

# SigEp



## VICE PRESIDENT OF RECRUITMENT

Facilitator Guide



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(NAME)

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(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.*

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

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

## Table of Contents

<u>Session</u>	<u>Time Allotted</u>	<u>Should Take Place</u>
Friday Night - program preparation and overview	30 minutes	Friday from 10:00 - 10:30 p.m.
Role Review and Core Components of Recruitment	2 hours, 40 minutes + break	Saturday from 9 - 11:50 a.m. (break for snacks at 10:00 a.m.)
Recruitment and Sales Skills	2 hours + break	Saturday 11:30 - 12 p.m. (break for lunch) Saturday 1:45 - 3:15 p.m.
Values-Based Recruitment	2 hours, 15 minutes + break	Saturday 3:05 - 5:30 p.m. (break for snacks at 4:00 p.m.)
Action Planning	45 minutes	Saturday 5:30 - 6:15 p.m.
Wrap Up	35 minutes	Saturday 6:15 - 6:50 p.m.

## Session: Friday Night – Program preparation and overview

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

### Flipcharts to prepare:

Group  
Expectations

Parking Lot

S.M.A.R.T.  
  
S  
M  
A  
R  
T

**Introductions (15 minutes):**

- **Facilitator introductions (5 minutes)**
  - **Facilitators will introduce themselves and cover the following items:**
    - **Who are you?**
    - **What do you do professionally? How does that relate directly to this officer track (if applicable)?**
    - **Undergraduate institution?**
    - **Where do you volunteer, or what is your involvement with SigEp?**
    - **Why is Carlson Leadership Academy and this particular session important to you?**
  
- **Participant introductions (10 minutes)**
  - **Facilitator note (optional): If you have a favorite name game or icebreaker, please feel free to facilitate that here.**
  - **Have participants get into groups of six.**
    - **Within these groups, have participants introduce themselves:**
      - **Name**
      - **Chapter**
      - **Biggest thing they're looking forward to during the Carlson program**
      - **One challenge in the chapter they're looking to learn how to overcome and improve the chapter experience**

**Program overview (5 minutes):**

- **Ask the participants the following question: Why did you all choose to spend your weekend here at Carlson?**
  - **To better understand your position**
  - **To become a better officer**
  - **To network and get ideas from other chapters**
  - **To be set up for success for the upcoming year**
  - **Regional Director or chapter volunteer wouldn't leave you alone about coming...**
- **Now that we know what brought you all here, let's talk about how we're going to ensure that you all get everything that you want out of this experience.**
  - **While we will cover some of the basics pertaining to your position, most of our time will be spent tackling tough issues that you're going to face this year. We surveyed outgoing chapter officers and asked them: "What do you wish you'd known, or been taught, prior to your time in office?", and developed the curriculum for this weekend based on what your peers and predecessors told us.**
  - **Highlight the materials (participant/officer guide) that they have received and explain how they will use them throughout the weekend. Don't lose this participant guide!**

- Create and set up the "parking lot" flip chart and hang it in the back of the room. Explain that if questions come up that aren't directly relevant to the topic being addressed at that time, then you'll put them in the parking lot and revisit them later. Let them know that they should feel free to add to this list as ideas come to mind.
- 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? They can record this on **page 1** in their participant guide.
  - Be prepared.
    - Bring paper/your participant guide, and a pen
    - Have your goals ready to discuss
    - Have questions, and ask them
  - Be engaged.
    - While you're here, spend your time with brothers from other chapters, particularly the guys in this room holding the same position as you. Don't spend all your time with chapter brothers - you can see them at home.
    - Network with your peers and share ideas
    - Keep your cell phones away
    - Contribute to the group
  - Be respectful of each other.
  - Don't be afraid to ask tough questions. We're here to ensure that you walk away ready to tackle the next year head on and we need to leave no stone unturned.
- What types of topics do you definitely want to cover this weekend? Some examples include:
  - Getting your chapter on the same page with whom to recruit
  - Knowing where to find the "ideal SigEp" on campus
  - Recruiting outside of formal recruitment and moving to year-round recruitment
  - Selling SigEp's value
  - Overcoming objections to joining
  - Utilizing your recruitment committee
  - High-level understanding of the Balanced Man Scholarship
- Provide an overview of what will be covered in this track 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.

**Effective goal setting (5 minutes):**

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

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

**Wrap-up (5 minutes):**

- **Ask the participants if they have any questions regarding Carlson, intended outcomes or expectations for the weekend.**
- **As a facilitator, share your favorite memory from Carlson and why you personally believe it was beneficial to your undergraduate experience to get the group excited for tomorrow.**
- **Remind them one more time to complete their homework regarding SMART goals.**
- **Remind them that breakfast will start promptly at 8:00 am, to be sure to have their participant materials ready for the day, and to bring their nametags with them to breakfast. Their nametags will be scanned into breakfast - they need to ensure that they get scanned in so they are not assessed a \$25 no-show fee for missing breakfast. If they are late, they will not get scanned and will be charged.**



## Session: Core Components of Recruitment

<b>Time:</b>	<b>2hrs 40 minutes total + break (snack)</b>
<b>Purpose:</b>	<ul style="list-style-type: none"> <li>▪ Understand the core parts of recruitment that are needed to be successful</li> </ul>
<b>Program Objectives:</b>	<ul style="list-style-type: none"> <li>▪ Provide an overview of the position roles and responsibilities</li> <li>▪ Participants will have a better understanding of their role and how their responsibilities will make an impact on their chapter.</li> <li>▪ Participants will understand the five core components of recruitment:                             <ul style="list-style-type: none"> <li>○ Recruitment Goals</li> <li>○ Recruitment Standards</li> <li>○ Potential New Member List</li> <li>○ Recruitment Committees</li> <li>○ Volunteer Recruitment Mentor</li> </ul> </li> </ul>
<b>Materials &amp; Equipment:</b>	<ul style="list-style-type: none"> <li>▪ Flipchart</li> <li>▪ Markers</li> <li>▪ Participant guides</li> </ul>
<b>Session Outline:</b>	<ul style="list-style-type: none"> <li>▪ Responsibilities of the VP of Recruitment (15 minutes)</li> <li>▪ Officer guide breakout groups (30 minutes)</li> <li>▪ Why core components (15 minutes)</li> <li>▪ Recruitment goals related to an optimal chapter range (20 minutes)</li> <li>▪ Recruitment standards that are communicated to the chapter (20 minutes)</li> <li>▪ Potential new member list that is used on a weekly basis (25 minutes)</li> <li>▪ Recruitment committees that meet consistently (25 minutes)</li> <li>▪ Volunteer recruitment mentor that is actively involved in the recruitment process (10 minutes)</li> </ul>
<b>Pre-Session Prep:</b>	<ul style="list-style-type: none"> <li>▪ Prepare flipcharts</li> </ul>

**Flipcharts to prepare:**

Responsibilities  
of the VPR

What do we track  
on the PNML?

How do you  
grow your  
PNML?

The “Ideal”  
SigEp

### **The Responsibilities of the VP of Recruitment (15 minutes)**

- **Prepare a flip chart labeled "Responsibilities of the VP of Recruitment". During the following discussion, capture their thoughts on the flipchart.**
- **Direct them to the list of responsibilities in their officer guide**
- **Ask the group: "You all ran for this job under some pretense of what you expected the position to be like and the corresponding roles and responsibilities. What do you think are the main responsibilities of the VP of Recruitment?"**
- **Ideally, you arrive at some version of the following points below:**
  - **Review this Officer Guide and develop a list of what needs to be changed or improved and an action plan to do so.**
  - **Set and work to achieve SMART goals.**
  - **Organize the recruitment committee and teams.\*\***
  - **Meet with each member of the recruitment committee and ensure he understands the expectations of his position.**
  - **Align the chapter under a shared recruitment vision and goal.**
  - **Develop and execute a recruitment strategy using values-based recruitment and year-round activities.**
  - **Set and uphold high recruitment standards that take a prospect's values under consideration.**
  - **Oversee the implementation of the Balanced Man Scholarship.**
  - **Coordinate chapter recruitment skills training.**
- **Let them know this list of responsibilities can be found in their officer guide.**

### **Officer guide breakout groups (30 minutes)**

- **Break participants into small groups of 4-6 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.**
- **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 20 minutes for the groups to present and open the floor to questions/comments/concerns after each presentation.**
- **Areas of the officer guide to assign:**
  - **Role of the VPR (pg. 5)**
  - **Audiences + Committee (pg. 6)**

- Values-based Recruitment (pg. 10)
  - Year-round Recruitment (pg. 11)
  - Balanced Man Scholarship (pg. 12)
  - Six Steps of Recruitment (pg. 26)
- While groups are working, walk around and help any groups that may be struggling. Also, follow along in your version of the officer guide and help point out concepts that they may have missed.
  - Encourage participants to capture any light-bulb thoughts or parking lot questions that may have come up during the discussion on the flipcharts in the back of the room to reference throughout the program. Both light bulb and parking lot flip charts are set up to be written on throughout the program. Remind everyone that you'll have time at the end of the program to revisit these concepts and questions.

#### **Why Core Components (15 minutes)**

- Organization is extremely important to any sales or recruitment success. Without the basic building blocks of the recruitment process, chapters struggle to consistently hit their goals. Imagine building a beautiful house on a shaky foundation. The core components are the foundation of recruitment. Regardless of sales skills or SigEp skills, if we don't have the foundation in place, the chapter will struggle to succeed with recruitment consistently.
- Lead the conversation:
  - What are some of the core components to the recruitment process?
  - Why are these core components (Goals, Standards, List, Committees, Mentors) needed?

#### **Recruitment Goals related to an Optimal Chapter Range (20 minutes – pg. 2 & 3 of participant guide)**

- What is optimal size or range?
  - Each individual chapter has an ideal size that it should be. Optimal size is not an exact number, but rather a strategically calculated range. This number is based on a number of different figures and characteristics of their campus and chapter. It's going to vary from campus to campus and some factors can have a greater effect on the chapter's optimal size than others. If you have any pushback on the concept of long-term planning, share that they know best what size they should be and they should be involved in the planning of their chapter's size this semester and in the distant future.
- Lead the conversation:

- Why is it helpful to know our optimal size?
- How does it affect the way we set goals?
- What campus/chapter characteristics do you think go into determining our optimal size?
- Is it realistic to achieve our optimal size this semester? Or should this be a long-term strategic plan?
- How can we hold ourselves and our chapters accountable to reaching our optimal size?
  
- **Effective goal setting**
  - Revisit the basics of SMART goals and flip chart from last night.
    - **Specific:** Goals must be something that can be described and understood easily by others - finite conditions, not general feelings.
    - **Measurable:** How can you measure your success? Whenever possible, use numbers or percentages to mark progress and/or achievement of the goal. You can't rely on personal opinion.
    - **Attainable:** Is the goal realistic? Goals should be a stretch to obtain but not impossible to achieve. Members will work toward what they believe they can achieve and are not inspired by boring, easy goals.
    - **Realistic:** Why does this goal matter? Explain how this goal connects to the larger picture or goal.
    - **Timely:** When is your deadline? Goals must have an end date when they are due. Creating a sense of urgency will push you and those you're leading to work harder.
  
- **Check in with the participants to confirm who has goals with them. Ask them to raise their hand if they brought their SMART goals with them.**
  - Ask the participants who brought their goals with them to give examples of some of their goals. If they are comfortable doing so, invite 3-4 participants to share their written goals with the group
  - As a group, work with that participant to determine if the goal is SMART, and how the goal might be improved to be more specific, measurable, achievable, realistic, or timely.
  
- **Make sure each participant fills out pages 3 and 4 of their guide with their goals for the spring and fall semester, as well as the chapter's optimal size range on page 2.**
  
- **Too often, people will leave Carlson excited about their goals and then forget about them a week later. Or we'll recruit a few less men than we originally planned on...and then we're content and give up on recruiting. This quick activity is meant to help them understand who they have as their support network to help them crush their goals. Do you want to be the VPR who met all your goals and changed the face of the chapter forever? Or do you want to be the guy who fell short and the next guy had to be the hero?**

- **Lead the conversation:**
  - **Who are the people that can help you meet your goals?**
    - Regional director and recruitment services team
    - Recruitment committee
    - Mentor for recruitment
    - Who else?
  - **How can you utilize them?**
    - Share your goals with the world, ask them to hold you accountable, break larger goals up into smaller tasks to generate momentum.
    - Ask the regional director to host a recruitment workshop with the entire chapter to train them how to recruit better, so you're not doing everything on your own. After all, recruitment should be a chapter-wide activity.
    - Meet with your recruitment mentor on a regular basis, throughout the entire semester to talk about the progress you're making and where you need to improve
    - Be open and receptive to feedback from former VPRs. They've probably made the same mistakes that you are going to
    - How else?
  - **What do you do if you miss your recruitment goal by a few men?**
    - Second rounds of recruitment
    - Recruit 365 days a year, always be building your network and building relationships with potential new members
    - Follow up on your Balanced Man Scholarship applicants that haven't joined SigEp yet. At this point, these guys are already impressed with the fraternity and you've made a good impression. Ask them to join

**Recruitment standards that are communicated to the chapter (20 minutes)**

- The first step in successful recruitment is identifying high quality candidates that meet and exceed the standards of membership. Before we identify the individuals, we need to define exactly what our recruitment standards are. (Page 6-7)
- Participants will split up into groups (group sizes will vary depending on attendance, so use your judgment on ideal group size) to hash out the following scenario explained by the facilitators. Allow 5-10 minutes for discussion and brainstorm within the groups.
  - One of the worst things that can be said during a recruitment committee meeting or bid discussion session when referring to a potential new member is, "he's a good guy"
    - What does that mean? How does one inherently define a "good guy"?

- **Our recruitment standards should be set on quantifiable values like student status, GPA, or number of community service hours, as well as character traits like determined, athletic, and goal-oriented.**
- **These characteristics give you a better insight into the individual's life and allow the recruitment committee to have more valuable conversations around each potential new member.**
- **What are the characteristics of the "ideal SigEp"?**
- **After 5-10 minutes, bring participants back to the large group and gain a consensus definition of "the ideal SigEp." Facilitators should record some responses on a flipchart.**
- **As groups present their ideal SigEp, have them share how they came to a consensus in their group.**
- **Take 5 minutes to run through the debrief questions and also review the template recruitment standards provided in the participant guide on **page 5**.**
  - **Key points from template recruitment standards:**
    - **We have two non-negotiables in SigEp – minimum GPA requirement and ability to financially afford the experience.**
    - **New members need to be bought-in to the Balanced Man Program and substance-free facilities.**
    - **We can budge on some of the qualifications/resume items, but the values are a must-have.**
    - **We don't need a finished product, but someone who is willing to work to better himself.**
    - **Every new member must be willing to help the chapter.**
  - **Debrief Questions:**
    - **How does this activity relate to your responsibilities with your chapter?**
    - **What about this activity was difficult? What challenged your group? How does that translate into what you'll be doing in your chapter?**

**Potential new member list that is used on a weekly basis (25 minutes)**

- **Remind the group of the consensus they came to in what constituted the ideal SigEp.**
- **All groups will create a list to record all of the different categories of information that we could track on a potential new member list.**
  - **Encourage the groups to think along the lines of the standards that we previously discussed.**
  - **Examples include: name, contact information, etc. as well as those characteristics we determined last night...does the candidate show leadership potential?**

- Groups should read off their unique answers and the facilitator should record them on a flipchart
- **Growing your Potential New Member List (Places and Ways)**
  - **Instructions:**
    - Everyone will remain in their same groups for this activity again. This activity is a similar concept as before – facilitator will share the topic, groups brainstorm answers, groups share unique answers and the facilitator will record answers on the flipchart.
    - In the next activity, we'll have groups make a comprehensive list of places and ways to find names of students who match up with "the ideal SigEp."
    - Encourage the groups to think about student organizations, things that chapter members can do to get new potential new members, who to talk to on campus/in the community. Make sure these efforts are focused on identifying the top talent.

***Facilitator Note:*** Strongly encourage participants to think outside of formal rush/recruitment methods of obtaining this information and seeking these individuals out.

- **Debrief**
  - How can you use the "places and ways" list on **pg. 8** of the participant's guide back at your chapter?
  - Whose responsibility is it to maintain/populate the PNML?
    - The vice president of recruitment should maintain the list, getting information he needs from his committee. The entire chapter should be adding names and information all the time.
  - How should the PNML be used by the recruitment committee?
    - It should be reviewed and updated at least weekly at a committee meeting.
  - How can the PNML be used by the entire chapter (reviewed regularly at chapter meetings)? How do you make it accessible to the chapter?

#### **Recruitment committees that meet consistently (25 minutes)**

- Now that you've mastered the tactics to grow your potential new member list, you'll want to surround yourself with a team of talented individuals to help manage the load. This is where a recruitment committee comes in handy.
- Emphasize that we'll cover recruitment skills, but it is not the job of the vice president of recruitment to be the best or the only recruiter. Recruitment should be a chapter-wide activity and the vice president's job is to be the most organized person who is delegating tasks, following up and ensuring everything is being done on time.
- Lead the Conversation – encourage chapters to share their own experiences.

- What is the job of the vice president of recruitment?
  - What is the job of the recruitment committee?
  - How often should recruitment committees meet? (Push them to say weekly throughout the entire semester, not just when "rush" is complete)
  - What should you talk about during the recruitment committee meeting? Have them draft a sample agenda if time allows.
  - How can utilizing a recruitment committee make your life easier?
  - How do we hold recruitment committee members accountable who aren't pulling their weight, showing up to events, inviting PNMs, etc.?
- Who should be on the recruitment committee?
    - Ideally, VPRs have already selected who their recruitment committee will be. But realistically, you'll encounter some chapters who have not. Guide this discussion to help them realize that they will not be as effective if they try to do everything on their own as opposed to surrounding themselves with a competent committee that can help by delegating tasks. Additionally, whenever we can encourage team based recruitment, where more chapter members share responsibility for the recruitment goals, the better.
    - Have you already selected your recruitment committee?
    - If not, what kind of people are you selecting for your committee? Are they simply your friends or do they possess a set of skills that will help with the overall goal?
    - Do you have a mixture of older and younger members on the committee? Each can provide a different perspective to various potential new members.
  - Participants should walk away from this quick discussion with a good idea of the type of person, and preferably exactly who should be on the recruitment committee. Direct them to **pg. 9** in their participant guide to capture these thoughts.
  - What do recruitment committee meetings look like?
    - Ideally, the recruitment committee meets every week, even beyond formal "rush" week. SigEp chapters recruit year-round and should always be building their personal network. You may get this question about year-round recruitment:
    - **FAQ:** My university doesn't allow us to recruit outside of the formal recruitment process. What should we do?
      - ***Answer:*** We should explicitly follow all university and IFC policies and regulations on when we are able to extend invitations for membership in our organization. In this instance, there is a difference in "recruiting" vs. "extending bids". While the university can set regulations on the latter, the university cannot restrict members' ability to build their personal networks and make friends with the people in their classes. SigEps should always be actively building relationships with those around us in order to be ready to extend membership invitations when the allotted time arrives.



- **Lead the conversation:**
  - **What's on the recruitment committee meeting agenda? Review **pg. 10 in the participant's guide** with an example recruitment committee meeting agenda**
  - **How often should you meet?**
  - **How do you assess PNMs at each meeting?**
  - **When do you take other brothers' opinions into account?**
  
- **Participants should walk away from this session knowing strategies of how to grow their potential new member list and how to utilize those around them to make sure you're regularly having touch points and following up on those PNMs to ensure they become SigEps.**

**Volunteer recruitment mentor that is actively involved in the recruitment process (10 minutes)**

- **Volunteer involvement in the recruitment process is important to ensure consistency year over year in the chapter and help hit recruitment goals.**
  
- **Volunteers will help you as VPR crush your goals and leave a legacy as an outstanding VPR**

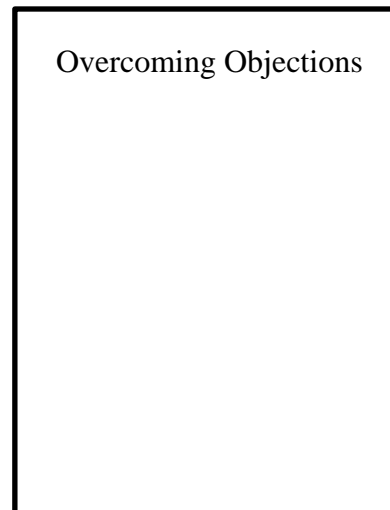
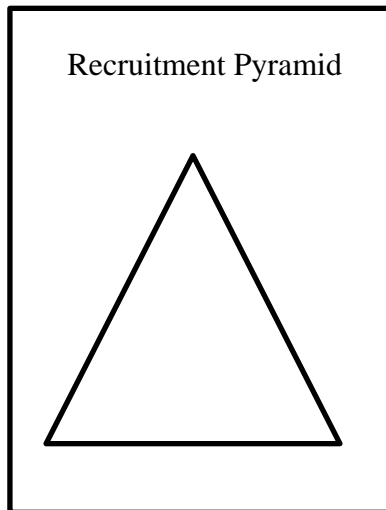
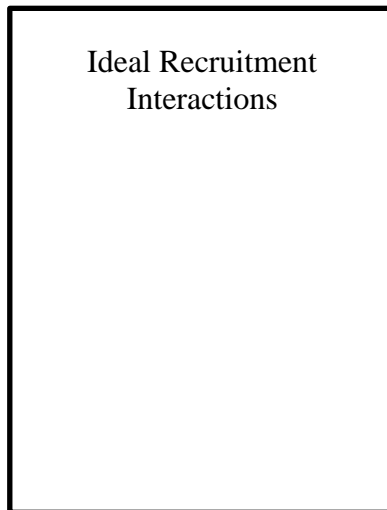
**Facilitators Note: Help the undergrads see how engaging with their recruitment mentor can benefit them in their role and personally.**

- **Lead the Conversation – encourage chapters to share their own experiences.**
  - **Who here has a recruitment mentor?**
  - **How has a volunteer recruitment mentor helped your chapter in the past?**
  - **What are the benefits of having a recruitment mentor?**
  - **What role do the alumni play in recruitment at your chapter?**
  - **How often should you try to meet or check-in with a mentor? (Push them to say weekly throughout the entire semester, not just when "rush" is complete)**

## Session: Recruitment and Sales Skills

Time:	2 hours total + break (lunch)
Purpose:	<ul style="list-style-type: none"> <li>▪ Learn to host values-based recruitment interactions with high return on investment</li> <li>▪ Articulate the SigEp experience</li> <li>▪ Understand the BMP as a product</li> </ul>
Program Objectives:	<ul style="list-style-type: none"> <li>▪ Participants will understand how to effectively sell SigEp's product.</li> </ul>
Materials & Equipment:	<ul style="list-style-type: none"> <li>▪ Flip chart</li> <li>▪ Markers</li> </ul>
Session Outline:	<ul style="list-style-type: none"> <li>▪ Large Scale Events vs. Small Scale Interactions (10 minutes)</li> <li>▪ The Recruitment Pyramid (15 minutes)</li> <li>▪ What is the SigEp product (30 minutes)</li> <li>▪ Identifying their needs (20 minutes)</li> <li>▪ Pitch me your product (20 minutes)</li> <li>▪ Overcoming Objections (25 minutes)</li> </ul>
Pre-Session Prep:	<ul style="list-style-type: none"> <li>▪ Prepare flip charts</li> </ul>

**Flipcharts to prepare:**



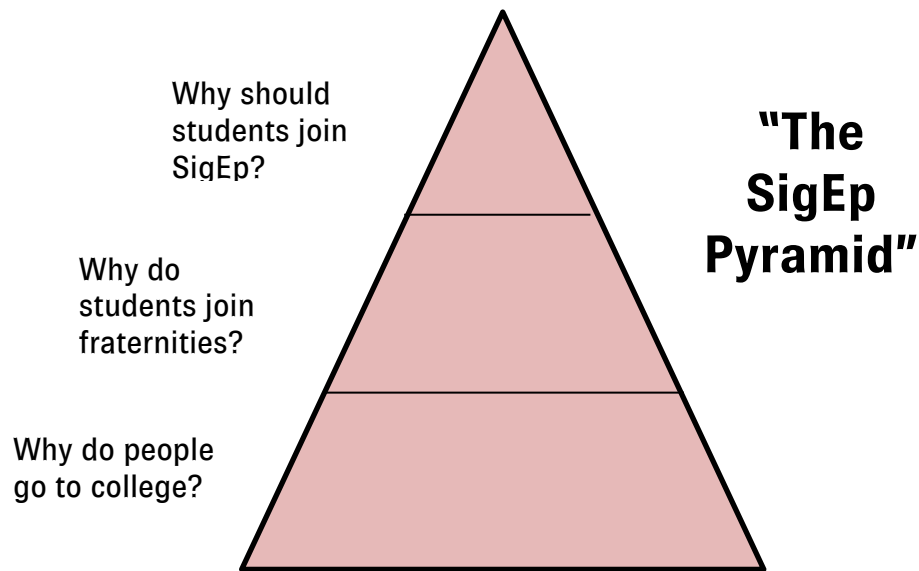
### **Large-Scale Events vs. Small-Scale Interactions (10 Minutes)**

- The purpose of this conversation is to set the paradigm for the rest of the activity of selling SigEp. The intended outcome here is to get participants to understand that expensive, large-scale recruitment events do not yield a high return on investment. Additionally, these events are often times only planned during the formal rush period, which discourages a culture of year-round recruitment.
- Small-scale interactions have a much greater return on investment and are more conducive to getting to know potential new members on a much deeper level. However, many participants will want to walk away with event ideas, so facilitate that conversation first:
  1. What are good recruitment events? Think of low-cost, values-based, high-ROI events... be prepared to record answers on a flipchart.
  2. Are these events conducive to getting to know more about someone's values? Or are we trying to impress potential new members with material possessions (our house, food, t-shirts, sunglasses, etc.).
    - a. Which one of these leads to greater commitment to the organization from the individual – material possessions or a firm commitment to our ideals?
  3. Should recruitment be limited to one or two weeks throughout the entire semester? How do we make recruitment a part of our culture?
  4. The most successful chapters make recruitment part of their recurring weekly schedule such as Friday afternoon ultimate frisbee or Monday night chapter dinner.

***Facilitators Note:*** If they dig in on year-round recruitment here, tell them we'll talk more about it later in the day. Have participants reference **pg. 11-13** in their participant guide to jot down notes/thoughts.

### **Application Activity Part 1: The Recruitment Pyramid (15 Minutes)**

- Walk up this activity by saying: Picture yourself as an incoming freshman. You're walking down a row of information tables at the organizational fair during the first week of school. Every fraternity is telling you why you should join their organization. They're all saying the same thing — alumni networking, brotherhood, sorority relationships, etc. You're exhausted, but SigEp is the last fraternity in the aisle. What is SigEp going to be promoting?
- The SigEp pyramid is a quick way to help participants understand what they should, and what they should not, be selling to potential new members. Lead this activity by introducing the walk-up and encouraging participants to follow along in their participants guide.



- In your participants guide, **open to page 14** for the SigEp pyramid. We're going to fill this out individually and then come back together as a group to talk about your responses for each tier of the pyramid.
- On the bottom tier, I want you to brainstorm many reasons why students choose to go to college.
- Have participants break off and complete the first tier on their own. After 5 minutes, come back together so they can share their results. Be prepared to record their results on a flipchart.
- When you're ready to move on to the second tier, have participants brainstorm why students choose to join fraternities in general. Explain that students go to college to get x,y,z (recap their answers), but they join fraternities because they want something more out of their experience. This means they cannot repeat answers that you used in the bottom tier. Each answer must be unique to this question.
- Have participants break off and complete the middle tier on their own. After 5 minutes, come back together so they can share their results. Be prepared to record their results on a flipchart.
- Finally, when you're ready to move on, many participants will have caught on to what you're doing. The last question is, "why should students join SigEp?" And just like the last time, we cannot repeat answers from the previous two tiers of the pyramid. Remind participants of the walk-up. Encourage them to think from the perspective of the potential new member. What are things that no other fraternity will be able to say about their fraternity? If they respond with answers like brotherhood, alumni networking, sorority relationships, etc., challenge them by telling them other fraternities also provide all of those things. What is unique to SigEp?
- Have participants break off and complete the final tier on their own. After 5 minutes, come back together so they can share their results. Be prepared to record their results on a flipchart.

- At the end of the discussion, you should land on SigEp-specific character traits like the Balanced Man Program, Substance-free facilities, the Balanced Man Scholarship, no pledging and no hazing, our specific values, our national leadership events like Ruck, the Tragos Quest to Greece, etc.

**Application Activity Part 2: What is the SigEp product? (30 Minutes)**

- Explain that from now on, we are going to think about recruitment from a sales prospective – we should think of our PNMs and our members as consumers of a product.
- If we think from this prospective, it is important to understand what the SigEp product is to be able to effectively sell and deliver it to our consumers.
  - *The SigEp product is the experience that members receive through active participation – (the items we mentioned in the top tier of the recruitment pyramid like the Balanced Man Program, our national leadership events, substance-free facilities, etc.)*
- Break participants up into their groups and give them 10 minutes to define the SigEp product. You can provide them with a flipchart sheet if they would like to record their notes collectively.
  - They might also use the following questions to come to their conclusion:
    - What do consumers get from their investment in this product?
    - What wants and needs does this product fill in the market?
    - How is our product different than competitors in the market?
    - Why would a consumer want to invest in this product?
  - After 10 minutes, have groups come back together and present what they defined as the SigEp product. They will likely list things like brotherhood, programming, social events and personal development. Point out that these are likely concepts, not necessarily products. Brotherhood and personal development are great concepts and ideas, but are not tangible until delivered or facilitated through a product. In fact, most student organizations, including other fraternities can offer these same products.
  - If participants haven't landed on the idea that the BMP experience is the SigEp product, encourage them to think deeper about successful products. Successful products that consumers want are well-packaged, easy to understand and use, and fit the wants and needs of the consumer.
  - Ask how the BMP does this for undergraduate consumers:
    - *Well-packaged* – It is a four-challenge program that focuses on five areas of development based in five philosophical tenets. Additionally, you can view the entire experience within the Balanced Man Program app.
    - *Easy to understand and use* – When understood and used correctly, the BMP as a product supplements the undergraduate academic experience and

facilitates the personal development of undergraduate members throughout college, not just as a new member

- *Fits the wants/needs of the consumers* – Undergraduate members spend 90 percent of their time in college outside of the classroom. The BMP, as well as substance-free facilities, provides a positive outlet and environment that aids development and growth. It also provides development that students will need to be personally and professionally successful after graduation.
- Ask the group, "If we aren't selling our core product, what are we selling to our consumers?"
- If the BMP is an expectation of membership and we aren't selling this to potential new members, we are misleading them in recruitment. If we leave this out, it could lead to chapter retention issues.
- What does our brand (social media, flyers, t-shirts) say about what we're actually selling?
- Explain that the BMP One-Pager, found on **page 15** is a very straight forward way to explain what the BMP is as the product of SigEp. It is well-packaged, easy to understand, and speaks to the needs of consumers.

### **Application Activity Part 3: Identifying Their Needs (20 Minutes)**

- Before you start pitching SigEp to potential new members, you need to know what they are looking for out of their college experience. *It's crucial to seek to understand before you decide how to pitch SigEp.* At this point, you'll find many people do not realize they want to join a fraternity, so you should avoid asking them specific questions about the fraternity experience.
- Lead the conversation:
  - What do we want to learn about potential new members? How do we learn that?
  - What types of questions should we ask potential new members?
  - What are open ended and close ended questions? Which ones are better to ask during the recruitment process?
  - **At this point, hopefully the group has concluded that open-ended questions give you more insight into the individual and his specific values. Open-ended questions typically start with why/what/how. Asking close-ended questions don't provide much value to the conversation. Close-ended questions can typically be answered with a yes/no.**

***Facilitators Note:*** Ask the group to brainstorm high-quality questions to ask during the recruitment process. If they come up with good answers, use them. If not, provide these suggestions below:

- Good questions to ask potential new members:
  - What are you looking to get out of your college experience?
  - Why did you choose \_\_\_\_\_ (insert university) for school?
  - What are you looking forward to the most about college?

- **Bad questions to ask potential new members:**
  - Why do you want to join SigEp? – they may not necessarily want to join SigEp, or Greek life at all for that matter. It's your job to convince them. Leading with this type of question could be a turn off to those men who aren't interested in Greek life.
  - What makes you want to be Greek? – again, they may not be interested. You shouldn't lead with questions like this because it will come off as if you're trying to sell them on something, rather than a genuine relationship you're interested in building.
  - Did you enjoy high school? – this is a close-ended question and can be answered with a yes/no. It doesn't provide any value to the conversation and you have to ask several questions in order to learn anything of substance about them.
  
- Once you know what drives an individual, you'll be able to sell them specific aspects of the Balanced Man Program that would be interesting to him. For example:
  - If he is really interested in his future career and success, you can sell him the professional development aspect of the Balanced Man Program, SigEp's leadership events like Life After College, and your mentoring program that helps pair students with professional mentors in their field of study.
  - If he shared that he isn't interested in a stereotypical college experience, you can sell him on SigEp's substance-free facilities, the Balanced Man Program tenets of no pledging and no hazing, and SigEp's motto, "this fraternity will be different."
- In either of these scenarios, you should share personal stories and share how the fraternity has made a tangible impact on your life.

**Application Activity Part 4: Pitch me your product (20 Minutes)**

- Direct participants to **page 16** where they will find the elevator pitch example document.
  - Have participants find a partner. In pairs, they will spend 5 minutes developing their pitch about SigEp's product: the BMP and the BMP App, and substance-free facilities.
    - They will need to develop the content of their pitch, which should be 1-1.5 minutes in length. They should practice this pitch with their partner.
  - After pairs have developed and practiced their pitch, participants should switch partners and practice their pitch again. With their new partner, they should give and receive feedback. They should work with this partner for 5 minutes and then rotate to a new partner to repeat this process.
  - After working with their third partner, have the group come back together as a large group. Ask for a few volunteers to practice their pitch for the group.
  - Have the group and facilitators provide feedback on the pitches. Have the group collectively answer questions about each pitch:
    - Do you feel this pitch sold you on the SigEp product and experience?
    - What did this pitch do well? What could be improved?
- Debrief Questions

- Why do you think we completed this pitch activity?
- Do you feel confident that your committee could complete this activity? What about the entire chapter?
- Aside from our word of mouth conversations with potential new members, what are other ways we can sell the SigEp product and experience?
- How will you use this experience when you return to your campus?

**Application Activity Part 5: Overcoming Objections (25 Minutes)**

- Ask participants what the most common objections to joining are and record their answers on a flipchart.
  - Good answers are: money, time, wanting to wait a semester to "get their feet under them," significant other or parents are opposed, not wanting to be hazed, not wanting to be a part of the stereotype.
- From the group, solicit responses to each objection. Steer the conversation toward these:
  - Money: a response about the value that someone will get from being a part of SigEp. How else would that money be spent if not in SigEp?
  - Time: Time management is a part of the first challenge. Guys in the chapter will help you manage your time better.
  - Hazing/stereotype: Illustrate how SigEp is different and doesn't fall into that bucket.
- Sometimes, potential new members will give many objections in the same breath. We can't hope to overcome all of them at the same time, so we want to divide them up and tackle one-by-one. Therefore, we need to use the problem isolation technique:
  - Clarify – "OK, I'm hearing that there are some concerns over you having enough free time, and your parents might not like the idea. Am I missing anything?"
  - Choose one to address – "OK, let's put the parent issue aside for a second and talk through your free time. We'll talk about parents after. Sound good?"
  - Address the issue using feel, felt, found.
- For delivery, explain the concept of "feel, felt, found, find" to overcome the objection.
  - Feel: Validate. "I know how you feel."
  - Felt: Relate. "I felt the same way."
  - Found: Show how you overcame. "Here's what I found."
  - Find: Tell him that he can overcome also. "I think you'll find that ..."
- Have a few volunteers role play with you in front of the large group. Use the most common objections.
- Have participants practice in role-playing pairs and give each other feedback. Practice many scenarios. Tell them to use the ones you've listed on the flipchart.
- Direct participants to **page 18** in their participants guide for the overcoming objections one-page resource with several responses and conversation prompts to common objections.



## Session: Values-Based Recruitment

Time:	2hrs 15 minutes total + break (snack)
Purpose:	<ul style="list-style-type: none"> <li>▪ Instill the importance of values-based recruitment</li> <li>▪ Develop strategies to implement values-based recruitment</li> </ul>
Program Objectives:	<ul style="list-style-type: none"> <li>▪ Participants will brainstorm best practices for values-based recruitment.</li> <li>▪ Participants will be confident discussing substance-free facilities or recruitment with their chapter and with PNMs.</li> <li>▪ Participants will understand how to implement values-based recruitment methods such as year round recruitment and the BMS within their chapter.</li> </ul>
Materials & Equipment:	<ul style="list-style-type: none"> <li>▪ Flipchart</li> <li>▪ Markers</li> </ul>
Session Outline:	<ul style="list-style-type: none"> <li>▪ Issue Overview &amp; Description (10 minutes)</li> <li>▪ Values Based Recruitment                             <ul style="list-style-type: none"> <li>▪ Part 1: Year-Round Recruitment (20 minutes)</li> <li>▪ Part 2: Recruiting on a substance-free message (50 minutes)</li> <li>▪ Part 3: Balanced Man Scholarship (50 minutes)</li> </ul> </li> <li>▪ Issue Reflection &amp; Action Planning (5 minutes)</li> </ul>
Pre-Session Prep:	<ul style="list-style-type: none"> <li>▪ Prepare flipcharts</li> </ul>

### **Flipcharts to prepare:**

1. "What is values-based recruitment?"
2. "Year-round recruitment strategies"
3. "sigep.org/bms"
4. "Why BMS?"
5. "Why is it important to recruit on a substance-free facility message?" – *keep folded/taped up until activity to avoid causing distraction*

You will also lead a rotating flip chart discussion about the BMS and discuss the "why" behind running the scholarship.

The following flip charts should be set up around the room:

1. "How should you prepare for the scholarship?"
2. "How can you fund the BMS?"
3. "How do you market the BMS application?"
4. "What questions should you ask in the interview?"
5. "What tips do you have for planning a BMS banquet?"
6. "What are your recruitment strategies within the BMS?"
7. "How to recruit finalists and applicants after the banquet?"

**Issue Overview & Description (10 minutes)**

- Before diving into the session, do a quick recap of what the participants have learned and accomplished so far at the program:
  - They've discussed the "who" of recruitment in understanding and identifying the ideal SigEp.
  - They've discussed the "what" of recruitment in better understanding the SigEp product and experience and what is necessary to sell this product effectively.
  - **Boiled down:** We've identified the right guys and the right experience, now we need to talk about the right ways--that align with our values-- to recruit these guys into this experience.
- Explain that for the remainder of the afternoon, the group will be closing the loop on successful recruitment and discussing how to recruit the ideal SigEps they have identified through *values-based recruitment* which provides better opportunities and environments to sell the SigEp product and experience. Participants can go to **pg. 20** in their participant guides to take notes or jot down thoughts.
- Using a flip chart, have the group brainstorm together what they think values-based recruitment means. Throughout the brainstorm, you should develop a list that at least includes. Record their answers on your flipchart:
  - Recruitment philosophy and initiatives that align with SigEp values.
  - Membership standards that objectively assess a PNM's commitment to the Cardinal Principles.
  - A chapter brand that is consistent with the SigEp mission and values.
  - Alcohol is not associated with recruitment initiatives.
- Ask the group why they think values-based recruitment is a crucial method for recruiting.
- Ask the group what they think the benefits are of values-based recruitment.
- **Next:** Hopefully they've brainstormed these answers as well. If not, introduce that we will specifically be covering three topics within values-based recruitment
  - Year-round recruitment
  - Recruiting on a substance-free message
  - Recruiting with the BMS
- Explain that for the rest of the session they will be learning how to effectively address the issue (i.e. the "how" of the issue).

**Year-Round Recruitment (20 minutes) (page 21)**

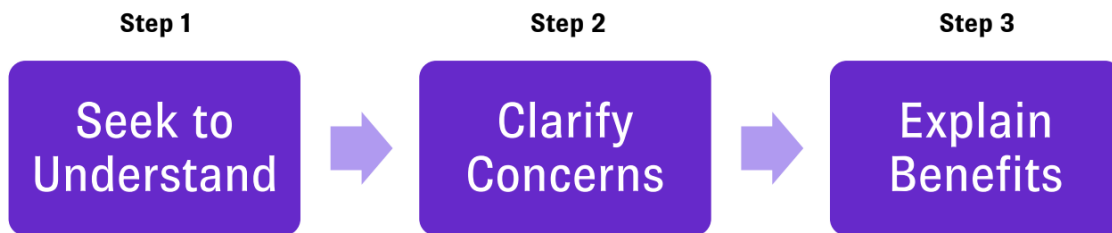
- Discuss the why/what of year-round recruitment. Make it clear you are not talking specifically about year-round bidding or "continuous open bidding" but just the act of constantly recruiting throughout the year, whether bids are given at all times or not.
- Using a flip chart, have the group brainstorm together successful year-round recruitment strategies. Here's some they should get to:
  - Recurring activities like weekly chapter dinners, study sessions, spike ball, etc.
  - Small budgets for taking individual PNMs out to a meal
  - Getting new names of friends from new members once they join and then recruiting those friends of new members
  - Having brothers meet PNMs through clubs and other involvement on campus throughout the semester

**Recruiting on a substance-free facility message (50 minutes)**

**Important notes for this section:**

- This is not time to debate the policy. Whether attendees agree with the policy or not, they have been tasked to recruit for their chapters future. If they have questions or issues with the policy, offer to connect them with their regional director or with chapters who have been successful with the policy
- Although this is specific to housed chapters, there will also be un-housed chapters in the conversation. This is applicable to them because they should still be participating in substance-free recruitment regardless of location and they should be having conversations about how SigEp is not focused on alcohol whether they have a house or not.

- **WHY:** Why is it important to recruit on a substance-free facility message? Create a flip chart and have participants share why it is important to recruit on this message. Here are a few answers you should expect:
  - These PNMs will be brothers eventually and it is important that they understand the policies.
  - SigEp is trying to be different than the stereotypical fraternity and substance-free facilities are part of that strategy.
  - It would be deceptive to not let them know before joining about the expectations.
  - If you fail to inform PNMs, you may see a large number of new members drop after they learn about the policy.
  - If you don't talk about it, the other fraternities are going to and you need to set the facts straight.
  - Helps turn away guys who are not looking for the right SigEp experience – it's like putting up a "No a\*\*holes" sign on your house.
- **HOW:**
  - Ask them what other expectations they go over with PNMs?
    - Minimum expectations for new members should have always existed. For example – how have we talked about the money expectation and time expectation before? What would happen if we didn't tell people that SigEp cost money before they accepted their bids?
  - Here's how we ***DO NOT*** do it..... "Hi, I'm Zac and I don't drink alcohol at my fraternity house". That's not what we're suggesting
    - This usually gets a few laughs and helps break the awkwardness
    - You can also provide an similar instance "Hi, I'm Zac and SigEp costs \$300 dollars" – No, no, no...
  - So ask them when this conversation should come up? Three examples when this might come up:
    - A PNM brings it up in conversation
    - A PNM asks about the chapter house or asks "what makes SigEp different"
    - During the final bid discussion/membership interview
  - Go over this 3 step conversation framework then walk through the specific steps of the conversation – this content is in their participants guide on **page 22**:



- Conversation Framework:
  - Start by asking what they know or what they have heard
  - Explain the history and "why" of the policy
  - Share what it is and what it is not
    - Dry facility, not dry fraternity
  - Explain features and benefits of the policy
  - Share personal anecdotes throughout conversation
  - "I like the substance-free house because I know I can study here at any time without being interrupted"

**Facilitator's Note:** Two facilitators can demonstrate this conversation at the front of the room

- **WHAT:** Features and benefits of substance-free facilities. Focus on benefits
  - Ask them what some of the benefits of a substance-free facility (alcohol free recruitment for un-housed chapters) are and put them up on a flip chart.
  - Here's 3 simple examples specific to housed chapters they should get to or you can provide:
    1. Quieter → We have brothers working internships in business/finance/politics who live in the chapter house because they can get sleep for their jobs and see all their brothers after work.
    2. Cleaner → Years of parties in a facility tend to take a toll on the building's structure, so a well-maintained structure stands out in comparison and is far more desirable to both residents and guests.
    3. Prouder → A substance-free facility will almost certainly be cleaner and smell nicer than a facility regularly used for parties. A clean house is more desirable for hosting faculty, friends, and parents.
  - In their participants guide, there is a list of 5-7 they can reference
- **PRACTICE:**
  - Have them break into groups of 3 so they can practice. For the un-housed chapters, have them practice how to discuss why SigEp is more than just the stereotypical party fraternity experience.

- 1 person practice as VPR, another pretend to be a PNM and another observe and provide feedback.
- Rotate through each position so everyone has a chance at VPR.
- Once every has gave the conversation a try, see if you can get some people willing to practice in front of the room.
- \*\*\*If a "PNM" is outwardly against the policy – talk through what this probably means about the PNM (philosophical misalignment) and how to handle this situation.
- Closing
  - Ask them why it is important to make sure every brother in the chapter is capable of this conversation
  - Brainstorm ideas as to how to train their chapters on this topic

### **Balanced Man Scholarship Rotating Flip Chart Discussion (50 minutes)**

- You will lead a rotating flip chart discussion about the BMS and also discuss the "why" behind running the scholarship.
  - The following flip charts should be set up around the room (page 26):
    - "How should you prepare for the scholarship?"
    - "How can you fund the BMS?"
    - "How do you market the BMS application?"
    - "What questions should you ask in the interview?"
    - "What tips do you have for planning a BMS banquet?"
    - "What are your recruitment strategies within the BMS?"
    - "How to recruit finalists and applicants after the banquet?"
  - Have one flip chart set up where you are speaking that says "Why BMS?"
- Intro and "Why BMS":
  - Before diving into the rotating flip charts, lead a discussion on the Balanced Man Scholarship and its value. Explain that the recruitment skills track is focusing more attention on the scholarship and its specifics, but we wanted to share best practices here as well because the BMS makes up about 20% of all SigEp new members.
  - To get a sense from the room, start off by asking for a show of hands to see how many chapters currently run the BMS.
  - On a flipchart, ask participants to share the reasons why a chapter would run the Balanced Man Scholarship.
    - Here are some good guiding responses that can be boiled down into bullet points:
      - Awarding a scholarship based on the ideals of Sound Mind and Sound Body will attract applicants who lead balanced lives.
      - The interview allows for unparalleled access to high-caliber students who embody the Fraternity's ideals.
      - The information you learn about each candidate will allow you to objectively assess their past performance, which is the best predictor of their future performance.

- Experience shows that students who perform better academically and are involved on campus are more likely to be financially responsible and have fewer behavioral problems.
  - Therefore, the BMS allows chapters to better filter a larger quantity of high-quality potential new members – which will significantly improve chapter operations. The scholarship also provides the opportunity to dispel fraternity stereotypes and build a better reputation for SigEp – one based on the values of our Fraternity and the achievement of our members.
  - A properly-run BMS will create a positive perception of SigEp for scholarship applicants, their parents, faculty, administrators and the campus community.
  - Furthermore, recruiting men who are attracted to SigEp for the right reasons, such as our commitment to Building Balanced Men, will lead to a more cohesive, driven and successful chapter.
  - Share these guiding philosophical points with the participants for the weekend:
    - The BMS is an investment. Giving scholarships and holding a great banquet costs money, but if we do it well, it will pay great dividends with great members.
    - The BMS is a RECRUITMENT TOOL. We are offering a scholarship to great students on campus, but don't forget why we're doing this in the first place.
  - Still, we need to maintain the integrity of the scholarship. Ideally, these are one and the same, and the guys who would make the best SigEps are also the guys who are the biggest contenders for the scholarship.
- Rotating flip chart activity
  - Split the group into 6 smaller groups
  - Have each group go to a flip chart and add ideas from their chapter or they have heard. If ideas are already up there, have them put a star next to it
  - Each group spends 1 minute at a flip chart
  - After 1 minute, have them rotate to the next flip chart
  - Once they've had a chance at each flip chart, allow a few minutes to go around and instruct each attendee to add a star to the tip or best practice they like the best on each flip chart
  - Facilitators go around and read off the top comments on each flip chart
  - Allow a few minutes for attendees to take photos of the flip chart or jot down the ideas in their workbook
- Balanced Man Scholarship Debrief
  - Lead the conversation:
    - Where do the sales skills you learned today overlap with the BMS process?
    - How could the BMS change the way your chapter recruits?
    - What do you need to do to implement the BMS at your chapter?

- What resources are available to help you implement the Balanced Man Scholarship?
  - BMS Guide
  - BMS Interview Guide & Workbook
  - Custom graphics and marketing from SigEp HQ (review what these look like in the participant guide – **pages 27-28**)
- What is the most difficult part about the BMS? How do chapters do this well?
- What resources are available for the Balanced Man Scholarship chairman and committee?
  - Visit [sigep.org/bms](http://sigep.org/bms) for more information.
- How do you start running a BMS?
  - Reach out to your regional director if this is something you're interested in.
  - Visit [sigep.org/bms](http://sigep.org/bms) for more information.
  - SigEp has a recruitment services team dedicated specifically to helping chapters start or improve their BMS and can provide one on one coaching for your chapter if you reach out.

## Session: Action planning

Time:	45 minutes total
Purpose:	<ul style="list-style-type: none"> <li>• Create or refine goals and action plans for this calendar year</li> <li>• Receive feedback on goals and action plans from their peers</li> </ul>
Session objectives:	<ul style="list-style-type: none"> <li>• Participants have well developed goals and corresponding action plans relevant to their position.</li> <li>• Participants network with other officers to gather best practices.</li> </ul>
Materials & equipment:	<ul style="list-style-type: none"> <li>▪ Flip charts</li> <li>▪ Masking tape</li> <li>▪ Participant guides</li> </ul>
Session outline:	<ul style="list-style-type: none"> <li>• Creating an action plan (15 minutes)</li> <li>• Discussion and brainstorming (30 minutes)</li> </ul>
Pre-session prep:	<ul style="list-style-type: none"> <li>• Flip chart with an example action plan</li> </ul>

### **Creating an action plan (15 minutes) (page 29-33)**

- By this point, all of the participants should have their goals written and reviewed, whether they brought those goals with them to Carlson or created them Friday night post-session. Reinforce that if they walk away without concrete and tangible goals, they haven't maximized their Carlson experience.
- Also reinforce that they have started to create action plans throughout the day today.
- Lead a discussion on what makes some goals successful and what causes other fail.
  - Have the participants reflect on goals that they've set in the past, either for themselves or their chapter, that they didn't accomplish. Why didn't they accomplish their goals?
  - Remind the participants of what makes a goal SMART and the importance of having written goals.
  - A goal without a plan is nothing more than a wish. Hope is a poor strategy for success. To achieve any goal, you need to have a plan of how you're going to get there.
  - Getting buy-in to your goals is not always easy, but it can be if you can articulate the clear path to achieving those goals and be open to feedback.
    - You might have excellent goals that can lead to positive change for your chapter, but if you try to tackle them alone, you will fail. Build a coalition, set expectations with them and ensure they have direction to help you tackle your goals.
    - Work the halls within the chapter, and get guys bought into your goals.
  - When leading a team, you need to regularly check-in with your team members to ensure they are following up on their commitments. This follow-up will ensure the progress you expect is being made.



- With the rest of our time this afternoon, we'll be creating action plans for the participants to take back to their chapters to get feedback on, build consensus around, and ultimately implement.
- At its simplest, an action plan is just "how do I get stuff done to accomplish my goal?". The plan outlines all the steps necessary to accomplish the goal and serves a project management tool to track progress.
- The following are elements of a basic action plan which we will be using shortly. Walk participants through each aspect:
  - **Deadline:** when does this task need to be accomplished to stay on track?
  - **Task:** what exactly needs to get done? EX: if the SMART goal is to create and implement a comprehensive recruitment plan, perhaps a task would be "Meet with the recruitment committee to develop a calendar of recruitment events".
  - **Owner:** who is responsible for getting this task done? Remind participants that they should not be the owner of every task. What can or should a committee member own?
  - **Who is involved?:** whose help is needed to complete this task? Also remind participants that this is super important to build a coalition of support. They need to be involving these individuals in the process and giving them plenty of advance notice of when they need their help and for what.

**Action plan creation & discussion (30 minutes):**

- You're now going to have participants begin creating action plans for the goals they set.
  - First, instruct participants to go back and review their SMART goals. Do they want to make any adjustments based on what they learned today? Do they want to create a new goal(s) based on what they learned?
  - Have participants work alone on their action plans using the worksheets found in their participant guide. Announce to all of them that you will be roaming around the room to help and answer any questions that they have while they're working.
  - Once they finish, have everyone find a partner to share their action plans and get feedback.
  - If time allows, let several participants present their SMART goal(s) and corresponding action plan(s) to the group.
- Ask the group for their thoughts on the time they spent formulating their plans. Was this easy or pretty difficult? Did they have any big revelations? Was there something else they came across that they thought was important to include in their plan?
- Have each participant commit to the following things:
  - Share their action plans and goals with their fellow executive board members
  - Present their goals to the chapter
  - Share their goals with chapter volunteers and the Regional Director for support and accountability

## Session: Wrap up

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

### **Facilitator's Choice (25 minutes):**

- At the end of the weekend, we want to give you the freedom to end your session in any way you see fit based on how your conversations have gone with your group. Below are a few options you can utilize to wrap-up your time. If you have an idea separate of what's listed below, feel free to use that too.
  - Parking Lot & Light bulb Moments Debrief
    - Throughout the course of the weekend, the participants will likely bring up many topics that could've derailed conversation and you put them in the parking lot to revisit them. This is your opportunity to go back to those topics and ensure that the participants don't leave with any lingering questions.
    - End the conversation by asking the group if there is anything else that wasn't in the parking lot that they still want to discuss.
    - Also debrief any of their "light bulb moments" – things that really stood out
  - Further discussion on hot-button issues
    - Give the participants the opportunity to continue asking questions about any major issues that they are facing in their chapter.
    - Address any and all questions for which you feel comfortable. If something comes up that you don't feel like you can answer (or don't feel comfortable answering), please find a staff member and they can help the participant with the question.
    - Potential issues:
      - Substance-free facilities: The chapter opposes the policy and thinks that implementing it will harm their chapter experience.
        - The Grand Chapter passed a resolution mandating substance-free housing for all SigEp chapter facilities by August 1, 2020,

and substance-free common spaces by August 1, 2018. The resolution passed by a 2-1 ratio.

- The resolution passed because the fraternity wanted to ensure that our focus is on what really matters--development, values, and brotherhood--and not solely on alcohol. The chapter house should be conducive to learning and fostering meaningful relationships, not a bar. Removing alcohol from our facilities sets the expectation that SigEp is focused on our values and providing valuable developmental programming through the BMP.
- Over 90% of men living in fraternity facilities are under 21 years old.
- Our chapter facilities must be spaces where it is easy to do right and hard to do wrong. The policy makes it easy for our members to make healthy lifestyle decisions in a positive atmosphere that is conducive with the reason people attend college, not a negative environment focused on alcohol.
- The substance-free policy doesn't ban drinking; it just bans drinking *at the chapter facility*. The policy does not make SigEp a dry fraternity. Social events with alcohol can still be held. Our VPs of programming have learned how to host fun events hosted at third-party venues this weekend. They have also been provided with more information on how to hold fun events without alcohol. Vice presidents of recruitment have also been taught how to recruit on a substance-free message. Your chapter will still have the opportunity to hold social events, just not at the house. Which is easier for you - you don't have to clean up after the party.
- Substance-free facilities will be cleaner and more conducive to a positive living environment - which will lead to more brothers being willing to live-in, and therefore create a better environment for brothers to relax without the fear of living in a dirty environment.
- BMP: The BMP just hasn't been working at their chapter and it seems more like another class than a fraternity.
  - Open the discussion up to the group about exciting things that other chapters do in their programs to make it less academic.
- BMP App: It seems like the BMP app is just another way for Headquarters to spy on us and get us in trouble.
  - Chapters asked for the app at the 2015 Conclave when the BMP was made mandatory. It is designed with chapter needs in mind-- not the needs of Headquarters.

- The BMP app is designed to make your jobs easier. If it's not - tell us what we need to improve!
  - Headquarters isn't in the business of getting chapters in trouble. They're there to help and support chapters and the BMP app is one way of doing that.
  - Headquarters doesn't have the time to look at every chapter's BMP in the app. They trust that you will use the way that it's intended.
  - The up-front, manual entry may be time consuming, but the long-term value added to your members and time you save is worth the up-front investment.
- Rotating flip charts for best practices
    - Setup flipcharts at all corners of the room with the major points that were discussed in your track throughout the weekend
    - Break everyone into groups and have them write out what their chapters do in each of the areas. After 2-3 minutes at the flipchart, have the groups rotate to the next flipchart. After each group has visited each flipchart and contributed, finish the activity by having the groups read out everything on the flipcharts to the group.
  - How to have crucial conversations
    - This gives you the opportunity to give your participants a crash course in how to have crucial conversations with the other leaders in their chapter or chapter members. Cover the main points below and have participants get up and practice in front of the group.
      - Start with heart: Go into each interaction with goodwill for the other person. Your fellow chapter leaders have to know you care before they care what you know.
      - Stay on topic: It's easy to get off track when emotions flare but it's imperative to stay in the dialogue of the conversation and leave emotion out of it.
      - Make it safe: State your purpose and intent clearly to the other person and be up front that you're not trying to attack the other person. Validate their concerns and advance the conversation.
      - Find common ground: Find an area that you can both agree on first to build to a solution that you can both ultimately be happy with.
      - Separate facts from story: When it comes time to make your case, only articulate irrefutable facts so as to not let your own bias enter the conversation.
      - Agree to a clear action plan: Thank the person for being so open to your conversation and your points and be sure to set next steps so you can follow up.

- How to give and receive feedback
  - This gives you the opportunity to give your participants a crash course in how to deliver and receive feedback with the other leaders in their chapter or chapter members. Cover the main points below and have participants get up and practice in front of the group.
  - Explain that the ability to both give and receive feedback is an important quality of a leader. Provide a brief framework and explanation of feedback:
    - Feedback should always be solution oriented - if you don't provide a solution, you're just complaining or catching someone losing
    - If and when the feedback will be difficult for the other person to hear - consider using a "compliment sandwich".
      - First, begin by talking about the project or progress and about the great things they've done. Remind them of the value they bring to the chapter or the project
      - Next, make them aware of the issue you're addressing. This has to be in a supportive, helpful tone - don't blame them. Bring up the issue or situation, point out what went wrong, and provide a suggestion or recommendation on how to improve and do better next time.
      - Close the conversation on a positive and encouraging note. Remind them of the value they bring to the chapter or project, get them excited about the progress made and the future of the project.
        - Remember to make yourself available at any time to discuss the project with them
      - After the conversation - if you notice a change in behavior - catch them winning! Make sure to congratulate them on the completion of the project, the progress they made, and thank them for their contribution.
    - Additionally, it's important as a leader to be able to receive feedback. Remember a few key points:
      - When people bring their feedback to you - they're doing it because they want to help you and see you succeed. Be open to their thoughts and criticisms - and don't react negatively to them.
      - Feedback conversations aren't your opportunity to argue with their perspective. If you have a different opinion, feel free to respectfully share your side of things, but don't become defensive or argumentative.
      - Make sure to say "thank you" to them for having the courage to bring their feedback to you, commit to considering their feedback and implementing/changing behavior as needed.
      - Don't forget to follow-up with them, and ask for continued support and feedback.

- Ask one participant to volunteer to walk the whole group through their action plan and provide feedback to them as an example of how they should do it in their small groups.
  - Make sure they walk away from the group feedback session knowing that they should always be providing constructive feedback with potential solutions or recommendations for change.
- Facilitator topic
  - If you have any final leadership lessons, or life lessons, you want to share that you believe would be of value to the participants in your session - use this time to tell your story

**Final Thoughts (10 minutes):**

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

**SigEp**

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