

SigEp



BALANCED MAN PROGRAM (BMP)

Participant Guide



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(NAME)

(CHAPTER)

HOW TO MAXIMIZE YOUR TIME AT CARLSON

AT CARLSON:

- **Meet brothers from different chapters.** Go out of your way to sit with members that are not from your chapter to build your SigEp network.
- **Be vocal in small group sessions.** You come from a far different chapter experience than everyone else in your track and your ideas and best practices can be very helpful to others, if you voice them.
- **Be an active listener.** Just as you have ideas that can be helpful to others, they have plenty of experiences and information that will be useful for you to take back to your own chapter.
- **Come prepared to every session.** The better prepared that you are going into each session, the more equipped you will be to participate and you will leave with more takeaways that can be implemented back at your chapter.
- **Write down everything that you can.** There is a lot of information that is imparted upon you throughout the weekend and it is easy to forget some important details if you do not write things down. When you go back to your chapter, your notes will help guide you in your post-Carlson planning.

AFTER CARLSON:

- **Review the goals that you set in your session with the rest of your executive board and volunteers.** This opens the conversation about the direction of your chapter and allows you to align your goals to those of the chapter as a whole (in addition to your fellow officers).
- **Create your action plan for carrying out your goals.** In doing this, you will be laying out the roadmap to achieve your goals with the rest of your executive board and your chapter. You probably started this within your track while at Carlson; spend time refining and finalizing when you return home.
- **Build momentum with your chapter.** At your next chapter meeting, have all the brothers who attended Carlson present to the other members about what was learned and the goals that were set for the chapter. It is important to get their feedback and, ultimately, their buy-in to the vision in order to accomplish these goals.
- **Keep your relationships strong.** Stay in touch with your facilitators and the brothers you met at Carlson and utilize them as a resource in the planning and execution of your goals.

2020 Carlson Leadership Academy Substance-Free Policy

We are fortunate to have opportunities such as the Carlson Leadership Academy made possible through the hard work of our undergraduates and volunteers, and the generosity of our Sigma Phi Epsilon Educational Foundation.

When such opportunities exist, Sigma Phi Epsilon must strive to make the most of it. As such, we expect the very best from everyone throughout the weekend. From the Creed of Sigma Phi Epsilon, artfully crafted by Past Grand President Oscar E. Draper '28-29, we affirm:

*That the word **Virtue** is an inclusive term; that it is not enough that I be merely passively virtuous: I must be positive on virtue's behalf. Therefore, I will stand aggressively for honesty in all walks of life, and I will speak cleanly, play cleanly, and live cleanly. Whenever I can, I will oppose lawlessness and vice.*

*Unless I succeed in being **Diligent**, I cannot be a good fraternity member. Believing that my fraternity can be no greater than any of its members, I shall strive to make it so high and so worthy that men will consider it an honor and privilege to belong to it, and will strive to be admitted to it.*

*That **Brotherly Love** must be given in order to be received, and that it cannot exist without the triumph of the principles of **Virtue** and **Diligence**, for these are essential parts of it.*

Brother Draper went on to say that the role of the citizen is vital to that of a Sigma Phi Epsilon.

I believe that obedience to the laws of my community and my country is essential to good citizenship; that the laws and rules of my fraternity and my chapter are intended to regulate the actions of its members, one with another, and that without fidelity to those laws and rules I cannot be a good citizen and a worthy member of Sigma Phi Epsilon.

From Brother Draper's thoughts and those of legendary college coach, Lou Holtz, we find three essential tenets for this weekend:

- **The 'Do Right' Rule.** You know the difference between right and wrong.
- **Commit to Excellence.** Do your best every time.
- **The Golden Rule.** Treat others the way you wish to be treated.

Rules of engagement:

1. **The Carlson Leadership Academy is substance-free for all undergraduates from arrival on Friday until the close of ceremonies on Saturday evening. Throughout the program, all local, state and federal laws apply.**
2. **Substances, including all illegal and illicit substances, alcohol, marijuana, or controlled substances without an appropriate prescription issued to the user by a licensed professional, are not permitted in any undergraduate hotel rooms through the duration of the program. Throughout the program, all local, state and federal laws apply.**

Why the BMP?

Through the BMP, members will:

- Be more attractive to future employers. Members will be able to demonstrate their growth and willingness to learn throughout college.
- Build a powerful and authentic network. SigEp's volunteers and alumni are ready and willing to mentor undergraduates with their careers.
- Experience fun and interactive events that build upon existing knowledge and skills.
- Feel responsibility for their chapter throughout their college careers. People value what they contribute to.
- Take part in the best possible chapter experience. The BMP allows each chapter member to put their talents to use for the benefit of the chapter.
- Reaffirm their membership in SigEp everyday. Other people will see the value of fraternity in your actions.



THE BALANCED MAN PROGRAM

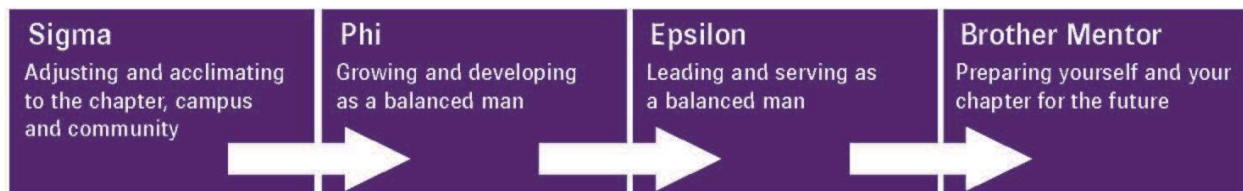
Ninety percent of college takes place outside of the classroom. It's in this part of the college experience — the unplanned, unstructured hours — that students discover their passions and plan their futures. For our brothers, much of this time is spent with their chapters — it's where they build close bonds of friendship and learn how to communicate and work with others, to lead, and to speak in front of a crowd. Our brothers accomplish all of this through the Balanced Man Program (BMP).

The Balanced Man Program is the centerpiece of the SigEp chapter experience and provides the experience that today's student needs to be successful during and after college. The Balanced Man Program is a non-pledging, non-hazing, personal, academic, leadership and professional skills development experience. Here is how the Balanced Man Program accomplishes those ideals:

The program is founded on five philosophical tenets ...

- Equal rights and responsibilities** - Full membership upon joining
- Continuous development** - Growing throughout life
- Accountability** - Committing to SigEp's high standards
- Living the Ritual** - Incorporating SigEp's values into everyday life
- Mentoring** - Maximizing growth through guidance and support

... and takes the form of four self-paced challenges that span throughout the college career ...



... focusing on five areas of development.



SigEp

Knowledge and understanding of the Fraternity



Intellectual

Academic performance and emotional and cultural growth



Physical Health and Wellness

Maintaining a healthy quality of life



Leadership

Growth and experience as a leader



Professional

Preparation for career success

To learn more about the Balanced Man Program, visit SigEp online at sigep.org/bmp

Coordinate vs. Facilitate Scenarios

Scenario 1:

You currently serve as the Phi Challenge Coordinator. 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. Address the following questions about this scenario:

- Who should lead this meeting?
- Are they a credible content expert? Why?
- Will they provide an engaging experience for attendees?
- What role do you play in organizing this meeting?

Scenario 2:

You currently serve as the Epsilon Challenge Coordinator. Based on your chapter's Epsilon Challenge programming, the last meeting in this challenge includes challenge reflection and preparation for the Brother Mentor Rite of Passage. Address the following questions about this scenario:

- Who should lead this meeting?
- Are they a credible content expert? Why?
- Will they provide an engaging experience for attendees?
- What role do you play in organizing this meeting?

Scenario 3:

You currently serve as the Sigma Challenge Coordinator. Based on your chapter's Sigma Challenge programming, you should be holding a meeting to focus on mental health practice and available mental health resources on campus to assist students. Address the following questions about this scenario:

- Who should lead this meeting?
- Are they a credible content expert? Why?
- Will they provide an engaging experience for attendees?
- What role do you play in organizing this meeting?

BMP Overview

Use this section to take notes as you discuss the Balanced Man Program Overview.

Notes on Philosophy:

[illegible]

[illegible]

[illegible]

[illegible]

Articulating the BMP Worksheet

4 Laws to a Perfect Pitch:

- **Short** – Must convey the basic idea in a small time frame.
- **Easy to Understand** – Shouldn't confuse the listener, needs to be clear.
- **Greed Inducing** – People will want to invest time or money to whatever your pitching.
People should want to be a part of whatever is being pitched.
- **Irrefutable** – Listeners should have little to no questions after your pitch. They should simply just say "That makes sense."

Building your pitch

What is the BMP?

How does it work?

Why is it important?

Your Audience:

What is most important for this audience to know about the BMP?

What strategies will you utilize to educate this audience on the BMP?

Challenge Development in the BMP App

Activity: Use the resources below as a reference for creating each challenge in the Balanced Man Program App.

Challenge:
Area of development #1: SigEp

Meeting/activity	Date	Who

Area of development #2: Leadership

Meeting/activity	Date	Who

Area of development #3: Professional

Meeting/activity	Date	Who

Area of development #4: Physical health and wellness

Meeting/activity	Date	Who

Area of development #5: Intellectual

Meeting/activity	Date	Who

Sample meeting agenda outline

Each section of the meeting agenda should be well outlined and written almost like a facilitator guide. It should include a time outline for each section as well.

Example:

Challenge Coordinator Welcome [5 minutes]

- Challenge coordinator welcomes attendees and provides an overview of the meeting
- agenda
- Challenge coordinator introduces guest speaker/facilitator for today's meeting

Academic Success Guest Speaker [35 minutes]

- Guest speaker from academic support services presents on strategies for academic success including study tips, note taking, and test preparation.
- Guest speaker provides overview of campus resources available to assist with academic success including tutoring, academic advising, study sessions, and writing assistance.
- Guest speaker leads an activity to help participants develop academic improvement plans to develop strategies for academic success.

Wrap-up [5 minutes]

- Lessons learned:
 - Provide an opportunity for a few members to share the most important thing they learned from today's meeting.
- Follow-up:
 - Set expectations for members to complete by the next meeting or event:
 - Set time and place for next week's meeting.
 - Post/provide contact information for the Challenge coordinator(s), vice president of member development and chapter president, etc.
- Questions:
 - Provide an opportunity to answer any questions members have from this meeting and in preparation for the next meeting.

Meeting Title & Date:

Purpose

Learning Outcomes

Participants will...

Areas of Development

Session Facilitator(s)

Session Outline [____minutes]

Materials and Equipment

Session Preparation

Frequently Asked Questions

Why have equal rights and responsibilities?

Benefits

Obstacles

Why is continuous development throughout college necessary?

Benefits

Obstacles

Why is membership lapsing necessary?

Benefits

Obstacles

Why should we hold members accountable for living the ritual?

Benefits
Obstacles

How do we do year-round recruitment with the BMP?

Benefits
Obstacles

Notes on overcoming objections:

SMART GOAL SETTING AND ACTION PLAN RESOURCE

SMART GOALS

A SMART Goal is a convenient acronym for the set of criteria that a goal MUST include in order for it to be realized by the goal achiever. There are numerous variations on the SMART acronym, however, the one we will follow is:

Specific

Goals must be something that can be described and understood easily by others – finite conditions, not general feelings.

Bad example: Increase participation of members.

Good example: Increase attendance at chapter meetings.

Measurable

Whenever possible, use numbers or percentages to mark achievement of the goal. You can't rely on personal opinion.

Bad example: More members will attend...

Good example: 80 percent of members will attend chapter meetings.

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.

Bad example: 100 percent of members will attend every meeting.

Good example: Increase attendance at chapter meetings by 10 percent from the prior Semester.

Relevant

Your goals must accurately address the root issue you are facing. Remember, "An accurate description of the problem, is 90 percent of the solution."

Bad example: Have alcohol at recruitment events so chapter members will attend and have better conversations

Good example: Teach chapter members tangible recruitment skills and eliminate alcohol from recruitment.

Timely

Goals must have an end date when they are due. Creating a sense of urgency will push members to work harder. How else will you know when to check performance?

Bad example: Winter

Good example: January 1, 2016

Examples

Non-SMART Goal: We need to improve recruitment.

SMART Goal: By December 15, 2019, the chapter will have recruited 20 new members who meet or exceed our minimum membership standards.

ACTION PLANS

Every SMART goal must be complemented by a detailed action plan. A good action plan provides the framework for achieving the SMART goal. The action plan helps map out the necessary tasks with a detailed schedule of key milestones and a list of key people for those milestones.

Overview

Great action plans:

- Determine what you will need to hit the goal.
- Provide a timetable for activities.
- Identify people with whom you will need to coordinate and will rely on to contribute.
- Anticipate problems and outline contingency plans.

Implementation

Follow this step-by step process to ensure you have a comprehensive action plan:

1. Clarify your goal.
 - a. Ensure it is specific, measurable, attainable, relevant and timely.
2. Build a list of tasks
 - a. Write down all action steps that you may need to achieve the goal.
3. Organize your list into a plan.
 - a. Decide on the order of action steps.
 - b. Rearrange your actions and ideas into a sequential order.
 - c. Review this list and see if there are any ways to simplify it further.

Follow Up

1. Monitor the execution of your plan.
 - a. Constantly evaluate the progress of your plan.
 - b. Manage the key people and be mindful of deadlines.
 - c. Adjust and optimize your plan if necessary.
2. Measure your success.
 - a. Has your action plan achieved the outcomes of your SMART goal?

SMART goals and action planning

Use this worksheet to document your SMART goal(s) and corresponding action plan.

SMART goal:

Deadline	Task	Owner	Who is involved?

SMART goals and action planning

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Deadline	Task	Owner	Who is involved?

[illegible]

NOTES

[illegible]

BALANCED MAN PROGRAM GUIDE

SigEp



BALANCED MAN PROGRAM GUIDE

In 1901, SigEp's Founding Fathers set out to provide an unparalleled fraternity experience. These 12 young men recognized the need for personal growth during the most crucial years in a man's life. They dreamed of a supportive experience with a brotherhood of high achievers. Ninety years later the Balanced Man Program was created to meet this same goal.

For a chapter to succeed with this program it takes values-based leaders with a thoughtful and organized approach, and a commitment to "Building Balanced Men." This is no easy task. Luckily, this resource helps you make our Founder's dream a reality. It was created to help your chapter provide the ultimate undergraduate experience.

This guide will help you understand the entirety of the Balanced Man Program. It was developed with input from volunteer and undergraduate leaders across the country and is intended to provide a comprehensive overview of both the program and the necessary steps to effectively implement the experience at a chapter. Specifically, it will help you to:

- **Understand why the Balanced Man Program needs philosophical buy-in to reach its full potential.**
- **Learn who is involved in successfully running the Balanced Man Program.**
- **See how the program is put into practice through simple, step-by-step processes to make your chapter more successful.**
- **Define the experiential programming you offer your members to set them apart from other undergraduates on campus.**

While anyone can use this document to better understand the Balanced Man Program, it is geared towards helping vice presidents of member development, development committees, and volunteers better understand and execute the Balanced Man Program.

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INTRODUCTION

HISTORY

Before looking at the Balanced Man Program as it exists today, it is important to understand why and how it began.

In 1989, SigEp was the largest Fraternity in the country and launched a strategic planning process to identify its strengths and weaknesses. The Strategic Planning Committee found that despite our impressive growth, we were faced with serious issues, including substance abuse, poor retention of members, declining academic performance and increasing issues with risk management and hazing. The current Grand President, Donald C. McCleary, Texas-Austin '71, knew we couldn't ignore these harsh realities. He formed the Committee on Self-Esteem to evaluate these issues and explore solutions. After much research the committee realized to address these issues we had to address our approach to member development.

The committee was not alone in its thinking. The undergraduate delegates at the 1991 Conclave recognized the same issues. That year, the Grand Chapter passed Resolution 37, a mandate to "transform the pledging process from proving worthiness to achievement in the chapter and community." Former Grand President, Frank J. Ruck Jr., Michigan '46, accepted this challenge and formed the Committee on Pledge Transformation.

In fall 1991 this committee met in Boulder, Colorado to begin working on what was then known as the Balanced Man Project. The committee took a deep dive into the issues facing our chapters across the nation. Their research revealed that chapter success tended to be cyclical. However, there were a few chapters that reached sustainable success. Furthermore, the membership experience at these chapters shared several commonalities: equal rights and responsibilities for all brothers, continuous development, accountability, deep appreciation for the Ritual and consistent mentoring. They believed if they could encapsulate the practices and philosophies of these chapters in a development program, SigEp could replicate this excellence across the country. This represented a paradigm shift within the fraternity world, redefining norms and instilling higher standards of performance for all members.

In 1992, the committee was ready to launch a test version of the newly named, Balanced Man Program. As they were looking at potential test chapters they ran across the New Hampshire Alpha Chapter at Dartmouth College. At the time, the chapter and the Greek community were in disarray. Risk management issues, low retention and poor academic performance were common themes throughout the Greek community. The school was considering abolishing fraternities all together unless something significant changed. The committee decided the Balanced Man Program was the answer the administration was seeking. The chapter unanimously voted to adopt the program and saw immediate results. Recruitment, retention and academic performance all began to improve. The chapter eliminated hazing and placed emphasis on leadership and service learning. Their new development program attracted the highest quality men on campus and surpassed the administration's expectations.

The committee took these results from Dartmouth to the undergraduate delegates at the 1993 Conclave. The Grand Chapter passed legislation allowing chapters to start adopting the Balanced Man Program. The legislation stated that a chapter had to vote in favor of adoption and once the program was adopted a chapter could not go back to pledging.

Within six months, 37 chapters had adopted the program. To support this demand, the program needed additional staff, training and resources. In 1994, the Balanced Man Program received the boost it needed. The federal government was impressed with SigEp's innovative approach to improving the collegiate

experience. Consequently, the Fund for the Improvement of Postsecondary Education granted SigEp \$250,000 to help support implementation of the Balanced Man Program. The Headquarters staff used this money to staff the program, create resources and provide training to newly adopted chapters.

This support helped chapters adopting the program produce phenomenal results. These pioneering chapters saw an increase in recruitment, retention, grades, campus leadership and volunteer support. In 1996, the Center for the Advancement of Public Health at George Mason University conducted a study on the Balanced Man Program's outcomes. Their study compared the experience a pledge-model chapter provided to the Balanced Man Program. Specifically, the study examined high-risk behavior, academic performance, social skills, interpersonal competency and the overall health of the chapter environment. The study concluded, "Not only have positive changes taken place over time with the Balanced Man Program, and negative changes taken place over time with pledge-model chapters, but the data indicates that, at the time of the final testing in the fall of 1996, the two sets of groups are significantly far apart." This success persuaded many other chapters to adopt the program. By the end of 1999, over 150 chapters were running the Balanced Man Program.

In the early 2000s SigEp faced some unintended consequences of the program's success. University administrators began to demand the program on their campus. Some schools even gave their SigEp chapters an option; close the doors or start running the Balanced Man Program. This demand was met with opposition from local chapters and their alumni, ultimately hurting the brand and effectiveness of the program.

In the mid 2000s the Headquarters staff focused its efforts on launching regional and national programs. Time, money and energy were invested in programs such as EDGE, the Ruck Leadership Institute and the Residential Learning Community. SigEp built on its reputation as an innovator in the Greek world as these programs grew, but the Balanced Man Program was losing momentum. The program stopped evolving. There was a lack of staff support and a halt to resource creation.

Consequently, many chapters lost an understanding of the program's philosophical tenets and the process for program implementation. Volunteers and undergraduates lost buy-in and began claiming, "the BMP is too complicated" or "this program won't work here." As a result, the brand of the Balanced Man Program diminished and many chapters failed to reach their full potential with the program.

In 2011, Grand President Bert J. Harris III, Florida '74, launched an effort to refocus support and resources to the Balanced Man Program. He launched a focus group of undergraduates to identify the strengths, weaknesses and opportunities of the Balanced Man Program. Next, the Balanced Man Program Task Force was formed to rethink and reinvigorate the program.

In May 2011, the task force met in Chicago to discuss the future of the program. They concluded that two major things needed to be accomplished. First, the national Fraternity must refocus its efforts on supporting the Balanced Man Program. Second, the national Fraternity must examine new ways to make the experience more relevant to today's undergraduate.

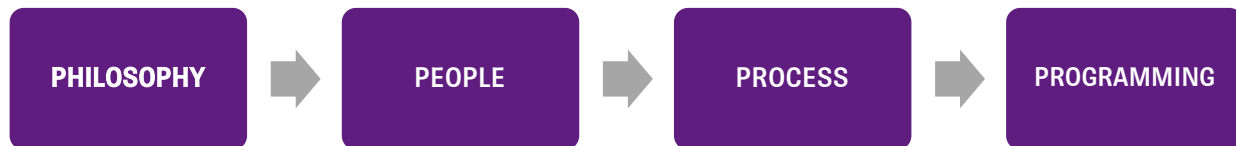
The National Board of Directors, the Headquarters staff, volunteers and undergraduate leaders took this charge from the Balanced Man Program Task Force and are dedicated to bringing momentum back to the program. Staff has refocused training around the program and has spent countless hours developing resources like this one to help chapters with implementation.

At the 2015 Grand Chapter Conclave, our undergraduates made history when they passed legislation making the Balanced Man Program the official development model of all SigEp chapters. With this milestone legislation, SigEp became the first national fraternity to remove pledging with an undergraduate vote. SigEp is responding to undergraduate and volunteer calls for additional Balanced Man Program training and resources. All parties are working to find new ways to make the Balanced Man Program more relevant and more impactful for today's undergraduate.

In 1901, twelve men decided the status quo was not good enough and set out to make a change for the better. Their changes resulted in the birth of Sigma Phi Epsilon. Today, over 110 years later, the Balanced Man Program remains the fruition of our Founders' dream.

PROGRAM FRAMEWORK

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 lays out the Balanced Man Program at its most basic level outlined along "4 P's":



The following sections take a deep dive into philosophy, people, process and programming to explain and outline the Balanced Man Program.

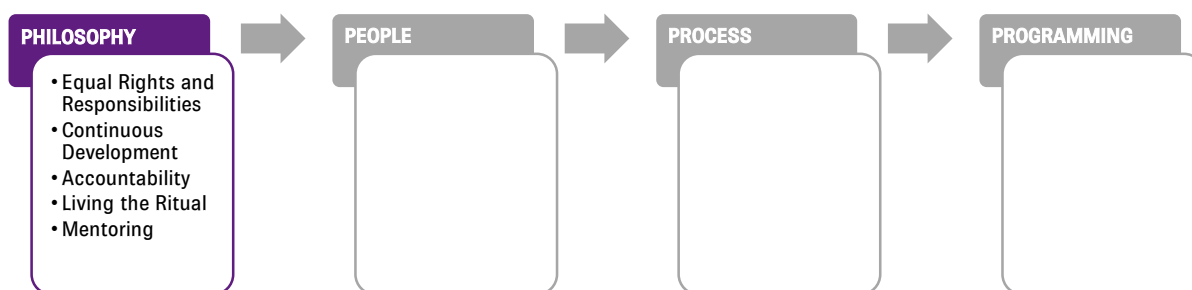
PHILOSOPHY

PHILOSOPHY INTRODUCTION

The Balanced Man Program is grounded in fundamental, philosophical tenets that provide a foundation for the membership experience. These tenets are rooted in the founding values of the Fraternity. They guide every aspect of the Balanced Man Program and must be in place before a chapter can effectively focus on implementation. Understanding and putting the following five tenets into practice is the most important step in reaching the full potential of the program:

- 1. Equal Rights and Responsibilities.**
- 2. Continuous Development.**
- 3. Accountability.**
- 4. Living the Ritual.**
- 5. Mentoring.**

THE BALANCED MAN PROGRAM FRAMEWORK



The upcoming section will discuss each element of the philosophy in detail. A response to frequently asked questions is also provided. After reading this section, you should be prepared to:

- Understand why the Balanced Man Program was created the way it was.
- Educate brothers on the fundamental philosophy behind the Balanced Man Program.
- Evaluate how your chapter exemplifies the philosophy of the Balanced Man Program.

Taking the time to understand the underlying philosophy is a necessary first step to successful implementation of the Balanced Man Program.

THE FIVE PHILOSOPHICAL TENETS

Equal Rights and Responsibilities - *All members are brothers*

SigEp was founded on the philosophy of love. Our Founders believed brotherly love must be given in order to be received. Implementing equal rights and responsibilities is the ultimate expression of brotherly love. It allows us to share brotherly love with all members of the chapter. Creating equal rights and responsibilities will:

- Develop stronger leaders as members have responsibilities and are engaged in chapter operations earlier in their experience.
- Teach all members that respect must be given in order to be received.
- Ensure all members are contributing during their entire undergraduate career.
- Give new members ownership in their experience and get them involved the day they join.
- Eliminate tiers and build brotherhood throughout the entire chapter.
- Maximize the talents of every member of the chapter.

Continuous Development - *Personal growth throughout life*

Our Founders set out to build a Fraternity that constantly added value to the lives of its members. They believed in development throughout life, not just in college. They were committed to developing habits of curiosity and lifelong learning. Today, many chapters only provide development opportunities for their new members. However, college men need to develop throughout their entire undergraduate experience to be successful in life after college. Additionally, members pay for every year of this experience and deserve a product in return. This tenet was reaffirmed in 2011 at Conclave when the undergraduate delegates to the Grand Chapter passed legislation endorsing a continuous development experience at every chapter. Implementing continuous development will:

- Push our members to learn and grow during every step of their undergraduate experience.
- Provide learning opportunities not afforded inside the classroom.
- Keep SigEp relevant throughout college raising the retention of the chapter.
- Separate SigEp from every fraternity on campus, making a chapter more appealing to potential new members.
- Ensure our graduates are better-prepared and better employees than the average student.

Accountability — *Committing to SigEp's high standards*

Membership in Sigma Phi Epsilon is reserved for men who meet our high expectation. To retain that membership, men must continually uphold the standards of being a brother in SigEp throughout their college career. Brothers are expected to participate in the chapter experience to improve themselves, their chapter, their campus and their community. Sigma Phi Epsilon's oath of obligation outlines these high expectations for a brother. Challenging our members to achieve more and holding them to these expectations will:

- Help our members make the most of their fraternity experience.
- Instill a lifelong habit of responsibility.

- Raise the performance of the chapter by helping each member reach their full potential.
- Prepare members for the accountability that comes in life after college.

Living the Ritual — *Incorporating SigEp's values into everyday life*

SigEp's Ritual was created to be a guide for living the best life. Our Founders believed the Ritual is most effective when it is lived, when its core messages are applied in our everyday lives. They believed the Ritual should not be viewed only as an event acted out on rare occasions. The lessons of the Ritual are intended to impact our lives, beyond the secrets that describe those lessons. Living the Ritual will ensure:

- Members develop a moral compass for the rest of their lives.
- Brothers are reminded of our purpose as an organization.
- Brothers have regular, consistent exposure to the Ritual.
- The chapter destroys negative stereotypes associated with fraternities by making values-based decisions.

Mentoring— *Maximizing personal growth through guidance and support*

College men need support and guidance to make the most of the opportunities available to them. Moreover, the Fraternity is not an individual journey and positive relationships maximize a brother's development. Experience as both a mentee and mentor in college allows individuals to be prepared to mentor over the rest of their life. Mentoring within the chapter will:

- Provide brothers someone to encourage and counsel them.
- Expose members to unique perspectives, cultures, personalities and experiences.
- Ensure members maximize their experience by learning from the mistakes of others.
- Strengthen brotherhood within the chapter through healthy relationships.
- Teach an invaluable skill set that will help members be better brothers, friends, coaches and spouses.
- Engage alumni and volunteers.

FREQUENTLY ASKED QUESTIONS

Why provide continuous development past the first semester?

What if the football coach only coached his players for the first semester they were on the team? After a semester of workouts, practices, film sessions and team meetings, he said, “ok, you’re done: all you have to do is show up for games for the next seven semesters.” Would you consider him a good coach? Of course not. Good coaches help players grow from the time of their first practice to the last play of their final game. To be a great chapter, we must take the same approach. The lessons our members learn the first day of freshmen year are just as important as the lessons they learn before graduation.

Does the Balanced Man Program take away the “tradition” of the Fraternity?

The Balanced Man Program is the true traditional experience. Our Founders did not establish the Fraternity with two-tiered membership. Pledging, as it is known today, came to be after World War II. The earliest known edition of the Sigma Phi Epsilon Bylaws considered members as brothers from the moment they accepted an invitation to join. With this said, the Balanced Man Program brings us closer to the traditions and intentions of our Founders.

Can we have local traditions in the Balanced Man Program?

Local traditions must align with the philosophy of the Balanced Man Program and promote a safe and positive experience for members. Remember tradition for the sake of tradition is not healthy. Look at your local traditions and ask “why do we do this?” If the answer is, “because we have always done it that way” then you should reconsider doing it. Good traditions have a meaningful purpose that aligns with the philosophy of this program.

No one else on campus operates like this. Why should we?

If your campus had 18 McDonald’s within two square miles, would you open another McDonald’s? No, you are better off building a Subway to make yourself more attractive. Offering something different than your peers allows you to attract the best students, leaders and athletes. Furthermore, Sigma Phi Epsilon is successful because SigEp is different. The five tenets outlined above will run counter to the prevailing attitudes among other fraternities on campus. Chapters and their members must have the confidence to be different than their peers.

The Balanced Man Program gives brothers their membership. Isn’t pledging more challenging?

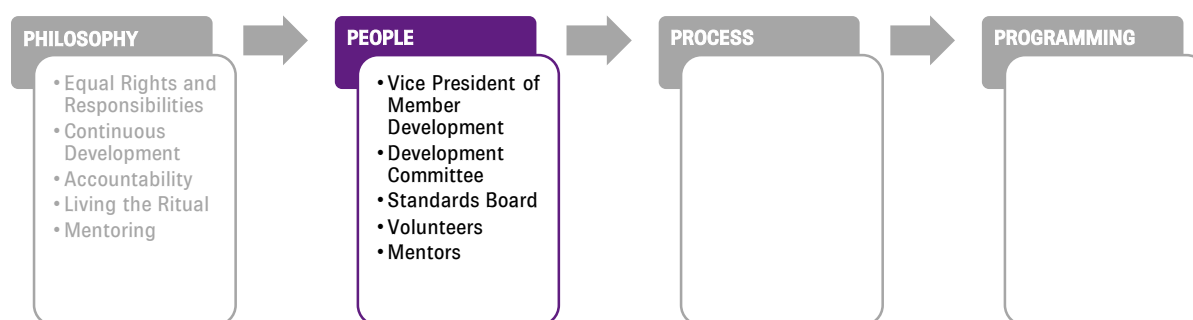
When the Balanced Man Program is run right, it is a more challenging experience than pledging. While brothers have the right to membership the day they join, it comes with many responsibilities. Brothers must be engaged their entire time in the chapter, not just the first semester. If brothers do not meet their expectations in each challenge, their membership is lapsed. Furthermore, the Balanced Man Program challenges brothers to provide the best experience on campus, regardless of what the rest of the campus is doing. This takes self-confidence to not care what other fraternities are saying about you. Finally, the Balanced Man Program requires chapters to be organized and dedicated to living SigEp’s values. Whether you are on the development committee, the standards board or are a challenge participant, the lessons you learn can be applied to your career after college.

PEOPLE

PEOPLE INTRODUCTION

Imagine if your university did not have administrators, teachers and employees. Who would you send your application to? What would happen to classes? Who would collect tuition? It is safe to say your university needs the proper people in place to provide a collegiate experience. The same is true about the Balanced Man Program. The program needs people to bring it to life. Without the right people to run the program, it remains nothing more than a noble idea. The people involved with the Balanced Man Program implement the philosophy of the program. These people must embrace the philosophical tenets of the program to be successful in their duties. No one person is solely responsible for the implementation of the program in a chapter. Instead, it takes a cross-functional team to create a successful experience. The members of this team include:

- 1. Vice President of Member Development**
- 2. Development Committee**
- 3. Standards Board**
- 4. Volunteers**
- 5. Mentors**



From the vice president of member development to non-SigEp professional mentors, it is people who drive the success of the Balanced Man Program. Information for each group is outlined in the following areas:

- 1. Roles and Responsibilities**
- 2. Frequently Asked Questions**

After reading this section, you should be prepared to:

- Help each person responsible for implementing the Balanced Man Program to understand their priorities in the role and best practices for success.
- Conduct a meeting with the development committee and standards board to discuss how the two groups work together on accountability.
- Improve your mentoring program by learning more about the roles and responsibilities.
- Recruit volunteers to execute the roles and responsibilities outlined in this section.

Finding and training the right people will prepare the chapter to effectively implement process and programming.

ROLES AND RESPONSIBILITIES

VICE PRESIDENT OF MEMBER DEVELOPMENT

The vice president of member development is responsible for the development and growth of the members in the chapter. A majority of the chapter's development takes place in the Balanced Man Program. He is the chief coordinator of this program and is responsible for leading and managing the development committee to provide a beneficial experience for every member. He ensures the program is properly implemented. Additionally, he educates himself on all the components of the program so he can educate others.

The top priorities of the vice president of member development, as it relates to the Balanced Man Program, are to:

- ☐ Appoint the development committee.
- ☐ Meet with each member of the development committee and ensure they understand the expectations of their positions.
- ☐ Review the current development program.
- ☐ Determine why each activity occurs, its benefits, and how it aligns with SigEp's mission of "Building Balanced Men."
- ☐ Develop a list of what needs to be changed or improved and an action plan to do so.
- ☐ Review and be familiar with the "The Ritual and Guide of Sigma Phi Epsilon".
- ☐ Take notes on how each challenge fulfills the high expectations set forth in the Ritual.
- ☐ Have a thorough knowledge of the roles and responsibilities of the standards board.
- ☐ Set a weekly meeting time for the development committee and prepare an agenda for each meeting.
- ☐ Set short-term and long-term goals for each committee member.
- ☐ Work with the vice president of programming to plan the development calendar for the next year.

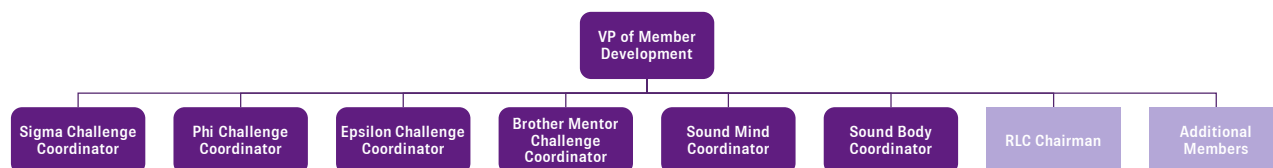
Vice presidents who excel focus on implementing the following best practices:

- ☐ Report on all development events occurring within the challenges and provide dates for upcoming events at the weekly chapter meeting.
- ☐ Update chapter officers on the progress of the development committee at the weekly executive board meeting.
- ☐ Hold weekly meetings with the development committee. Have each member report on activities in their area and have challenge coordinators report on the progress of members in their respective challenge. Follow up on action items and goals from the previous week.
- ☐ Attend member development activities to measure effectiveness and ensure all Fraternity policies and procedures are followed.
- ☐ Meet with the faculty fellow on a monthly basis.
- ☐ Ensure challenge trackers are updated regularly.
- ☐ Ensure all Rites of Passage are scheduled in advance and on the chapter calendar.
- ☐ Ensure that all new member registration fees are paid within 48 hours of a member joining.

The quality of the Balanced Man Program greatly increases when the vice president of member development implements these priorities and best practices.

DEVELOPMENT COMMITTEE

The development committee is charged with facilitating the development of members in the chapter. The vice president of member development serves as the committee chairman for the members outlined in the diagram below. Those members in light purple directly support the implementation of the Balanced Man Program.



The RLC chairman focuses on implementing the Residential Learning Community program in coordination with the BMP. Additionally, the vice president of member development may appoint more members to his committee to meet the needs of the chapter.

To ensure success with the Balanced Man Program, a chapter must have the best people in leadership positions. The vice president of member development is responsible for finding the right brothers for the job. In order to do so, he must set standards for each member to become eligible to be a part of the committee. These standards should include, but are not limited to brothers who:

- ☐ Are in good standing with the chapter as it pertains to behavior, finances and grades
- ☐ Have proven leadership experience (in the chapter or on campus)

After standards are set, he should ask brothers to apply to serve on the committee. The application should include at a minimum, the following questions:

- ☐ Why do you want to hold this position?
- ☐ How will you improve the challenges?
- ☐ What leadership experience do you have and how will you apply it to this position?

After reviewing the applications, he should interview each applicant to find out more about his goals and aspirations for the position. After the interviews are complete, he selects the best brothers for the job and provides them the training, resources, and support necessary to succeed.

The quality of the chapter's development experience depends on the hard work and determination of this committee. Without this committee, the chapter is more of a social club than a fraternity.

CHALLENGE COORDINATORS

Challenge coordinators are responsible for providing quality programming and a relevant experience for each challenge participant. While some priorities and best practices vary from challenge to challenge many stay the same. The top priorities of the challenge coordinators are to:

- ☐ Review the current challenge.
- ☐ Determine why each activity occurs, what the benefits are and how they align with mission of "Building Balanced Men."
- ☐ Develop a list of what needs to be improved and an action plan to do so.
- ☐ Review and be familiar with the "The Ritual and Guide of Sigma Phi Epsilon".
- ☐ Take notes on how each meeting and activity fulfills the high expectations set forth in the Ritual.
- ☐ Have a thorough knowledge of the roles and responsibilities of the standards board.
- ☐ Work with the vice president of member development to set goals for the upcoming semester and year and place all challenge events on the chapter calendar.
- ☐ Meet with the mentors of the challenge participants to discuss and define expectations.

Challenge coordinators who excel focus on implementing the following best practices:

- ☐ Provide an update on the progress of challenge participants at weekly development committee meetings.
- ☐ Provide quality programming for members of the challenge.
- ☐ Partner with the university, alumni and volunteers from the community to deliver relevant programming.
- ☐ Attend all programming activities for the challenge and ensure all policies and procedures are followed.
- ☐ Work with standards board to hold brothers accountable for completing the challenge in the appropriate time frame.
- ☐ Ensure each member of the challenge has a mentor.
- ☐ Ensure challenge trackers are updated and made available to challenge participants.
- ☐ Ensure Rites of Passage are scheduled monthly and on the chapter calendar.

In addition to these priorities and practices, there are responsibilities specific to each challenge:

SIGMA CHALLENGE COORDINATOR

Research shows the first 30 days of membership in an organization are the most important in determining the quality of the experience. Expectations, habits and affinity for the organization are all shaped heavily within this time frame. The actions of this coordinator directly shape each new member's experience inside the chapter. They are building the new members who will shape our Fraternity. A successful Sigma Challenge Coordinator will do the following:

- ☐ Develop and/or execute the Sigma Challenge using the Sigma Challenge resources found at SigEp.org.
- ☐ Hold weekly Sigma Challenge meetings or programs.
- ☐ Schedule the Sigma Rite of Passage as needed at regular chapter meetings.
- ☐ Work with the vice president of member development and the vice president of finance to ensure all new member fees are paid to Headquarters in the appropriate time frame.
- ☐ Track the progress of brothers in the Sigma Challenge.
- ☐ Work with the standards board to address members not meeting minimum time frames.
- ☐ Determine the process and qualifications for appointing new member mentors.

PHI CHALLENGE COORDINATOR

Most members in the Phi Challenge will be second-semester freshmen and sophomores. This is a critical time in the personal development of these men, as most of their college identity will be formed during this time. The Phi Challenge Coordinator has the opportunity to help facilitate this process. Phi Challenge coordinators are responsible, at a minimum, for the following:

- ☐ Develop and/or execute the Phi Challenge.
- ☐ Hold Phi Challenge meetings or programs at least twice a month.
- ☐ Track the progress of brothers in the Phi Challenge.
- ☐ Work with the standards board to address brothers not meeting minimum time frames.
- ☐ Schedule and hold the Phi Rite of Passage at least three times a year.
- ☐ Ensure each member in the challenge has a chapter mentor.
- ☐ Identify potential new member mentors for the Sigma Challenge.

EPSILON CHALLENGE COORDINATOR

Most members in the Epsilon Challenge will be assuming leadership positions in the chapter and on campus. Productive leadership habits and management skills will not only positively affect them, but also the people they serve in the leadership roles. This coordinator helps brothers make a positive impact by using the following tactics:

- ☐ Develop and/or execute the Epsilon Challenge.
- ☐ Hold Epsilon Challenge meetings or programs twice a month.
- ☐ Schedule and hold the Epsilon Rite of Passage at least three times a year.
- ☐ Track the progress of members in the Epsilon Challenge.
- ☐ Work with the standards board to address members not meeting minimum expectations.
- ☐ Determine the process and standards by which professional mentors are identified.
- ☐ Maintain a list of professionals who are willing to serve as mentors with current contact information.

BROTHER MENTOR CHALLENGE COORDINATOR

Many members in the Brother Mentor Challenge turn away from active engagement in the fraternity at this stage to prepare for life after college. The Brother Mentor Challenge Coordinator has an opportunity to provide the education they need inside SigEp while keeping their oldest members engaged. Many of the topics covered in this challenge focus on preparing brothers for life after college. Because the Brother Mentor Challenge Coordinator is still in school, he must organize and execute this challenge with the help of an alumnus or volunteer. When this challenge is run right, the Brother Mentor Challenge Coordinator is the most popular position in the chapter because he gets to work with successful alumni on a regular basis.

Furthermore, habits and skills challenge participants learn during this challenge will aid them in the transition from college to the “real world.” Therefore, this coordinator’s hard work will have a life-long impact on the success of the brothers in this challenge. Brother Mentor Challenge Coordinators should focus on the following tactics:

- ☐ Develop and/or execute the Brother Mentor Challenge.
- ☐ Hold Brother Mentor Challenge meetings or programs at least once a month.
- ☐ Schedule and hold the Brother Mentor Rite of Passage at least 3 times a year.
- ☐ Work with the Epsilon Challenge coordinator to maintain a list of professionals who are willing to serve as mentors.

- ❑ Make sure all necessary contact information is up to date for potential professional mentors.
- ❑ Hold a reception or event to honor all professional mentors.

SOUND MIND PROGRAM COORDINATOR

Developing a sound mind means living a lifestyle that allows you to expand and challenge your mind both inside and outside of the classroom. The Sound Mind programming coordinator helps members achieve this lifestyle by providing quality sound mind programming opportunities. He must work with the challenge coordinators to find appropriate programming for each challenge. This coordinator has the opportunity to help all brothers grow intellectually and develop habits that keep their mind healthy by doing the following:

- ❑ Communicate regularly with each challenge coordinator to identify the programming needs of each challenge.
- ❑ Attend all development committee meetings and report on completed and upcoming activities.
- ❑ If needed, work with the RLC chairman to recruit a faculty fellow.
- ❑ Develop programming utilizing the skill set of the faculty fellow.
- ❑ Work with challenge coordinators to provide sound mind programming

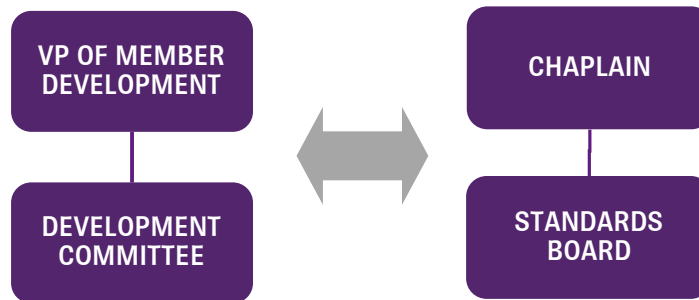
SOUND BODY PROGRAM COORDINATOR

The Sound Body programming coordinator has the opportunity to help all chapter members develop and maintain a healthy body. He must work with the challenge coordinators to provide sound body programming appropriate for each challenge. His job is not only improving the fitness of each member, but also ensuring all members develop habits that will produce healthy lifestyles by doing the following:

- ❑ Communicate regularly with each challenge coordinator to identify the programming needs of each challenge.
- ❑ Attend all development committee meetings and report on completed and upcoming activities.
- ❑ Create a chapter environment that encourages members to live a healthy life through proper exercise and nutrition habits.
- ❑ Work with challenge coordinators to provide sound body programming
- ❑ Engage content experts to educate chapter members
- ❑ Introduce, implement, and track sound body programming that challenges all members

STANDARDS BOARD

While the standards board has many responsibilities within the chapter, they play a vital role in implementing two of the main philosophies of the Balanced Man Program, living the Ritual and accountability. They execute the Rites of Passage and help the chapter understand how to make the Ritual a part of their everyday lives. Additionally, the standards board works with the development committee to ensure members understand the expectations of the Balanced Man Program and are held accountable to these expectations.



The top priorities of the standards board, as it relates to the Balanced Man Program, are to:

- ☐ Review and be familiar with each Rite of Passage in the "The Ritual and Guide of Sigma Phi Epsilon".
- ☐ Have a thorough knowledge of the roles and responsibilities of the development committee.
- ☐ Meet with the development committee and ensure everyone understands their role with the Balanced Man Program. Additionally, set expectations for how these two groups will work together.

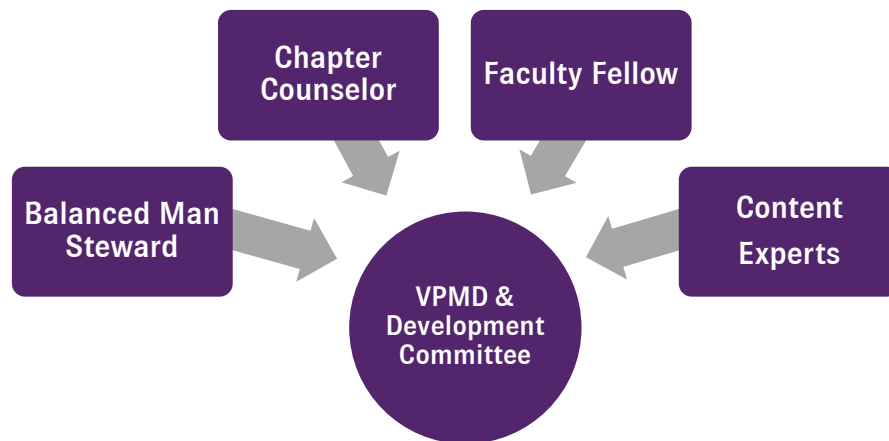
Standards board members who excel focus on implementing the following best practices:

- ☐ Report on membership statuses and announce upcoming Rituals at the weekly chapter meeting.
- ☐ Ensure all Fraternity policies and procedures are followed at member development activities.
- ☐ Collaborate with the development committee to hold members accountable for completing each challenge.
- ☐ Manage the trial process for brothers whose membership has lapsed.
- ☐ Provide Ritual studies for each challenge at least once a semester.
- ☐ Work with challenge coordinators to ensure all Rites of Passage are scheduled in advance and on the chapter calendar.
- ☐ Help brothers find ways to incorporate the Ritual into their everyday lives.
- ☐ Provide encouragement and recognition when brothers uphold the oath of obligation.
- ☐ Ensure members are meeting their expectations as mentors.

A chapter can see the philosophical tenets of accountability and living the Ritual come to life when the standards board implements these priorities and best practices.

VOLUNTEERS

Volunteers support the vice president of member development and the development committee in fulfilling their responsibilities and maintaining continuity from year-to-year. For many chapters, they are key to the long-term success of the Balanced Man Program. They can help with everything from adoption of philosophy to execution of programming. Great volunteers take every opportunity to educate themselves on the Balanced Man Program, so they can help the chapter improve. These key volunteers and their respective roles are outlined below:



BALANCED MAN STEWARD

Many chapters fail to obtain sustainable success with the Balanced Man Program because they don't have support and guidance of a volunteer. Balanced Man Stewards can provide both of these things. They are there to educate and assist the vice president of member development and his committee as they properly implement the program. They provide advice as problems arise and mistakes are made. Additionally, they help the leaders continuously improve the programming opportunities available to meet the needs of all chapter members' year after year. Their hard work dramatically impacts the quality of SigEp's future volunteers.

The top priorities of the Balanced Man Steward are to:

- ❑ Understand the philosophy, people, process and programming associated with the Balanced Man Program.
- ❑ Frame the Balanced Man Program as a way to impact the changing needs of undergraduate brothers.
- ❑ Meet regularly to review challenge programs with the vice president of member development and challenge coordinators.
- ❑ Support challenge coordinators in providing quality programming by engaging content experts and members of the campus and community.
- ❑ Encourage new members to take advantage of all of the rights and responsibilities of membership.
- ❑ Reinforce the proper execution of the Ritual.
- ❑ Monitor the enforcement of all challenge time frames.

A Balanced Man Steward who excels is focused on implementing the following best practices:

- ❑ Empowering the vice president of member development and challenge coordinators to provide quality programming.
- ❑ Helping the challenge coordinators find the right people to deliver quality programming.
- ❑ Communicating the importance of single-tier membership and helping brothers see the benefits of “full rights and responsibilities.”
- ❑ Helping the vice president of member development and challenge coordinators organize, plan and execute challenge meetings.
- ❑ Helping the development team and the standards board understand the importance of membership lapsing and how to execute it.
- ❑ Facilitating an effective transition between officers to maintain a sustainable membership experience and transfer lessons learned.

Balanced man stewards help chapters reach sustainable success when they deliver on the priorities and practices listed above. Their work and dedication supports a quality membership experience.

CHAPTER COUNSELOR

Chapter counselors work with the balanced man steward and other mentor committee volunteers as they provide counsel and advice to the vice president of member development and his committee.

Chapter counselors who excel are focused on implementing the following best practices:

- ❑ Understand the Balanced Man Program and can communicate it to volunteers and alumni.
- ❑ Support all volunteers as they mentor chapter leaders whose role it is to align the chapter experience with the philosophical tenets of the Balanced Man Program.
- ❑ Work with the chaplain mentor the standards board through the membership lapsing process.
- ❑ Along with the AVC, recruit and engage volunteers from the local alumni base and host institution to serve as mentors for chapter officer roles.
- ❑ Hold regular mentor meetings or conference calls to discuss best practices for mentorship between mentors and undergraduates.

Chapter counselors who implement the priorities and practices above help chapters gain momentum with the Balanced Man Program.

FACULTY FELLOWS

Faculty fellows support the execution of challenge programming. To reach the full potential of the Balanced Man Program, the development committee must rely on “experts” to help deliver quality programming. Faculty fellows fill this void through facilitating discussions, teaching important skills and challenging members to live a balanced life inside and outside of the classroom. The top priorities of the faculty fellows, as it relates to the Balanced Man Program, are to:

- ❑ Help challenge coordinators brainstorm programming ideas to meet the needs of all chapter members.
- ❑ Assist challenge coordinators in the execution of programs and activities.
- ❑ Facilitate sessions for challenge members.
- ❑ Help the sound mind programming coordinator build an academic plan to aid members who are struggling academically.
- ❑ Attend challenge programs and provide encouragement and tips to help succeed inside the classroom.
- ❑ Meet monthly with the sound mind programming coordinator to check in on his progress and provide support.
- ❑ Recruit additional faculty to help execute programming within the challenges.

Faculty fellows who implement these practices help challenge participants excel inside and outside of the classroom.

CONTENT EXPERTS

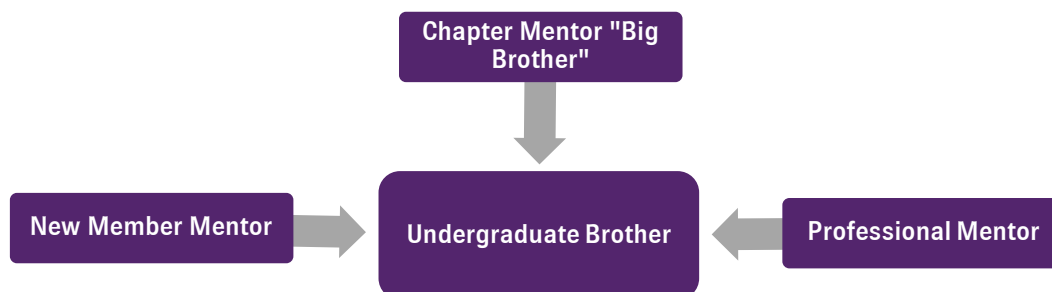
Often times, challenge coordinators become overwhelmed because of all of their roles and responsibilities. Content experts can relieve some of this burden. These volunteers leverage their experience and expertise to support a specific programming area. Content experts can be alumni, university faculty or staff, graduate students or even members of the local community. For example, your chapter could recruit a personal trainer from the university recreation center to support sound body programming. The top priorities of content experts are to:

- Meet with challenge coordinators at the beginning of each semester to select appropriate programming opportunities for each challenge in their area of expertise.
- Help challenge coordinators find resources and facilitators to support their programming needs.
- Facilitate programming opportunities for each challenge in their area of expertise.

More information on content experts can be found in the “programming” section of this resource.

MENTORS

Mentors coach and guide brothers through the membership experience. They have the opportunity to make a significant impact in the lives of their mentees. Throughout a member's experience, he interacts with three different mentors:



While brothers obtain new mentors as they progress through the challenges, the relationships they build with each mentor do not end. Moreover, these relationships should extend past the undergraduate years.

Mentors must be chosen carefully and given guidance on how to interact with their mentee. Standards for the selection of mentors are listed below and guidelines for interaction are listed in the “process” section.

NEW MEMBER MENTOR

The new member mentor is assigned the first week a member joins SigEp. This mentor plays a vital role in their mentee's transition to SigEp and college. He is responsible for building a strong, positive foundation for his mentee's fraternity experience and should be a living example of SigEp's values. New member mentors should meet these minimum standards:

- ☐ Have at least a 3.0 cumulative GPA.
- ☐ Be in good standing as it pertains to behavior, finances and grades.
- ☐ Finished the Sigma Challenge.
- ☐ Be involved within the chapter (attendance at meetings and events, holds leadership positions, etc.).

Proper guidance from a mentor ensures new members are starting their SigEp experience off on the right foot.

CHAPTER MENTOR

The chapter mentor is often referred to as the “big brother.” Each member selects his chapter mentor at the conclusion of the Sigma Challenge. This allows each brother at least six weeks to get to know the members of the chapter and identify potential mentors. This mentor plays a valuable role in the personal growth of their mentee during his middle years in college and should be committed to seeing him succeed throughout the undergraduate experience. Chapter mentors should meet these minimum standards:

- ☐ Have at least a 3.0 cumulative GPA.
- ☐ Be in good standing as it pertains to behavior, finances and grades
- ☐ Started the Phi Challenge.
- ☐ Be involved within the chapter (attendance at meetings and events, holds leadership positions, etc.).
- ☐ Have a personal connection with the mentee and a desire to see him grow.

When a chapter mentor is a living example of SigEp's values he can drastically impact the growth of his mentee.

PROFESSIONAL MENTOR

The professional mentor is an alumnus, volunteer, or community member selected before a brother enters the Brother Mentor Challenge. This mentor helps foster the personal and professional growth of their mentee to prepare for life after college. These mentors have an opportunity to set up their mentees to be successful in the next phase of their lives. Professional mentors should meet these minimum standards:

- ☐ Graduated for three years and at least 25 years old.
- ☐ Commit to giving the necessary time to spend with their mentee one-on-one.
- ☐ Have experience in a career field that interests the mentee.

A committed professional mentor helps their mentee end their undergraduate experience on a positive note.

FREQUENTLY ASKED QUESTIONS

How much teaching or lecturing should a challenge coordinator provide each meeting?

Very little if he is doing his job right. Challenge coordinators are much like wedding planners. Wedding planners work behind the scenes. They don't bake the cake; they find the best chef to do it. They don't make the flower arrangements; they hire the best florist in town to do it. To make the wedding successful they recruit the best people to do the job. The same is true of a challenge coordinator. Great coordinators recruit volunteers and experts to facilitate meetings. This ensures the most qualified person is teaching the material and keeps members engaged by providing new faces.

As vice president of member development, what qualities should I look for in a challenge coordinator?

Find a brother who "models the way." Challenge coordinators should be living examples of balanced men that uphold our cardinal principles in their everyday lives. Additionally, find a brother who understands he must recruit the right people to deliver quality programming.

What is the difference between a good "big brother" and a bad "big brother"?

Oftentimes big brothers look at their relationship with their mentee as purely social. A good big brother is never a "drinking buddy." Instead, big brothers should spend time teaching their mentees how to make the most of their collegiate and fraternity experience. They should study, workout, set goals and challenge their mentees to be a "balanced man." When done right, little brothers see their big brothers as a confidant, a resource and a role model.

How do we recruit volunteers to be professional mentors? Where can we find them?

Create a resource that members can use to recruit professional mentors. This resource should outline the Balanced Man Program, the expectations and role of a mentor, and how much time the mentor will need to commit. Many individuals would make great professional mentors. Identify their potential by reaching out and becoming their friend. Examples of potential mentors include, but are not limited to:

- ☐ Parents
- ☐ Faculty
- ☐ Community leaders
- ☐ Clergy
- ☐ University alumni
- ☐ Chapter alumni

How do chapters best utilize their volunteers to help with the Balanced Man Program?

First, a chapter should ensure they have volunteers to fill the roles of chapter counselor, balanced man steward and faculty fellow. These volunteers are crucial to the success of the implementation of the program. The development committee should meet with these volunteers monthly to discuss progress and get advice to make improvements to the program. Second, a chapter should utilize additional volunteers for mentoring and programming by recruiting local alumni and volunteers to be professional

mentors for brothers in the Brother Mentor challenge and asking volunteers to help deliver a program on a topic of their expertise. Utilizing volunteers properly ensures members are getting the most out of the Balanced Man Program.

What do we do if our chapter doesn't have many volunteers?

The responsibilities of many of the volunteer roles that support the Balanced Man Program can be found through other volunteers. Chapters successfully recruit new volunteers by having an understanding of the role and its responsibilities and then identifying people on campus, in the alumni ranks, or in the community that would be able to fill the role. You can also reach out to current volunteers to help identify people who would like to be more involved.

What if we don't have enough brothers that have completed the Phi Challenge to be mentors for all the other brothers?

The description of the mentor requirements above is to ensure that there are standards for being a mentor and to provide the mentee with a mentor who is knowledgeable and able to provide a positive impact on a member's experience. It is not uncommon for chapters who are building up their membership base to have a brother take on more than one mentee. This will allow the chapter to keep the standards of being a mentor rather than relaxing the requirements and having to increase them as the chapter grows.

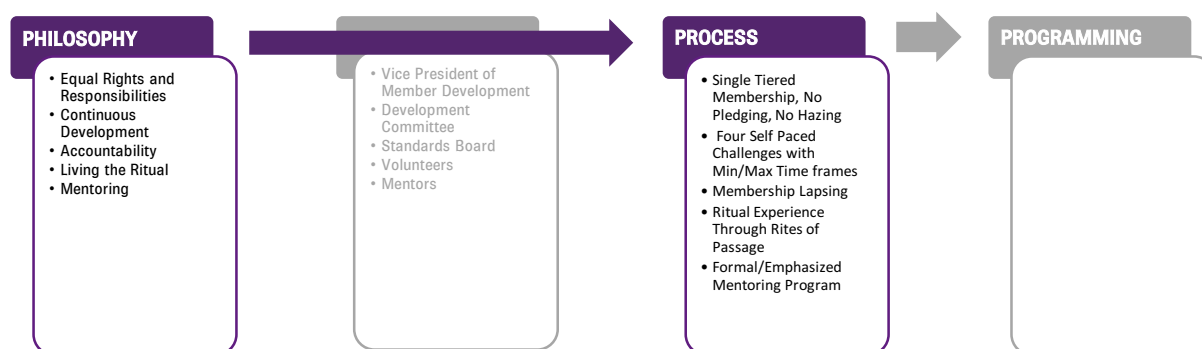
PROCESS

PROCESS INTRODUCTION

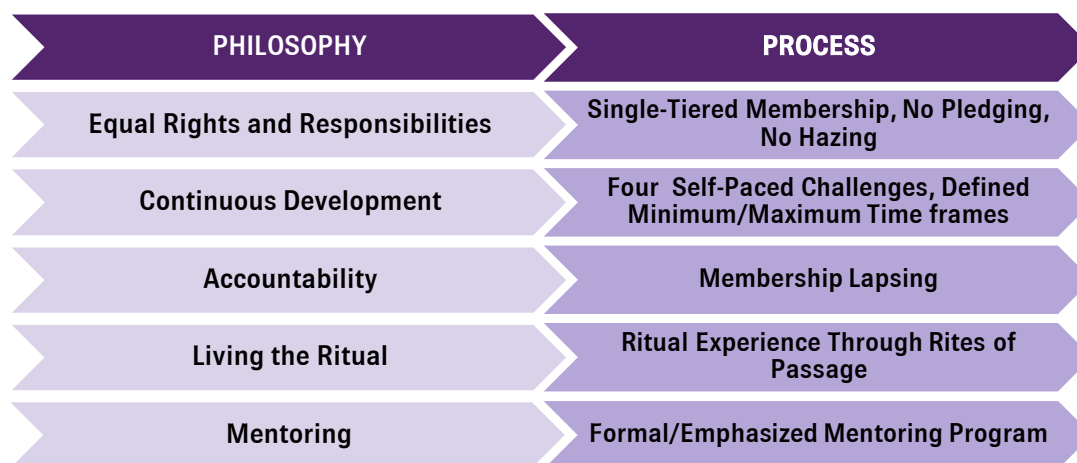
Once the right people with the right philosophies are in place, we turn our focus to the process by which the Balanced Man Program is executed. The people involved with the Balanced Man Program drive the process by which it is put into practice. This process drives the quality of the membership experience. Without this process, philosophy never reaches implementation. The five main processes that bring the philosophical tenets to life are:

1. **Single-tiered Membership, No Pledging, No Hazing.**
2. **Four Self-Paced Challenges with Defined Minimum and Maximum time frames.**
3. **Membership Lapsing.**
4. **Ritual Experience Through Rites of Passage.**
5. **Formal/Emphasized Mentoring Program**

THE BALANCED MAN PROGRAM FRAMEWORK



Each element of the process directly relates back to a philosophical tenet of the Balanced Man Program. The following diagram indicates the relationship. It is important to understand the connection between philosophy and process before moving forward.



In the following pages, we break down each element of the Balanced Man Program process using a common framework:

- 1. Overview**
- 2. Implementation**
- 3. Frequently Asked Questions**

After reviewing the following section, you should be prepared to:

- Evaluate how your chapter is currently executing the Balanced Man Program.
- Identify ways to improve the process by which your chapter's program is implemented.
- Educate others on the processes outlined in this section.
- Understand the ideal challenge time frames and how to enforce them through membership lapsing.
- Improve your challenge meetings by learning best practices for meeting execution.
- Improve challenge tracking and individual member assessment.
- Create a written development program with the components outlined in this section.
- Learn how the Rites of Passage fit into the challenges and when to schedule them.
- Improve your mentoring program by learning more about the roles and responsibilities.

OVERVIEW

1 – SINGLE-TIERED MEMBERSHIP, NO PLEDGING, NO HAZING

Implementing a process where all members are treated with equal rights and responsibilities eliminates tiers of membership and challenges all members to contribute throughout their time in the Fraternity. Contrary to popular belief, eliminating tiers of membership does not require the chapter to simply accept anyone and everyone. Instead, the ownership is placed on the vice president of recruitment and his recruitment committee to identify and offer bids only to those men who meet the highest standards. From there, it is the responsibility of the brother to live up to the expectations of his chapter throughout his years in the chapter.

The concept of pledging is counterproductive to a brother's experience because it limits his abilities to participate or contribute to the chapter from day one. Restricting the rights of our brothers hinders growth and ultimately doesn't challenge them to reach their full potential.

Finally, hazing has no place in the college fraternity experience. While hazing may be defined differently from state to state, the underlying principle that our members deserve a safe fraternity experience does not change. Furthermore, the act of hazing completely contradicts the Ritual. There can be no tolerance among Sigma Phi Epsilon brothers for behaviors or actions that violate any definition of hazing.

2 – FOUR SELF-PACED CHALLENGES WITH DEFINED MINIMUM/MAXIMUM TIME FRAMES

A challenge is a portion of the development experience that includes clear expectations, programs and opportunities for a brother to grow and develop. Challenges with time frames bring structure, competition, and fun to the membership experience. While the challenges are self-paced, they are not intended to make the fraternity experience an individual journey. Group and team activities are still critical for brothers to form bonds with others across the chapter. The concept of self-paced denotes attention to individual performance, needs and goals. Simply put, progression through each challenge is based on individual achievement and no member should be held up from further developing himself because certain members are less ambitious or goal-oriented. Every member should be encouraged and empowered to reach his full potential.

Furthermore, by establishing a minimum time frame, we ensure that each member is spending the appropriate time reflecting on the purpose of each challenge. The maximum time frame sets an expectation for minimum participation.

3 – MEMBERSHIP LAPSING

Our Founders created SigEp because they were not satisfied with the status quo. Furthermore, our Ritual challenges brothers to not settle for mediocrity. Consequently, chapters should hold high expectations of their brothers. High expectations challenge brothers to diligently improve themselves and others around them. When brothers meet these high expectations, the chapter is filled with high achievers committed to SigEp's values.

Standards in the areas of academics, finances, and behavior are commonplace in chapter life. The Balanced Man Program adds a standard for a minimum level of involvement and achievement because a chapter can only be as good as the sum of its brothers' efforts to support Sigma Phi Epsilon.

This concept is known as membership lapsing. A lapse in a brother's membership is defined as expulsion due to non-performance. If a member fails to progress through the development experience and meet the expectations of his challenge within a defined time frame, the standards board is asked to reconsider his membership within the chapter. This process is outlined below, as are the three "off ramps" that exist for brothers at the end of the Sigma, Phi, and Epsilon challenges. While these are the most convenient and appropriate times for a brother to assess his membership in the fraternity, they are not the only opportunities. Other scenarios when the vice president of member development and challenge coordinators feel necessary to address a brother's membership should be dealt with when they arise, not waiting for the end of a challenge. It is important to remember that this is only necessary if brothers choose not to participate and live up to the expectations they agreed to as members of Sigma Phi Epsilon.

4 – RITUAL EXPERIENCE THROUGH RITES OF PASSAGE

All brothers in Sigma Phi Epsilon experience the same Ritual. The Balanced Man Program spreads the Ritual experience into four Rites of Passage. Each Rite of Passage allows a brother to experience a portion of the Ritual. Over four years, brothers have consistent touch points with the Ritual, which de-emphasizes the Ritual as an end-point in the fraternity experience. Rather, the Ritual is positioned to serve its intended role as a point for reflection and a reminder of the values and high expectations we strive for as brothers.

5 – FORMAL/EMPHASIZED MENTORING PROGRAM

Mentoring must be a constant throughout the Balanced Man Program experience. It is always provided and eventually expected of brothers in the chapter. Mentors play a critical role in helping brothers set and accomplish goals while making decisions that will influence their lives. The three mentors outlined in the previous section provide this guidance and counsel to brothers.

IMPLEMENTATION

To ensure your chapter can consistently execute the processes outlined above and explained below, your chapter must have a written program. A written development program is essential for several reasons:

- ☐ **Each member of the chapter can see his opportunities for development throughout his time in the chapter.**
- ☐ **Members can use this program for recruitment by showing a potential new member all of the benefits of the Balanced Man Program.**
- ☐ **Each member of the challenge can see what he is expected to complete.**
- ☐ **It ensures continuity. Each year the development committee can improve upon this written program.**

The components of a quality written program include:

DEVELOPMENT COMMITTEE MATERIALS:

- ☐ Job descriptions of each member of the development committee.
- ☐ Sample semester calendar of events.
- ☐ Contact information for campus resources.
- ☐ Expectations for how the development committee interacts with the chapter and the standards board.
- ☐ Standards and processes for membership lapsing and accountability.
- ☐ The chapter's process for implementing a mentoring program.
- ☐ A historical record of programming to track accomplishments.
- ☐ Best practices from the former vice president of member development.

OUTLINES OF THE FOUR CHALLENGES INCLUDE:

- ☐ The purpose of each challenge.
- ☐ The minimum and maximum challenge time frames.
- ☐ Sample challenge meeting agendas.
- ☐ Expectations of each challenge participant.
- ☐ A list of requirements and activities challenge participants are expected to complete.
- ☐ Ideas for challenge programming.
- ☐ Challenge trackers.

A written development program allows the vice president of member development and the development committee to improve the Balanced Man Program each year instead of recreating it. Organizing the components listed above is a big step towards improving the membership experience for years to come. If your chapter does not have a written development plan visit the BMP Implementation Page to get started. More information on this resource can be found in the "Programming" section of this guide.

1 - SINGLE-TIERED MEMBERSHIP, NO PLEDGING, NO HAZING

Implementing single-tiered membership requires confidence from a chapter. First, the chapter must have the confidence to be different than every other fraternity on campus. Second, brothers must have the confidence to acknowledge that age or time in the chapter does not determine a man's worth.

To accomplish this element of the Balanced Man Program, the opportunities and expectations provided to all members of the chapter must be equal. These include:

- ☐ **Voting on chapter business.**
- ☐ **Equal expectations for behavior and participation.**
- ☐ **Equal standards and accountability mechanisms for all members.**
- ☐ **An expectation to attend chapter and committee meetings.**
- ☐ **Opportunities to be on a committee or hold an office.**
- ☐ **Participation in all chapter events and programs.**
- ☐ **Use of the chapter house.**

Additionally, the chapter cannot effectively implement single-tiered membership if it limits the rights of any group of members purely on the basis of tenure or standing within the chapter. This does not limit the chapter from enforcing fines, punishments, suspensions, and expulsions for actions by a member who violates the chapter's standards or membership agreement.

Pledging is a mentality that requires new members to earn their right to be a brother after they join. The Balanced Man Program adopts the view of our founders; members earn their right to be a brother through the recruitment process and should be given the rights and responsibilities of a brother on the day they join. Implementing single-tiered membership eliminates pledging from the chapter.

Hazing is counterproductive to the founding purpose and principles of SigEp. The first step towards eliminating hazing from the fraternity experience is to become educated on how hazing is defined. Visit your state's website to learn about how they define hazing. SigEp's definition of hazing can be found in SigEp's Risk Management Policies. This document defines hazing as:

"Any action taken or situation created, whether on or off fraternity premises, to produce mental or physical discomfort, embarrassment, harassment or ridicule. Such activities may include, but are not limited to, the following: use of alcohol; paddling in any form; creation of excessive fatigue; physical and psychological shocks; morally degrading or humiliating games and activities; late work sessions which interfere with scholastic activities; and any other activities which are not consistent with fraternal law or ritual, the regulations and policies of the educational institution or applicable local, state, or federal law. Permission or approval by a person being hazed is not a defense."

It is important to recognize that there is no master document that explains exactly what is and is not hazing. Therefore, it is essential to ask questions and regularly evaluate your chapter's development activities. Here are some tips to ensure your chapter is following all policies surrounding hazing:

- ☐ **Educate your chapter on the state's statute and case law regarding hazing.**
- ☐ **Review University and SigEp policies on hazing.**
- ☐ **Meet with the Greek Life Professional on campus to review your development plan.**
- ☐ **Meet with your Regional Director to review your development plan.**

- ❑ **Evaluate your member development plan and make sure each activity has a purpose and is grounded in the philosophy of the Balanced Man Program.**
- ❑ **Use the parent litmus test. Would the member's parents be okay with their son doing this? Would my parents be proud I was asking my brother to do this?**

Following the guidelines above will help your chapter comply with all policies and ensure your members are afforded a safe and healthy experience.

2 - FOUR SELF-PACED CHALLENGES WITH DEFINED MINIMUM/MAXIMUM TIME FRAMES

Members complete four challenges as they progress through their undergraduate development experience as a member of Sigma Phi Epsilon. Each challenge aims to fulfill a specific purpose with respect to a brother's development needs. The four challenges and their intended purposes are as follows:

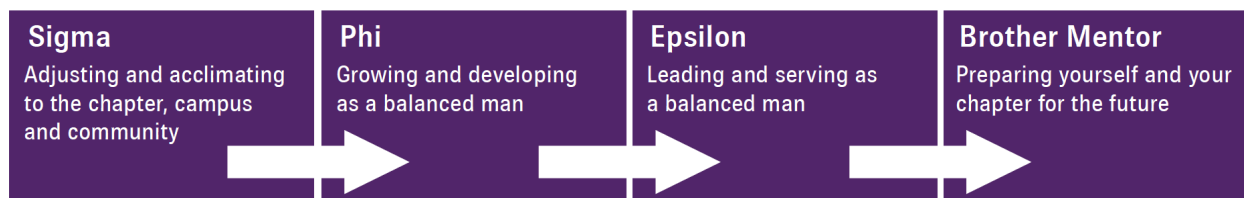
Sigma Challenge: *Adjust and acclimate to the chapter, campus and community*

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*

These challenges occur in a specific order that tracks with the undergraduate experience:



Additionally, there must be a minimum and maximum time frame associated with each challenge to provide structure to the challenge and program. The minimum time frame ensures each member is spending an appropriate amount of time in the challenge while the maximum time frame ensures a consistent level of achievement and participation. Setting appropriate time frames are essential to the execution of challenges. The following are recommended time frames for each challenge:

Sigma Challenge	6 – 8 weeks
Phi Challenge	12 – 52 weeks
Epsilon Challenge	28 – 80 weeks
Brother Mentor Challenge	Until graduation

Scheduling opportunities for challenge members to interact is crucial to executing a quality challenge. Interactions can include a challenge meetings and/or challenge specific programming. The frequency of interaction is tied to the specific challenge and is outlined below:

Sigma Challenge
Phi Challenge
Epsilon Challenge
Brother Mentor Challenge

Weekly interactions
At least two interactions per month
Two interactions per month
At least one interaction per month

Defining the content for a challenge interaction, whether it is a challenge meeting or challenge programming is critical to the success of the challenge, and thus critical to successful implementation of the Balanced Man Program. The following best practices will help chapter leaders to improve the quality of each interaction:

Have a topical title that reflects the content and outcomes.

If not, there either (a) isn't enough material to warrant a meeting or program or (b) there is too much material to cover and challenge participants will struggle to retain the material. In both scenarios, the challenge members waste their time by participating.

Always start on time.

Starting late will frustrate those who arrived on time and empower those who are habitually late.

Start by outlining the intended outcomes for the session.

This gives participants an opportunity to understand the purpose of the session.

End by summarizing the most important things to remember from the session.

Revisit the outcomes that were laid out in the beginning. Give participants an opportunity to share their biggest takeaways from the session.

Send a follow-up email to challenge participants from each session.

This is an opportunity to recap the material covered during the session, reinforce the key lessons learned, and provide details for the next meeting or program.

Limit lecturing.

Lecturing is the least effective learning technique, especially when it comes from a peer. Leave lecturing to professors or subject matter experts. Instead, focus on the following techniques:

- ☐ Peer-led small or large group discussions.
- ☐ Individuals and small group presentations by challenge participants.
- ☐ Replace a meeting with an experiential program that covers the same material.
- ☐ Use video and audio to teach the same material.

Have an agenda.

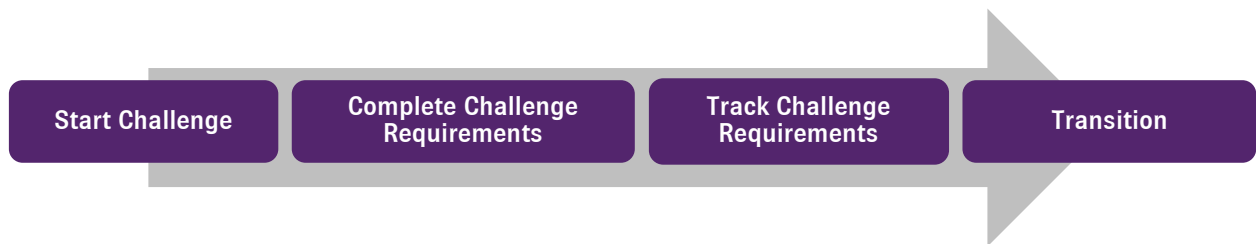
Every quality challenge meeting has an agenda. Below is a list of everything you may do during a challenge meeting. Use this list to develop an agenda for a weekly meeting:

- ☐ Roll call.
- ☐ Review the purpose of the meeting and what will be accomplished.
- ☐ Follow up on the last challenge activity and get feedback from participants.
- ☐ Discuss opportunities to accomplish challenge requirements from upcoming chapter and campus events.
- ☐ Discuss the state of the chapter and opportunities for growth and improvement
- ☐ Hold Q&A with chapter leaders or alumni-volunteers.
- ☐ Encourage participants to speak about recent completed challenge requirements and what they learned.

- ☐ Choose a current event and discuss as a group.
- ☐ Encourage brothers to talk about recent mistakes they have made and what they have learned.
- ☐ Discuss how brothers are incorporating the Ritual into their everyday lives
- ☐ Announce when and where challenge members can meet with challenge coordinators to track progress.
- ☐ Review information from the previous and upcoming chapter meeting.
- ☐ Closing comments, questions and takeaways.

As mentioned above, programming can be included in a challenge meeting or held completely separate. Visit the programming section of this guide to learn more about executing quality challenge programming.

Progressing members through each challenge requires work on the part of challenge coordinators and the vice president to track each member's accomplishments and progress through each challenge. While this process may appear complicated, it can be broken down into four simple elements:



Start Challenge

At the start of each challenge, there are specific responsibilities that fall on both the challenge coordinator and the challenge participant. The coordinator is responsible for:

- ☐ Maintaining a roster of all brothers in his challenge.
- ☐ Tracking the date when a brother starts the challenge.
- ☐ Track the date each brother started the challenge.

At the start of the challenge, the challenge participant is responsible for:

- ☐ Checking in with his challenge coordinator to confirm the challenge start date.
- ☐ Setting the minimum and maximum time frames and upcoming Rites of Passage on their calendar.
- ☐ Understanding the challenge requirements.

Completing Challenge Requirements

As brothers move through the challenge, they participate in meetings and programs and identify independent opportunities to complete challenge requirements. In doing so, the challenge coordinator is responsible for coordinating meetings and programming helping brothers complete requirements for the specific challenge and for assisting participants in identifying opportunities on campus and in the campus community that will satisfy challenge requirements.

The challenge participant is responsible for actively seeking out opportunities to complete requirements and being prepared to present on completed requirements during challenge meeting. Additionally, he is responsible for writing reflections on what he has completed and what he learned from the experience and for meeting with the challenge coordinator to confirm completion of a requirement.

Challenge Tracking

It is difficult to remember everything a challenge participant completed without a method for tracking. Challenge coordinators must track the completion of these requirements. To do this, they should focus on:

- ☐ Using a simple challenge tracker that includes every challenge requirement.
- ☐ Designating a block of time each week when challenge participants can meet with them to discuss completed requirements.
- ☐ Tracking updates and encouraging challenge participants to use this time so they don't fall behind.
- ☐ Publishing the trackers so the entire chapter can see each member's progress.
- ☐ Reminding participants who are approaching the maximum time frame.

At the same time, the participant is responsible for tracking his progress and making time to meet with the challenge coordinator during the designated blocks of time.

Transition

As a brother completes all of the requirements for a given challenge, he enters a transition phase that must occur before he moves on to the next challenge. During this time, he completes the following:

- A reflection on what he has learned during the challenge.
- A transition meeting with the coordinator, vice president of member development, and his mentor to verify he is prepared to move onto the next challenge.
- Schedules a time to participate in and prepares for the next Rite of Passage

3 - MEMBERSHIP LAPSING

SigEp exists to “Build Balanced Men.” The fulfillment of this purpose requires commitment from both the chapter and the individual. A chapter must provide quality programming and development opportunities for all members. Individual brothers must commit to take advantage of these opportunities.

When brothers don’t uphold this commitment, membership lapsing occurs. This process ensures each member is achieving a minimum level of involvement and personal growth. Additionally, it provides distinct “off ramps” for members to decide if they wish to continue their SigEp experience. You can implement this process using the following steps:

Set clear expectations

Review minimum and maximum time frames and challenge requirements whenever a member enters a new challenge. Clear expectations are the first step to implementing membership lapsing.

Provide regular updates and reminders

Challenge coordinators should give challenge participants monthly reminders on how close they are to the maximum time frame.

Don't avoid difficult conversations

If a member is not on track to complete a challenge within the maximum time frame, the challenge coordinator must be able to address the issue directly. Asking questions to identify all issues and offering help and support to the member in an effort to complete the challenge ensures we live up to our expectation of brotherly love.

Refer members to the standards board

If the challenge participant fails to complete a challenge by the maximum time frame due to negligence and non-performance and despite support and offers of assistance from the challenge coordinator, he should be referred by the challenge coordinator to the standards board.

Complete the standards board trial process

The standards board will meet with the member in question in accordance with the Fraternity’s trial procedures and discuss his performance. Assuming all of the previous steps were followed, there are three possible outcomes to this standards board meeting:

- Resignation.
- Expulsion.
- Commitment to a plan with specific benchmarks (rare cases).

It is critical that the standards board accurately documents the process and follows each step of the trial procedures.

Remember, much like failing to pay dues, membership lapsing is a choice by the individual, not a punishment from the chapter.

To implement membership lapsing, chapters should ensure there is supporting language in the local chapter bylaws, membership agreement, and any other standards documents. Clear standards must also be communicated to all members of the chapter.

4- RITUAL EXPERIENCE THROUGH RITES OF PASSAGE

The Balanced Man Program emphasizes a Ritual that is forward looking. To accomplish this, the Ritual of Sigma Phi Epsilon is structured into four Rites of Passage that reinforce the lessons of the Ritual throughout the experience. Before each challenge, brothers experience a Rite of Passage to better understand the relevant values and lessons in addition to the secrets of our Fraternity. Each Rite of Passage builds on the previous to help a brother reflect upon the meaning of his experience in Sigma Phi Epsilon.

Each of the four Rites of Passage precedes the challenge that bears a similar name. For example, the Sigma Rite of Passage precedes the Sigma Challenge and so forth. The complete structure is outlined below:



When Rites of Passage are scheduled on a regular basis, members have the best opportunity to progress through the challenges and brothers have regular exposure to the Fraternity's values. Doing so takes coordination across the chapter's leadership team using the following tactics:

- ❑ The development committee and the standards board meet before the beginning of each semester to schedule the Rites of Passage for the entire semester.
- ❑ The vice president of member development should announce upcoming Rites of Passage weekly at chapter meetings.
- ❑ The chapter performs the Sigma Rite of Passage at each chapter meeting after a new member joins.
- ❑ The Phi, Epsilon and Brother Mentor Rite of Passage are scheduled at least three times a year.

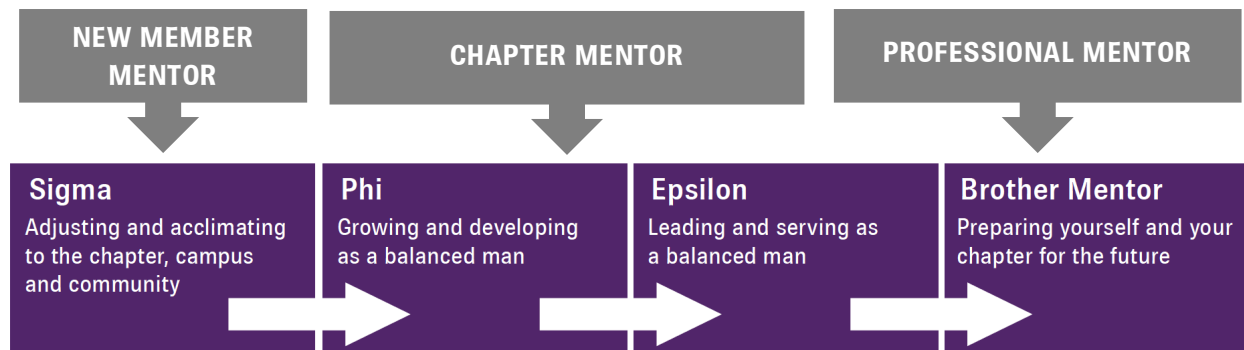
Performing the Rites of Passage takes careful preparation and organization. The following steps ensure proper execution:

- All brothers who play a role in the performance of the Ritual should meet monthly to practice each Rite of Passage.
- On the day of Ritual, the standards board should arrive an hour early to prepare the room.
- On the day of Ritual, ask brothers to arrive 30 minutes before the ceremony so everyone can practice one last time.
- The chaplain should hold a Ritual study one week after the Rite of Passage for all brothers who went through the ceremony.

The chapter can also use the Rites of Passage to engage alumni in the chapter. Alumni attendance at Ritual meetings also reminds them of the teachings and values of the Fraternity and keeps them engaged as volunteers and donors.

5 - FORMAL/EMPHASIZED MENTORING PROGRAM

Mentoring is provided during every phase of the undergraduate experience. As discussed in the “people” section, mentors play a key role in the development of their mentee. The following diagram outlines how the three mentors pair with the four challenges:



NEW MEMBER MENTOR PROGRAM

New member mentors are assigned to a brother within a week of him joining the chapter and remain in place for the duration of the Sigma Challenge.

An effective new member mentor creates a strong foundation for their mentee's SigEp experience. Establishing a new member mentor program that identifies those men in the chapter who are committed to helping brothers transition to life in SigEp and life in college requires the following of the vice president of member development and his committee:

1. Develop written standards for brothers before being assigned a new member as a mentee (details in the People section).
2. Match new members with mentors where there is an instant connection (ex. hometown, major, career interest, involvement on campus, etc.).
3. Meet with potential mentors to set expectations and guidelines as to how they are expected to interact with their mentee, specifically:
 - a. Goal setting – create and review goals with mentee.
 - b. Sigma Challenge – attend meetings and programs as requested by the coordinator.
 - c. Sound mind and body activities – go to the library, on-campus community events, the gym, or anywhere else that increases the new member's exposure to the concepts of sound mind and sound body.
 - d. Alcohol free - find activities that don't involve alcohol to ensure mentees understand this relationship is more than just a “social interaction.”
 - e. Casual interactions - go to the movies, attend a sporting event or find other ways to get to know new members on a personal level.
 - f. Introductions - introduce their mentee to brothers in the chapter.
 - g. Campus orientation – help their mentee understand how to get around campus.
4. Introduce new members to their mentors during the Sigma Rite of Passage.
5. Follow up on a regular basis throughout the Sigma Challenge with mentors and mentees to ensure a positive mentoring relationship has developed.

New member mentors are an easy solution to help new members integrate into SigEp and ensure they remain in the chapter. If your chapter does not have a new member mentor program, start by finding

the best role models in your chapter and matching them up with new members the first week they join. This is an easy step towards improving retention and the membership experience.

CHAPTER MENTOR PROGRAM

Chapter mentors are paired with mentees through a mutual selection process at the onset of the Phi Challenge and retain their mentoring responsibilities through completion of the Epsilon Challenge. Because this mentor relationship has the longest duration it is critical that the pairing be a good match. Assigning or selecting a chapter mentor too early and without consideration only hurts the SigEp experience for both sides.

Often referred to as “big brothers,” these men play a critical role in shaping the path a brother takes during his middle years in college and chapter life. Chapter mentor programs are effective when the vice president of member development and his committee implement the following process:

1. Create written standards for brothers to complete before chapter members must meet to become eligible to become a chapter mentor (see People).
2. Set expectations for mentor/mentee interactions, specifically:
 - a. Creating and reviewing goals with their mentee.
 - b. Attending challenge meetings and programs as requested by the coordinator.
 - c. Making time to go to the library, gym or to find other avenues to grow mentally and physically together.
 - d. Helping their mentee identify strengths, passions, and opportunities for growth.
 - e. Supporting their mentee to get involved in campus organizations.
 - f. Finding weekly opportunities to spend time together without alcohol.
 - g. Guiding their mentee in his academic studies and pursuits.
 - h. Finding a monthly service project to participate in together.
 - i. Inviting their mentee to attend meetings or events dealing with an on campus organization the mentor is involved with.
3. Meet with all eligible mentors to outline these expectations.
4. Ask brothers completing the Sigma Challenge to submit a list of 5 brothers, in priority order, who they would like as a chapter mentor.
5. Identify the first brother on the list who meets the standards for mentors and confirm his commitment to mentor the mentee.
6. Notify the mentee of his new chapter mentor.

Chapter mentors are a catalyst for growth for brothers during the crucial years of college. Following the steps above will greatly improve each member’s fraternity experience.

PROFESSIONAL MENTOR PROGRAM

Members starting the Brother Mentor Challenge seek and engage a professional mentor for the duration of their time in the chapter.

These mentors are intended to help upperclassmen brothers prepare personally and professionally to transition to life after college. Professional mentor programs are effective when the vice president of member development and his committee work with volunteers to implement the following process:

1. Set written standards for professional mentors (see People).
2. Identify a list of potential professional mentors who meet these standards.
3. Discuss tactics for finding a professional mentor during a brother's transition out of the Epsilon Rite of Passage, specifically:
 - a. Identifying five or more potential mentors who meet the chapter's standards.
 - b. Ask a potential mentor to serve in that capacity.
 - c. Clearly define expectations for the mentor/mentee relationship.
4. Confirm the selection of a mentor with the Brother Mentor Challenge Coordinator.
5. Set expectations with the mentor around what type of activities they should be involved in:
 - a. Goal setting- creates and reviews goals with their mentee.
 - b. Chapter programs- attends all programs or meetings the challenge coordinator asks of them.
 - c. Monthly meetings- sits down one-on-one with their mentee to check his personal and professional progress.
 - d. Networking- helps mentee network in his desired career field.

When implemented correctly, professional mentor programs help our oldest members make a smooth transition to life after college. Brothers will be better employees than their peers and more prepared to live a balanced life outside of college.

FREQUENTLY ASKED QUESTIONS

Why should new members be treated equally?

As previously mentioned, our Founders were all equal when they were new members. Members need to prove their worthiness through the recruitment process. This is the way it works in most organizations and jobs. When applying for a new job, you submit a resume, attend an interview and prove your worthiness. Furthermore, if you hold your new members to different standards than your older members you are sending this message: “you only have to do these things for this period of time and then you are free.” You will see the consequences of that message when older members are not contributing to the chapter.

But what if the new member is messing up, how do we punish him?

The Balanced Man Program promotes equal rights and responsibilities for all brothers. If a new member makes a mistake, ask yourself a few questions:

- ☐ Why didn't the older members step up and help him?
- ☐ If an older brother committed the same action, would it be a mistake?
- ☐ How could the challenge coordinators or chapter leaders better have clarified expectations?

Work with the new member's mentor to help him correct his behavior. Additionally, make sure older members are “modeling the way.” Remember, at any time you can send any member to standards board for their review.

What if new members don't respect older members?

Respect is given to those who respect others. Respect is neither given automatically nor based on age or level. New members will respect those that lead by example.

Why should new members be able to vote?

Voting will allow new members to take ownership over the experience and help motivate them to maintain involvement. By the time they join, new members should have a basic understanding and, if educated properly by older members, should feel comfortable voting.

Why can't we call our new members "pledges?" Everyone else on campus does it.

Practice like you play. Your new members are not pledging and they are not treated this way. Word choice factors into culture. The negative connotations that come along with the word “pledge” will end up in the culture of the chapter.

How do you know if someone is worthy of the secrets of the Fraternity?

This is a function of the quality of men a chapter recruits. A chapter should only offer membership into the fraternity to men who meet our standards and through which have demonstrated their worthiness. We should not wait until after a member joins to then ensure he meets the standards of being a brother in Sigma Phi Epsilon.

How do we change our chapter's culture with respect to single tiered membership?

Start with your Sigma Challenge. Do new members have the same rights as the rest of the chapter? Do new members have the same opportunities to participate and lead? If the answer is no, create a list of rights and responsibilities for all members. Next, look at what responsibilities members have after they finish the Sigma Challenge? Are they required to finish challenges in the maximum time frame? Do they have to contribute to the day-to-day operations of the chapter? If the answer is no, create a list of expectations for all members. Sit down with the older members of the chapter and make sure they understand these expectations.

Does "self-paced challenges" mean we can't have "classes?"

Self-paced means you should not hold up someone's progression through the challenge because of the actions of someone else. Simply put, when a member has fulfilled all of his requirements, he moves on to the next challenge.

How does year-round recruitment affect the execution of the Balanced Man Program?

When the Balanced Man Program is properly executed it perfectly aligns with year-round recruitment. Self-paced challenges allow for members to enter and exit challenges at their own pace. Let's say your chapter recruits a member in October. The members in the sigma challenge have completed weeks A, B, and C. The new member joins in at week D, finishes the remainder of the term and then completes the weeks missed at the beginning of the next term or cycle.

Can we participate in "Rush" or Formal Recruitment and operate the Balanced Man Program?

Yes, the program is designed to be flexible whether taking members in at the beginning, middle, or end of a term. Regardless of when a member joins, the program should be built in such a way that it is focused on the individual progress of a brother, not the progress of the group.

Can a member join as a junior or senior and still reach the Brother Mentor Challenge?

Yes. If a member is a junior or older, he can demonstrate which requirements he has met for the first three challenges. The time frames for the challenges can be waived, and he can complete the remaining requirements in a shorter amount of time. However, he still needs a four-six-week onboarding process to become acquainted with SigEp and the members of the chapter.

Why can older members move through the challenges more quickly?

SigEp and the Balanced Man Program are committed to the development of every member. After two years on a college campus, a man will have already undergone a certain amount of development outside the chapter. In this case, it is possible that the imposed minimum time would be a detriment to a man's undergraduate experience, rather than an enhancement. This delay would be inefficient and counterproductive to the man's development. Minimum times can be waived for those members who either have less than two years of school remaining before graduation or are approved unanimously by the standards board.

What if an older brother is busy and can't complete the challenges? Is he subject to membership lapsing?

A minimum level of involvement and achievement is required to remain in the chapter. There are always exceptions to the rule but these should be few and far between. If members are consistently allowed to remain in the chapter without completing challenge requirements, it sets a low standard for the rest of the chapter.

Why does the Balanced Man Program break up the Ritual?

The Balanced Man Program offers additional exposure to the Ritual. A member is given ample time to reflect on the importance of the Ritual as he progresses through each challenge. Additionally, the chapter is performing the Ritual more often, creating a stronger understanding and affinity to its teachings.

PROGRAMMING

PROGRAMMING INTRODUCTION

As previously mentioned, to get the most out of the Balanced Man Program a chapter must:

1. Understand the philosophy of the Balanced Man Program and implement those tenets in the experience.
2. Have people who understand philosophy and want to support and implement the Balanced Man Program.
3. Define a process of the Balanced Man Program for the people to implement.

Finally, a chapter must provide quality programming that fits into the process. This is done by providing programs and experiences in three transitional stages and five areas of development that are comprehensive within the undergraduate experience:

THE FIVE AREAS OF DEVELOPMENT



SigEp

Knowledge and understanding of the Fraternity



Intellectual

Academic performance and emotional and cultural growth



Physical Health and Wellness

Maintaining a healthy quality of life



Leadership

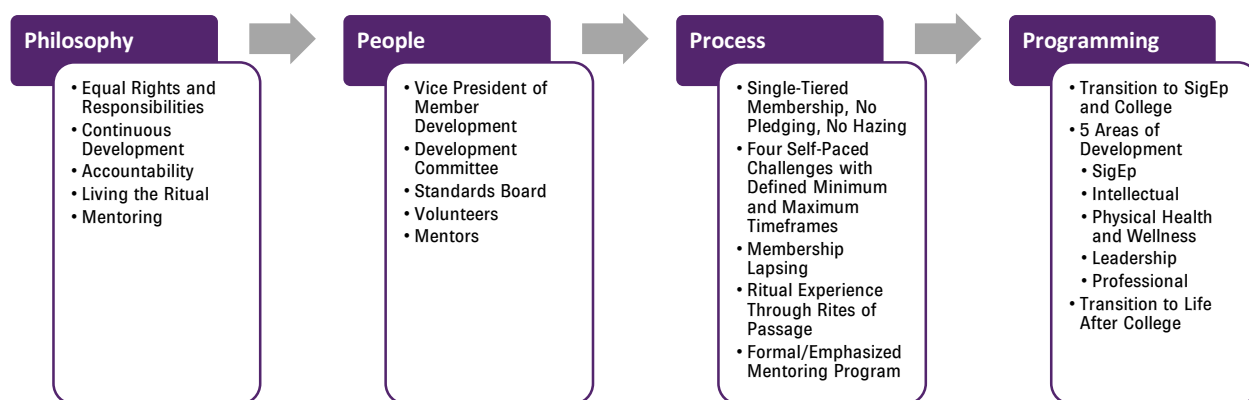
Growth and experience as a leader



Professional

Preparation for career success

THE BALANCED MAN PROGRAM FRAMEWORK



Quality programming does more than simply improve the undergraduate experience. It equips members with the skills and experiences to be successful after college. This section outlines the programming details in each area as well as frequently asked questions as it relates to development programming and tips for successful implementation.

This section will prepare you to:

- Learn best practices for helping new members transition to college and to SigEp.
- Evaluate whether your current challenges include the programming areas discussed in this section.
- Understand how to execute a quality programming event.
- Utilize the SigEp resources including challenge databases to improve your current challenge or build a program from scratch.

In addition to reading this section, explore the following resources:

CHALLENGE DATABASES

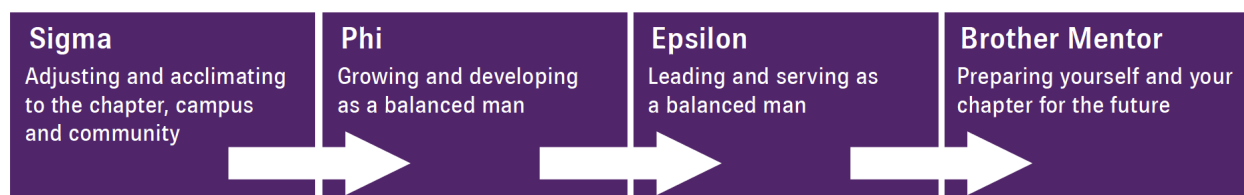
The [Balanced Man Program Implementation Page](#) on the SigEp website provides four challenge databases. Each database has over 100 suggestions for challenge content:

- [Sigma Challenge Database](#).
- [Phi Challenge Database](#).
- [Epsilon Challenge Database](#).
- [Brother Mentor Challenge Database](#).

These documents were created to provide you with quality programs and activities that fulfill the outcomes of each challenge. This document is not intended to be a standalone challenge. Instead, it is a menu of options that can be used to improve current challenges or build new ones.

PROGRAMMING SPECIFICS

Each challenge is filled with programming to help challenge participants grow and develop. These programs accomplish set outcomes for each challenge. To decide on what programs to offer, we must understand the intended outcomes for each challenge.



Sigma Challenge Outcomes:

- Understand the history, structure, benefits and values of the national Fraternity and local chapter
- Understand the resources and involvement opportunities available on campus.
- Develop skills necessary to live independently including effective time and stress management skills, as well as test taking and study habits.
- Understand how to maintain a sound body in college.
- Understand the importance of SMART goals and how to achieve these goals.
- Obtain new member mentor and understand how to utilize him.

Phi Challenge Outcomes:

- Understand your role in the chapter and the benefits of fraternalism.
- Engage in a chapter or campus leadership role.
- Create a personal path for academic success (declaring major, developing habits, mapping out classes).
- Develop healthy habits in physical, nutritional and mental health.
- Develop an understanding of personal strengths and how to leverage these strengths
- Develop cultural and spiritual awareness.
- Obtain a chapter mentor and work with him to set and achieve SMART goals.
- Learn and develop basic leadership skills and practice these skills through involvement on campus and in the chapter.
- Build a foundation for professional development (resume, internship opportunities).

Epsilon Challenge Outcomes:

- Improve the chapter by taking on a leadership role.
- Continue on a personal path for academic success.
- Develop healthy habits in physical, sexual and preventative health.
- Enable other brothers to build a sound mind and a sound body.
- Further develop an understanding of personal strengths and how to leverage these strengths.
- Experience opportunities to develop an appreciation for the arts, civic engagement and basic life skills (public speaking, etiquette, etc.).
- Experience opportunities that drive you outside your comfort zone.
- Set SMART goals and work with mentor to achieve these goals.

- Further develop leadership skills and practice these skills through involvement on campus and in the chapter.
- Develop basic professional skills and use these skills to obtain an internship.

Brother Mentor Challenge Outcomes:

- Improve the chapter by passing on lessons learned and best practices to younger members and preparing to contribute as an alumnus.
- Explore academic opportunities beyond the undergraduate experience.
- Develop healthy habits in physical and preventative health.
- Develop basic life skills to succeed after college (financial, cooking, home maintenance, insurance, etc.).
- Prepare for professional success after college by developing necessary skills, establishing a network of volunteers and alumni, and understanding how to leverage the SigEp experience in the professional world.
- Set SMART goals and work with professional mentor to achieve these goals.
- Further develop leadership skills and practice these skills through involvement on campus and in the chapter.
- Obtain a professional mentor and work with this mentor to grow professionally.

FIVE AREAS OF DEVELOPMENT

To accomplish these outcomes a chapter should provide programming across five areas of development. These areas branch across every challenge and help members develop critical skills to succeed through college and beyond.



1 - SigEp Development

Membership in SigEp is for a lifetime, not just four years. Therefore, brothers need to learn more about the Fraternity and its members throughout their time in the chapter to gain perspective on where the chapter has been and where it is headed. Chapters must provide opportunities for brothers to build relationships, learn about the Ritual and take chapter leadership positions. This area helps members understand the SigEp experience is a lifetime journey, not just four years.



2 - Intellectual Development

SigEp subscribes to the ancient Greek belief that the mind is central to humanity and that the body serves as a vessel for the mind, and thus the exercise of both is necessary for a balanced life. Developing a sound mind means living a lifestyle that allows you to expand your mind inside and outside of the classroom setting. By increasing the intellectual growth and academic performance of each member, the fraternity maintains its relevance.



3 - Physical Health and Wellness Development

Many students enter college with a sound body but don't make it a priority as other priorities begin to fill their time. To achieve balance in college our members must learn how to live a healthy lifestyle. The chapter can assist by providing programming that challenges members to build healthy habits for a lifetime. Programming in this area should cover physical, nutritional, sexual and preventative health.



4 - Leadership Development

In life there are “leaders” and then there are “those who lead.” Leaders hold positions. Those who lead inspire others to do great things. College campuses are filled with students who hold positions and lack the skills to inspire others. With the correct programming, our members can gain the skills to inspire others to do great things. Doing so also increases the presence of SigEp leaders across campus that are making a difference in student organizations and academic colleges.



5 - Professional Development

Very few classes in college teach students how to properly transition into the professional world. The Fraternity must fill this void. With quality professional development programming our members will be more likely to succeed after college than their peers. Additionally, professional development programming and networking is a great opportunity to engage alumni in the development experience.

Specific programming ideas for each one of the themes mentioned above are in the challenge databases. These documents are valuable resources to fulfill the programming needs of a chapter. Instructions for utilizing these resources are outlined in the next section.

TRANSITIONAL PROGRAMMING

There are three areas of programming that are the most critical to the SigEp experience. These areas help provide guidance and support during crucial points in our members lives.

TRANSITION TO SIGEP

Research shows the first 30 days of membership in an organization are the most important. Within the first month new members form their perceptions of the organization, develop habits, build loyalty and create relationships. Without a proper on-boarding, members are at risk of starting their fraternity experience on the wrong foot. Alternatively, focusing on the transition to SigEp has the following benefits:

- More engaged members
 - The decision to join is reaffirmed by the value they receive
 - They build strong bonds of loyalty to the fraternity.
 - Members build stronger friendships and relationships with brothers
- More productive members
 - Members better understand the benefits and opportunities of the fraternity.
 - New members are more engaged and feel empowered to participate.
 - Brothers develop strong habits that stay with them throughout their experience.
- Higher member retention
 - Experiencing a positive experience in the first 30 days of membership increases a member’s chances of staying in the Fraternity throughout his time in college.

Programming in this area is accomplished in the “SigEp Development” area of the Sigma Challenge. For examples, please visit this section of the Sigma Challenge Database.

TRANSITION TO COLLEGE

A young man's transition to college is one of the most pivotal growth points in his life. Students are living on their own for the first time and some aren't prepared to do so. They don't have their parents there to help them adjust. By focusing on the transition to college:

- New members are prepared to succeed in college.
- The Fraternity helps to fill the void between home and college.
- Brothers begin to see the chapter as their "home away from home."
- Parents recognize the immediate value that SigEp provides to their son.

Programming in this area bridges the Sigma and Phi Challenges. This area compliments transition to college well as it covers the remaining four development areas: Intellectual, Physical Health and Wellness, Leadership and Professional. With the right programs, chapters have an opportunity to be a huge asset in their members' transition to college. See the Sigma Challenge Database and the Phi Challenge Database for programming examples.

TRANSITION TO LIFE AFTER COLLEGE

College men are leaving school less prepared to succeed in the working world. They lack the professional skills to meet their employer's expectations and the personal skills to lead a balanced life outside of school. The Fraternity is positioned to assist with this critical transition by providing programming to help fill the gap between college and the working world. Doing so provides the following benefits to SigEp and its members:

- Keeps SigEp relevant to brothers as they progress through college.
- Gives members a unique skill set to set them apart from their peers at graduation.
- Prepares brothers to live and succeed personally outside of college.
- Increases the likelihood that members are prepared to find jobs and enter graduate school.

It is difficult for an undergraduate challenge coordinator to teach upperclassmen about life after college when they have not experienced that transition. Identifying volunteers and alumni to facilitate programs on this topic is critical to successful programming. Additionally, professional mentors can play a role by allowing their mentees to job shadow, teaching them to network in a given field, or providing best practices for balancing a healthy lifestyle after college.

Programming in this area is accomplished through the leadership and professional development areas in the Brother Mentor Challenge. See the Brother Mentor Challenge Database for programming examples. With the right programming facilitated by the right people, supported by the right mentors, chapters have an opportunity to add value at a time in the membership experience when brothers typically question the lifelong value of the fraternity experience.

IMPLEMENTING QUALITY PROGRAMMING

Many chapters lack an organized approach to implementing programming in each challenge. The following diagram outlines the process by which chapters can assess and improve the quality of their development programming:



The graphic above outlines five steps to help execute quality programming. Here is a closer look at each step:

ASSESS

Know what you want participants to learn from the activity. Discuss the desired outcomes with other leaders.

PLAN

Make a list of all the supplies you need and understand how the activity works. Make a list of tasks you need to complete before the activity. Know how much time you will need and how the activity will end.

PREPARE

Complete all tasks on your list and assemble any materials you will need. Coordinate with any speakers or venues that are involved in the activity to make sure everyone is on the same page.

LEAD

Show up prior to the activity to prepare and troubleshoot. Make sure participants know the rules and expectations. Execute the activity.

EVALUATE

With the challenge participants, look back at the activity and assess strengths and weaknesses. Make a list of these items and keep notes for the future.

Following these steps allows a chapter to stay organized and continually assess their performance. Some additional tips include:

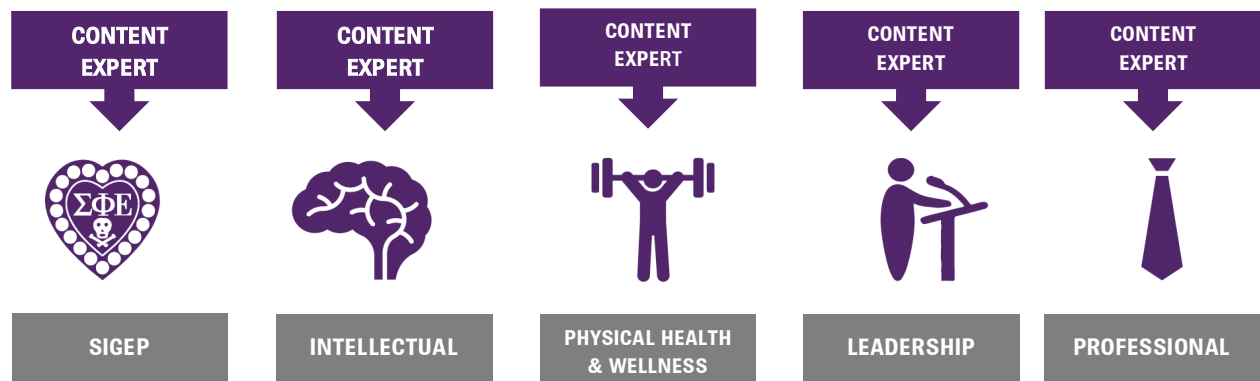
- Dedicate at least 20 percent of your chapter's budget to development programming.
- Keep detailed notes on how certain programs are executed. This can include: invitations, contact information, task lists, etc. Pass these notes onto the next officer.
- Recruit the best people outside of SigEp to help with programming. Find faculty, professional mentors, sorority women, service organizations and alumni to help execute challenge programming.

- Invite potential new members to participate in challenge programming. This gives them an opportunity to see the benefits of the Balanced Man Program in action.
- At the beginning of each challenge meeting, ask participants for feedback on the latest programming. Record their feedback and pass this on to the next officer.
- Before a brother moves onto the next challenge, have him fill out a survey rating his favorite and least favorite programs of the challenges. Use this information to make improvements.

If your chapter does not have an organized approach to provide programming, use the diagram and tips above to get headed in the right direction.

UTILIZING CONTENT EXPERTS

Content experts can play a crucial role in helping your chapter implement quality programming. Recruit a content expert to support each programming area:



These volunteers can be alumni, university faculty or staff, graduate students or even members of the local community. Here are some examples:

- SigEp Content Expert- SigEp Alumnus with an in-depth knowledge of the fraternity's history, values and Ritual.
- Intellectual Content Expert- Staff member from the university's "Center for Academic Success."
- Physical Health and Wellness Content Expert- Graduate student specializing in kinesiology or athletic training.
- Leadership Content Expert- Staff member from the university's leadership school.
- Professional Content Expert- Staff member from the university's "Career Center."

For more information on the roles and responsibilities of content experts look back at the "people" section of this resource.

UTILIZING CHALLENGE DATABASES

Each challenge database contains over 100 suggestions for challenge content. These databases line up with the development areas and themes mentioned above. These resources can be used in two ways:

IMPROVING CURRENT CHALLENGES

The challenge databases can be used to improve the quality of your chapter's current challenges. To do so, follow these steps:

1. Start with the Sigma Challenge. Review the challenge outcomes, development areas and themes outlined above.
2. Compare these outcomes, areas and themes to your current Sigma Challenge and see which items you are missing.
3. Review the Sigma Challenge Database. After reviewing each development area and theme and deciding which ones to add, find a suggested activity or program to incorporate at your chapter.
4. As you go through, see if there are activities in the database that could replace some of the current ones in the challenge. If you find some, replace the current challenge activities with ones from the databases.
5. Repeat this process for the Phi, Epsilon and Brother Mentor Challenges.

BUILDING NEW CHALLENGES

The challenge databases can be used to build entirely new challenges. To do so, follow these steps:

1. Start with the Sigma Challenge. Review the challenge outcomes, development areas and themes outlined above.
2. Review the Sigma Challenge Database. Start with the first theme under "SigEp Development" and choose one or more of the suggestions under the theme.
3. Repeat this same process for the remaining themes and development areas.
4. Repeat for the Phi, Epsilon and Brother Mentor Challenges.

To access the Challenge Databases visit the [Balanced Man Program Implementation Page](#) on the SigEp Website.

FREQUENTLY ASKED QUESTIONS

Should we make all members of the Sigma Challenge memorize the local and national history?

One of the goals of the Sigma Challenge is to help members understand the local and national history of SigEp. Memorizing doesn't guarantee an understanding. Think about studying for a biology test. If you just have to list out all the information and not explain it, you forget what you learned after you take the test. A better strategy is to have the members of the Sigma Challenge research and present the local and national history. This helps them gain a richer knowledge of the information. Additionally, it gives them an opportunity to practice presenting in front of a group.

A lot of our new members leave the Fraternity after a month because they say, "SigEp is not the Fraternity they thought it was." What can we do to raise retention early on?

Look at the best practices outlined in this section. Use the first month of a new member's experience to teach him the values of SigEp. Help him understand all of the development opportunities the Fraternity offers. If his first month is only filled with social events this sends the message that SigEp is nothing more than a social club.

Most of our challenge meetings consist of the challenge coordinators lecturing participants on the topics of the meeting. The challenge participants are not engaged and don't see value in the meetings. How can we change this?

To engage challenge participants, have them experience what they are learning. Get out of the classroom and provide opportunities for them to get experience with the topics you are covering. Additionally, find volunteers that have expertise in the topics you are covering. Ask them to teach challenge participants about this topic. These strategies allow challenge participants to learn from the experts and get hands on experience.

Our juniors and seniors don't see value in SigEp. How do we engage them?

One of the biggest mistakes chapters make is not providing programming opportunities for their oldest members. Provide programs on professional development, life skills and other relevant topics. Spend money on these programs. It doesn't have to be much but make sure you are putting enough time, money and resources to each program so you attract these members.

We don't have alumni to lead programs on professional development and life skills for the Brother Mentor Challenge. What should we do?

Go outside SigEp to recruit speakers to facilitate these sessions. Ask community volunteers or university officials to deliver programming on professional development and life skills.

CONCLUSION

CONCLUSION

In 1901, our founders set out to create a fraternity experience that challenged the status quo. They knew this endeavor was not going to be easy. They knew they would be met with opposition for being different. They knew it would take countless hours of hard work to overcome the challenges they faced and achieve their goal. As a result, they found like-minded men who were committed to the Cardinal Principles of Sigma Phi Epsilon.

Today, the same challenges and opportunities exist for you with the Balanced Man Program. The program is different, and for good reason. It was created to help your chapter provide the ultimate fraternity experience. The program continues to receive acclaim for leading the fraternity world in the experience of our members. The program recently received mention in a New York Times article lauding the Balanced Man Program as a program “which replaces the traditional pledging period with a continuing emphasis on community service and personal development.” The Balanced Man Program has also been mentioned on NPR in a discussion on progress to combat fraternity hazing and even on a national political scale, being featured as a positive example by congressional leaders working to combat college hazing.

These are all examples of the support we receive for leading the way in providing a more positive experience. In order to continue to receive this support and to take full advantage of this program, your chapter must:

- **Understand the philosophy of the Balanced Man Program and implement those tenets in the experience.**
- **Have people who understand the philosophy and want to bring that philosophy to life in order to support fellow members.**
- **Define a process for the Balanced Man Program to be implemented on your campus.**
- **Provide quality programming that teaches invaluable skills that set your members apart from their peers.**

You are not alone on this journey. Use this resource to help you implement the philosophy, people, process and programming of the Balanced Man Program. Recruit dedicated chapter brothers to help you execute each step. Seek guidance and support from your volunteers and the Headquarters staff.

Successfully implementing the Balanced Man Program is a long-term investment. The lessons you learn as a leader will stay with you long after your time in college. Most importantly, the experience you provide will positively impact your brothers for the rest of their lives.

MEMBER ACCIDENT PROTECTION PROGRAM

A benefit of membership of the Sigma Phi Epsilon Fraternity

What is the Member Accident Protection Program?

The member accident protection program of the fraternity is a benefit of membership. The program is intended to compliment the health insurance of every undergraduate member of the Fraternity for injuries as a result of accident. The premium for this program is paid by the Fraternity and the program may be cancelled or changed at the sole discretion of the Fraternity at any time. The information provided is for informational purposes only and is not intended to replace the insurance contract. For specific information regarding any claim, please contact Holmes Murphy.

Who is an insured person under the member accident program?

All eligible undergraduate members of the fraternity are insured for covered injuries that are incurred while the policy is in force and occur while:

- The member is in good standing with the Fraternity. Membership will be verified with SigEp. Therefore, it is important that new members are reported in a timely manner and that all dues and insurance fees have been paid; and
- The member is enrolled as a student at an institution of higher learning where there is an undergraduate chapter. If a covered injury occurs during the holiday or summer break, then the eligible member must have been enrolled in school as a student during the prior school term and be continuing in school the following term.

What protection is provided?

The following limits of protection are provided;

- \$10,000 accident medical expense and/or dental accident injury maximum
- \$5,000 accidental dismemberment and/or accidental death benefit
- 52 week benefit period
- \$0 deductible

How are benefits paid?

- Additional benefits will be paid only when the eligible medical expense is not recoverable from any other insurance policy, service contract or workers' compensation policy. This policy will reimburse deductibles and co-pays of health insurance programs.
- Benefits for any one accident shall not exceed, in the aggregate, the medical expense maximum.
- In the absence of any other applicable coverage, this coverage is primary.

What is accidental dismemberment?

When, because of covered injuries, the Insured sustains any of the following losses within 52 weeks after the date of the accident, the Company will pay benefits for loss of:

Paraplegic or greater.....100%
Two or more members.....100%
One member.....50%

Member is defined as hand, foot or sight of eye. The percentage shown is applied to the accidental dismemberment principal sum. Loss means severance of the limb at or above the joint and total and irrecoverable loss of the entire sight. Loss must occur within 52 weeks after the date of the accident. Only one of the amounts (the largest applicable) will be paid for any one accident.

What is accidental death?

The Company will pay the accidental death principal sum when a covered injury results in the Insured's death. Death must occur within 52 weeks of the covered accident. If accidental dismemberment benefits have been paid for a loss resulting from the same accident, the accident death benefit will not be payable. To receive benefits, loss must be independent of sickness and all other causes.

What are the exclusions on this policy?

The policy does not cover loss nor provide benefits for:

- Sickness or disease, in any form;
- Infections except pyogenic or bacterial infections caused wholly by a covered injury;
- Fighting (unless an innocent victim);
- Injury due to participation in a riot;
- Injuries due to intramural tackle football, hockey or rugby. All other intramural activities are covered;
- All intercollegiate sport participation including off season conditioning;
- Injuries resulting from the use of any illicit drug and/or narcotic unless administered upon the advice of a physician;
- Claims occurring while parachuting or hang-gliding;
- Suicide, attempted suicide or intentionally self-inflicted injury;
- Injury resulting from any declared or undeclared war;
- Injury while in the armed forces of any country;
- Cosmetic surgery;
- Hernia in any form;
- Expenses for treatment on or to the teeth, except for treatment resulting from injury to natural teeth;
- Eyeglasses, hearing aids, and examination for the prescription or fitting there of;
- Loss resulting from air travel, except as a fare-paying passenger on a commercial airline;
- Treatment provided in a government hospital unless the Insured is legally obligated to pay such charges;
- Injury covered by any workers' compensation or occupational disease law;
- Expenses covered by any other policy.

Important notes:

- **The Member Accident Protection Program is NOT a substitute for health insurance. It provides NO protection for sickness or illness. Every member of the Fraternity must be certain that they obtain health insurance coverage from their parents or another source.**
- **Coverage applies to United States students only. Coverage does not apply in Canada.**
- **Policy requires reporting within 180 days. A delay in reporting can cause your claim to be denied or have your benefit payments delayed.**



To whom are claims reported?

Holmes Murphy
13810 FNB Parkway
Suite 300
Omaha, NE 68154

(800) 736-4327

Fax: (800) 328-0522

fraternityclaims@holmesmurphy.com

www.holmesmurphyfraternal.com

When you call to report a claim you will need to reference that you are reporting this claim as a member of the fraternity program and provide the name of the fraternity and the university/college at which you are a member.



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Ruck was a mind-changing experience. It's one thing to sit in a classroom and be told what leadership is. It is another to learn what leadership is, to experience it and to discuss it with men who are like-minded, full of potential and invested in the same goal of improving themselves.



**June 17-21, 2020
Richmond, Virginia**

**Apply by March 1
sigep.org/ruck**