

SigEp



SHAWN MCKENNA PRESIDENTS ACADEMY

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.**

Shawn McKenna



Shawn McKenna was a member of the Maine Alpha Chapter at the University of Maine, where he earned his degree in business administration in 1977. From 1977 to 1982, Shawn served on Sigma Phi Epsilon's staff as a regional director, director of chapter services and managing director for the National Housing Corporation (now SigEp National Housing, LLC).

A Director of SigEp National Housing for over 30 years, Shawn served as its president from 1988 to 1990. Brother McKenna selflessly and heroically served as a volunteer for several chapters and as a mentor for brothers young and old. In 2007, he received SigEp's highest honor, the Order of the Golden Heart. At the 2009 Grand Chapter Conclave, Shawn was elected to Sigma Phi Epsilon's National Board of Directors.

Professionally, Shawn worked for The Procter & Gamble Corporation during the 1980s, wrote a book on marketing and later left to form his own business. He co-founded SDO, Ltd., in the early 1990s and served as the company's managing director and CEO.

Shawn's life work revolved around the study and teaching of leadership. He developed an innovative leadership curriculum and dedicated his life to teaching leadership to a younger and promising generation. The Shawn McKenna Presidents Academy will teach the young men charged with leading our chapters how to make tough decisions and how to think critically to achieve their goals. They'll learn to be the men that our society needs — men like Shawn.

Self-management: My passions for leadership

What are the reasons I chose to run for chapter president?

My top three goals for my chapter are:

1.

2.

3.

What is my personal passion for leadership? Why is leading my chapter important to me?

What is going to make me the best possible president for my chapter? What do I need to do to become a better leader?

Self-management: My leadership strengths

<div>Strengths</div>	<div>Weaknesses</div>
<div>Opportunities</div>	<div>Threats</div>

On a scale of 1-10, how self-aware am I?

1 2 3 4 5 6 7 8 9 10

Why do I rank myself as this?

What is one piece of feedback I've received recently about my leadership?

Did I agree or disagree with this feedback, and why?

What, if anything, have I done or plan to do to adjust my leadership based on this feedback?

Self-management: My leadership strengths

For me, what is the difference in confidence and ego?

How do I exhibit either, or both, qualities?

How can I channel my confidence in the right direction?

How do I use my confidence to help empower and lead other?

Moving from policy to practice

[illegible]

[illegible]

Managing others: Asking questions

Scenario 1:

One participant is the President, the other is a brand new chapter member. As the president, you need to find out how the new member's experience has been thus far, and figure out what adjustments might need to be made to the Sigma Challenge.

Scenario 2:

One participant is the President, the other is a member of the recruitment committee. As the president, you need to gauge the recruitment committee member's interest in running for the role of VP Recruitment.

Takeaways and reflections:

Asking questions to empower action

What challenges are you facing in your role?

How do you plan to address those challenges?

Who can you empower to help you solve those challenges?

What are your next steps?

How can I support you?

Asking better questions

Scenario 1

One participant is the President, the other is the VP Finance. The VP Finance is struggling to collect dues, but hasn't tried anything other than making announcements in chapter meetings. The President's job is to get the VP Finance to implement dues accountability, seek help from the rest of the exec board on collecting, and explain to the chapter that it's important they pay their dues.

Scenario 2

One participant is the President, the other is the VP Recruitment. The VP Recruitment is struggling to reach their recruitment goal, and is discouraged. The President's job is to get the VP Recruitment to recognize the importance of reaching the recruitment goal, get him to commit to asking for support from several other/new chapter members, identify what's wrong with their current process and fix it

Scenario 3

One participant is the President, the other is the Chaplain. The Chaplain is failing to expel a member who was caught hazing. The President's job is to show the Chaplain why it's important to expel someone who was hazing a new member, help him identify who needs to back the Chaplain up in that process, and create a plan to expel that member and create a chapter culture of accountability

Reflections/takeaways:

My values

Authenticity	Kindness
Achievement	Knowledge
Adventure	Leadership
Authority	Learning
Autonomy	Love
Balance	Loyalty
Beauty	Meaningful Work
Boldness	Openness
Compassion	Optimism
Challenge	Peace
Citizenship	Pleasure
Community	Poise
Competency	Popularity
Contribution	Recognition
Creativity	Religion
Curiosity	Reputation
Determination	Respect
Fairness	Responsibility
Faith	Security
Fame	Self-Respect
Friendships	Service
Fun	Spirituality
Growth	Stability
Happiness	Success
Honesty	Status
Humor	Trustworthiness
Influence	Wealth
Inner Harmony	Wisdom
Justice	

My top 5 values

1.

2.

3.

4.

5.

Situational leadership: Scenarios

Scenario 1

The chapter is placed on a temporary cease of operations for risk management and substance free policy violations. Have the Presidents discuss how they would work with their executive board to create an action plan to have that cease of operations lifted and have better practices and policies in place moving forward?

Scenario 2

The chapter is struggling to meet recruitment goals. Based on the background and passions of the President, how would he best lead the chapter to reach their recruitment goals?

Scenario 3

The chapter is having significant apathy issues with brothers participating in challenge meetings. Based on the background and passions of the President, how would he best lead the chapter to improve the BMP and increase challenge meeting participation?

Takeaways/reflections:

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, measureable, 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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CHAPTER PRESIDENT

OFFICER GUIDE

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[SigEp's Risk Management Policies](#)
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[Balanced Man Program Guide](#)
[Maximizing Officer Elections Resource](#)
[Officer Transition Guide](#)
[Officer Guides](#)

INTRODUCTION

Congratulations on being elected Chapter President! Being President is not only an honor, but a great responsibility. Your brothers have selected you to lead your chapter. Your brothers have trusted you to take your chapter to great heights. The members of your chapter, your volunteers, your university administration and the Headquarters staff will look to you for leadership and consistent communication. Your actions will inspire the successful operation of your chapter and assist chapter members in building a Sound Mind in a Sound Body.

The Ideal

The ideal President is a forward-thinking and driven leader who is committed to SigEp's values. The President must create a shared vision for chapter success and effectively communicate this vision to the executive board, the chapter, volunteers, university administration and Headquarters staff. At various times throughout his tenure, the President will be a doer and a delegator; he will encourage and empower brothers and sometimes he will have difficult conversations with brothers. The ability to thoughtfully select which role you should play in different situations will make you a successful leader and President.

Impact

The SigEp experience has been a life-changing experience for hundreds of thousands of brothers for over 100 years. As President, you have the opportunity to impact the current undergraduates in your chapter and the many brothers who have not yet joined SigEp.

When done right, SigEp can be the most transformative experience in a young man's life. SigEp helps men transition from high school to college; SigEp provides leadership opportunities for brothers throughout college; and, SigEp teaches men lifelong skills and professional skills that set our brothers up for success after college. Perhaps most importantly, SigEp provides lifelong friendships grounded in Virtue, Diligence and Brotherly Love.

As President, you will lead your executive board and chapter to provide the outstanding experience that SigEp promises. These efforts will help brothers today and for the rest of their lives.

Purpose of this Guide

This guide outlines the necessary steps and supporting resources to ensure that you are most effective in your role and that you and your chapter see the impact outlined above. Should you have questions or need support, contact your [regional director](#).

PEOPLE

Introduction

The President has many responsibilities. If not managed properly, these may become overwhelming. Understanding and managing each of these roles and responsibilities will allow you and your executive board to accomplish your goals in the relatively short time you hold this position.

Job Description

To be successful during your term in office you must first understand the key roles and responsibilities as outlined below:

Key Roles:

Chief Executive Officer: You set the strategic vision for the chapter and ensure this vision aligns with SigEp's mission and values. You hold yourself, officers and members accountable to the actions that will fulfill this vision.

Relationship Coordinator: You coordinate and collaborate with your chapter's volunteers, your university's fraternity and sorority life staff and the regional director.

Risk and Crisis Manager: You should work with your vice president of programming and risk management chairman to foster a safe and healthy environment for your brothers and guests.

Ritualistic President: You assist in the execution of the Ritual by supporting the planning of the Ritual and serving as the President during the Ritual.

Key Responsibilities:

- Lead and manage your executive board.
- Delegate tasks and projects to the appropriate officer.
- Set SMART goals and hold members accountable to those goals.
- Serve as the ritualistic President.
- Facilitate weekly executive board and chapter meetings.
- Communicate regularly with volunteers, university staff and the regional director.

- Track activities, wins and opportunities to improve in a way that leads to a seamless transition.
- Ensure chapter operations align with local chapter and Grand Chapter Bylaws.

Your year as Chapter President will be full of excitement and challenges. **It is important to remember you must lead the way.** By matching your actions with your words, you establish a credible example for other chapter members to follow. Be quick to look in the mirror before looking to others. Many members will look to you, as well as the other officers, to set the standard of behavior and performance. It will be difficult for you to enforce chapter and Grand Chapter Bylaws if you do not abide by them yourself.

Audiences

In your role as the President, you will have the opportunity to interact with many different “audiences.” These are individuals or groups that you will work with on a consistent basis throughout your term in office. Because of this, you should start by understanding who your key audiences are and how they ideally interact with the President.

Executive Board

- Description: The executive board consists of at least the vice presidents of member development, recruitment, finance, communications and programming and the chaplain.
- Relationship/Interaction: This is your team. Each of these officers should work with you and their mentor to set goals for their term in office. You will empower each member of the executive board to meet his goals. You should meet with your entire board regularly- either weekly or bi-weekly. You should also meet with each individual executive board member regularly to support them and hold them accountable to their goals.

Chapter Members

- Description: All undergraduate SigEps who are in good standing with your chapter.
- Relationship/Interaction: A leader is only as successful as the team around him. The President should work with the entire chapter to achieve your goals and vision. The chapter elected you to lead them. They will look to you as a role model. Be sure to model the way.

President Mentor

- Description: The President mentor is a volunteer specifically designated to help you be successful in your role.
- Relationship/Interaction: You should take initiative to build a relationship with your President mentor. Establish expectations of each other to help you transition into your

role, conduct your responsibilities and achieve your goals. This mentor has experience and an outside perspective that will help you throughout your term.

Alumni and Volunteer Corporation

- Description: The Alumni and Volunteer Corporation (AVC) is an independent corporation with the expressed purpose of supporting the activities of the undergraduate chapter. This comes in four major areas: alumni cultivation, undergraduate mentoring, asset management and corporate health.
- Relationship/Interaction: Your AVC is there to provide you with support and guidance. You should provide these volunteers with regular updates on the chapter's progress.

Standards Board

- Description: This board serves directly under the chaplain and is responsible for conducting the Rites of Passage, as well as the trial and appeal procedures when necessary.
- Relationship/Interaction: Support the standards board, especially if/when difficult standards board cases occur.

Faculty Fellows and Resident Scholars

- Description: These key volunteers are responsible for supporting the chapter's academic plan and performance.
- Relationship/Interaction: While these volunteers may spend more time with your vice president of member development, development committee and academic chairman, it's important that you have a working relationship with these key volunteers. Share your goals with them and ask that they keep you updated on their projects and feedback on the chapter.

University Faculty and Staff

- Description: Greek life professionals and faculty members.
- Relationship/Interaction: University faculty and staff can serve as great mentors for you, your officers and any chapter members. They have the potential to be long-time volunteers and mentors, because they work on campus. They will see you as a representative of your entire chapter and will lean on you to accomplish things with your chapter. Represent SigEp well when interacting with university faculty and staff.

Parents

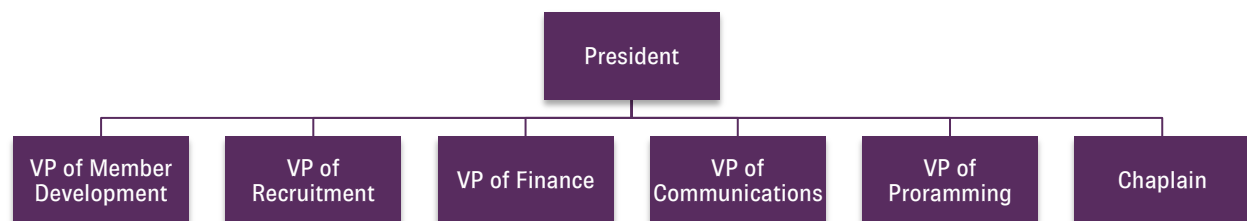
- Description: Parents of your chapter members.
- Relationship/Interaction: For today's college students, parents are more and more involved in their lives and decisions. Consequently, parents will look to you to ensure their sons are having a safe, healthy and developmental fraternity experience.

Regional Director

- Description: SigEp Headquarters staff member who works with chapters to help them achieve their goals, specifically in the areas of recruitment, membership experience, leadership training, fiscal health and member safety.
- Relationship/Interaction: Your regional director can be a great mentor and teammate to help you achieve your goals. Share your goals and plans with him and ask for feedback. Use his experience to help you, your executive board and your chapter succeed.

Executive Board

Your executive board is your committee and your team. If your executive board is successful, you will be successful. SigEp's recommended executive board follows:



Each executive board member is responsible for his area of fraternity operations and his committee. A brief explanation of each officer role is below:

Vice President of Member Development – The vice president of member development is responsible for the chapter's Balanced Man Program. He ensures that each member improves in the six areas of development: SigEp, Sound Mind, Sound Body, personal, leadership and professional.

Vice President of Recruitment – The vice president of recruitment is responsible for empowering his recruitment committee and the entire chapter to recruit the best men at your university. This should be a year-round effort that includes the Balanced Man Scholarship.

Vice President of Finance – The vice president of finance is responsible for the chapter's finances. He should prepare a budget before each semester begins and he should manage that budget throughout the year. The chapter's budget and finances should be transparent with chapter members and volunteers.

Vice President of Communications – The vice president of communications is responsible for your chapter's brand. Through social media, mass emails, press releases and more, this officer helps share the great things your chapter is doing with key stakeholders.

Vice President of Programming – The vice president of programming is responsible for the chapter's calendar. He and his committee help plan and execute chapter events, both on- and off-campus. He and his committee are also responsible for the safety of our members.

Chaplain – The chaplain is responsible for the Ritual and overseeing the standards board. He and the standards board will set expectations for chapter member behavior and hold members accountable to those standards.

In the *Concepts and Skills* section of this officer guide, you will find suggestions and best practices for helping your executive board be successful this year.

CONCEPTS AND SKILLS

Introduction

An effective President is a leader. Many SigEp Presidents are elected because they consistently showed their brothers they are doers who set goals and accomplish and exceed those goals. As demonstrated in the *Executive Board* section of this officer guide, each member of your executive board has a lot of responsibilities. You will be much more successful this year if you lead your team to execute those responsibilities, rather than try to accomplish everything on your own.

Being a leader is complex. People of all ages strive to be better leaders. Countless articles and books have been written about leadership. Fortunately, SigEp provides an opportunity for you to improve your leadership skills at a young age, making you more prepared than many undergraduates. Countless theories and approaches to leadership exist. This *Skills and Concepts* section will outline some of those theories and approaches. After reviewing this officer guide, please challenge yourself further and research other leadership education opportunities.

Important Concepts

Remember the Ritual

SigEp's Cardinal Principles, Virtue, Diligence and Brotherly Love, should guide your decision-making as President, and as a SigEp brother for life.

Virtue – Behaving with decency as befits the day. Virtue is being honest with yourself and others. Virtue is doing the right thing.

Diligence – Persevering and staying focused on top priorities. Diligence is using your time wisely. Diligence is overcoming the obstacles in your path, regardless of difficulty.

Brotherly Love – Exhibiting true friendship. Brotherly Love is treating others with kindness, encouraging others when they succeed and helping others when they misstep.

For more descriptions on Virtue, Diligence and Brotherly Love, refer to *The Ritual and Guide of Sigma Phi Epsilon*. Each Rite of Passage provides great guidance to consider and study.

Great Presidents do their best to consider the Ritual before acting. They *live the Ritual*.

The Five Practices of Exemplary Leadership

After years of studying leadership, Brother **Barry Posner, California-Santa Barbara '70**, and James Kouzes created the five practices of exemplary leadership in their book, *"The Leadership Challenge."* Posner and Kouzes collected information from thousands of people and found a consistent pattern in the behavior many people identified as leadership. These five practices are widely accepted and crucial to being an effective leader.

Model the Way – Set the example by aligning your actions with shared values.

Inspire a Shared Vision – Envision the future by imagining exciting possibilities. Enlist others in a common vision by appealing to shared aspirations.

Challenge the Process – Search for opportunities by seeking innovative ways to change, grow and improve. Experiment and take risks by constantly generating small wins and learning from mistakes.

Enable Others to Act – Foster collaboration and strengthen others by sharing power.

Encourage the Heart – Recognize contributions by showing appreciation for individual excellence. Celebrate wins publicly.

SigEp's [Ruck Leadership Institute](#) is an intense five-day event for SigEp's top rising leaders. At Ruck our scholars dive into each of these five practices. If you haven't been to this leadership event, make sure you apply this year.

Be a Great Communicator

Have you ever heard someone say, "**Uncertainty breeds doubt?**" It's true. Regardless of your chapter's reputation, your reputation, you and your chapter's past success and accomplishments, if your constituents don't hear from you, they may question or doubt your progress. But don't take it personally... this is human nature.

Great companies and organizations communicate frequently to their constituents. They provide regular status updates that celebrate big wins, share goals and priorities and provide updates on those goals.

As President, it is your responsibility to communicate with your constituents or audiences. Your AVC, your President mentor, your university's Greek life professional and your regional director all want to hear from you. They want to hear about your goals, they want to hear about the obstacles you're running in to, and **they want to help you!**

Set clear expectations with each of your audiences/constituents at the beginning of your term in office. How frequently do you want to check-in with them? Is it a meeting, a phone call or an

email? What will these check-ins include? Be deliberate and consistent with your communication.

Be a great communicator. Communicate consistently and deliberately. Share your and your chapter's wins and opportunities to improve. Your audiences will appreciate it and you will be a better leader because of it.

Great leaders have a guiding motto.

You are going to be faced with difficult decisions. You and your fellow leaders should develop a motto to guide you and your teams through the decision-making process. These mottos come from our shared beliefs, values and ethical norms. They help us understand the basis for making tough decisions, and provide a moral ground to stand upon.

What will your motto be? It should be grounded in the values of SigEp, and it should set you up to fulfill your oath as an officer.

"As President of a 180- man chapter, our executive board created the motto 'Louisiana Beta will provide an unparalleled fraternity experience that cultivates lifelong success making our brothers better leaders, coaches, friends, husbands and fathers.' This motto guided everything we did and we often referred back to it for guidance in the face of controversy."

Andrew Leonpacher, Louisiana State '12, former Chapter President,
current Deepwater Facilities Engineer with Chevron

Understanding Management vs. Leadership

There are very distinct differences between the two concepts. Management provides the systems that create order out of chaos. Leadership inspires chaos to improve the human condition and allow for the growth and development of people. Much like a muscle that grows stronger with a greater degree of challenge, the human spirit and its ability to accomplish extraordinary things develops with each opportunity to challenge one's comfort zones, allowing people to dream bigger, achieve more and be fulfilled.

Management

- **Planning and Budgeting** – Establishing detailed steps and timetables for achieving needed results, then allocating resources necessary to make it happen.
- **Organizing and Staffing** – Establishing structure for accomplishing the plan, staffing that structure, delegating responsibility/authority for carrying out the plan, providing policies/procedures to help guide people and creating methods and systems to monitor implementation.
- **Controlling and problem-solving** – Monitoring results, identifying deviations from plan, then planning and organizing to solve these problems.

Leadership

- **Establishing direction** – Developing a vision of the future—often the distant future—and strategies for producing the changes needed to achieve that vision.
- **Aligning people** – Communicating direction in words and deeds to all those whose cooperation may be needed, so as to influence the creation of teams and coalitions that understand the vision and strategies and that accept their validity.
- **Motivating and inspiring** – Energizing people to overcome major political, bureaucratic, and resource barriers to change by satisfying basic, but often, unfulfilled, human needs.

From the book, *“On Becoming a Leader”* by Warren Bennis:

The manager administers; the leader innovates.

The manager is a copy; the leader is an original.

The manager maintains; the leader develops.

The manager focuses on systems and structure; the leader focuses on people.

The manager relies on control; the leader inspires trust.

The manager has a short-range view; the leader has a long-range perspective.

The manager asks how and when; the leader asks what and why.

The manager has his or her eye always on the bottom line; the leader’s eye is on the horizon.

The manager imitates; the leader originates.

The manager accepts the status quo; the leader challenges it.

The manager is the classic good soldier; the leader is his or her own person.

The manager does things right; the leader does the right thing.

Both leadership and management are important skills for a President. Before you approach your next challenge, ask yourself, *“Should I be a manager or a leader in this situation? Which approach will lead to success?”*

Measure your chapter against your potential, not your peers.

Don't let yourself or your brothers get consumed with what the other chapters on your campus are doing. Success is measured by what you are capable of, not what your neighbor is doing.

"We did not want to be compared to other fraternities. We were focused on developing men, not just hosting social events. How are we different if we tried to copy other chapters' practices?"

Matt Eisen, Yale '10, former Chapter President, current MBA
Candidate- Harvard Business School

Remember CADIF

As a chapter leader, you represent yourself and your organization every day. There is a direct correlation between your attitude and your ability to improve your chapter. To perform your best every day, it's important to have a guiding philosophy.

A simple philosophy is **CADIF: Commitment, Attention to Detail, Immediate Follow Up.**

CADIF is a behavior that guides your work and your approach to life. Living by CADIF will show friends, family, chapter brothers, alumni, volunteers and Greek life professionals that you are dependable and reliable.

Commitment – Dedication to your elected office, fellow chapter leaders, brothers and your university.

Example behaviors that demonstrate Commitment:

- Model the way- Represent Virtue, Diligence and Brotherly Love in all that you do.
- Master your time management skills by planning ahead and mapping out your week each Sunday night.
- Set SMART goals and hold yourself accountable to completing them.
- Create a vision and always be striving to achieve it.
- Be consistent with attendance. Presence matters.
- Class work and officer responsibilities are balanced with social life, involvement outside of SigEp and personal health.
- Always seek guidance and be open to constructive feedback.

Attention to Detail – Thoroughness and accuracy when accomplishing a task through concern for all the areas involved.

Example behaviors that demonstrate Attention to Detail:

- Before starting a task or project, lay out all the steps necessary for completion.

- Take detailed notes during meetings.
- Keep your room, work space, and other areas clean and organized.
- Proper attire is worn for chapter-related meetings.
- Manners and etiquette are part of every interaction.
- Use proper grammar and punctuation in emails or agendas.
- Understand that any action can set a precedent or create a perception, both positive and negative.
- Set up a professional voicemail.

Immediate Follow Up – Timely and consistent communication.

Example behaviors that demonstrate Immediate Follow-Up:

- Following a meeting, send out a detailed email with key points and action items.
- Send hand-written thank you notes.
- Be prompt with your response:
 - Always answer your phone when available.
 - Return phone calls within 24 hours.
 - Reply to emails within 48 hours.
 - Notify an individual if you need more time to reply.

Utilize your support system

You are surrounded by people that want to see you succeed. Take advantage of these key resources:

University

- Establish relationships with key university officials and understand their vision for the Greek community.
- Read [the Student Guide for University Partnership](#) to learn about ways to partner with your university.

Regional Director

- If you don't know your regional director, reach out and introduce yourself.
- Review the [Regional Director Suite of Services](#) to learn more about what he can offer your chapter.
- Make a list of things he can do to help you and your executive board accomplish your goals.

Volunteers

- Reach out to members of your AVC and build a relationship with them.
- Outline your vision and goals for the chapter and seek their feedback on what you can do to improve.

Important Skills

Leading a Committee to Success

As President, you are chairman of the executive board, which is your committee. While you do not select your committee members, it's important that you build a strong working relationship with each member of the executive board.

Transition and Goal Setting Retreat

One of the first things you should do as President is schedule your transition retreat. Utilize the resources on the [Officer Transition section](#) of sigep.org. This page includes a comprehensive transition guide and supporting resources to help you ensure this important process is successful.

Managing Your Committee

After holding your transition retreat and setting SMART goals with each officer, it is important to maintain consistent communication, check-ins and feedback. Here are some suggestions:

- **Hold a weekly executive board meeting** – Use this meeting to check in on each officer's progress on their SMART goals. Each officer should be prepared to provide a thoughtful and concise update, to answer questions, to receive feedback and to outline next steps.
- **Work as a team** – While each officer has his own responsibilities, your executive board is an intelligent and experienced team. Do your best to create an environment where all officers are asking questions and providing feedback on officers' goals and action plans.
- **Delegate to your committee** – The President can't do everything. Find projects that other officers and brothers will be excited to own and execute. Your role is a communicator and a coordinator. With that said, be careful you aren't perceived as the leader who delegates all of his responsibilities.
- **Follow up** – Make sure meeting minutes are sent by the vice president of communications.

Leading Your Committee

As explained in the *Important Concepts* section of this officer guide, management and leadership are very different. It's important that you are both managing and leading your committee. Some examples of leading your committee are:

- **Set your vision and repeat it often** – Your executive board should have created a team motto at your transition retreat. Don't leave that motto behind. Repeat it at your meetings. Write it on flip chart paper and hang it on the wall. When you run into a tough decision, refer back to your vision.
- **Think big picture and long term** – Leave a legacy. What will you implement or initiate that will leave a lasting mark on your chapter? What will you and your executive board be remembered for? Write it down. Don't allow day-to-day tasks to slow you down from accomplishing your goals and achieving your vision.
- **Be dynamic and thoughtful in your leadership of each individual officer** – Each of your officers and brothers is different. If you are going to be successful, you will probably need to encourage, empower and recognize each of them differently. You will hold each officer accountable differently.
- **Be a team player** – Give credit to others whenever possible. Praise in public; criticize in private.

Running an Effective Meeting

Having effective meetings are an essential part to achieving the goals of your chapter. Meetings are one of the most efficient ways for our chapters to manage tasks, hold each other accountable, move projects forward and have open conversations that solve problems.

However, meetings can also waste time if they are not executed properly. According to a survey of U.S. professionals by Salary.com, meetings ranked as the number one office productivity killer. As leaders, we must be cognizant to prepare meetings that have a clear purpose that leave our brothers feeling energized and excited to make our organization better.

Suggestions for running an effective meeting:

- **Set clear outcomes and objectives** – There should be a clear purpose for calling the meeting. Know exactly what you want to accomplish before sending out meeting times and agendas.
- **Be deliberate with whom you invite** – Everyone who is in attendance should feel relevant or they will consider the meeting a waste of time.
- **Distribute an agenda before the meeting** – Having an agenda will give the meeting a direction and save time by keeping everyone focused. Agendas sent in advance also help attendees prepare for the meeting.
- **Set expectations** – Establish a framework for how the meeting is going to run. Facilitate the meeting when discussions begin to get off-topic. People peaking out of turn or talking too long can derail a meeting.

- **Start and end on time** – People will respect you if you respect their time. Sixty minutes is usually the longest time any group will stay fully engaged. Avoid surpassing 60 minutes for a regular or weekly meeting.
- **Assign a scribe** – Notes that accurately reflect the discussion and result are important. Send follow-up. This should help avoid discussing the same topics at multiple meetings.
- **Ban technology** – Technology can be a huge distraction. Unless a computer is necessary, have everyone put it away.
- **Summarize decisions and assigned action items** – Decisions, next steps and responsibilities should be clear. Assign an owner to each action item.
- **Follow up** – Summarize the key points and action items of the meeting. Remember CADIF. Send the follow up via email in the 24 hours following the meeting.

PLANNING

Introduction

Proper planning is essential for all chapter leaders, *especially* Chapter Presidents. This section provides an outline and initial steps for what you will need to plan your year as President.

First Steps

Below is a list of the first steps a President should take once his term begins. These steps do not have to be completed in this exact order, but all should be done in a timely manner after being elected.

- Review this officer guide and the supporting resources.
- Review the [Officer Transition Guide](#) and develop a plan to execute an effective transition process.
- Watch the [Training in 10: Successful Officer Transition video](#).
- Attend and support the execution of the officer transition retreat.
- Review and be familiar with your chapter's local bylaws, your chapter's membership agreement, and the [Grand Chapter Bylaws and Administrative Policies and Procedures](#).
- Read [SigEp's Risk Management Policies](#) and your university's risk management policies. Watch [this video](#) to learn more about creating a safe environment.
- Set up weekly chapter meetings and executive board meetings.
- Schedules meetings or calls with the following people to introduce yourself, set expectations for working together and communicating, share your goals and build your relationship with each:
 - President mentor.
 - AVC President.
 - Chapter counselor.
 - University Greek life professional.
 - Regional director.
- Meet with each officer on the executive board to build or continue to build your working relationship with them.
- Work with the vice president of programming to build a calendar with major events and deadlines. This includes member development events, university deadlines and meetings, leadership events, Rites of Passage and major recruitment periods.

- Plan to participate in SigEp's leadership events. All new members should attend EDGE in your area. All chapter officers and leaders should attend your region's Carlson Leadership Academy. If your chapter has one in your area or can attend, plan to send members to Life After College. At least two members should apply for the Ruck Leadership Institute and the Tragos Quest to Greece. If this summer is an odd year (2017, 2019, etc.), be prepared to send a delegate and alternate to SigEp's Grand Chapter Conclave.
 - Learn more about each of [SigEp's leadership events](#).
- Review the [officer guides](#) for each of the executive board positions to build an understanding of what success looks like for each of your team members.

A Week in the Life of a President

Following is a list of activities that most Presidents do on a weekly basis. Throughout the year, the President's weekly activities will likely change as different events arise, such as finals week, formal recruitment or homecoming week.

- Chair the executive board meeting with a focus on the following:
 - Follow up on officer action items from the previous week.
 - Review the chapter calendar for the week.
 - Openly discuss new projects and ideas with other officers.
 - Coordinate and schedule chapter events.
 - Set chapter priorities for the week that are in-line with the chapter's goals and vision.
 - Review and track your weekly, monthly, semester progress against your goals.
 - Prepare for chapter meeting by creating and reviewing agenda items.
 - Ensure that all officers understand their responsibilities for the week ahead.
- Preside over the chapter meeting. Follow the prescribed order of business. A chapter meeting should last no more than 60 minutes.
- Ensure each executive board officer holds a committee weekly meeting. Ensure the chaplain convenes the standards board.
- Speak with the following individuals about current issues, chapter happenings, upcoming programs, recruitment, development, standards board, finances:
 - President mentor.
 - University Greek life professional.
 - Alumni and Volunteer Corporation President.
 - Regional director.
- Follow up on action requested of you and action you requested.
- Assess the safety of your chapter environment and events. Ensure all policies and procedures are followed.
- Ensure the chapter is represented at the IFC/All-Greek Council meeting.

- Ensure all forms and necessary materials are sent to Headquarters and the university in a timely manner.
- Make sure the chapter is represented at all appropriate functions and meetings on campus and in the community.

A Year in the Life of a President

As President, you have many things to keep on your radar throughout the year. Here is a snapshot that can serve as a reminder and help you plan for the year.

January

Hold a chapter-wide retreat to present your executive board's goals to the chapter.

February

Attend your region's Carlson Leadership Academy.

May

Set goals for the summer with each officer and agree on a communication plan and list of action items for the next few months.

August

Hold a semester kick-off meeting or retreat with the executive board to assess officers' goals and action plans.

September

Review the [Maximizing Officer Elections](#) resource and develop a plan for the upcoming elections.

November

Ensure chapter officers are preparing for the upcoming elections.
Near the end of the month, hold officer elections.

December

Help facilitate the transition process with incoming officers.

Note: University calendars vary widely by chapter and university. This list is not all-inclusive for all chapters. You should consult with volunteers, past officers, your Greek life professional and regional director to build your personal list.

CONCLUSION

The President is crucial to a chapter's success. Great Presidents align their officers and chapter members behind a vision for the chapter and make significant progress toward that vision. Different years may call for a President to focus on different areas of chapter operations. For example, your chapter may need you to focus on standards and spend extra time supporting the chaplain and standards board this year and next year's President may spend more time on the Balanced Man Program. Regardless of which areas you focus on, it is your commitment to the Ritual, your leadership skills and your communication skills that will help you be successful.

Additional Resources

In addition to this document, you have a host of other resources at your disposal to help guide you during your time as the President. Following is a list of the resources mentioned in this officer guide.

The Ritual and Guide of Sigma Phi Epsilon

The Ritual is not an online resource, but every chapter should have Ritual books. Should you have questions, please contact your regional director.

Sigma Phi Epsilon Grand Chapter Bylaws and Administrative Policies and Procedures

The Grand Chapter Bylaws have been created and updated by the Grand Chapter (including undergraduates like you) at every Conclave since SigEp's founding. These bylaws and policies should be a baseline for your chapter's bylaws.

SigEp's Risk Management Policies

The safety of your members is incredibly important. Please familiarize yourself and your executive board with SigEp's risk management policies.

Your Regional Director and Headquarters staff

The regional director and entire Headquarters staff is tasked with helping you and your chapter achieve SigEp's mission: "Building Balanced Men." Use them, especially the regional director, as a resource as you strive to achieve your goals.

Balanced Man Program Guide

This is a comprehensive resource that walks through the entire philosophy and structure of the BMP. It discusses programming content, roles of the development committee and the processes for implementing the program within a chapter.

Maximizing Officer Elections Resource

This guide provides tangible, easy-to-use steps to be successful in every phase of the elections process.

Officer Transition Guide

This guide outlines the steps and supporting resources needed to ensure your chapter has an effective and comprehensive transition process.

Officer Guides

These resources provide you a detailed look at what it takes to be successful for each executive board position.

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
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