

SigEp



RECRUITMENT SKILLS

Facilitator Guide



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(NAME)

(CHAPTER)

Program Schedule

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

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

Saturday	
<i>Session</i>	<i>Time</i>
Chapter excellence breakfast	8:00 - 9:00 a.m.
Undergraduate breakout tracks	9:00 - 11:50 a.m.
<i>Between 10:00 - 10:45 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

<u>Session</u>	<u>Time Allotted</u>	<u>Should Take Place</u>
Introductions and Expectations	30 minutes	Friday from 10:00 – 10:30 p.m.
Responsibilities of Recruitment Committee & 6 Steps of Recruitment	1 hr, 40 minutes + break	Saturday from 9:00 - 10:50 a.m. (10 minute break at 10:00 a.m. for snacks in pre-function area)
Values-Based Recruitment + BMS Introduction	1 hour	Saturday from 10:50 – 11:50
Interview Skills + BMS Debrief	2 hrs, 5 minutes hours + break	Saturday from 1:45 – 4:00 p.m. (10 minute break at 4:00 p.m. for snacks at pre-function area)
Action Planning	1 hr, 15 minutes	Saturday from 4:30 – 5:45 p.m.
Wrap Up	1 hr, 5 minutes	Saturday from 5:45 – 6:50 p.m.

Friday Night SESSION: Introductions and Expectations Page 1 Participant's Guide

Time:	30 minutes total
Purpose:	<ul style="list-style-type: none"> ▪ Introduce participants and facilitators ▪ Provide an overview of the program and schedule
Session objectives:	<ul style="list-style-type: none"> ▪ Provide an overview of Carlson and intended outcomes for the weekend. ▪ Ensure that participants are prepared to make the most out of their Carlson experience.
Materials & equipment:	<ul style="list-style-type: none"> ▪ Flip charts. ▪ Masking tape. ▪ Participant guides.
Session outline:	<ul style="list-style-type: none"> ▪ Introductions (15 minutes) ▪ Program overview (5 minutes) ▪ Effective goal setting (5 minutes) ▪ Wrap up (5 minutes)
Pre-session prep:	<ul style="list-style-type: none"> ▪ Prepare flipcharts ▪ Prepare to distribute participant guides

Flipcharts to prepare:

**Group
Expectations**

Parking Lot

**Responsibilities of
Recruitment
Committee + BMS
Chairman**

**Light bulb
Moments**

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 is Carlson Leadership Academy 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
 - One challenge in the chapter they're looking to learn how to overcome and improve the chapter experience

Program overview (5 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
 - 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 "parking lot" 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? (page 1 of participant guide)
 - 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? Some examples include:
 - Getting your chapter on the same page with whom to recruit.
 - Knowing where to find the "ideal SigEp" on campus.
 - Recruiting outside of formal recruitment and moving to year-round recruitment.
 - Selling SigEp's value.
 - Overcoming objections to joining.
 - Utilizing your recruitment committee.
 - High-level understanding of the Balanced Man Scholarship
- Provide an overview of what will be covered in this track.
- If there are any topics they identified above that aren't covered in the curriculum, add them to your "parking lot" to revisit later.

Effective goal setting (5 minutes):

- Ask the group who knows what SMART goals are. Walk the group through the acronym, outlining each component on a flip chart.
 - Specific: Goals must be something that can be described and understood easily by others - finite conditions, not general feelings.

- Measurable: How can you measure your success? Whenever possible, use numbers or percentages to mark progress and/or achievement of the goal. You can't rely on personal opinion.
 - Attainable: Is the goal realistic? Goals should be a stretch to obtain but not impossible to achieve. Members will work toward what they believe they can achieve and are not inspired by boring, easy goals.
 - Realistic: Why does this goal matter? Explain how this goal connects to the larger picture or goal.
 - Timely: When is your deadline? Goals must have an end date when they are due. Creating a sense of urgency will push you and those you're leading to work harder.
- Check in with the participants to see who has goals with them. Ask them to raise their hand if they brought their SMART goals with them.
 - Ask the participants who brought their goals with them to give examples of some of their goals.
 - Have them split up into small groups to brainstorm what kind of goals they have set or want to set.
 - If they are comfortable doing so, invite 3-4 participants to share their written goals with the group
 - As a group, work with that participant to determine if the goal is SMART, and how the goal might be improved to be more specific, measurable, achievable, realistic, or timely.
 - 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.
 - "You all said earlier tonight that you're all here with the intent to make the most of this weekend to walk out better officers. To do that, you need to have your goals formulated and ready for tomorrow. Take some time tonight to talk with your chapter or with other guys in this room to help you create your goals."

Wrap-up (5 minutes):

- As a facilitator, share your favorite memory from Carlson and why you personally believe it was beneficial to your undergraduate experience to get the group excited for tomorrow.
- Remind them one more time to complete their homework regarding SMART goals.
- 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.

Saturday Morning

SESSION: Responsibilities of Committee & 6 Steps of Recruitment

Time:	1 hour, 40 minutes total + break
Purpose:	<ul style="list-style-type: none"> ▪ Provide an overview of the position roles and responsibilities ▪ Introduce the six steps of recruitment
Program Objectives:	<ul style="list-style-type: none"> ▪ Participants will have a better understanding of their role and how their responsibilities will make an impact on their chapter. ▪ Participants will understand that recruitment is the lifeblood of the fraternity and is the easiest way to positively or negatively affect a chapter's culture ▪ Participants will understand the six steps of recruitment and the impact each step has on year-round recruitment, formal recruitment, and the Balanced Man Scholarship. ▪ Participants will become comfortable introducing themselves, making friends and asking open-ended questions throughout the recruitment process
Materials & Equipment:	<ul style="list-style-type: none"> ▪ Flipchart. ▪ Markers. ▪ Participant guides.
Session Outline:	<ul style="list-style-type: none"> ▪ Responsibilities of the Recruitment Committee + BMS Chairman (10 minutes) ▪ Why Recruitment? (10 minutes) ▪ The Six Steps of Recruitment (80 minutes)
Pre-Session Prep:	<ul style="list-style-type: none"> ▪ Prepare flipcharts.

Flipcharts to prepare:

Why Recruitment?

The Six Steps of Recruitment

Growing your PNML & Marketing your BMS

The Responsibilities of the Recruitment Committee + BMS Chairman (10 minutes):

- Prepare a flip chart labeled "Responsibilities of the Recruitment Committee + BMS Chairman". During the following discussion, capture their thoughts on the flipchart.
- Ask the group: "You all are on the recruitment committee or participate in facilitating recruitment efforts 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 Recruitment Committee + BMS Chairman?"
- Ideally, you arrive at some version of the following points below:
 - Align the chapter under a shared recruitment vision and goal.
 - Develop and execute a recruitment strategy using values-based recruitment and year-round activities.
 - Set and uphold high recruitment standards that take a prospect's values under consideration.
 - Oversee the implementation of the Balanced Man Scholarship.
 - Coordinate chapter recruitment skills training.

Why Recruitment? (10 Minutes)

Instructions

- The first section in the recruitment skills track is all about "why" do we recruit? The bottom line you want to get to by the end of the conversation is simple: "recruitment affects everything we do as an organization and is the quickest way to change a chapter culture, for better or for worse."
- Lead the conversation: "Why do we recruit?". Prepare to record answers on a flipchart.
- Some other reasons why recruitment is important are laid out in this section.
 - Without recruitment, there is no chapter
 - Recruitment is the easiest way to change a chapter (GOOD or BAD!)
 - Objectively and subjectively better men will challenge current members and the chapter to continuously improve thereby improving the quality of the chapter and experience of its members
 - Recruitment drives our chapter's economic engine and gives us resources to operate and deliver the SigEp experience
 - Recruiting values-based men who align with our Cardinal Principles of Virtue, Diligence and Brotherly Love as well as the Balanced Man ideals of Sound Mind and Sound Body will ensure we accomplish the mission intended by our founders
 - Men with strong values and integrity make smart decisions in an ever-changing temptation-filled environment
 - Recruiting values-based men is the best way to positively impact your chapter
 - "The goal is not to do business with everyone who wants what we have. The goal is to do business with those who believe in what we believe." – Simon Sinek, Start With Why

The Six Steps of Recruitment (80 minutes):

Instructions

- In this section, you'll review the six steps of recruitment and break them down, step-by-step, to go through best practices in each step. There is some intentional overlap between the recruitment skills and VPR tracks. Go through each of the six steps and encourage conversation whenever possible.
- There is a lot of overlap between the six steps of recruitment and the five stages of the Balanced Man Scholarship. Be sure to incorporate information about the BMS whenever possible.
- In each section, be sure to review the impact that it has on formal and year-round recruitment, and the Balanced Man Scholarship. Remember, there are multiple different roles in your session, so you should make them relevant to everyone.
- As a reminder, the six steps of recruitment are (pg. 2 in the participant guide):
 - 1. Build a potential new member list (PNML)
 - 2. Introduce yourself
 - 3. Make a friend
 - 4. Introduce him to your friends
 - 5. Introduce to SigEp
 - 6. Ask him to join

▪ **STEP ONE – MAKE A LIST (PNML) (pg. 3-4 in the participant guide)**

○ **What is the Potential New Member List (PNML)**

The Potential New Member List (PNML) is an important first piece of the recruitment process to establish. The PNML acts as the “funnel” for the recruitment process. It provides organization to our recruitment and evaluation process of potential new members (PNM’s). The PNML captures important information, tracks and assesses experiences in sound mind, sound body, involvement, soft skills, work ethic/passion and alignment to our values as well as other relevant pieces of information about the PNM’s relationship to our members and SigEp.

○ **Who is responsible for updating the PNML?**

The recruitment committee is responsible for updating the PNML. If you know an interested member, give his name and contact information to a member of the recruitment committee.

○ **ACTIVITY: THE RULE OF TEN**

*Begin with one row ten x’s or stick figures. Explain that they represent ten PNMs on the PNML. Walk through each stage of the recruitment process explaining how nine of the ten will exit the process by not answering the phone not coming to events, not meeting our standards, etc. while drawing additional lines of x’s with less in each row until one remains. Explain that this is a marketing/sales concept and discuss what this means for recruitment: **our list must be 10x the size of our goal.***

OUTCOME: Chapter identifies the need for a PNML 10x the size of our recruitment goal

○ **Where do we find PNMs? How do we find enough men to make a 200-400 man PNML?**

These answers are also the same answers that could apply for ways that we can market the Balanced Man Scholarship. Encourage participants to break off into groups and come up with their suggestions. Make a list on a flipchart with responses from participants.

OUTCOME: Chapter identifies opportunities to fill the PNML year-round through members’ personal networks, the Balanced Man Scholarship, the formal recruitment period, other student organizations, recommendations etc.

Step 1: Make a potential new member list (PNML)	Year-Round Recruitment Impact	Each week, members should be adding potential new members to the list, and members of the committee should be meeting and moving potential new members through the six step process.
	Formal Recruitment Impact	Defined, objective criteria help us define our ideal new member, help us capitalize on formal recruitment and prevent us from extending membership to members who don’t meet our standards or align with our values and philosophy. See “Setting Standards” section in VPR Guide for more information to track on the PNML
	Balanced Man Scholarship Impact	The BMS is our best opportunity to fill the PNML with high quality PNM’s. Tip: Assess past goals, results and practices of the BMS. Determine greatest areas of opportunity and highest returns on investment through a Keep, Stop Start activity with the BMS Chairman. This will ensure the BMS continually contributes quality leads to our PNML

▪ **STEP TWO – INTRODUCE YOURSELF (pg. 5 in the participant guide)**

○ **How long does it take to form a first impression?**

It takes roughly 7 seconds to form a first impression. Once that first impression is formed, it takes roughly 7 minutes to change that initial impression. Therefore, it is critical to prepare our members to leave strong, positive impressions with the potential new members they interact with.

○ **Why do people join SigEp? Ultimately, people join people. Potential new members will join SigEp for the men that are already involved. This means that if we want to attract the most qualified men that align with our values, we need to leave great first impressions that reflect the very best of SigEp and its values.**

○ **What makes a good handshake?**

ACTIVITY: THE PERFECT HANDSHAKE

A good handshake plays a huge role in first impressions. Demonstrate the perfect handshake, narrating these steps:

- 1. Make eye contact and square your body.
- 2. Gesture your arm forward to initiate the greeting.
- 3. Extend your right hand to meet the other person's right hand.
- 4. Point your thumb upward toward the other person's arm and extend your arm at a slight downward angle.
- 5. Wrap your hand around the other person's hand when your thumb joints come together.
- 6. Grasp the hand firmly and squeeze gently once. Remember that limp handshakes are a big turnoff, as are bone-crushing grasps.
- 7. Hold the handshake for two to three seconds.
- 8. Pump your hand up and down one to three times to convey sincerity.
- Have participants get up and practice the perfect handshake by introducing themselves to five other participants in the room.

○ **ACTIVITY: THE THREE A'S OF FIRST IMPRESSIONS:**

Draw three A's on a flipchart, explaining that each represents a key ingredient to a successful first impression. Ask the participants to guess what each stands for, writing the words out once they guess correctly, then explain each.

- *Appearance :Well dressed, clean cut, smiling, open body language*
- *Attitude: Friendly, excited, happy, welcoming, non-judgmental*
- *Action: Greeting people, introducing yourself, working the room, introducing PNMs to other members, no bro huddles*
- *Also, what we do as individuals and as an organization on campus, how we act in class, what organizations we're in, how we treat people, etc.*

Step 2: Introduce Yourself	Year-Round Recruitment Impact	Every person you interact with outside of SigEp has the possibility of becoming a PNM. Your first impression is a tremendous opportunity to define SigEp
	Formal Recruitment Impact	In a formal recruitment setting, first impressions are important. Potential new members are looking at many different fraternity options and making their decisions quickly. Start off your relationship on the right foot, and you're in a good place. If you have to make up for a bad first impression, you'll likely lose him to another chapter.
	Balanced Man Scholarship Impact	First impressions tremendously impact the interview process in the BMS

▪ **STEP THREE – MAKE A FRIEND** (pg. 6 in the participant guide)

○ **What's the easiest way to get to know someone?**

The best way to get to know someone is by talking about their favorite topic in the world: themselves.

○ **What kinds of questions should we ask them?**

We drive these conversations by asking quality open-ended questions. We have two ears and one mouth, use them proportionally. Asking quality open-ended questions helps you gain a deeper understanding of the PNM and allows you to better learn their character and values. This information is important in determining if they will be a great fit for SigEp.

○ **What is more important – getting to know them at this point or selling SigEp?**

Your ability to be curious and ask great questions and learn about PNM's shows you care about them and will set SigEp apart in recruitment. Building a genuine relationship during the recruitment process is the most critical contributor to success. Be interested, then interesting.

○ **ACTIVITY: THE FIVE F'S** (Use the same method as the three A's)

OUTCOME: Members have an easy bank of questions to use when needed or applicable

To make initial conversations both easy and meaningful, ask open ended questions in these five categories:

- Family
- Future
- Firsts
- Favorites
- Fun

These categories will get PNMs talking about themselves which, again, gets them to feel connected with us and gives us useful information about them.

○ **ACTIVITY: QUESTION PRACTICE**

OUTCOME: Members are comfortable asking open-ended questions and are able to create genuine and deep connections with PNM's. Members are able to use this information to evaluate PNM's in the recruitment process and connect to other member's in the chapter

Have participants stand and pair up with someone in the room (cannot be someone immediately next to them). Explain that the two are to have a conversation with one partner (the recruiter) only asking questions. After 2 minutes, instruct them to switch roles and allow the conversation to go on for another two minutes. Point out that with practice, this becomes a habit and makes for easy conversations with PNMs.

Step 3: Make a friend	Year-Round Recruitment Impact	Recruitment is all about friendships. If we have genuine relationships with people, we have many more opportunities throughout the year to invite them to events, to spend time with brothers, and to join the chapter.
	Formal Recruitment Impact	People join people. When PNMs are deciding what chapters to visit again, they're going to think about who they connected with the best. If we build real friendships, they're more likely to come back to SigEp
	Balanced Man Scholarship Impact	The BMS interview and BMS banquets are huge opportunities to build relationships with applicants and connect them with brothers with similar interests.

- **STEP FOUR – INTRODUCE TO YOUR FRIENDS** (pg. 7-9 in the participant guide)
 - At this point, you should have developed a genuine relationship with the PNM, where you'll know about his future aspirations, his interests and hobbies, and what he likes to do for fun. Ideally, the transition to introducing him to someone should be natural if you've developed a deep relationship.
 - **Who should you introduce him to?**
Introduce him to someone with like-minded interests and hobbies. For example, if the PNM mentioned that he enjoys playing soccer or watching hockey, connect him with a brother that is also interested in the same things. Also, be sure that he meets several members of the recruitment committee.
 - **When is the appropriate time to introduce him to someone?**
Once you've built a genuine relationship with a PNM, the next step is to take action, introduce him to other members and make them feel connected to you and the fraternity. This can happen casually at a recruitment or chapter event or you could set up interactions between the PNM and other members. Be sure to introduce him to members with similar interests, hobbies, majors, career paths, backgrounds etc.
 - **ACTIVITY – BRAINSTORM RECRUITMENT INTERACTION ACTIVITIES**
Group participants into small groups (3-5). Have members identify events and environments that would reinforce SigEp's positive brand and values, and where PNMs can be easily introduced to other people in the chapter. Think along the lines of the six areas of development in the BMP (SigEp, Sound Mind, Sound Body, Personal, Leadership, Professional). Be prepared to record answers on a flipchart.
 - **Are recruitment events the best way to ensure PNMs join SigEp?**
No, often times, recruitment events are even counterproductive if the environment is not conducive to getting to know someone on a deep level. The best way to build a relationship with a PNM is with casual, personal interactions. This could include a lunch with two recruitment committee members and the PNM, playing a sport together or studying for an upcoming exam together.

Step 4: Introduce to Your Friends	Year-Round Recruitment Impact	This step should be natural. If a genuine relationship is built, it should be easy to connect the PNM to other brother's in the chapter, especially if the benefit and interests are mutual. This captures the ideal spirit of networking. Connecting great people with great people for their mutual benefit
	Formal Recruitment Impact	Strategic conversations before and after formal recruitment events about connecting PNM's to members will maximize the opportunities in formal recruitment
	Balanced Man Scholarship Impact	This step should impact our BMS interview strategy with who we pair to applicants. This should impact our banquet seating strategy by how we arrange the banquet seating.

▪ **STEP FIVE – TALK ABOUT SIGEP**

○ **When should you bring up SigEp in the conversation?**

After building a genuine relationship with potential new members and after connecting them with other friends with similar interests, SigEp will present itself as a natural talking point as it has likely impacted a large part of your life and college experience.

○ **How do we talk about SigEp?**

The way we talk about SigEp is important because we define the PNM's expectations for membership by the way we talk about SigEp and how we pitch it to them. We have to put ourselves in the shoes of the PNM and think about his needs as a college student/man.

Once we understand his needs, we can determine the aspects of SigEp that will be the most appealing and have the greatest impact.

○ **What does a SigEp pitch look like?**

i. Ask Questions – What do they want/need?

- Ex: "What do you want out of college/life/Greek Life?"
- Ex: "What interests you about fraternities?"
- Ex: "What do you know about fraternities?"

ii. BMP

- Mission: Building Balanced Men
- Single-tier membership, no pledging, no hazing
- Equal rights and responsibilities
- Continuous development – 4 challenges
- Development activities specific to your chapter
- Mentorship

iii. Big Picture

- National Fraternity Facts
- Leadership Programs (Carlson, Ruck, Tragos, Life After College)
- Most Innovative - Fraternity of Firsts

iv. Chapter Specifics

- Commitments (dues, time, grades, participation)
- Chapter specific events, leadership on campus, ect.

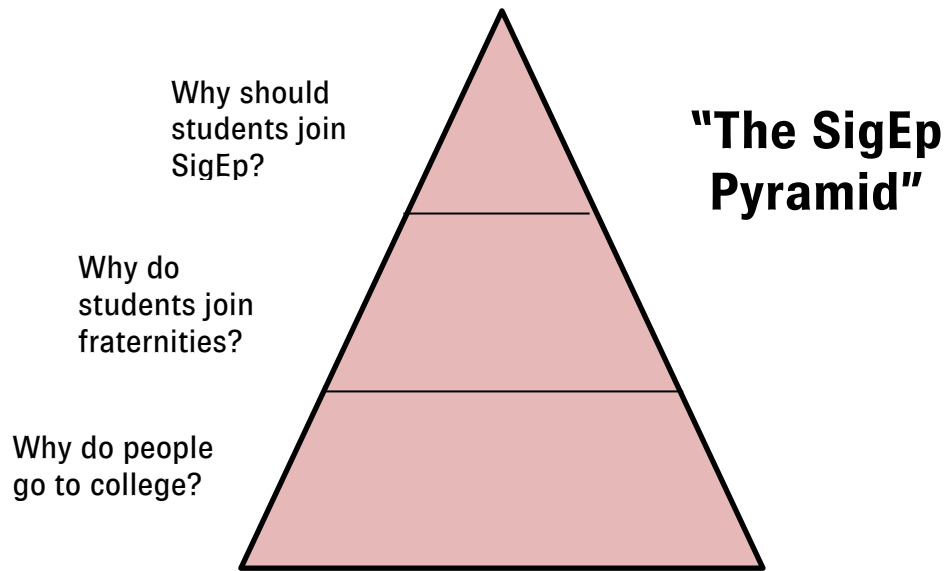
v. Ask Questions

- Ex: "What do you like most about SigEp?"
- Ex: "How would you benefit from being a member?"
- Ex: "What can you add to the chapter?"
- The key is to get him to tell you why he should be a SigEp so that it is his idea

ACTIVITY: THE RECRUITMENT PYRAMID (pg. 9 in the participant guide)

READ: Picture yourself as an incoming freshman. You're walking down a row of information tables at the organizational fair during the first week of school. Every fraternity is telling you why you should join their organization. They're all saying the same thing — alumni networking, brotherhood, sorority relationships, etc. You're exhausted, but SigEp is the last fraternity in the aisle. What is SigEp going to be promoting?

The SigEp pyramid is a quick way to help participants understand what they should, and what they should not, be selling to potential new members. Lead this activity by introducing the walk-up and encouraging participants to follow along in their participant's guide.



- In your participants guide, open to pg. 10 for the SigEp pyramid. We're going to fill this out individually and then come back together as a group to talk about your responses for each tier of the pyramid.
- On the bottom tier, I want you to brainstorm many reasons why students choose to go to college.
- Have participants break off and complete the first tier on their own. After 5 minutes, come back together so they can share their results. Be prepared to record their results on a flipchart.
- When you're ready to move on to the second tier, have participants brainstorm why students choose to join fraternities in general. Explain that students go to college to get x,y,z (recap their answers), but they join fraternities because they want something more out of their experience. This means they cannot repeat answers that you used in the bottom tier. Each answer must be unique to this question.
- Have participants break off and complete the middle tier on their own. After 5 minutes, come back together so they can share their results. Be prepared to record their results on a flipchart.
- Finally, when you're ready to move on, many participants will have caught on to what you're doing. The last question is, "why should students join SigEp?" And just like the last time, we

cannot repeat answers from the previous two tiers of the pyramid. Remind participants of the walk-up. Encourage them to think from the perspective of the potential new member. What are things that no other fraternity will be able to say about their fraternity? If they respond with answers like brotherhood, alumni networking, sorority relationships, etc., challenge them by telling them other fraternities also provide all of those things. What is unique to SigEp?

- *Have participants break off and complete the final tier on their own. After 5 minutes, come back together so they can share their results. Be prepared to record their results on a flipchart.*
- *At the end of the discussion, you should land on SigEp-specific character traits like the Balanced Man Program, Substance-Free Facilities, the Balanced Man Scholarship, no pledging and no hazing, our specific values, our national leadership events like Ruck, the Tragos Quest to Greece, etc.*
- *See pg. 11 for a quick reference guide to the BMP.*

ACTIVITY: PRACTICE THE PITCH (pg. 11 in the participant guide)

Outcome: Each member can customize their SigEp pitch based on an individual PNM's interest

Have chapter members pair off again to practice the pitch with one member role-playing as a PNM. Explain that they will each get four minutes to run through the pitch, although this would normally take longer than that.

Step 5: Talk about SigEp	Year-Round Recruitment Impact	Every member is an ambassador for our organization. Everyone should be comfortable giving an elevator pitch about SigEp because you never know when you'll encounter incredible talent.
	Formal Recruitment Impact	Formal recruitment comes with a short attention span. It's crucial to be able to get to know someone enough to understand what they value, and deliver a pitch about the organization to keep SigEp at the top of their list.
	Balanced Man Scholarship Impact	In many cases, you have one chance during the Balanced Man Scholarship interview to deliver a pitch and get someone really interested in SigEp. Having this skill mastered will allow you to convert a large number of applicants into potential new members.

▪ **STEP SIX – ASK HIM TO JOIN**

○ **When should we ask someone to join?**

Before we ask anyone to join, it is important to understand and handle any questions or concerns they have. Doing so ensures that everyone we invite to join will do so.

A simple method for doing so is:

- Ask for objections: "Hypothetically, if you were to get a bid, is there anything that might stop you from joining?" (page 13-15 in participant guide)
 - Ask clarifying questions: "Why don't your parents want you to join a fraternity?" Paraphrase their objection to make sure you have it right.
 - Feel, Felt, Found: "I know how you feel... I (or one of the brothers) felt the same way... What I/he found was..."
 - Isolate & Repeat: "If X weren't a problem, is there anything else that would get in the way of you joining?"
- What are the most common objections to joining a fraternity?
- Dues/Money
 - Stereotypes
 - PNM doesn't drink
 - Time commitment
 - Focus on academics
 - Parents don't want him to join
 - Significant other

Step 6: Ask him to join	Year-Round Recruitment Impact	In year-round recruitment, there isn't the urgency of a "bid day" or another decision point. Chapter members have to master the skill of asking members to join so that they can create the urgency.
	Formal Recruitment Impact	Most of the time, invitations to join will happen outside of the formal scholarship process. However, the work of explaining SigEp and the values will help to address potential objections before they even become an issue.
	Balanced Man Scholarship Impact	Know where you stand before offering a bid. Have intentional and direct conversations about membership. The worst place to be is to offer someone a bid without knowing what they think or feel about SigEp. Ask them!

Saturday Late Morning

SESSION: Values-Based Recruitment and BMS Introduction

Time:	1 hour total
Purpose:	<ul style="list-style-type: none"> ▪ Understand the importance of the interview throughout the recruitment and Balanced Man Scholarship process
Program Objectives:	<ul style="list-style-type: none"> ▪ Participants will understand values-based recruitment and the strategies for how to implement them, specifically membership interviews and scholarship interviews ▪ Participants will understand the high-level overview of how to run a Balanced Man Scholarship through the 5-stages of the BMS.
Materials & Equipment:	<ul style="list-style-type: none"> ▪ Flipchart. ▪ Markers. ▪ Participant guides.
Session Outline:	<ul style="list-style-type: none"> ▪ Values-based Recruitment Overview (30 minutes) ▪ Balanced Man Scholarship introduction (30 minutes)
Pre-Session Prep:	<ul style="list-style-type: none"> ▪ Prepare flip charts.

Flipcharts to prepare:

**Values-based
Recruitment**

Why use the BMS?

**SigEp's BMS
resources
sigep.org/bms**

**Contact info for the
regional directors to
get them set up for
BMS coaching.**

Values-based Recruitment Overview (30 Minutes)

Part 1: What is values-based recruitment? (15 minutes)

- Have the group brainstorm together what they think values-based recruitment means. Throughout the brainstorm, you should develop a list that at least includes. Record their answers on your flipchart:
 - Recruitment philosophy and initiatives that align with SigEp values.
 - Membership standards that objectively assess a PNM's commitment to the Cardinal Principles.
 - A chapter brand that is consistent with the SigEp mission and values.
 - Alcohol is not associated with recruitment initiatives.
 - Volunteers are engaged throughout the recruitment process.
- Ask the group why they think values-based recruitment is a crucial method for recruiting.
- Ask the group what they think the benefits are of values-based recruitment. Also, ask what they think the potential drawbacks, if any, are for values-based recruitment.

Part 2: Strategies for values-based recruitment (15 minutes)

- Introduce common strategies for values-based recruitment. As you introduce each strategy, have participants raise their hands if they currently utilize this strategy in their recruitment initiatives:
 - The Balanced Man Scholarship.
 - Year-round/365 recruitment.
 - Substance-free recruitment (page 16-18)
 - Membership applications.
 - Membership interviews.
- As a group, develop a pros and cons list for each strategy. Prepare to record their answers on a flipchart.
- Explain that while we will not dive into how to utilize each strategy, there are many resources online, as well as the fellow recruitment committee members in the room, that can help lay out best practices for implementing these strategies.

Balanced Man Scholarship Introduction and Discussion (30 minutes)

Instructions:

Lead a discussion on the Balanced Man Scholarship and its value. Explain that the recruitment skills track is focusing more attention on the scholarship and its specifics because there is a lot of overlap between BMS skills and recruitment skills.

To get a sense from the room, start off by asking for a show of hands to see how many chapters currently run the BMS. On a flipchart, ask participants to share the reasons why a chapter would run the Balanced Man Scholarship.

Here are some good guiding responses that can be boiled down into bullet points:

- Awarding a scholarship based on the ideals of Sound Mind and Sound Body will attract applicants who lead balanced lives.
- The interview allows for unparalleled access to high-caliber students who embody the Fraternity's ideals.
- The information you learn about each candidate will allow you to objectively assess their past performance, which is the best predictor of their future performance.
- Experience shows that students who perform better academically and are involved on campus are more likely to be financially responsible and have fewer behavioral problems.
- Therefore, the BMS allows chapters to better filter a larger quantity of high-quality potential new members – which will significantly improve chapter operations. The scholarship also provides the opportunity to dispel fraternity stereotypes and build a better reputation for SigEp – one based on the values of our Fraternity and the achievement of our members.
- A properly run BMS will create a positive perception of SigEp for scholarship applicants, their parents, faculty, administrators and the campus community.
- Furthermore, recruiting men who are attracted to SigEp for the right reasons, such as our commitment to Building Balanced Men, will lead to a more cohesive, driven and successful chapter.
- Share these guiding philosophical points with the participants for the weekend:
 - The BMS is an investment. Giving scholarships and holding a great banquet costs money, but if we do it well, it will pay great dividends with great members.
 - The BMS is a RECRUITMENT TOOL. We are offering a scholarship to great students on campus, but don't forget why we're doing this in the first place.
- Still, we need to maintain the integrity of the scholarship. Ideally, these are one and the same, and the guys who would make the best SigEps are also the guys who are the biggest contenders for the scholarship.

Lead the conversation:

- What is the most difficult part about the BMS? How do chapters do this well?
- What resources are available for the Balanced Man Scholarship chairman and committee? Visit sigep.org/bms for more information or reach out to your regional director to get set up with one on one coaching for your BMS.
- How do you start running a BMS? Reach out to your regional director or SigEp's recruitment services team if this is something you're interested in. Visit sigep.org/bms for more information as well.

All of these answers and more are below:

What is the BMS?

The Balanced Man Scholarship (BMS) allows SigEp to find men who embody the Fraternity's values and ideals. It is the single best recruitment tool in the fraternity world. When used effectively, the BMS can be your chapter's most valuable asset in recruiting great students, strong leaders and well-rounded new brothers. For a full suite of resources dedicated to planning and running an effective Balanced Man Scholarship, please contact your regional director.

Why Should We Run the BMS?

The benefits of running the Balanced Man Scholarship effectively are numerous. The application allows for unparalleled access to incoming or current students. Your chapter will not only have information on each candidate, but will also have the opportunity to interview those candidates in their home over the summer or on campus in the fall.

The BMS attracts the best and brightest, and brothers can immediately add applicants to the chapter's potential new member list. An awards banquet is a tremendous opportunity to include parents, alumni-volunteers and university administration in the recruitment process, while recognizing applicants and current brothers for academic achievements.

5 Step Process (pg. 20 in the participant guide)

The Balanced Man Scholarship can be carried out through a simple five-step process:



Balanced Man Scholarships can range from one \$500 award to multiple scholarships of over \$1,000, depending on a chapter's resources.

Planning for the BMS is a year-round process. Once a Balanced Man Scholarship banquet is complete, and candidates are recruited, preparation and scheduling for next year's scholarship should begin. Here is a sample timeline for a Balanced Man Scholarship in the fall (also on pg. 20 of participant's guide):

November – Select a Balanced Man Scholarship chairman. Evaluate the most recent BMS and identify areas for improvement.

January – Finalize a BMS budget and specific timeline for the next year.

February – Finalize all hard copy or electronic application and solicitation materials.

April – Email the application to incoming students. Send it from a customized email address such as MySchoolSigEpBMS@gmail.com. The application should be available online and must be very easy to complete. Asking for difficult or time-consuming items like essays and transcripts is the biggest obstacle to having many candidates to interview. Set a preferred deadline for 30 days after the application is sent, but also have a final deadline that allows you to send multiple email reminders.

May – Reserve a banquet location. Recruit a keynote speaker. Send invitation letters to special guests and speakers.

June – Select and notify first round semi-finalists.

August – Conduct an interview with every applicant that reaches your minimum GPA requirement. Meeting as many applicants as possible is a critical way to use the scholarship for recruitment purposes. Host the meetings in the first two weeks of the school year, before freshmen start getting busy. Some chapters conduct interviews in the students' homes over the summer, which can be effective but difficult to organize.

Mid August - Another crucial, often-missed step is the process of becoming friends with applicants. This step can't be skipped as you push BMS applicants through the Six Steps of Recruitment. Host a BBQ to welcome all applicants to campus, or invite them to chapter Sound Mind and Sound Body events. Get to know them as friends, and introduce them to SigEp before the awards banquet.

Late August – Host the banquet and award scholarships before the university's formal recruitment occurs. Invite the finalists' parents to attend, so they see how great SigEp is and encourage their son to join.

Fall semester– Follow up with candidates and recruit them to join SigEp.

Saturday Late Afternoon SESSION: Interview Skills & BMS Debrief

Time:	2 hrs, 5 minutes total + break
Purpose:	<ul style="list-style-type: none"> ▪ Understand the importance of the interview throughout the recruitment and Balanced Man Scholarship process
Program Objectives:	<ul style="list-style-type: none"> ▪ Participants will understand the need to train their interview teams to conduct impactful interviews to ensure high-quality new members join their chapters ▪ Participants will begin to develop habits of asking open-ended questions throughout the recruitment and Balanced Man Scholarship processes ▪ Participants will get practice on how to conduct an interview and review the 5-stages of the BMS
Materials & Equipment:	<ul style="list-style-type: none"> ▪ Flipchart. ▪ Markers. ▪ Participant guides.
Session Outline:	<ul style="list-style-type: none"> ▪ The Interview Process (60 minutes) ▪ Interview Practice (35 minutes) ▪ Balanced Man Scholarship debrief (30 minutes)
Pre-Session Prep:	<ul style="list-style-type: none"> ▪ Prepare any flip charts to help with the explanation of the interview.

The Interview (60 minutes)

Whether you utilize interviews for the Balanced Man Scholarship or general membership, these interview techniques apply to both. Use these skills throughout the recruitment process and the interview process to successfully recruit high quality new members.

Throughout this session, we'll thoroughly cover all aspects about the interview. From preparations to the closing, you will become the master at asking quality open-ended questions and learning when to elevate the conversation to the next level to talk about SigEp.

The interview is the most critical part of the Balanced Man Scholarship, but it is the most commonly overlooked and underprepared part of the process. When our interview committee masters the interview process, chapters can increase the amount of men who are recruited through the BMS and transform the quantity and quality of recruitment. The five stages of the Balanced Man Scholarship are as follows:



The remainder of this session will focus on stage 3, the interview.

Setting Up the Interview (pg. 31 in the participant guide)

When we contact applicants to schedule an interview, we have an amazing opportunity to set a great first impression. While it is common to communicate with brothers via email or text message, our first contact to our applicants should always be by phone. Making a phone call demonstrates the confidence and professionalism we hope to see in applicants. Before calling, you should:

- Find a quiet location with little background noise
- Consider the time you are calling and double check which time zone they are in
- Have your call script laid out in front of you
- Open the potential new member list (PNML) and be ready to take notes. He might have questions you don't know the answer to but will need to follow up on later.

Questions:

- What is the best way to contact someone that you've never spoken to before? (cold call)
- What should you mention in the cold call?
- Develop a template script for your cold call.

COLD CALL SCRIPT

- *"Hi, this is (state your name). May I please speak to (applicant's name)"*
 - Introduce yourself as (your name), I work with the Balanced Man Scholarship for Sigma Phi Epsilon Fraternity at (school name).
- *"We received your application for the scholarship and we were impressed. I would like to schedule an interview with you for the next round of the scholarship."*
 - Have a couple of dates that you have planned out already and ask him if any of them work for him. If he doesn't know when he is available, tell him that you will call back to set a date. Set a day and time when you can call back.
- Ask if he has any questions
 - If you can't answer the questions, refer him to the BMS Chairman.
- At the end of the conversation, make sure you repeat your name and give him your number in case he needs to get in touch with you again.
- *"It was great to talk to you, and I look forward to meeting you on (determined date)"*

Pre-Interview Preparations (pg. 33 in the participant guide)

It only takes seven seconds to form a first impression. That means you only have one shot to get it right. If you are sloppy and unprofessional, the applicant may assume this is how you conduct yourself on a regular basis — and you are his only perception of SigEp. However, if you are on time, professionally dressed, and follow these best practices, you'll make a great first impression.

The five keys to a great first impression are:

- 1. Send a Reminder**
- 2. Review the Scholarship/Membership Application**
- 3. Be Prepared**
- 4. Personal Hygiene**
- 5. Dress for Success**

Interview Agenda (pg. 36 in the participant guide)

Questions:

- What should we include in the interview?
- What is an ideal agenda?

The goal of the interview is to begin building a relationship. Don't think of this interview process as a typical job interview that you may have participated in before. This interview is much more of an interactive conversation that exists to understand the values and purpose of each applicant.

Beginning the conversation with small talk is a great way to put the applicant at ease. Interesting things you noticed on his scholarship application provide a great way to begin a conversation. Some other potential topics you can begin discussing are hometown, major, career interests, campus involvement, hobbies, community involvement and favorite sports team, among others. Feel free to share some of your own interests, but don't spend a lot of time on yourself. This interview is about them. Remember, as Greek philosopher Epictetus said, "you have two ears and one, so we can listen twice as much as we speak."

1. Small talk
2. Introduction of yourself, interview team
3. Introduction of BMS (or SigEp if during a membership interview)
4. Ask the scholarship candidate if he has any questions about the scholarship (or fraternity if during a membership interview)
5. Interview questions...
6. Closing

Interview Questions

Questions:

- What types of questions are best for the membership/scholarship interview?
- What is the difference between an open-ended and close-ended question? Which one should we use more throughout the interview?
- What do we want to learn about the candidate throughout the interview?
- In your groups, brainstorm examples of potential interview questions you can ask. Spend 5-10 minutes thinking of the best questions and sharing them with those around you.

Throughout the interview, you should try to relate to the applicant's experiences and interests with your own experiences with SigEp. Remember to be tactful and subtle with this. The experiences you relay about yourself and SigEp dictate the applicant's perception and impression of the SigEp. There are two types of questions you can ask:

Open-Ended Questions

Open-ended questions usually start with "tell me about a time when you..." or "why did you choose..." and the responses usually require more than just one word. These questions put the interviewee at ease and help them become more comfortable speaking to the interviewers.

Closed-Ended Questions

If you can answer a question with a simple "yes" or "no," it's probably a closed-ended question. These types of questions rarely provide substance to the conversation and do not give you much insight to their background or personal values.

In order to ease the interviewee into answering questions about their personal values, background and upbringing, you should begin with easy open-ended questions. After the ice is broken and the conversation is moving along, you can move into more thought-provoking questions. This will help identify the top candidates from your applicant pool.

The number of questions you ask and the amount of time you spend during an interview will vary from candidate to candidate. We recommend asking 6-10 questions over a period of 30-60 minutes. Here are the best questions you should ask during a scholarship interview:

Beginning

- Why did you choose (insert college/university) for school?
- What are you going to miss most about high school?
- "Tell me about yourself?"

Questions About College

- What has been your favorite part about (insert university) so far?
- What are you looking forward to the most about going to college?
- What kind of legacy do you want to leave at (insert university)?

Thought-Provoking Questions

- What's been your greatest challenge so far? What do you think will be your greatest challenge in college?
- We believe in continuous development – in what area do you feel that you have the greatest opportunity to improve?
- What experience have you had that you've grown the most from?

Closing the Interview (pg. 41 in the participant guide)

At the close of the interview, whether for a scholarship or membership, you always want to do two things:

1. Leave them wanting to know more about SigEp and the fraternity
2. Schedule the next interaction

If the interviewee responded positively to the possibility of learning more about SigEp, you should arrange another informal interaction outside the interview setting. Offer to help him move into their residence hall, give them a tour of campus or the city, or simply grab a bite to eat.

If he seemed to be very eager to learn more information about SigEp, feel free to send them the Information Guide or Balanced Man Program One Page Guide. These documents can help guide some of your future conversation, especially if he already has some preconceived notion of fraternities. Both documents can be obtained from your regional director.

If he seemed interested, but maybe a little hesitant, don't push any additional information on him. Just schedule an informal interaction and plan to hear him out. If you don't know his objections or what he's looking for, you can't begin to push information on him.

A best practice for scheduling the next interaction is to immediately open your calendar on your phone and schedule the next meeting before the candidate leaves. You can send them reminder texts leading up to the next interaction as well.

ACTIVITY: INTERVIEW PRACTICE (35 minutes): (pgs. 37-40 in participant's guide)

Break off into pairs and spend the next 15 minutes practicing the scholarship/membership interview. From opening, introductions, to interview questions and closing. Do it all in 15 minutes. When the first person is done, have them switch. Remember to use the skills they learned in the six steps of recruitment... don't push SigEp immediately in the conversation, ask good questions and get to know the person sitting across from you.

Balanced Man Scholarship Debrief (30 minutes)

Lead the conversation:

- Where do the skills you learned today overlap with the BMS process?
- How could the BMS change the way your chapter recruits?
- What do you need to do to implement the BMS at your chapter?
- What resources are available to help you implement the Balanced Man Scholarship?
 - BMS Guide
 - BMS Interview Guide
 - Custom graphics and marketing from SigEp HQ (review what these look like in the participant guide – pgs. 23-24)
- What is the most difficult part about the BMS? How do chapters do this well?
- What resources are available for the Balanced Man Scholarship chairman and committee? Visit sigep.org/bms for more information.
- How do you start running a BMS? Reach out to your regional director or SigEp's recruitment services team if this is something you're interested in. Visit sigep.org/bms for more information
- SigEp has recruitment managers dedicated specifically to helping chapters start or improve their BMS and can provide one on one coaching for your chapter if you reach out.

Saturday Early Evening SESSION: Action Planning

Time:	1 hr, 15 minutes total
Purpose:	<ul style="list-style-type: none"> ▪ Create or refine goals and action plans for this calendar year ▪ Receive feedback on goals and action plans from their peers
Session objectives:	<ul style="list-style-type: none"> • Participants have well developed goals and corresponding action plans relevant to their position. • Participants network with other officers to gather best practices.
Materials & equipment:	<ul style="list-style-type: none"> • Flip charts • Masking tape • Participant guides.
Session outline:	<ul style="list-style-type: none"> • Creating an action plan (20 minutes) • Action plan creation & discussion (55 minutes)
Pre-session prep:	

Creating an action plan (20 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.
- 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 that 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 create and implement a comprehensive recruitment plan, perhaps a task would be "Meet with the recruitment committee to develop a calendar of recruitment events".
 - 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 & discussion (55 minutes): (pgs. 55-59 in participant's guide)

- You're now going to have participants begin creating action plans for the goals they set. First, instruct participants to go back and review their SMART goals. Do they want to make any adjustments based on what they learned today? Do they want to create a new goal(s) based on what they learned?
- Have participants work alone on their action plans using the worksheets found in their participant guide. Announce to all of them that you will be roaming around the room to help and answer any questions that they have while they're working.

Have participants take a shot at planning a BMS at their campus. On pg. 25 of the participant's guide there is a simple written plan document that takes about 10 minutes to make a quick BMS plan.

This written plan document is available electronically at sigep.org/bmsplan as well.

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

Saturday Evening SESSION: Wrap Up

Time:	1 hr, 5 minutes total
Purpose:	<ul style="list-style-type: none"> ▪ 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:	<ul style="list-style-type: none"> ▪ Wrap up the weekend by closing on a positive note and completing all conversations and talking points from the session.
Materials & equipment:	<ul style="list-style-type: none"> ▪ Flip charts ▪ Masking tape ▪ Participant guides.
Session outline:	<ul style="list-style-type: none"> ▪ Facilitator's choice activity(s) (55 minutes) ▪ Final thoughts (10 minutes)
Pre-session prep:	<ul style="list-style-type: none"> ▪ 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 (55 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 opposes the policy and thinks that implementing it will harm their chapter experience.
 - a. The Grand Chapter passed a resolution 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.

- b. 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.
 - c. Over 90% of men living in fraternity facilities are under 21 years old.
 - d. Our chapter facilities must be spaces where it is easy to do right and hard to do wrong. The policy makes it easy for our members to make healthy lifestyle decisions in a positive atmosphere that is conducive with the reason people attend college, not a negative environment focused on alcohol.
 - e. 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 at the facility without alcohol. VPs 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 the facility.
 - f. 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.
2. BMP: The BMP just hasn't been working at their chapter and it seems more like another class than a fraternity.
 - a. Open the discussion up to the group about exciting things that other chapters do in their programs to make it less academic.
 3. BMP App: It seems like the BMP app is just another way for Headquarters to spy on us and get us in trouble.
 - a. **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.
 - b. 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.
 - c. 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.
 - d. The BMP app is designed to make your jobs easier. If it's not - tell us what we need to improve!
 - e. 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.

- b. Rotating flip charts for best practices
 - i. Setup flipcharts at all corners of the room with the major points that were discussed in your track throughout the weekend
 - ii. 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.

- c. How to have crucial conversations
 - i. 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.
 - 1. 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.
 - 2. 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.
 - 3. Make it safe: State your purpose and intent clearly to the other person and be upfront that you're not trying to attack the other person. Validate their concerns and advance the conversation.
 - 4. 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.
 - 5. 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.
 - 6. 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.

- d. How to give and receive feedback
 - i. 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.
 - ii. 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:
 - 1. Feedback should always be solution oriented - if you don't provide a solution, you're just complaining or catching someone losing
 - 2. If and when the feedback will be difficult for the other person to hear - consider using a "compliment sandwich".
 - a. 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
 - b. 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.

- c. 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.
 - i. Remember to make yourself available at any time to discuss the project with them
 - d. 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.
3. Additionally, it's important as a leader to be able to receive feedback. Remember a few key points:
- a. 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.
 - b. 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.
 - c. 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.
 - d. Don't forget to follow-up with them, and ask for continued support and feedback.
- iii. 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.
 1. 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.
- e. Facilitator topic
- i. 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 "light bulb" 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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