SigEp

CARLSON LEADERSHIP ACADEMY

SIGMA PHI EPSILON

VICE PRESIDENT OF MEMBER DEVELOPMENT

Facilitator Guide

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 a.m., 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.

Table of Contents

Session	Time Allotted	Should Take Place
Program preparation and overview	Pre-program	Prior to arrival
Introductions, overview and paradigm setting	30 minutes	Friday, 10:00-10:30 p.m.
Vice President of Member Development Responsibilities	30 minutes	Saturday, 9:00 - 9:30 a.m.
BMP Framework	5 minutes	Saturday, 9:30 - 9:35 a.m.
BMP Overview	1 hour	Saturday, 9:35 - 10:45 a.m.
Break (snacks available in pre-function area)	10 minutes	Saturday, 10:15 - 10:25 a.m.
BMP App Training	1 hour	Saturday, 10:45 - 11:45 a.m.
Challenge Programming In the BMP App	1 hour, 30 minutes	Saturday, 1:45 - 3:15 p.m.
Selling the BMP App and App Usage Best Practices	1 hour	Saturday, 3:15 - 4:15p.m.
Break (snacks available in pre-function area)	10 minutes	Saturday, 4:00 - 4:15 p.m.
Frequently Asked Questions	1 hour	Saturday, 4:15 - 5:15 p.m.
Working with various stakeholders	45 minutes	Saturday, 5:15 - 6:00 p.m.
Action planning	40 minutes	Saturday, 6:00 - 6:40 p.m.
Wrap-up	10 minutes	Saturday, 6:40 - 6:50 pm

Learning Outcomes

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

As a result of participating in the Vice President of Member Development track at the Carlson Leadership Academy, participants will:

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

Session: Introductions, overview and paradigm setting

Time:	30 minutes total
Purpose:	● Introduce participants and facilitators. ● Provide an overview of the program and position tracks.
Session Objectives:	● Participants will form relationships with facilitators and other participants. ● Participants will understand the session plan and how they can grow through the weekend at Carlson.
Materials and Equipment:	● Flip charts. ● Post-it notes. ● Masking tape. ● Participant guides.
Session Outline:	● Introductions (15 minutes). ● Program Overview (10 minutes). ● Wrap-up (5 minutes).
Pre-Session Prep:	● Review session curriculum to ensure you have a thorough understanding.

Introductions (15 minutes)

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

Program Overview (10 minutes)

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

Wrap-up (5 minutes)

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

Session: Vice President of Member Development Responsibilities

Time:	30 minutes
Purpose:	● Provide an overview of the Vice President of Member Development job responsibilities.
Session Objectives:	● Participants will understand each of the responsibilities of their role.
Materials and Equipment:	● Flip charts. ● Post-it notes. ● Masking tape. ● Participant guides. ● PowerPoint slides. ● A/V equipment.
Session Outline:	● Responsibilities of the VPMD (10 minutes) ● Officer guide breakout groups (20 minutes)
Pre-Session Prep:	● Prepare any necessary flipchart content. ● Ensure all A/V equipment is properly functioning. ● Review session content and pages used in the participant guide.

Responsibilities of the VPMD (10 minutes)

- Have a flip chart prepared to discuss and capture their thoughts - make sure you're recording these on flipchart.
- Lead them to the ultimate list that's in their officer guide.
- "You all are in this track for a reason. You had an idea of the roles and responsibilities associated with the BMP and development committee. Let's outline what the five main responsibilities of the development committee are."
  - ***Ask them to take notes on <mark>page 3</mark> of the participants guide.***
- Ideally, the group arrives at some version of the points below:
  - Responsible for the development and growth of members of the chapter
    - Members grow throughout their time in the chapter because of the BMP. Without the guidance of the development committee, the BMP will not be successful and members won't grow as much as they could have.
  - Lead and manage the development committee
    - The development committee helps you make informed decisions and carry out the BMP. It is up to you to hold the development committee responsible for their goals and commitments.
  - Balanced Man Program expert
    - The BMP is SigEp's main product. It is vital that you are able to articulate the BMP to various stakeholders, can answer questions about the BMP, and overcome

objections in relation to the BMP. As an expert with the BMP, you will also be tasked with all BMP App related questions and will be responsible for implementing the app at your chapter.

- ○ Event manager
    - ■ The chapter will plan large-scale development programs that are beyond the scope of the challenge coordinators. You will play a key role in managing these meetings and supporting your committee in key development meetings and activities.
- ○ Standards Board liaison
    - ■ You will work with the standards board and the chaplain to coordinate Rites of Passage and hold members accountable to their commitment to participating in development throughout their time in the chapter.

Officer Guide Breakout Groups (20 minutes)

- Break participants into small groups of 4-5 people. Give each group a flip chart page and markers. Have each group read through a section of the officer guide and present to the rest of the group a summary of their section, what their takeaways were and how it pertains to each of the main responsibilities of the position.
- Facilitator Note: Participants may zone out during this session. To prevent this, prompt the group with the following:
    1. Reading and articulating back are two ways to master content quickly. This covers both.
    2. This will allow participants to work on their public speaking ability.
    3. The adage of "you never really learn something until you teach it to someone else" holds true and this will allow you to teach others.
- Give the groups about 10 minutes to read through their portion of the officer guide and prepare their presentation for the rest of the group. Allow about 15 minutes for each group to present and open the floor to questions/comments/concerns after each presentation.
    - ○ **_Facilitator Note:_** _Walk around while they are reading through the guide and help groups. Read through the guide and point out any concepts that they are missing._
- Areas of the officer's guide to assign:
    - ○ People: Page 5-11
    - ○ Managing your committee & Delegate your way to success: Page 10; 15
    - ○ Organizing & Event Planning: Page 10-11
    - ○ Engage content experts for development programming: Page 11-12
    - ○ Be Guided by Philosophy: Page 14-15
    - ○ Relevant Development & Chapter buy-in: Page 15-16
    - ○ Planning: Page 17-19

Session: Balanced Man Program Framework

Time:	5 minutes
Purpose:	● Provide an overview of each section of the BMP framework and overall session plan.
Session Objectives:	● Participants will understand each area of the Philosophy, People, Process, and Programming of the BMP.
Materials and Equipment:	● Flip charts. ● Post-it notes. ● Masking tape. ● Participant guides. ● PowerPoint slides. ● A/V equipment.
Session Outline:	● Session Overview (5 minutes)
Pre-Session Prep:	● Prepare any necessary flipchart content. ● Ensure all A/V equipment is properly functioning. ● Review session content and pages used in the participant guide.

Notes for Facilitators: *Depending on the pace of your group, this curriculum might include more content than you have time to get through.*

Session Overview (5 minutes)

- Now that we understand the Vice President of Member Development, we will focus on successful programming and implementation of the BMP. (Slide 2)
    - Explain that the priority for the remainder of the day is on two very important things:
        - Understanding all of the main program elements of the Balanced Man Program, and
        - Tackling the tough issues they will face through experiential learning.
- Provide an overview of the BMP framework. Some of this may be review for you, but it's essential to build a foundation for good member development." (Slide 3)
- The Balanced Man Program Framework. (Slide 4)
    - Flip to slide 4 and ask for people to raise their hands if they have seen this.
    - Explain: The Balanced Man Program has a reputation for being complex and difficult to implement. This is not the case if you understand the program framework and how each piece fits together to create the ultimate undergraduate experience. The diagram below outlines the Balanced Man Program at its most basic level outlined along "4 Ps."
    - Explain that this will guide our time and that we will discuss each in the framework.
    - Before moving to the next slide, ask the group the question: "Now that we've looked back at the framework, let's answer the basic question: Why is the BMP valuable?" (Slide 5)

- ○ Have a few participants answer the question before providing the answers.
- ● Why is the BMP valuable? (Slide 6)
  - ○ Creates positive chapter environment.
  - ○ Provides a continuous development experience. Teaches the value of accountability.
  - ○ Provides quality mentor support.
  - ○ Develops a deeper Ritual understanding.
    - ■ ***Facilitator's Note:*** *Participants likely won't offer this last one on their own. It will take prompting.*
- ● Remind participants to remember these benefits as we go throughout the day.

- ● **Session Format (Slide 7)**
  - ○ Use the framework as a guide – We will walk through each of the "4 Ps" in order.
  - ○ Discussion and experience based – To be successful everyone needs to be engaged, and willing to learn and help teach one another.

Session: BMP Overview

Time:	1 hour
Purpose:	● Provide an overview of each section of the BMP framework.
Session Objectives:	● Participants will understand each area of the Philosophy, People, Process, and Programming of the BMP.
Materials and Equipment:	● Flip charts. ● Post-it notes. ● Masking tape. ● Participant guides. ● PowerPoint slides. ● A/V equipment.
Session Outline:	● Philosophy (10 minutes). ● People (10 minutes) ● Process (15 minutes) ● Programming (20 minutes) ● BMP Overview Wrap-up (5 minutes)
Pre-Session Prep:	● Prepare any necessary flipchart content. ● Ensure all A/V equipment is properly functioning. ● Review session content and pages used in the participant guide.

Philosophy (10 minutes)

Introduction (5 minutes)

- View the Simon Sinek TED Talk "Start with Why" and discuss (Slide 8).
  - Start at 1:30; End at 4:45
  - https://www.youtube.com/watch?v=u4ZoJKF_VuA
- *Facilitator Note: The intended outcome is that participants understand the value of starting with the purpose for doing something.*
  - Ask the group: how does this connect to the philosophy of the BMP?
    - "Everyone knows what they do, some know how they do it, and very few people know why they do what they do. This explains why some organizations are able to inspire and others are not."
    - "People don't buy what you do, people buy why you do it."
  - Talk about how this plays into getting chapter members bought into what you do with the BMP.
    - The BMP is SigEp's product. The philosophy is why we do it.
- History of the philosophical tenets (Slide 9)
  - The philosophical tenets came from the top 10 percent of our chapters at the time of the creation of the BMP and are rooted in our Founder's mission.

- BMP Framework: Philosophy (Slide 10)
  - What are the five philosophical tenets?
  - Why is philosophy important?

Overview (5 minutes) (Slide 11)

- Walk through each of the philosophical tenets and ask the group:
  - Explain each tenet in your own words.
  - Why is this included in the "why" for the BMP?
    - Equal Rights and Responsibilities. (Slide 12)
    - Continuous Development. (Slide 13)
    - Accountability. (Slide 14)
    - Living the Ritual. (Slide 15)
    - Mentoring. (Slide 16)

Facilitator Note: *The group should already have a good understanding of the philosophy. Lean on them to explain the content. Ensure that you do not spend too much time on these. You will have the opportunity to provide further clarification to individuals throughout the activities later in the day. Also note that there are pages in the participant guide for attendees to take notes on each section of this module – encourage them to do so.*

People (10 minutes)

Quick Review (Slide 17)

BMP Framework: People
- Note that we will not be spending a lot of time on the "people" portion of the BMP during our session. The reasons being: overall, the roles are relatively straight-forward, the BMP guide provides in-depth information on each position, and we spent a good amount of time on the "people" last night.
- Walk through each role
  - *Facilitator Note: Participants can use either the BMP Guide or VPMD Officer guide to find an answer quickly.*
  - VP of Member Development (Slide 18): This key chapter role needs to be a strong leader with skills in delegation, management and good judgement. Ask the group: What are his main roles? What are some of his key responsibilities?
    - *Facilitator Note: VPMD role should be a quick recap of the morning session.*
  - Development Committee (Slide 19): Made up of challenge coordinators, Sound Mind and Sound Body Chairmen. Note that the number of coordinators per challenge can vary depending on the size of the chapter. Reinforce the idea that every challenge needs one coordinator at minimum.
  - Standards Board (Slide 20): Their main roles are holding members accountable for their development and carrying out Rites of Passages/ Rituals.

- ○ Volunteers (Slide 21): Our local supporters who work with and mentor undergraduate leaders… including the balanced man steward, challenge coordinator mentors, and the faculty fellow.
        - ○ Mentors (Slide 22): These are mentors within the BMP and different from volunteers. These roles include new member mentors, chapter mentors, and community mentors.
- Ask participants to raise their hands if they have:
    - ○ New member mentors?
    - ○ Chapter mentors/ big brothers?
    - ○ Community/ career mentors?
    - ○ Defined roles for each of these mentors?
- Review structure of mentoring program (Slide 23)
- Discussion on the purpose of each mentor role and the benefits that the mentors can bring.
    - ○ Examples of benefits include:
        - ■ New member mentors: Help new members feel welcome, improve new member GPA, improve retention of new members, increase engagement of older brothers serving as mentors.
        - ■ Chapter mentors/ big brothers: Build lifelong relationships that extend beyond college, create a network of support between older and younger members.
        - ■ Community/ career mentors: Provide valuable insights and experience that another current college student couldn't, provide opportunity for alumni to engage with the local chapter in a positive way, network and support transition to the workforce.

Process (15 minutes) (Slide 24)

- Introduce the process as the "how" and note that it aligns directly with the philosophy. The five processes of the program embody how the philosophy is executed on a day-to-day basis. (Slides 25-26)
- Walk through each of the components of the process using the slides. This is A LOT of information so do not be afraid to move quickly. The goal is to expose participants to this information once. Remind them that everything that is covered in the *Balanced Man Program Guide*.
    - ○ Single-tiered membership; no pledging, no hazing (Slides 27-29)
        - ■ Facilitator Note: Put the definition of hazing (or a bulleted definition) on a flipchart and keep it at the front of the room for the remainder of the program.
            - ● As participants develop challenges later in the program, remind them of this definition. If they have questions, about if a meeting or activity is hazing, have them compare it to the definition of hazing posted in the front of the room. Simply ask "is it hazing?" and compare the definition with the proposed meeting or activity.
    - ○ Self paced challenges with defined minimum and maximum timeframes (Slides 30-32)
    - ○ Membership lapsing (Slide 33)
    - ○ Ritual experience through rites of passage (Slide 34)
    - ○ Formal/ emphasized mentoring program (Slide 35)

- ***Facilitator Note:*** *You may have to explain these concepts to participants that are unfamiliar. Don't be afraid to take time to answer those questions during this session. Rely on participants with a working knowledge of the philosophy and process to drive the session forward.*
- Wrap up process: questions, comments, takeaways (Slide 36)

Programming (20 minutes) (Slide 37)

- Why is programming last? (If necessary, remind them to to think back to the "golden circle" that was mentioned during the "Start with Why" video… it's the "what" of the BMP)

- Development themes (3 minutes) (Slide 38-39)
  - Areas of Development:
    - SigEp
    - Leadership
    - Professional
    - Physical Health and Wellness
    - Intellectual
  - Sub-topic areas within each area of development (Slide 40). Categorizes programming within each area of development. Each challenge should have programming from each area of development. Every element of programming (meetings and activities) should have an associated development theme.
    - Example: Within the leadership area of development, a chapter could hold a meeting about how to participate in service and service learning. This meeting would fall under the area of leadership and fulfill the development area of service.
- Breakdown of development per challenge (7 minutes)
  - The breakdown of development areas per challenge is different. For example, the amount of SigEp development in the Sigma Challenge is more than the amount of SigEp development in the Brother Mentor Challenge.
  - Ask participants to breakdown the development areas for each challenge. The breakdowns should come close to the following:
    - ***Facilitator's Note:*** *There is no hard and fast answer to this breakdown. This should start a discussion between participants.*
    - Sigma Challenge
      - SigEp: 35%
      - Leadership: 10%
      - Professional: 10%
      - Personal Health and Wellness: 20%
      - Intellectual: 25%
    - Phi Challenge
      - SigEp: 15%
      - Leadership: 20%
      - Professional: 15%
      - Personal Health and Wellness: 25%
      - Intellectual: 25%

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    - ■ Epsilon Challenge
      - ● SigEp: 10%
      - ● Leadership: 30%
      - ● Professional: 30%
      - ● Personal Health and Wellness: 15%
      - ● Intellectual: 15%
    - ■ Brother Mentor Challenge
      - ● SigEp: 10%
      - ● Leadership: 25%
      - ● Professional: 35%
      - ● Personal Health and Wellness: 10%
      - ● Intellectual: 20%
- ● Resources and Program Structure (10 minutes)
  - ○ This section will walk through how programming events fit into the larger scheme of challenges and discuss best practices for planning meetings and activities for BMP programming.
  - ○ All challenges should have: (Slide 41)
    - ■ Purpose: High level overview of what the challenge should accomplish.
    - ■ Learning outcomes: Specific things that each challenge participant should come away with after completing the challenge.
    - ■ Expectations: Minimum requirements and standards for each member in the challenge.
  - ○ To accomplish challenges, members should complete: (Slide 42)
    - ■ Meetings: These are group gatherings that should fulfill the learning outcomes of the challenge. Content experts should be engaged as facilitators.
    - ■ Activities: These are requirements that members should complete during the challenge but are not necessarily a part of a specific meeting. They should be completed by each participant within the given timeframe for a challenge.
  - ○ Slide 43: provides an overview of the purpose of each challenge. Challenge programming should ultimately strive to fulfill the intended outcomes.
  - ○ Slide 44: provides an overview of the intended learning outcomes. The example shown is for the Phi Challenge, but each challenge will have a designated set of learning outcomes. Learning outcomes can be found in the challenge templates and on the BMP App.
  - ○ Meetings and activities should also have a consistent structure to ensure continuity and quality programming. (Slide 45-48)
  - ○ Each meeting should be organized ahead of time and should take into consideration the following:
    - ■ Theme.
    - ■ Learning outcomes.
    - ■ Session outline/ agenda.
    - ■ Facilitator.
    - ■ Any necessary materials.
  - ○ Remind participants that BMP programming should be coordinated and planned through the BMP app.

BMP Overview Wrap-up (5 minutes)

BMP Resources
- Remind participants that resources can be found on the SigEp website on the BMP implementation page. (Slide 49) Also remind them that the materials they received at Carlson (BMP Guide and VPMD Officer Guide) should be used throughout their time as an officer.
- At this point, let participants know that we have completed the content heavy portion of the morning and they will be problem solving and generating ideas through activities to address issues going into the afternoon.

What did you learn? (Slide 50)
- Have participants record two things they took away from this BMP overview session. Have them record these thoughts on two sticky notes and place them onto pre-made flipcharts. Have participants share their takeaways.

Session: BMP App Training

Time:	1 hour
Purpose:	● Ensure that participants are able to use and explain the BMP App.
Session Objectives:	● Participants will have a working knowledge of how to use the BMP App.
Materials and Equipment:	● Participant laptops ● A/V Equipment
Session Outline:	● Using the BMP App (55 minutes) ● Wrap-up (5 minutes)
Pre-Session Prep:	● Ensure participants bring their laptops and participant guides.

Using the BMP App (55 minutes)

- Now that all of you have logged into the app, this session will focus on how to use the app on a day-to-day basis. With this knowledge, you will be able to implement the app at your chapters.
- To start, participants will log-in to the app via computer via bmpapp.com.
- Participants will get a guided tour through the app. Highlights include:
  - Home page
  - Progress chart
  - Chapter Roster
  - Community Feed
  - Challenge participants
  - Database Challenges
  - Database Meetings
  - Database Activities
- Following the guided tour, participants will be shown how to upload and change challenges on the app. Steps are below:
  1. Clone a database challenge.
     a. Once a challenge is cloned, VPMDs can make edits to it.
  2. Creating database activities.
     a. Go to Database Activities.
     b. Click on "New Database Activity".
     c. Fill out all of the necessary information (boxed in red) and any other pertinent information.
  3. Adding an activity to a challenge.
     a. Go into the challenge that was created.
     b. Scroll to the bottom to see the Database Activities section.

        c. Click on the red plus button.

        d. Use the magnifying glass to find the activity that was created.

        e. Fill out the necessary information (boxed in red).

4. Creating and adding database meetings.

        a. Follow the same steps for an activity for meetings.

5. Deploying a challenge.

        a. Once a challenge is ready to be sent to the members in the challenge, click on the "Deploy" button about halfway up the challenge page.

        b. Select a start date and select all members that are receiving a challenge.

6. Meeting updates.

        a. Using the meeting updates tab, VPMDs or challenge coordinators can update meetings after the challenge is deployed.

- Participants will then be encouraged to create their own challenge, activities, and meetings while Headquarters staff is there to address any bugs or questions.

Wrap-up (5 minutes):

- Recap guided tour of the BMP app:
  - Home page
  - Progress chart
  - Chapter Roster
  - Community Feed
  - Challenge participants
  - Database Challenges
  - Database Meetings
  - Database Activities
- Remind participants that the first steps to begin using the app are as follows:
  - Appoint challenge coordinators for Sigma, Phi, Epsilon and Brother Mentor
  - Update chapter roster to accurately reflect each brothers current challenge
  - Create each challenge in the BMP app
  - Deploy challenge to all chapter members

Session: Challenge Programming in the BMP App

Time:	1 hour, 30 minutes
Purpose:	● Allow participants to practice developing meaningful meetings and challenges utilizing resources and the BMP app.
Session Objectives:	● Participants will feel comfortable going back to their chapters and building out full challenges with their development committee through the BMP app. ● Participants will generate creative ideas for challenge meetings and activities in the app.
Materials and Equipment:	● Flip charts. ● Calendars. ● Markers. ● Masking tape. ● Participant guides. ● Challenge templates ● Laptops.
Session Outline:	● Introduction (5 minutes) ● Challenge Development (55 minutes) ● Challenge presentations (25 minutes) ● Wrap-up (5 minutes)
Pre-Session Prep:	● Prepare any necessary flipchart content. ● Review challenge templates and databases. ● Review the BMP app.

Introduction (5 minutes)

- This session is meant to show participants how to build out full challenges in the BMP app. They will be broken into four groups (one for each challenge) and will come up with activities and meetings for that challenge.
- Recap programming from the previous session. Emphasize the following:
  - The purpose of each challenge (Slide 52)
    - Sigma Challenge- Adjusting and acclimating to the chapter, campus and community
    - Phi Challenge- Growing and developing as a balanced man
    - Epsilon Challenge- Leading and serving as a balanced man
    - Brother Mentor Challenge- Preparing yourself and your chapter for the future

  - The different areas of development
    - SigEp
    - Leadership

- - - ■ Professional
      - ■ Physical Health and Wellness
      - ■ Intellectual
    - ○ The breakdown of development area by challenge that the participants already came up with.

Challenge Development (55 minutes)

- Split into four groups and assign a challenge to each group.
  - ○ **Facilitator's Note:** *There is one challenge template guide available for each challenge. This should be used as a last-minute resource if participants are truly struggling to come up with meeting and activity ideas.*
- Each group should do the following:
  - ○ Determine how many meetings the challenge should have.
    - ■ Sigma Challenge-- 8 weeks, one meeting per week
    - ■ Phi Challenge-- 12-52 weeks, one meeting every other week
    - ■ Epsilon Challenge-- 28-80 weeks, one meeting every other week
    - ■ Brother Mentor Challenge-- Until graduation, one meeting per month
      - ● Take into account breaks… for example:
        - ○ Phi Challenge: 52 weeks - 20 weeks (for breaks) = 32 weeks
          - ■ One meeting every other week means 16 meetings
  - ○ Come up with a list of meetings for the challenge.
    - ■ Participants should keep in mind the development breakdown per challenge.
    - ■ As participants create meetings, they should plot them on the calendar provided.
    - ■ Encourage participants to come up with out-of-the-box meetings that would be attractive to members and accomplish the learning outcomes for the challenge.
  - ○ Come up with a list of potential activities for the challenge.
    - ■ The groups should create a list of two activities per development area.
    - ■ As mentioned in the last session, activities are not necessarily a part of meetings and need to be completed by individuals before the challenge is over.
  - ○ Develop each challenge meeting and activity in the BMP app.
- **Facilitator Note:** *There are several pages (pg 6-8) in the participant guide to help attendees with this activity. There's a chart they should use, as a group, to develop their activities/meetings for each area of development within their assigned challenge. From there, they can use the next worksheet to more fully flesh out one of the meetings. A basic sample meeting agenda is also included (pg 9 - 10).*

Challenge Presentations (25 minutes)

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

Wrap-up (5 minutes)

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

What takeaways do you have from the challenge building process?
- Participants should walk away with the understanding that challenge building is not as complicated as it first appears.
- Just as participants built out challenges as a team during the session, they should build out challenges as a team in their chapters. Their development committees and volunteers will be key in building out the challenges. Challenge building is not an individual activity.

Session: Selling the BMP App

Time:	1 hour
Purpose:	- Ensure that participants are able to use and explain the BMP App. - Ensure participants can clearly articulate the value of the BMP App. - Help participants develop a strategy for implementation and usage at the chapter level.
Session Objectives:	- Participants will have a working knowledge of how to use the BMP App. - Participants will understand how to sell chapter members on using the BMP app. - Participants will create a project plan for implementing the BMP App at their chapter.
Materials and Equipment:	- Participant laptops - A/V Equipment
Session Outline:	- Sales framework (10 minutes) - Selling the BMP app to your chapter (25 minutes) - BMP App Implementation and Usage Project Plans (20 minutes) - Wrap-up (5 minutes)
Pre-Session Prep:	Ensure participants bring their laptops and participant guides.

Sales Framework (10 minutes):
- Explain that selling the Balanced Man Program is like selling any other product, service or value proposition. In order for them to sell their chapter brothers on the BMP app, they are going to need a framework:
  - Identify needs
  - Align with product
  - Overcome objections
  - Close the deal
  - Follow-up
- Write each of these out on a flip-chart and discuss each one with the group in more detail.
- Put up two additional flip charts title "decision makers" and "influencers". Explain that there are two types of "customers" and they are going to identify
  - Decision makers
  - Influencers

- Have participants provide examples of decision makers and influencers. Once this is done, have them list out attributes for both customer types.
- ***Facilitator note: Have participants identify the decision makers and influences in their chapter on page 11 of the participant guide.***

Selling the BMP app to your chapter (25 minutes)
- On a flipchart, have participants identify chapter members' needs in operating the BMP. Examples could include:
    - Easy way to track progress on challenge meetings and activities
    - Easy way to understand what is expected and when it needs to be completed
    - Hand held and mobile user experience
    - Easy way for coordinators and VPMDs to track progress
    - Easy and efficient way to transition the BMP to the next VPMD and coordinators
- Once these have been put on a flipchart, have participants discuss how the app can solve all of the BMP needs of their chapter members. Encourage them to discuss the following benefits of the BMP app:
    - Making your meetings and activities more engaging and impactful
    - Brothers become more engaged with the BMP on a daily basis
    - The BMP becomes more customizable by chapter
    - Brothers see tangible benefits from the BMP
    - Challenges are easily deployed whenever a member joins
    - The app makes it easier to track progress of individual members
    - Members can complete challenges at their own pace
    - Transitioning the BMP from one VPMD to the next is as easy as updating the officer portal
    - Outgoing VPMDs can focus their time on passing down knowledge instead of a full BMP
    - The incoming VPMD knows immediately where all members are in their challenge
- After this, put up a flipchart and utilize brothers in the room whose chapters are utilizing it well to brainstorm additional ways to sell chapter members on utilizing the app
- **Facilitator note: Participants can takes notes on page 12 in their participants guide.**

BMP App Project Plans (20 minutes)

- ***Facilitator's Note:*** *Headquarters staff will still be in the room to answer any lingering questions about the BMP App, but you will be facilitating this section.*
- Have participants refer to pages 13-16 in their participant guide. Here they will find a project plan for the BMP App. This plan will be shared with their Regional Directors to ensure that there is follow-up.
- Participants should fill out dates for all of the activities in the plan.
    - Some participants will be further along than others. The goal is to have all participants have at least a plan for:
        - Deploying the Sigma, Phi and Epsilon Challenges by the end of the semester.
        - Have all four challenges written in the app by the end of the semester.
        - Selling challenge members on utilizing the BMP app for each challenge.

- - ■ Example project plan on Slide 54
  - ● The goal of the project plans is for the participants to have a tangible next step when they go back to their chapters. This project plan should guide their actions throughout the semester.
    - ○ ***Facilitator's Note:*** *Participants must keep their participant guides. Shortly after the program, Regional Directors will be following up and asking VPMDs for copies of their BMP App project plans.*

Wrap-up (5 minutes)

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

Session: Frequently Asked Questions

Time:	1 hour
Purpose:	● Allow participants to feel comfortable with BMP FAQs and how to answer them.
Session Objectives:	● Participants will have any concerns about the BMP sufficiently addressed. ● Participants will be able to answer BMP FAQs in their chapter.
Materials and Equipment:	● Flip charts. ● Markers. ● Tape.
Session Outline:	● Introduction (5 minutes) ● Benefits and Obstacles (20 minutes) ● Overcoming Objection Techniques (15 minutes) ● Practice (15 minutes) ● Wrap-up (5 minutes)
Pre-Session Prep:	● Prepare flip charts.

Introduction (5 minutes)

- Why are we discussing this?
  - After getting a few answers, drive home the following points:
    - To be successful, we must know what's going to stand in our way and how to overcome it.
    - We are always looking to improve and get closer to the ideal, but no one is there yet.
- The following FAQs will be addressed during the session (participant guide **page 17**):
  - Why have equal rights and responsibilities?
  - Why is continuous development throughout college necessary?
  - Why is membership lapsing necessary?
  - Why should we hold members accountable for living the Ritual?
  - How do we do year-round recruitment with the BMP?
    - ***Facilitator's Note:*** *Many chapters see the BMP as a big obstacle to implementing year-round recruitment because people don't join with a "class." They should begin to emphasize the individual aspect of the BMP. Also note that there are worksheets in the participant guide so attendees can take notes on each area of this module.*

<u>Benefits and Obstacles (20 minutes)</u>
- Split participants into two groups per FAQ (e.g. four FAQs→ eight groups) and assign each group one of the FAQs.
    - Two groups should be assigned per FAQ and given a flip chart divided into two columns. Give groups about five minutes to fill out their flip charts.
    - One group should be discussing the benefits of each FAQ (e.g. the benefits of equal rights and responsibilities) and under each column:
        - Benefits to the individual.
        - Benefits to the chapter.
    - One group should be discussing the obstacles that they may face. Under each column:
        - Obstacles to the FAQ.
        - Ways to overcome the obstacles.
- Allow each group to present their findings to the large group. Other participants should be able to contribute to the flipcharts during the presentations.

<u>Overcoming Objections Techniques (15 minutes)</u>

- ***Facilitator's Note:*** *These techniques are sales techniques and can be applied to anything outside of the BMP. They are also helpful for anyone looking to pursue a career in sales. They can take notes on **page 18** of their participant guide.*
- Before implementing any strategy, you ALWAYS start by validating the person.
- ***Facilitator's Note:*** *Give an example of techniques 1-3 with another facilitator or with a participant. You can use an example objection related to the BMP or another objection that you're comfortable with.*
- Strategy 1- Feel, felt, found, find
    - "I understand how you feel…"
    - "I felt the same way…" or "I know someone who felt the same way…"
    - "I have found that…"
    - "You'll find that…"
    - This strategy forces you to exhibit empathy, not sympathy.
    - Serves as a basic framework and safety net.
- Strategy 2- Problem Isolation
    - Validate then…
    - If "x" wasn't a problem, do you have any other concerns?
    - The goal of this strategy is to get to the heart of the issue. Once you have isolated the problem, use the first strategy.
- Strategy 3- Getting to 'Yes'
    - People are more likely to agree if they agree to smaller things first
    - Instead of giving them an option of 'no', give people two options-- they have to say yes to one of them.
        - Example: "does a call on Tuesday or Wednesday work better for you?"
- Strategy 4- Building a coalition
    - Participants can't do things by themselves in their chapters.
    - They must find like-minded individuals in their chapters to support them.

- ○ Use this coalition to influence a larger portion of the chapter than just one person can influence.

Practice (15 minutes)

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

Wrap-up (5 minutes)

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

Session: Working with Various Stakeholders

Time:	45 minutes
Purpose:	● Ensure that participants feel comfortable with their committees
Session Objectives:	● Participants will understand their development committee's role. ● Participants will learn how to best work with their development committee.
Materials and Equipment:	● Flip charts. ● Markers. ● Tape.
Session Outline:	● Introduction (5 minutes) ● Role of the development committee (10 minutes) ● Other Stakeholders (15 minutes) ● Working with the development committee (10 minutes) ● Wrap-up (5 minutes)
Pre-Session Prep:	● Prepare flip charts.

Introduction (5 minutes)

- One of the most important roles of the VPMD is the management of the development committee.
- The development committee will be the people that execute the challenges and most development events. It is important to understand their roles and how to interact with them.

Roles of the development committee (10 minutes)

- Challenge coordinators: responsible for providing quality programming and a relevant experience for challenge participants.
    - Facilitate vs Coordinate
        - Coordinators are like wedding planners-- they don't play the music, bake the cake, arrange the flowers, etc. They are the ones that go and find the best people for those jobs.
        - Likewise, coordinators should not be leading every meeting. If a meeting requires outside expertise, the challenge coordinator is responsible for finding that expert.
        - Example:
            - Within your chapter's Phi Challenge programming, you should be holding a meeting that focuses on cultural and spiritual awareness. Based on the Phi Challenge Guide, this meeting should be a discussion and activity.
                - Who should lead this meeting?
                - Are they a credible content expert? Why?
                - Will they provide an engaging experience for attendees?
- Sound Mind and Sound Body chairmen: Help members achieve a sound mind/ sound body lifestyle through quality programming.
    - If coordinators are like wedding planners, these guys are like chefs in the kitchen: they focus on specific things to support multiple challenges.

Other stakeholders (15 minutes)

- Other stakeholders include:
    - Balanced Man Steward
    - AVC
    - University faculty or administration
- In order to work with these stakeholders, you must be able to articulate the BMP.
    - Elevator pitch:
        - 30 second pitch or explanation that covers the basics of the topic.
    - Have participants pair up and practice telling various stakeholders about the BMP. Their partners will represent the various stakeholders.
    - Afterwards, have a few participants give elevator pitches in front of the whole group.
- What to expect from various stakeholders:
    - Balanced Man Steward:
        - VPMD mentor. This volunteer should be an expert in the BMP and will help with day-to-day planning.
    - AVC:
        - The AVC will provide general support for the BMP and can be used as facilitators for meetings.
    - University administration:
        - They can be used as content experts for meetings and should be used frequently for different topics.

Working with the development committee (10 minutes)

- Delegate the work out to the committee.
    - You cannot do all of the work yourself. You will suffer and the end product will suffer. Use your committee to take work off of your plate.
    - Have participants break into pairs and share how they have effectively delegated or been delegated to. Be sure that participants are hitting on at least the following points:
        - Setting clear expectations and deadlines is key for delegating effectively (just like in goal setting)
        - It is imperative that the people that are being delegated to feel like they are part of the team, not that they are in a boss/ employee relationship.
    - ***Facilitator's Note:*** *delegation is one of the most important topics for the VPMDs to take away from the session. Make sure to really hit this home.*
- Hold weekly meetings with the full development committee.
    - These meetings should go over future events and events that have just happened. Evaluate the effectiveness of past events and ensure that future events are planned for.
        - All development events should be fully planned at least two weeks in advance.
        - Ensure that your coordinators are using outside experts for topics that they need help with.

Wrap-up (5 minutes)

- What are the big takeaways from this session?
- What best practices will you take back to your chapter?

Session: Action planning

Time:	40 minutes
Purpose:	Create or refine goals and action plans for this calendar year Receive feedback on goals and action plans from their peers
Session objectives:	Participants have well developed goals and corresponding action plans relevant to their position. Participants network with other officers to gather best practices.
Materials & equipment:	Flip charts Masking tape Participant guides.
Session outline:	● Creating an action plan (10 minutes) ● Action plan creation (30 minutes)
Pre-session prep:	SMART goals established

Creating an action plan (10 minutes):
- By this point, all of the participants should have their goals written and reviewed prior to their arrival at Carlson. Reinforce that if they walk away without concrete and tangible goals, they haven't maximized their Carlson experience.
- Lead a discussion on what makes some goals successful and what causes other fail.
  - Have the participants reflect on goals that they've set in the past, either for themselves or their chapter that they didn't accomplish. Why didn't they accomplish their goals?
  - Remind the participants of what makes a goal SMART and the importance of having written goals. Refer them to **page 19** of the participant guide.
  - A goal without a plan is nothing more than a wish. Hope is a poor strategy for success. To achieve any goal, you need to have a plan of how you're going to get there.
  - Getting buy-in to your goals is not always easy, but it can be if you can articulate the clear path to achieving those goals and be open to feedback.
    - You might have excellent goals that can lead to positive change for your chapter, but if you try to tackle them alone, you will fail. Build a coalition, set expectations with them and ensure they have direction to help you tackle your goals.
    - Work the halls within the chapter, and get guys bought into your goals.
  - When leading a team, you need to regularly check-in with your team members to ensure they are following up on their commitments. This follow-up will ensure the progress you expect is being made.
- With the rest of our time this afternoon, we'll be creating action plans for the participants to take back to their chapters to get feedback on, build consensus around, and ultimately implement.
- At its simplest, an action plan is just "how do I get stuff done to accomplish my goal?". The plan outlines all the steps necessary to accomplish the goal and serves a project management tool to track progress.

- The following are elements of a basic action plan which we will be using shortly. Walk participants through each aspect:
    - Deadline: when does this task need to be accomplished to stay on track?
    - Task: what exactly needs to get done?
    - Owner: who is responsible for getting this task done? Remind participants that they should <u>not</u> 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.

<u>Action plan creation (30 minutes)</u> :
- You're now going to have participants begin creating action plans for the goals they set. First, instruct participants to go back and review the goals they came into the session with. 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 on **pages 21-25**. 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. Refer them to **page 20** in the participant guide.
- Once they finish, have everyone find a partner to share their action plans and get feedback.
- If time allows, let several participants present their SMART goal(s) and corresponding action plan(s) to the group.
- Ask the group for their thoughts on the time they spent formulating their plans. Was this easy or pretty difficult? Did they have any big revelations? Was there something else they came across that they thought was important to include in their plan?
- Have each participant commit to the following things:
    - Share their action plans and goals with their fellow executive board members
    - Present their goals to the chapter
    - Share their goals with chapter volunteers and the Regional Director for support and accountability

Session: Track Wrap-up

Time:	10 minutes
Purpose:	● Wrap-up the Carlson weekend.
Session Objectives:	● Participants will feel energized to implement topics at their chapters.
Materials and Equipment:	● Flip charts. ● Markers. ● Tape.
Session Outline:	● Wrap-up (10 minutes)
Pre-Session Prep:	● None

● Give participants time to walk around and take note of the information posted on the help wanted boards. Encourage participants to share contact information with one another, remind them to revisit their participant materials with their chapter and volunteers.

● Introduce the three keys to improving your chapter's membership experience (Slide 55):

  ○ Be confident– We need to be confident and able to resist negative pressure to be most effective.
  ○ Build a coalition– You can't do this alone.
  ○ Follow through– None of this matters if you do nothing.

● Leave them with some inspiring words about leaving a legacy and the impact of when it's done right (Slide 56).
  ○ Remind participants of the importance of their role. When they do their job correctly, what is the impact they can make?
  ○ As you go back to your schools where many chapters look like animal house… and there are pressures to fulfill the stereotype.
  ○ Remember, the BMP is the true traditional fraternity experience… thank you for making our Founder's dream a reality.

● Thank participants for attending the track and provide your contact info as an additional resource.

SigEp