment, Balanced Man Scholarship</li> <li>● A toxic Greek community on the campus             <ul style="list-style-type: none"> <li>○ Hazing, or ultra-competitive culture of turning each other in</li> </ul> </li> <li>● Little to no volunteer support (outside of you as the volunteer)</li> <li>● Little to no support from the Fraternity and Sorority Life office on campus</li> <li>● The old way of thinking vs. a new way of thinking             <ul style="list-style-type: none"> <li>○ A division in the chapter with cliques, or old/new ways of thinking. Maybe there are some undergraduates who like the idea of SigEp today, but others who do not.</li> </ul> </li> </ul>

*Collect all answers. Move to the next flip chart.*

**Finally, ask the group, let's first consider what obstacles, undergraduate students might face as it relates to their role in the chapter and being a student today? This impacts how you're able to support your mentee as a student.**

*Wait for responses. Collect answers on the flip chart. If your small group struggles to come up with answers, prompt them with some of the following ideas:*

- Juggling academic work and classes, with being a student leader
- Being a leader in the organization and trying to change a culture on their campus or in their organization
- Having a lot of priorities on campus that each requires 100% of their attention at all times
- A campus community that may be toxic or not conducive to supporting the way fraternity could be done today
- Being far away from home
  - Being away from family for the first time
- Being a first-generation college student
- Financial situation
  - Working might be a priority for a student instead of the fraternity (or working might be a priority to pay for chapter dues).

*Collect exhaustive lists for all three flip charts. Explain:*

**There are a lot of obstacles we as volunteers might encounter, and our students might encounter. There are a lot of obstacles that we could encounter with our students. It's not easy to be a volunteer and it's not easy to anticipate everything that will get thrown our way. But, if we recognize obstacles that we might face, it's easier for us to be prepared when obstacles come our way. We can also spend time focusing on how to support our students in obstacles that they may face, the best we can.**

**Let's now go back and try and come up with ways we can overcome these obstacles, proactively or reactively.**

*You have an option to either do this next activity as a small group or do a 'pair and share.' You can either prompt discussion in the small group about how to proactively prepare for obstacles, or have them pair off and each pair can create proactive approaches or ways to overcome the obstacles on the flip chart and present back to the small group. This just depends on the size of the group and your preference. If the group seems tired, have them pair and share.*

*Go back to your first flip chart with the list of obstacles that volunteers may face in their role as a person. One by one, prompt your small group to consider*

*a way to either proactively prepare for an obstacle, or ways they can overcome that obstacle. Do this with each flip chart. Have them consider:*

- **Who in their network can help them?**
  - District Governor
  - Regional Director/Chapter Services Director
  - Volunteer Services Staff
  - Volunteer network created here
  - Fraternity or sorority Life office
- **What can you do as a volunteer to avoid or overcome that obstacle?**
- **What are signs of warning for this obstacle?**
- **How do you anticipate a red flag?**

*Once you've gone through the obstacles and ways to overcome, debrief the activity with the group.*

**Ask your small group:**

- **How did it feel to consider the obstacles that could get in your way as a volunteer?**
- **How did it feel to proactively consider how to address or approach those obstacles?**
- **Why is it good to discuss obstacles we might face in our role as volunteers?**
  - Our students are dealing with a lot. We're asking them to be leaders and change agents on their campus and in fraternity today. It's tough to do that, and also be 18-22 and learning about yourself. They're being challenged, and we have to consider how we support them as people, students, SigEps, and change agents.
- **What will you do differently or proactively as a result of this conversation?**

**Session Eight: Goal sharing, Commitments and Wrap Up**  
**Saturday: 4:15 - 4:45**

Time:	30 minutes
Purpose:	Volunteers will share their goals, discuss their commitments, and understand the next steps after the program.
Session Objectives:	<ul style="list-style-type: none"> <li>● Express 1 goal to the large group with the prompted script to ensure accountability</li> <li>● Discuss post-program requirements</li> </ul>
Materials & Equipment:	Post It Notes Goal setting worksheets Post Program Requirements
Session Outline:	Large Group Circle Up Share Post program requirements Goal Sharing Commitments Closing Statements
Pre-Session Prep:	Give small group post-it notes

4:15 - 4:45 pm	<b>Commitments &amp; Wrap Up (Large Group)</b>
	<p><i>Facilitators open by overiewing everything we've discussed. We've reached the end of our time together on site but we're still going to be connecting after the program.</i></p> <p><i>Share next steps for the Institute (they will receive an email regarding this after the program), so they do not need to take notes.</i></p> <ul style="list-style-type: none"> <li>● <b>Complete the Cox Institute survey for program feedback</b></li> <li>● <b>Join the Cox Institute FB Group for more conversations and connections</b></li> <li>● <b>Share your finalized goals with your small group facilitator after the program</b></li> </ul>

	<ul style="list-style-type: none"> <li>● <b>Meet with your undergraduate mentee to discuss your goals and his goals from Carlson</b></li> <li>● <b>Your district governor will check in with you</b></li> <li>● <b>Be engaged on a call with your small group post-program (4-9 months after the program)</b></li> </ul> <p><i>Facilitators have everyone share a goal they've completed and the impact they want to have in their role with the large group. Allow the group to share.</i></p> <p><i>Commitments are what you are walking out of here with. This doesn't have to necessarily be the goal you just created or shared, but what you now want to commit to after going through the program. All attendees do this activity, including facilitators.</i></p> <p><i>Attendees answer the following prompt individually and then share one by one using the prompt. Have everyone stand up and get in a circle to share commitments.</i></p> <p><i>"I commit to ____ and you can support me by ____." Pass out post-it notes for people to write their commitments on.</i></p> <p><i>Allow for time to exchange contact information to engage in post-program conversations, photos, and any other wrap up comments and questions.</i></p> <p><i>Lead facilitator shares announcement for the rest of the day:</i></p> <ul style="list-style-type: none"> <li>● <i>Attend volunteer awards ceremony at 5 pm (they receive certificates)</i></li> <li>● <i>Reception at 9:30 after dinner</i></li> <li>● <i>Take everything out of the room/clean up.</i></li> <li>● <i>Any other program-specific announcements</i></li> </ul>
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**\*\*See additional resources for post-program requirements and feedback.**



**SigEp**

**Sigma Phi Epsilon**

310 South Boulevard • Richmond, VA 23220

(804) 353-1901

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