SigEp

CARLSON LEADERSHIP ACADEMY
SIGMA PHI EPSILON

RISING LEADERS
Facilitator Guide

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CARLSON LEADERSHIP ACADEMY

SIGMA PHI EPSILON

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

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

Facilitator guide table of contents

Session	**Time Allotted**	**When should this take place in the program?**
Program preparation and overview	Pre-program	Prior to arrival
Introductions and program overview / expectations	30 minutes	Friday, 10:00 – 10:30 p.m.
Paradigm setting and starting with why	75 minutes	Saturday, 9:00 – 10:15 a.m.
Break *(snacks available in the pre-function area)*	15 minutes	Saturday, 10:15 – 10:30 a.m.
"How" - *The Leadership Challenge*	75 minutes	Saturday, 10:30 – 11:45 a.m.
"How" - Project planning and management	75 minutes	Saturday, 1:45 – 3:00 p.m.
"How" - The art of collaboration and delegation	80 minutes	Saturday, 3:00 – 4:20 p.m.
Break *(snacks available in the pre-function area)*	10 minutes	Saturday, 4:20 – 4:30 p.m.
"What" - Leadership in SigEp	60 minutes	Saturday, 4:30 – 5:30 p.m.
"What" - Building a plan for leadership development	1 hour	Saturday, 5:30 – 6:30 p.m.
Thank you notes and track wrap-up	20 minutes	Saturday, 6:30 – 6:50 p.m.

Program preparation for facilitators

The rising leaders track is in its third year at Carlson. It aims to engage SigEp's newest, up and coming members, as they prepare to take on executive officer and chapter leadership roles in the future.

The track is framed in Simon Sinek's Golden Circle concept. You will be responsible for presenting this concept on Saturday morning and referencing it throughout the track. Please take time prior to the program to complete the following to prepare:

- Watch Simon Sinek's TED Talk: How great leaders inspire action.
- Review The Golden Circle presentation notes

You will also be providing an overview of *The Leadership Challenge* (written by James Kouzes and Brother Barry Posner) and, specifically, the Five Practices of Exemplary Leadership as a model for achieving effective leadership. You will reference this model of leadership throughout the program. To prepare, please review this overview of the five practices.

Please also take note of the suggestion on page 34 of this facilitator guide. At the end of the track, participants are asked to identify their biggest takeaway and their commitment for each module. You can absolutely wait until the end of the day and allow them to reflect and complete the chart; however, you may find more benefit in asking them to complete these questions at the end of each module so they are completing the chart throughout the day. The choice is yours!

Also, please be aware that, in your session, you will have some Hickman Scholars! One of our alumni, Kent Hickman, Colorado '61, was so inspired by our young leaders that he made an incredibly generous gift to our Educational Foundation to ensure 60 rising leaders will be able to attend this track in perpetuity. These scholars went through an application process and were selected based on their merit and leadership potential. When on-site, you will see them recognized as Hickman Scholars on their nametags. This will be the 2nd class of scholars, with 2019 being the inaugural year.

Thank you again for your involvement and the positive impact you will be making on SigEp's rising leaders. Should you have any questions about the curriculum, please contact Stacy Nicodemus (804-869-3838), Alex Stepanek (804-971-7875) or Matt Wallace (804-346-7852).

Session: Introductions and program overview / expectations

Time:	30 minutes
Purpose:	▪ Introduce self and others ▪ Set ground rules for session
Session objectives:	▪ Participants will understand the importance of their attendance at Carlson and how to get the most out of their experience.
Materials & equipment:	▪ Student Leadership Practices Inventory (SLPI) – one per participant
Session outline:	▪ Introductions (15 minutes) ▪ Program overview and expectations (15 minutes)
Pre-session prep:	▪ Determine icebreaker you want to use with the group

Introductions (15 minutes)

- Facilitator introductions (5 minutes).
  - Facilitators will introduce themselves and cover the following items:
    - Who are you?
    - What do you do professionally?
    - Undergraduate institution?
    - Where do you volunteer? Or what is your involvement with SigEp?
    - Why is Carlson and this session important to you?

- Participant introductions (10 minutes).
  - Facilitator Note (optional): If you have a favorite name game or ice breaker, please feel free to facilitate that here **–OR–**
  - Have participants get into groups of six. Within these groups, have participants introduce themselves, including their name and their chapter and what they hope to learn this weekend.

Program overview and expectations (15 minutes)

- Ask the participants the following question: Why did you all choose to spend your weekend here at Carlson?
  - To become a better leader
  - To network and get ideas from other chapters
  - To be set up for success for the upcoming year / collegiate experience
  - Maybe your Regional Director or chapter volunteer wouldn’t leave you alone about coming...

- Now that we know what brought you all here, let's talk about how we're going to ensure that you all get everything that you want out of this experience.
  - Our time will be spent covering topics that are vital to the success of any leader - either within SigEp or in the professional world. Mastering these skills are necessary for your success.
  - Highlight the participant guide that they have received (or will receive tomorrow morning) and explain how they will use it throughout the weekend. Don't lose this participant guide! Ask them to put their name / chapter on the front.
  - Set up a "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.
  - Set up a "lightbulb" flip chart. Explain that this should be utilized whenever the group comes to a collective realization about a new idea or exciting concept. This serves as a place to capture moments when the lightbulb goes off for the group and will be easy to garner more takeaways at the end of the weekend.
- We need to set some ground rules for the weekend to ensure that we can make the most of our time together. What expectations do you all have of us and of each other?
  - Be prepared.
    - Bring paper/your participant guide, and a pen
    - Have questions, and ask them
  - Be engaged.
    - While you're here, you should not be with the friends and chapter brothers who came with you. Branch out to be with others.
    - 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.
- Ask if there are any topics participants definitely want to cover this weekend. Jot them down on a flip chart and post in the room. Try and answer them throughout the weekend as time allows.

Important:
Provide each participant with a Student Leadership Practices Inventory. Explain that you will be diving into learning about leadership styles tomorrow morning so they should complete the assessment tonight and fill in their scores before coming to sessions tomorrow.

Dismiss them for the evening. Remind them that breakfast will begin at 8:00 AM the next morning and they should be there promptly to avoid a missed meal fee of $25. This session will begin again right after breakfast, at 9:00 AM.

Session: Paradigm setting and starting with "why"

Time:	75 minutes
Purpose:	▪ Introduce the track's framework, The Golden Circle ▪ Provide a foundation of the ideal SigEp experience
Session objectives:	▪ Participants will understand the concept of starting with "why".
Materials & equipment:	▪ Flip charts ▪ Masking tape ▪ Participant guides
Session outline:	▪ Morning opener (5 minutes) ▪ Start with "why" (10 minutes) ▪ Introduction of the Golden Circle (25 minutes) ▪ Leaders who led with "why" (15 minutes) ▪ Start with why reflection (5 minutes) ▪ Applying SigEp to the Golden Circle (15 minutes)
Pre-session prep:	▪ Review the materials focusing on the Golden Circle ▪ Create a flipchart with the visual representation of the Golden Circle ▪ Create flipcharts for the SigEp & the Golden Circle exercise

Morning Opener (5 minutes)

- Welcome participants back.
- Reintroduce yourself for any participants who arrived late last night or did not attend last night's session.
- Have a few participants share what they are most excited to learn about today.

Start with Why? (10 minutes)

Introduction to the "starting with why" concept

- Have participants look at the "start with why" excerpts in the participant guide (page 1). Select five participants to read an excerpt out loud, in order:
    - Excerpt 1: Why are some people and organizations more innovative, more influential and more profitable than others?
    - Excerpt 2: Even among the most successful, why are so few able to repeat their success over and over?
    - Excerpt 3: The leaders who have the greatest influence in the world all think, act and communicate in the same way — and it's the complete opposite to everyone else.
    - Excerpt 4: Most people can explain what they do. Some can explain how they do it. But very few can articulate why.

  - Excerpt 5: Our "why" is the overarching purpose or cause that drives us when we are at our best. It's what inspires us to get out of bed in the morning.

- After the last participant has read their excerpt, ask the group:
  - What stands out to you in this excerpt?
- ***Facilitator note:*** Ensure you communicate that "why" is your purpose, cause or belief. It inspires and motivates action.

Introduction of The Golden Circle (25 minutes)

- Create a flip chart that has the visual representation of the Golden Circle (see example in the participant guide on page 2). You will now introduce this concept.
- Direct participants to the Golden Circle notes page in the participant guide on page 2.
- Every great organization and leader functions on three levels:
  - *What* we/I do.
  - *How* we/I do it.
  - *Why* we/I do it.
- When these three pieces are aligned, we have a filter to make decisions; it provides a foundation for innovation and builds trust.
- ***What*** **- (Slide 2 of the Golden Circle Presentation Notes):** Almost every organization or individual knows what they do. This is the products they sell, services they provide, or for an individual, it is their job title or role.
- ***How*** **- (Slide 3 of the Golden Circle Presentation Notes):** How organizations and individuals do what they do. The "how's" are the strengths, values or guiding principles that set an organization or individual apart.
- ***Why*** **- (Slide 4 of the Golden Circle Presentation Notes):** Few individuals or organizations can clearly articulate why they do what they do. For businesses, making money is not a WHY, but is the result of WHAT they do.
  - ***Facilitator note:*** Ensure you leave participants with an understanding that the "why" are our contributions, impact and motivation. The "why" is what drives and inspires us to do what we do.

- Direct participants back to the flipchart of the Golden Circle. Explain that most people naturally explain from the outside-in as it can be easier to explain and understand WHAT an organization or individual does than to expect others to be motivated to take action (buy a product, follow them as a leader, etc.). **(Slide 5 of the Golden Circle Presentation Notes)**
- Ask the group what the issue is with starting from the outside and working towards the inside of the circle?
  - ***Facilitator note:*** Ensure participants understand that "why" and "how" do not inspire action. "Why" motivates and inspires behavior. **(End of Slide 5 of the Golden Circle Presentation Notes)**
  - ***Use the law firm example from Slide 5:***

        - What: Here is our law firm.
        - How: We have the most intelligent lawyers from the world's best schools. We also have an impressive client list. And our offices are pristine.
        - Intended behavior: Come do business with our law firm.
- Ask participants what the benefit is of starting with the inner circle and starting with "why"? ***It communicates purpose and communicates what drives decision-making and behavior.*** **(Slide 6 of the Golden Circle Presentation Notes).**
    - ***Use the law firm example from Slide 5 but start with "why":***
        - Why: We believe in servicing the needs of others so they can focus on the difference they need to make.
        - How: We do so by bringing the most intelligent lawyers who have graduated from the world's best schools. We work with top-performing organizations. We have pristine offices that help us do good work.
        - What: We are a world-class law firm. Come see for yourself.
    - A consumer or client would feel more motivated because they understand why the law firm exists and what they aim to do. Their purpose is clearly stated and it's easier to buy into what they do and how they do it because we understand WHY they do it.

Leaders who led with "why" (15 minutes)

- To apply this concept, have groups get into small groups of 4-5.
- Groups will discuss and brainstorm examples of effective leaders who "led with why" and have made their purpose known.
- The leaders they brainstorm might include well-known leaders or people in their social sphere (parents, family members, peers, or mentors).
- Give each group 1 minute to present on the leader they discussed in their group and explain how this leader has been effective because they "led with why" and made their purpose as a leader known.

Start with why reflection (5 minutes)

- Give participants 5 minutes to complete their starting with why reflection in their participant guide on page 3. They should be reflecting on the following questions relating back to their personal Whys.
    - Why am I at Carlson?
    - Why did I join SigEp?
    - Why do I want to develop as a leader?

Applying SigEp to the Golden Circle (15 minutes)

- Now that participants have reflected on their personal whys, ask them to apply the Golden Circle concept to SigEp as an organization. Break them into small groups and complete the "SigEp as the Golden Circle" worksheet in their participant guide on page 4.
- Give groups 7 minutes to complete the worksheet. They should focus on SigEp's "what", "how" and "why". Come back together as a larger group.
- On three flip charts (one each for "what", "how" and "why"), record the answers the groups came up with:
    - Why - Purpose, cause or belief, driving motivation - CLARITY
    - How - Values or guiding principles, specific actions taken to achieve why - DISCIPLINE
    - What - Tangible proof or results, manifestation of why - CONSISTENCY

Module wrap-up
Explain that the remainder of the rising leaders track will be focused on the Golden Circle concept:
- We are starting with "why" and exploring our purpose.
- Next, we will move to "how" and ways we can engage in effective leadership.
- This afternoon, we will spend time determining our "what" by developing personal paths for leadership development.

At this point, please provide participants with a 15 minute bathroom and snack break. Snacks will be available between approximately 10:00 – 10:45 a.m. in the pre-function area.

Session: "How" - *The Leadership Challenge*

Time:	75 minutes
Purpose:	▪ Introduce *The Leadership Challenge* as a model for exemplary leadership.
Session objectives:	▪ Participants will gain understanding of the Five Practices of Exemplary Leadership. ▪ Participants will better understand their personal leadership style and how they can harness their style for success.
Materials & equipment:	▪ Flip charts. ▪ Post-it notes. ▪ Masking tape. ▪ Participant guides. ▪ Student Leadership Practice Inventory (1 per participant) which should have been distributed last night and attendees bring back today (completed)
Session outline:	▪ Session opener (5 minutes) ▪ *The Leadership Challenge* - Five practices of exemplary leadership (20 minutes) ▪ A "how" of effective leadership - Using *The Leadership Challenge* (15 minutes) ▪ Student Leadership Practices Inventory results (15 minutes) ▪ *The Leadership Challenge commitments* (15 minutes) ▪ Unpacking the SLPI and *The Leadership Challenge* (5 minutes)
Pre-session prep:	▪ Become familiar with *The Leadership Challenge* and review the website. ▪ Create a flipchart with a list of the 5 practices

Session Opener (5 minutes)

- Explain that for this next session, we will be focusing on finding our "how" in the Golden Circle.
- Remind participants that the "how" includes our natural strengths, the actions we take, and guiding principles to allow us and help us be at our best[1].
- Relate this back to the Golden Circle flip chart. Our "how" are the actions we take to realize and fulfill our "why"

***The Leadership Challenge* - Five Practices of Exemplary Leadership (20 minutes)**

- Explain that to further explore "how" we can engage in leadership to fulfill our "why", we will be exploring a model of leadership.
- To better understand how we can engage in leadership to fulfill our "why", we will use the Five Exemplary Practices of Leadership in *The Leadership Challenge.*

[1] Sinek, S. *Stand Out In The Job Market-Complete Guide.* Simon Sinek, Inc.

- Ask how many participants have heard of *The Leadership Challenge.*
- Provide a background on *The Leadership Challenge*[2]*:*
    - It is a framework/model of exemplary and effective leadership.
    - It is co-authored by Dr. Jim Kouzes and Dr. Barry Posner. Dr. Posner is an alumnus of SigEp from the California-Santa Barbara Chapter.
    - It is based in research that first began in 1982 that consisted of hundreds of interviews, case studies, and survey questionnaires to better understand extraordinary leadership.
    - Kouzes and Posner have been studying and writing about leadership within the context of *The Leadership Challenge* for over thirty years.
    - It has been listed as one of the Top 100 Best Business books of all time.
    - Corporations around the world use *The Leadership Challenge* in their business practices and employee development, including Intel, Microsoft, FedEx, Nestle, Office Depot, and the U.S. Armed Forces.
- From over thirty years of research, *The Leadership Challenge* presents that exemplary leaders commonly engage in five practices of leadership. Write the five practices on a flipchart:
    - Model the Way.
    - Inspire a Shared Vision.
    - Challenge the Process.
    - Enable Others to Act.
    - Encourage the Heart.
- As you go through each practice in depth, explain that these practices can be achieved through engaging in behaviors or "commitments" (term used by the authors).
    - ***Facilitator note:*** In other words, to effectively practice Modeling the Way, exemplary leaders clarify their values and set the example for others (those are the 2 commitments).
- As you discuss each practice, pause and allow participants to reflect on a leader they know that utilizes this practice and engages in these commitments. Allow a few people to share their example then move onto the next practice.
    - ***Facilitator note:*** In the participant guide on pages 5 and 6, there's a chart detailing each practice and the corresponding commitments and behaviors. Have attendees use this as a reference.

<u>Model the Way</u>
- Commitment #1: Clarify values - Find your voice by clarifying your personal values
- Commitment #2: Set the example – Align your actions with shared values

<u>Inspire a Shared Vision</u>
- Commitment #1: Envision the future – Imagine exciting and ennobling possibilities
- Commitment #2: Enlist others – Find a common vision and appeal to shared aspirations

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[2] Kouzes, J. & Posner, B. (2016). *The Leadership Challenge Story*. Retrieved from www.leadershipchallenge.com/about.aspx

<u>Challenge the Process</u>

- Commitment #1: Search for opportunities – Seek innovative ways to change, grow and improve
- Commitment #2: Experiment and take risks – Constantly generate small wins and learn from mistakes

<u>Enable Others to Act</u>

- Commitment #1: Foster collaboration – Promote cooperative goals and build trust
- Commitment #2: Strengthen others – Share power and discretion

<u>Encourage the Heart</u>

- Commitment #1: Recognize contributions – Show appreciation for individual excellence
- Commitment #2: Celebrate the values and victories – Create a spirit of community

A "how" of effective leadership - Using *The Leadership Challenge* (15 minutes)

- Next, divide the participants into five groups. If you have a large group, split participants into ten groups.
- Each group will be focusing on one of the exemplary practices. Assign each group a practice. For programs with ten small groups, a practice can be assigned to two groups.
- For 5-7 minutes, groups should discuss and determine a leader, business or organization who serves as a great example of their assigned practice.
- They should discuss how this leader/organization is a good example of their practice and determine examples of how they exhibited behaviors that align with the commitments of this practice. Notes can be taken in their participant guide on page 7.
- An example would be:
  - *Practice:* Inspire a Shared Vision.
  - *Leader/Organization:* Martin Luther King, Jr.
  - *Exhibiting commitments:*
    - Envision the future - His "I Have a Dream" speech is a tangible example of how he shared his vision for achieving civil rights and equality.
    - Enlist others - He helped bring unity and collaboration through helping create the Southern Christian Leadership Conference (SCLC), which brought together leaders from black churches across the South. He also educated and empowered many activists through non-violent activism inspired by Ghandi.
- After 5-7 minutes of discussion, bring the entire group together. Have each group present their example and provide explanation of why they chose that leader/organization.
- Explain that these examples show us that utilizing the Exemplary Practices of Leadership from *The Leadership Challenge* can be a beneficial tool to accomplishing leadership and ultimately a great model for "how" we can achieve our "why."
- For the next portion of the session, you will be discussing and exploring the practices in relation to each each individual's leadership strengths and weaknesses.

Student Leadership Practices Inventory Results (15 minutes)

- Have students refer to their Student Leadership Practices Inventory (SLPI). Last night they should have answered the questions. These questions are linked to specific behaviors associated with the Five Practices of Exemplary Leadership.
- They should transfer their scores from each question to the columns on the back and add the columns down to better understand the leadership practices they engage in.
- Each column is associated with one of the Five Practices and each column in a measurement of how frequently a participant demonstrates this practice while leading:
    - Column 1: Model the Way
    - Column 2: Inspire a Shared Vision
    - Column 3: Challenge the Process
    - Column 4: Enable Others to Act
    - Column 5: Encourage the Heart
- Go through each column and ask for a raise of hands if this was their highest ranked column.
- It is okay if some scores are higher or lower than others; we gravitate towards practices we feel most comfortable engaging in. However, our lower scores indicate we have areas for improvement.
- For the remainder of this portion of the session, have participants reflect and share with a partner about their SLPI scores:
    - Which practice do you demonstrate most frequently (highest ranked column)?
    - What are examples of how you have exhibited this practice?
    - Which practice do you demonstrate least frequently (lowest ranked column)?
- After a few minutes, bring the group back together. Have a few participants share about their SLPI.
    - Did anything about your scores surprise you?
    - Who felt like their scores were accurate of how they prefer to lead?

***The Leadership Challenge* commitments (15 minutes)**

- Have participants turn to the "T*he Leadership Challenge* commitments" page in their participant guide (page 8).
- They will use this chart to identify one area of opportunity for each of the 5 challenges.
- Encourage participants to refer to their SLPI and the *Leadership Challenge* chart in their participant guide to determine what one thing they can do to improve in that area.
- Ask for a volunteer to share one area of improvement for each of the 5 practices.

Unpacking the SLPI and *The Leadership Challenge* (5 minutes)

- Explain that *The Leadership Challenge* helps us recognize what exemplary leadership looks like and how to achieve it.
- Explain that *The Leadership Challenge* can be thought of as **a tool box** for accomplishing leadership/"why". These exemplary practices are like the hammers, screwdrivers, saws, etc.

They have different purposes, but help facilitate exemplary leadership and achieve positive outcomes.

  - ***Facilitator note:*** As the participants go through the rest of the program, encourage them to think about how they and their fellow track attendees utilize these tools to accomplish exemplary leadership.

- Explain that for the remainder of the track, participants will be working together in groups to learn about project management, delegation and collaboration. As they work together, they should focus on how others exhibit the Five Practices and how they personally exhibit the Five Practices.
- *The Leadership Challenge* also illuminates areas for improvement to be more effective leaders. Later in the afternoon, participants will develop a Path for Leadership development to sketch out how they will grow as leaders. They should keep their SLPI scores in mind throughout the day and as they develop this path.

Session: "How" - Project planning and management

Time:	75 minutes
Purpose:	▪ Provide an opportunity for participants to learn and discover best practices in project planning and management.
Session objectives:	▪ Participants will understand how to project plan and execute project management.
Materials & equipment:	▪ Flip charts ▪ Masking tape ▪ Participant guides
Session outline:	▪ Session introduction (5 minutes) ▪ Project planning vs. project management (10 minutes) ▪ Project planning overview (10 minutes) ▪ Application activity: project planning case studies (25 minutes) ▪ Project management and application activity (20 minutes) ▪ Session wrap-up (5 minutes)
Pre-session prep:	▪ Prep flip chart for project management process

Session introduction (5 minutes)

- Introduce this session by discussing the role of leaders. Ask the group what they think is the general role of a leader.
- Most answers will likely fall under the themes of achievement, getting things done, accomplishing goals. They might also include the relational aspects of leadership and include things like building teams, motivating others, helping others succeed, collaborating, etc.
- To relate this back to *The Leadership Challenge,* we can utilize the following definition of leadership:
  - *"Leadership is the art of mobilizing others to want to struggle for shared aspirations."*[3]
  - The shared aspirations portion of this definition recognizes the fact that leaders are often charged with a task, a project to accomplish or a challenge to overcome.
  - As followers and fellow leaders, we expect leaders to do something and make an impact.
- Explain that to better understand the "how" of exemplary leadership, this session will focus on accomplishing goals and executing projects.

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[3] Kouzes & Posner, 2013, *The Student Leadership Challenge: Facilitation & Activity Guide.* San Francisco, CA: John Wiley & Sons, Inc. Pg. 13.

Project Planning vs. Project Management (10 minutes)

- In a survey of outgoing SigEp executive officers, they indicated that one of top skills they wish they would have developed before taking office included project planning and management.
- Provide the definition of project management: [4]
    - "A temporary endeavor undertaken to create a unique project, service or result. A project is temporary in that it has a defined beginning and end in time, and therefore defined scope and resources."
- Ask the participants if anyone has been a part of a group or project that has successfully executed a project.
- Have volunteers explain what made their group or project successful. They should likely hit on key points:
    - We planned ahead.
    - We managed our progress.
    - We set deadlines.
    - We divided and conquered.
    - We met our objectives/purpose.
- Introduce the project management process (also on page 16 in the participant guide):
    - *Initiating* - The idea for the project emerges and the purpose is determined.
    - *Planning* - The work for the project is fully outlined, including steps to completion, roles, deadlines and resources needed.
    - *Executing* - Responsibilities and tasks are executed.
    - *Controlling & Monitoring* - Managing the progress of the project and status of tasks associated with the project.
    - *Closing* - The intended outcome is achieved, the project is assessed.
- Explain that this concept spans beyond just work, school, or positions they hold. It can be applied to almost everything. Think about moving to college, organizing a dinner party, or planning a vacation. All require planning and management.
- Project planning and management is not only a useful skill in leadership, but applicable to many situations in life.
- Explain that it is important to note that project planning and management are not one in the same.
    - Project planning is one of the first steps in project management.
    - However, they are heavily dependent on each other. Without planning, the management process can become messy. Without effective management, the time and energy spent planning goes to waste.
    - Project management is the entire process including initiating, planning, executing, monitoring and controlling, and closing. [5]

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[4] Project Management Institute. (2016). *What is Project Management?* Retrieved from www.pmi.org/about/learn-about-pmi/what-is-project-management

[5] Project Management Institute. (2016). *What is Project Management?* Retrieved from www.pmi.org/about/learn-about-pmi/what-is-project-management

Project Planning Overview (10 minutes)

- Ask how many participants regularly keep a "to-do" list to track class assignments.
- Explain that we can think of the project planning element of project management as creating a robust and comprehensive "to-do" list. Once, we have an idea of what needs to get accomplished, who is responsible, and how we will accomplish these items, we move into the accomplishment phase, or the remaining steps in the project management phase.
- Explain that the most critical element of project planning is recording all steps to successful project completion into a project plan.

A strong project plan can and should be the structure that leads to successful project completion. Have participants brainstorm necessary elements of a project plan. After a few participants provide answers, provide an overview of the elements of a strong project plan (**Facilitator note:** *these are all listed in the participant guide on page 10).*:

- *Tactical items to support project completion*: Tactical items include the sub-projects that support a project being completed.
  - *Example:* If the main project is planning the Balanced Man Scholarship banquet, there will be tactical items of booking the venue, determining the menu if food is being served and planning for a speaker and special guests.
- *Ownership:* While most projects will require the collaboration and input of multiple people, there should be one or a few point people who oversee the planning and execution of the tactical items.
  - *Example:* The Balanced Man Scholarship chair would provide strategic oversight of planning and implementing the banquet taking place. He would engage necessary committee members to accomplish tactical items.
- *Steps for completion*-Each tactical item should have designated steps to ensure accomplishment.
  - *Example:* To accomplish the tactical item of arranging a speaker for the banquet, someone will need to determine the message they are trying to get across to attendees, find a speaker who would have experience in speaking about the topic, invite the speaker and confirm the speaker's participation,
- *Support Needed:* Each project will involve other people in some capacity. This step determines the involved individuals who will provide support for the project.
  - *Example:* Planning the banquet will not be possible without the support of other executive officers (i.e. vice president of finance will help with payment) and committee members (i.e. committee members can take on helping with certain tactical items such as awards, arranging food, etc.).
- *Roles*: It is important to designate and communicate the expectations of each person's involvement and responsibilities.
  - *Example:* If the vice president of finance will be responsible for making payments for the venue, food, and any other items that incur expenses, it is important to designate this responsibility early and confirm the vice president of finance has an understanding of his responsibility.

- *Resources:* It is important to determine the resources necessary to complete the project successfully. This could include finances or physical resources.
  - *Example:* If planning the banquet includes providing meals for guests, the resources necessary would include financial support to pay for food for members and guests.
- *Status:* This is important so the project manager understands where things stand and whether or not they have been completed, or are delayed for some reason.
  - *Example:* Once the date of the banquet is selected, the status field for planning the meal can be marked with an update on the progress. This might include "meet with catering staff" or "menu selected". This would indicate that the next step towards completion would be collecting dietary restrictions and final headcounts to submit to the catering company.
- *Deadlines for completion:* Deadlines can vary based on the project but should be designated during the planning process to keep the end goal in mind. You can also designate deadlines for specific steps for a tactical item.
  - *Example:* The process of arranging the menu (tactical item) will ultimately be completed when the banquet (the project) takes place. However, there will be an internal date for finalizing the menu a few weeks before and submitting final numbers a few days before the event.

Application Activity: Project Planning Case Studies (25 minutes)

- Explain that project management starts when ideation is over. The idea of what needs to be done has been determined. Project management focuses on how it will get it done.
- Break participants into 5 groups. In their groups, participants will complete a project planning case study from the initiating phase through the project planning phase in the project management process. These are listed in the participant guide on page 11.
- Each group will be assigned a project for which they need to plan. Their project plan may include multiple tactics to accomplish the project.
- Groups should use the project planning worksheet in the participant guide on page 12.
- Project planning prompts:
  - Project 1: Plan a chapter retreat.
    - You are the president of your chapter. In recent weeks, the chapter's morale has been low and members feel unmotivated to contribute. In a regular check-in with your chapter counselor, you discuss the current state of the chapter. Your chapter counselor suggests holding a chapter retreat so members can reconnect, re-energize and get back on the same page for the rest of this semester and next.
  - Project 2: Develop a recruitment training program.
    - You are the vice president of recruitment and your chapter has recognized there is a need to transition to year-round, values-based recruitment methods. This will be a cultural shift for the chapter, but can be achievable with the right support and training for the chapter. You and your committee will need to develop an on-going training program that educates all chapter members on effective recruitment strategies to utilize outside of formal rush and recruitment events. You will need to

develop regular training sessions that engage professional recruiters and sales experts as coaches and trainers.

- Project 3: Increasing alumni engagement.
  - Your chapter has historically struggled to keep alumni engaged and informed with what is going on with the chapter. This has resulted in low volunteer involvement and support for the chapter. As chapter president, you will need to engage multiple chapter leaders to increase alumni engagement through communication and programming. You decide to improve your chapter newsletter and host an alumni/undergraduate softball game.
- Project 4: Service learning partnership development.
  - You currently serve as the vice president of programming. Your chapter wants to develop a service learning partnership with a local non-profit organization. As service and philanthropy programming falls under the responsibility of the vice president of programming, you and your committee will need to develop and manage the service learning partnership. However, you should also collaborate with the vice president of member development to ensure service learning is an element of the challenges within the Balanced Man Program. Your job is to establish a service learning partnership with the local branch of Big Brothers Big Sisters.
- Project 5: Facilities cleanliness and management.
  - You have recently been elected as the housing manager, a newly created position because the house has not been well taken care of and the lack of cleanliness is impacting the experiences of the residents. Your chapter president and AVC president have charged you with creating a plan to ensure the facility is well-maintained and all chapter members are engaged and have responsibility for taking care of the facility.

Project Management and application activity (20 minutes)

- Reinforce the importance of project management before moving into the application activity:
  - All of the work that goes into planning stages goes to waste if project management is not effectively executed until the end of the project.
  - While project planning is a critical step, it is only one step in the comprehensive project management process.
- Explain that for the next portion of this session, you will discuss ways to avoid common mistakes in project management.
- Since you will not be able to complete the later stages of project management (executing, controlling/monitoring and closing) in this session, you will discuss common pitfalls or mistakes in project management and develop strategies to avoid or alleviate these mistakes.
- Begin by having the group brainstorm some ideas of pitfalls in project management/common mistakes. Record their answers on a flip chart.

- They will likely come up with many of the common mistakes, but make sure to include the following common mistakes [6] in the list if they do not (note: these are also in the participant guide on page 13):
    - The project does not fit with the organization's priorities.
        - *Description:* The project does not align with the organization's priorities. The alignment may not be clearly stated or communicated so few people recognize the importance of the project. If only a few people recognize it, the project is not seen as a priority among the entire organization. Therefore, buy-in is low which influences low engagement or involvement with the project.
    - Proper training is not provided for managing the project.
        - *Description:* The right people can be in place but if they are not trained to have skills to accomplish the tactical items in the plan, this will delay their progress and the progress of successfully completing the project on time.
    - Members are not recognized for their work on the project.
        - *Description:* Without recognition for their work, members will not feel motivated to continue to work on the project.
    - Project management processes and tools are inconsistent.
        - *Description:* The process for a project (i.e. an event or program) changes each year, "re-inventing the wheel."
    - The organization does not have the structure to support the project.
        - *Description*: There are not enough or too many individuals working on the project, there are not adequate finances to support the project.
    - The wrong people are working on the project.
        - *Description:* Members on the project management team do not have the competency in skills or abilities to successfully implement the project.
    - The scope of the project is unclear.
        - *Description:* The scope of a project is essentially "what is going to get done" or "what will be delivered at the end". The focus of the project can change overtime, which changes the project's original purpose. The reach of the project can be misunderstood and the project can become much larger or much smaller than anticipated.
    - The project plan is not detailed enough.
        - *Description:* Without enough detail, deadlines and budgets can be misunderstood causing the project to take longer or cost more than it should. It can lead to things being underestimated as well.
    - The risk of the project is underestimated or mismanaged.
        - *Description*: Unexpected events occur and impact the successful implementation of the project that could have been anticipated and avoided at the beginning of the project.

[6] Adapted from Stanleigh, M. (2016). *10 Common Project Management Mistakes and How to Correct Them.* Retrieved from www.bia.ca/10-common-project-management-mistakes-and-how-to-correct-them/

- After going through common mistakes in project management, ask each project planning group (chapter retreat, recruitment training, alumni engagement, service learning and facility cleanliness) the following three questions about their project:
        - What is a potential pitfall?
        - If not addressed, how could this impact your project's successful completion?
        - What do you plan to do to address this pitfall?
    - Each group should discuss their project scenario and develop a plan to correct this mistake or pitfall.
- Give each group 5-7 minutes to discuss and develop their plan for correction.
- Have each group present their scenario and plan to correct the pitfall/mistake.

Session wrap-up (5 minutes)

- Wrap-up this session by discussing the following questions:
    - How can you utilize project planning and management as you develop as leaders?
    - How can you utilize these skills outside of formal leadership roles?
    - How did this session build upon the session earlier on *the Leadership Challenge* and Five Practices of Exemplary Leadership?

Session: "How" - The art of collaboration and delegation

Time:	80 minutes
Purpose:	▪ Discuss effective collaboration and delegation. ▪ Practice promoting collaboration and engaging in delegation.
Session objectives:	▪ Participants will develop knowledge and skills to motivate others/teams through collaboration and delegation.
Materials & equipment:	▪ Flip charts ▪ Masking tape ▪ Ropes
Session outline:	▪ Session opening (5 minutes) ▪ Collaboration (30 minutes) ▪ Delegation (40 minutes) ▪ Session closing (5 minutes)
Pre-session prep:	▪ Create a flipchart with the definitions of 'collaboration' and 'cooperation' ▪ Create a flipchart listing the steps for successful delegation

Session opening (5 minutes)

- Begin this session by reminding participants of the definition of leadership utilized in *The Leadership Challenge*:
  - *"Leadership is the art of mobilizing others to want to struggle for shared aspirations."*[7]
- In the prior session, the group discussed ways to accomplish "shared aspirations" through project planning and management.
- For this session, the group will focus on the art of mobilizing others through exploring collaboration and developing skills in delegation.
- Similar to learning more about project planning and management, in a survey of outgoing executive officers and chapter leaders, they indicated that promoting collaboration and successful delegation were two things they wish they learned more about as both played an important part in their role.

[7] Kouzes & Posner, 2013, *The Student Leadership Challenge: Facilitation & Activity Guide.* San Francisco, CA: John Wiley & Sons, Inc. Pg. 13.

Collaboration (30 minutes total)

What makes for successful collaboration? (10 minutes)

- Put these two definitions on a flip chart: Collaboration is the action of working with someone or a group of people to produce or create something. Cooperation is the process of a group working towards to the same end.
- Ask what the difference is between these two concepts and have them take notes on page 14 in their participant guide:
  - Collaboration includes parties throughout the process to develop a shared and agreed upon goal or vision (note the most important words in that definition: "working with")
  - Cooperation divides duties to engage people to achieve the goal, but does not include them in developing the vision.
- Explain for the rest of this session we will be focusing on practicing and promoting collaboration. It's important that, as a leader, you work with your team - developing and agreeing upon a vision and working with them to achieve that vision.
- Ask the group to list some ways they can promote collaboration. Record their answers on a flip chart. Some answers to achieve collaboration may include:[8]
  - Understand the vision/goal/objectives.
  - Listening.
  - Ask questions.
  - Build and come to consensus
  - Assign roles based on strengths, and individuals feeling ownership.
  - Accomplish the task.
  - Learn from the process.
  - Make plans to improve for the future.

Collaboration Application activity (15 minutes)

- Have participants break up into groups of 8-10 people. Provide each group a length of rope.
- Groups will be given a task to build something with just the rope and the members of their group.
- There are a few rules to the activity:
  - Each task they receive will have a time limit for completion.
  - All members must be holding the rope at all times and must be involved in each task.
  - Two people must have their eyes closed the entire time. They can speak but must have their eyes closed.
  - Two members may not speak, but can have their eyes open during the activity.
- First, have the group build a circle. Give the group a 1 minute to build a circle.
- Next, have the group build a square. Give the group 2 minutes to build a square.
- After they have built the square, ask the group the following:
  - This one was a bit more difficult, did you change your strategy in completing the task?
  - What is a way you promoted collaboration in your group?

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[8] Adapted from Potter, A. et al. (2015, December 7). *Teaching Students the Art of Collaboration.* Retrieved from www.envisionexperience.com/blog/teaching-students-the-art-of-collaboration

- Next, give the prompt to build a hexagon (six-sided shape). Give them about 3 minutes to complete this task.
- For the final shape, give the prompt to build a five-pointed star. Give the group 5 minutes to complete this task.
- After they have built the star, ask the group the following questions:
    - How did you promote collaboration to complete these tasks?
    - As they increased in difficulty, how did you adapt as a group?
    - What did you do to build consensus among the group?
    - What made your group successful? If you did not complete a task, what prevented your group from being successful?

Debrief (5 minutes)

- Debrief the collaboration section with the following questions:
    - Now that we've learned a little bit more about how we can promote collaboration and build upon what we've learned about so far today?
    - When it comes to collaboration, where do you think you excel at promoting collaboration? What could you improve upon?
- Explain that the next portion of the session will focus on delegation, which can be an important element of collaboration and project planning/management.

Delegation (40 minutes total)

Introduction to Delegation (5 minutes)

- Ask for a raise of hands for participants who have been a part of a team where they felt they took on a majority or all of the work to accomplish the task or project.
- Next, ask if this process would have been more enjoyable if they had received helped? Would it have been more effective?
- With leaders being responsible for making an impact and executing projects, it is unrealistic to think that you can accomplish everything on your own.
- Ask the group what the benefits of effective delegation, for the leader and the group members.
    - For the leader:
        - They can serve as a project manager and oversee the many parts of the project.
        - They can still achieve projects or tasks by engaging others with strengths and skills the leader might not possess.
        - It's less work on the leader.
    - For the group members
        - They feel empowered and engaged by the leader.
        - They feel trusted and important.
        - They do not feel like they are punted a project or are doing others work.
        - They can take ownership of their responsibilities and be proud of their responsibilities.
- Promoting collaboration is a great step to engaging others in accomplishing a goal or task and delegation is a tactic to promote collaboration and project management.

- Before moving into steps for successful delegation, ask how many have ever experienced being punted a project (i.e. given a project with no help, guidance or support with expectation of execution) versus being delegated a project.
    - ***Facilitator note:*** Explain that the two can look very similar but can have very different effects on the project's success.
- Ask the group if they can think of any differences between punting a project and delegating a project:
    - Punting
        - Shaky hand-off of the project.
        - Less guidance is given up front.
        - Often summarized by the phrase "Can you just do this?"
        - Often results in the person being punted the project not feeling supported or prepared.
        - Usually a situation of someone being volunteered or "voluntold" to do something or accomplish a project.
    - Delegating
        - Requires an intentional conversation about the project.
        - Discussion regarding expectations and deadlines happens during the delegation ask.
        - Those being delegated to feel empowered and prepared to accomplish the project or task.
        - Ongoing support and check-in is provided by the leader.

Steps for successful delegation (15 minutes)

- Begin by having a participant share a time that they were delegated a task by a leader. Ask what made getting that task delegated to them a successful experience.
- Explain the ***steps for successful delegation***[9]. Write the steps for successful delegation on a flip chart and go through each step in detail (***Facilitator note:*** *these are also listed in the participant guide on page 15)*:
    - *Prepare* - Determine intended outcomes and expected results. Be prepared in the specific ask of delegating a task/responsibility.
    - *Assign* - Determine who will be responsible for executing a task/project. Ensure deadlines, budget, and context are well communicated to involved parties. Do your best to assign roles, responsibilities and tasks to people who have a skill set and interest that fits the needs of the assignment. This will provide an additional layer of empowerment for individuals involved.
    - *Confirm understanding* - Avoid assumptions being made and miscommunication affecting the progress. Confirm understanding with involved parties. Have individuals summarize and paraphrase to ensure they understand what is expected and their responsibilities.

[9] Enriching Leadership International. (2016). Retrieved from www.enrichingleadership.com/resources/michelles-articles/the-six-steps-to-delegation/

- *Commitment* - As you confirm understanding, make sure you gain the individual's commitment to the task. Ensure they have learned all necessary skills and have all necessary knowledge to be successful. This may require additional training, but can be worth the payoff if individuals feel empowered to complete their tasks.
- *Avoid "delegating back"* - Delegating back occurs when an individual does not have the appropriate amount of time to accomplish a task they have been delegated and tasks are then given back to the leader or manager. To avoid delegating back, make sure that those you are delegating tasks fully understand the time and effort the task will take. If an individual hits a snag or obstacle, leaders should coach them through it, not take the task back.
- *Accountability* - This requires ongoing check-ins and progress reports. Expectations cannot just be communicated during the introduction and assignment stages. You should be revisiting expectations throughout the process of project management and execution.

Delegation Role Playing (15 minutes)

- Explain that perfecting anything takes practice, including learning how to delegate. When we delegate, we want to ensure we're not just punting a project or task.
- For the next ten minutes, participants will work with a partner to go through a series of role playing activities to practice conversations about delegation.
- For each conversation, they will either serve as a "delegator" (person doing the delegation) or "delegatee" (i.e. person being delegated to).
- For each scenario, each "delegator" should go through each of the steps of successful delegation (Prepare, Assign, Confirm Understanding, Commitment, Avoid "delegating back," Accountability).
- Explain that the delegator will be making an ask of the delegatee, but the delegatee will also be given a prompt in this scenario. If there is an opposition that could impede successful delegation, the delegator should work through the scenario with the delegate to find a collaborative situation that will allow for successful delegation.
- Have each pair refer to the delegation prompts in their participant guide. They should switch off being the delegator and the delegatee. Explain that after each prompt, the delegatee should provide feedback to the delegator based on the steps for successful delegation.
- Delegation role playing prompts (also listed in the participant guide on pages 16 and 17):
  - *Prompt 1:*
    - Delegator scenario: You are the vice president of communications. Your position is in charge of upholding the chapter's brand through social media. You are not well-versed in social media brand management, but excel in project management and leading a team. You do have a committee member who has great social media presence and is studying marketing. Ask the committee member if they are willing and able to take on the task.
    - Delegatee scenario: You are a member of the communications committee. You enjoy contributing and providing insight but have not taken on a formal role as you are also a busy marketing major pursuing an internship. At the time, you are not sure

you have the appropriate time to fully commit to adding something to your already busy schedule.

- *Prompt 2:*
  - Delegator scenario: You are a vice president of recruitment and need to appoint a new Balanced Man Scholarship chair for the upcoming year to plan and execute all initiatives related to the BMS, including overseeing the application, interviews and the recognition banquet. You really care about the BMS and want it to be successful this year. A member recently joined your committee with a passion for recruitment and a knack for event planning. Ask the committee member if they are willing and able to take on the task.
  - Delegatee scenario: You recently joined the recruitment committee because you personally had a great recruitment experience and want to give back in that area. You also have event planning experience from your involvement in high school and other clubs on campus, but you do not have a great deal of experience with the background logistics of the BMS aside from applying when you joined.
- *Prompt 3:*
  - Delegator scenario: You are the vice president of member development and need to appoint a Sigma challenge coordinator to revamp your chapter's new member programming. It is a job that will take some experience and knowledge of programming. You are busy with the oversight of the other three challenges, coordinating rites of passage, and managing your chapter's members challenge completion. A member of your committee has served as a Phi and Epsilon coordinator and is in the brother mentor challenge. He just finished his internship and has some newfound availability in his extracurricular schedule. Ask the committee member if they are willing and able to take on the task.
  - Delegatee scenario: You are a member of the development committee and have experience as a successful Phi and Epsilon challenge coordinator. You have been a member of the development committee for a few semesters but had to take a break to complete an internship last semester. You have completed your internship have new found availability in your schedule and want to get back involved with the development committee. However, you don't really have any experience educating new members.
- *Prompt 4:*
  - Delegator scenario: You are a member of the programming committee and are in charge of planning and executing an upcoming social mixer with a sorority on campus. You will need to engage a fellow committee member to help plan the event. Specifically, you need someone to assist with coordinating the guest list and preparing the venue space with decorations prior to the event. All members of the programming committee are in charge of an event throughout the semester so you want to be conscious of others' time. Ask a committee member if they are willing and able to take on the task.

  - Delegatee scenario: You are a member of programming committee and have already planned and executed your event for the semester. However, a fellow programming committee member needs assistance with an upcoming social mixer with a sorority.
- *Prompt 5:*
  - Delegator scenario: You are the chapter president and have received feedback from the Alumni and Volunteer Corporation (AVC) that the chapter needs to do more outreach and engagement to alumni. They have spelled out the benefits of having alumni more informed and engaged: alumni are more likely to support the chapter (financially and with their time as volunteers) if they are kept in the loop and the undergraduates are reaching out. You agree there is room for improvement but your current workload with school and duties as president would make it difficult for you to spearhead this project alone. The vice president of programming has already agreed to make this more of a priority to engage alumni through events. However, you need to include the vice president of communications in these initiatives to collaborate with the vice president of programming to communicate and engage alumni. This will include creating a regular newsletter and event related information to be sent out to alumni. Ask the vice president of communication if he is willing and able to take on the task.
  - Delegatee scenario: You are the vice president of communications and have been successful so far in managing the chapter's brand and online presence. You recognize there are still ways your chapter can improve and reach more audiences, however you are worried about how much time it will take to add these responsibilities to your plate.
- *Prompt 6:*
  - Delegator scenario: You are the vice president of programming for your chapter. One of your chapter's goals for this year is to develop and sustain an ongoing service learning partnership with a local non-profit. This partnership would engage all members at some point throughout the semester. With the oversight of all programming for the chapter on your plate, you cannot dedicate the time and energy necessary to fully support the service partnership. There is a member of the programming committee who is passionate about service but has not been assigned an on-going project for the year. Ask the committee member if they are willing and able to take on the task.
  - Delegatee scenario: You are a member of the programming committee. You are very passionate about service and involvement in the community. You are a member of another club on campus that focuses on community service.

Debrief (5 minutes)

- What did we learn from this activity?
- Have participants provide some examples of how their partner engaged in effective delegation.
- How does effective delegation connect to project planning and management?
- What are some of the barriers we could face when it comes to delegation? How can you overcome these barriers?

Session closing (5 minutes)

- Close this session with a brief discussion of how collaboration and delegation play an important role for leaders by going through the following questions:
  - Why is it important to develop skills in collaboration and delegation as leaders?
  - What are the consequences if we don't develop skills in collaboration and delegation?
- Explain that for the remainder of the afternoon, you will be focusing on "what" participants will do to further develop as leaders and take on leadership roles.

At this point, please provide participants with a 10 minute bathroom and snack break. Snacks will be available between approximately 4:00 – 4:45 p.m.. in the pre-function area.

Session: "What" - Leadership in SigEp

Time:	60 minutes
Purpose:	▪ To educate rising leaders on the opportunities to hold formal leadership roles within SigEp. ▪ To educate rising leaders on how SigEp can be a beneficial pathway for leadership development.
Session objectives:	▪ Participants will better understand the roles and responsibilities of executive officers. ▪ Participants will understand the opportunities available in SigEp to continue to develop as leaders.
Materials & equipment:	▪ Flip charts ▪ Masking tape ▪ Participant guides ▪ Officer guides-1 per position
Session outline:	▪ Session intro (5 minutes) ▪ Leadership in SigEp (35 minutes) ▪ Position planning (15 minutes)
Pre-session prep:	▪ Review officer guides

Session Intro (5 minutes)

- Now that the group has explored "why" and "how," the remainder of the program will be focusing on the "what" portion of the Golden Circle.
- Remind the group that "what" focuses on what an organization or individual does. This could be what products or services a business offers or the title or role an individual holds.
- Within SigEp, we can think of the "what" of the Golden Circle as effective leaders taking on officer positions and the leadership roles within our chapters.

Leadership in SigEp (35 minutes)

- Explain that SigEp provides a great opportunity to practice and develop leadership skills through involvement on various committees and positions. Ask for examples of ways members can engage in leadership while in SigEp. Make sure to provide an explanation of the purpose each of these roles serves in the chapter. They should hit on the following points:
  - *Committee member*- supports the strategic efforts of the committee, attends meetings, provides input, assists as deemed appropriate.
  - *Chairperson*- Provides strategic oversight for a committee related initiative. (i.e. the BMS chairmen is a member of the recruitment committee that is responsible for executing the Balanced Man Scholarship.)
  - *Executive board officer*- Oversees an area of chapter operations

  - *Chapter mentor*- Provides ongoing support and guidance for another brother one-on-one as an undergraduate mentor.
  - *New member mentor*- Provides support and guidance one-on-one as a mentor for a new member in the chapter throughout the Sigma challenge.
- Ask for a raise of hands of how many participants are currently serving on a committee. Ask for a few volunteers to share what committee they are a part of.
- Explain that executive officers serve as committee chairs and are responsible for the management of a certain area of operations.
- For the next 15 minutes, participants will work in small groups to explore one of the seven executive officer positions.
- Split participants up into seven groups. Each group will be assigned an executive officer position. Groups should research and discuss their assigned position and prepare a 2 minute presentation to the large group. An officer guide for each position will be available in your room as a resource.
- Groups should develop a pitch/presentation that explains what this role does for the chapter and how this role supports and furthers the chapter's operations. Groups should answer the this main question:
  - Why this position is important to the chapter's success?
- Groups should be focusing on the following areas of their assigned officer position (and take notes on page 18 of their participant guide:
  - Roles
  - Responsibilities
  - Important skills and attributes
  - With whom does this person work? (i.e. audiences/stakeholders)
- Give each group an officer guide and flip chart paper/markers to prepare for their presentation.
- After 15 minutes of preparation, have the groups present their assigned executive officer. Instruct participants to take notes on the various positions in their guide.

After the activity, note to participants that on page 19 of their participant guide, they can see quotes from past chapter officers. They were surveyed, upon completing their term in office, about what they wish they had known before taking on their role. You can see that what they wanted is the foundation for this rising leaders track curriculum. Being a part of this track, this weekend, is putting them ahead of their peers and making them more prepared to take on leadership roles in the future.

Position Planning (15 minutes)

- Explain that it is never too early to be thinking about how they can prepare to run for an executive board position.
- Have participants open their participant guide to the "Position Planning" worksheet on pages 20 and 21.

- For the next, 10 minutes, have participants complete the "Position Planning" worksheet on pages 20 and 21. On this worksheet, they will be reflecting and answering the following prompts:
  - What position(s) on the executive board are you most interested in?
  - What experiences have you had that would help you be successful in this position?
  - What skills and attributes do you possess that would make you a good fit for this position?
  - What areas of improvement can you focus on to prepare for running for this position?
  - Who can help you prepare and provide support / guidance?
  - What are your next steps in preparing to run for this position?
- After 15 minutes, have participants share with a partner their completed worksheet and/or ask for a volunteer or two to share their plan to run for an elected position in SigEp.

Session: "What" - Building a plan for leadership development

Time:	1 hour
Purpose:	▪ To provide an opportunity for participants to reflect on their experiences and develop a path for their leadership development.
Session objectives:	▪ Participants will develop a personal path/goals for leadership while in SigEp.
Materials & equipment:	▪ Flip charts. ▪ Masking tape. ▪ Participant guides.
Session outline:	▪ Session intro (5 minutes) ▪ Plan development (55 minutes)
Pre-session prep:	▪ Create your own Golden Circle ▪ Create a flipchart listing SMART goals acronym

Session Intro (5 minutes)

- Ask a few participants to recap / provide highlights of what has been covered in the Rising Leaders track so far:
  - The Golden Circle concept
  - *The Leadership Challenge*
  - Project planning and management
  - Collaboration and delegation
  - Leadership within SigEp
- Explain that for the remainder of the session, participants will be developing their personal plan for leadership development. They will be developing a plan so they can best utilize their time as an undergraduate to develop as a leader in SigEp.
- This activity will help them finalize "what" they will do to fulfill their "why."

Plan Development (55 minutes)

- This plan is a roadmap to help participants focus on their progress towards achieving their goals and fulfilling their "why."
- The personal plan for leadership development template can be found in their participant guide on pages 22 through 29.
- As they work on their plan, participants will complete the following:
  - Program recap (page 22)
  - My golden circle (page 23)

- Develop SMART goals for this semester, this year, and the remainder of college to achieve their "Why" and become an effective leader (pages 24 – 29)

Program recap handout, page 22 (10 minutes of the 55 minute block)

- Have participants fill out the chart which helps them start to understand their major takeaways from each module of the track and what commitment they will make to "take this home". **NOTE: if you'd prefer, you could have participants fill out these 2 columns at the end of every module versus waiting until the end in this session.**

My golden circle, page 23 (10 minutes of the 55 minute block)

- Participants should take what they've learned to complete their own "golden circle" detailing their:
    - "Why" (purpose as a leader)
    - "How" (strengths, values and guiding principles)
    - "What" (title, roles and behaviors)
  - ***Facilitator note:*** This can still be a difficult concept for participants to actually apply to their own lives. One tactic to use - create your own golden circle and share that with the group first so they can use as an example.

My plan for leadership development, pages 24 - 29 (35 minutes of the 55 minute block)

- This is where participants will start to create their SMART goals, specifically for: (a) this semester, (b) this year, and (c) remainder of college.
- Each goal should help them achieve the "why" they identified in the prior "my golden circle" activity.
- Review the concept of SMART goals with participants (page 24):
  - Ask the group who knows what SMART goals are and ask them to outline what they are 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.
    - Relevant: Why does this goal matter? Explain how this goal connects to the larger picture.
    - 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.

- Have participants start by completing a goal for this semester, this year and the remainder of college (all templates can be found in the participant guide on pages 25 through 29). This can be a difficult concept for students so be sure to encourage them to ask questions / for help and walk around to see how they are doing.
- After creating their goal(s), space is also provided so they can start a corresponding action plan. What steps do they need to take to achieve this goal?
- Extra goal pages are included in the participant guide if they want to start working on more.
- If time allows, have a couple of participants share their SMART goals with the group and/or share with a partner and get feedback (ex: how can the goal be SMART-er)?

Facilitator note: *More than likely, they will not complete these activities before time is up. Help them understand the importance of putting pen to paper and documenting / refining their goals. Encourage them to complete this work once they return home and to seek out a volunteer or mentor to assist in refining their goals.*

Session: Track wrap up

Time:	20 minutes
Purpose:	▪ Clear up any lingering questions or concerns of participants ▪ Help participants understand how to maximize on this experience and empower them to lead in the future
Session objectives:	▪ Participants will feel empowered to lead and make an impact on their chapter.
Materials & equipment:	▪ Thank you notes (provided in small group session room)
Session outline:	▪ Thank you notes (10 minutes) ▪ Track wrap-up (10 minutes)
Pre-session prep:	

Thank you notes (10 minutes)
We all know that the art of a hand-written note is dying, yet in today's electronic society, it's more important than ever. Please ask participants to write a note of thanks. If they are a Hickman Scholar (which would be indicated on their nametag), they can write a note to Kent Hickman thanking him for his generosity and allowing them the opportunity to attend. Not a Hickman Scholar? Who is the volunteer, parent or chapter brother who encouraged him to attend or perhaps covered the cost? Carlson specific thank you notes will be provided in your small group room.

All completed notes can either be returned to the program's office or to a staff member. If the note is for Kent, we will package up all the notes and send in one package together from Richmond. If the note is for someone else, please ask the student to write the recipient's name on a post-it and affix to the card. If he has additional information about the recipient (address, city where he/she lives, e-mail address, etc), please have them include that information on the post-it as well. When we get back to Richmond, we'll do our best to identify the recipient in our database and mail out the notes. Students are also more than welcome to take the note with them and present personally.

Track wrap-up (5 minutes)

- Wrap the track up with doing a quick round of "lessons learned" or a similar activity where participants quickly share the most impactful thing they learned this weekend.
- Explain that they've taken the first, but important steps, in their leadership development in SigEp.
- Leave them with some words of wisdom. You can adapt as you see fit, but hit on the following points:
    - The participants in this track impact the future of their chapters.
    - They are the future executive board officers, but have a responsibility to foster a positive chapter experience now.

- What they have spent the weekend learning will only be beneficial if they commit to utilizing the information when they get back to campus.

- Thank participants for attending and post your contact information if you are comfortable with sharing it.

If you find yourself with extra time on Saturday evening, here are some additional ideas of things you can add:

- 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" in case there was time 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.

- Discussion on hot-button issues
  - Give the participants the option to ask 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.

- Rotating flip charts for best practices
  - Setup flipcharts at all corners of the room with the major points that were discussed in your track throughout the weekend (ex - *The Leadership Challenge,* project management, etc)
  - Break everyone into groups and have them rotate from flip chart to flip chart and discuss each area. They can talk through things like: where they or their chapter struggles, what they or their chapter can do to improve, etc.

SigEp

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