# SigEp

## CARLSON LEADERSHIP ACADEMY
### SIGMA PHI EPSILON

# VICE PRESIDENT
# OF PROGRAMMING
## Participant Guide

# CARLSON LEADERSHIP ACADEMY

## SIGMA PHI EPSILON

_____

(NAME)

_____

(CHAPTER)

# HOW TO MAXIMIZE YOUR TIME AT CARLSON

<u>AT CARLSON</u>:
- **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.

<u>AFTER CARLSON</u>:
- **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.**

# Program Schedule

*This is a general schedule for all programs. Session locations will be listed in the program specific schedule available at check-in on-site.*

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

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

# Table of Contents

| Session | Time Allotted | Should Take Place |
|---|---|---|
| Program preparation and overview | Pre-program | Prior to arrival |
| Introductions, overview and paradigm setting | 30 minutes | Friday, 10:00 – 10:30 p.m. |
| Responsibilities of the Vice President of Programming | 30 minutes | Saturday, 9:00 - 9:30 a.m. |
| Successes and challenges with substance-free facilities | 45 minutes | Saturday, 9:30 - 10:15 a.m. |
| *Break (snacks available in the pre-function areas)* | 15 minutes | Saturday, 10:15 - 10:30 a.m. |
| Hosting quality chapter events | 75 minutes | Saturday, 10:30 - 11:45 a.m. |
| Lunch | 1 hour, 45 minutes | Saturday, Noon – 1:45p.m. |
| Moving from Policy to Practice *(joint session with presidents and volunteers, stay in meal function room)* | 1 hour | Saturday, 1:45 - 2:45 p.m. |
| How to host a social event at a third-party alcohol vendor | 40 minutes | Saturday, 2:50 - 3:30 p.m. |
| Elevating service & philanthropy | 40 minutes | Saturday, 3:30 - 4:10 p.m. |
| *Break (snacks available in the pre-function areas)* | 10 minutes | Saturday, 4:10 - 4:20 p.m. |
| Identifying issues and buying into risk management | 40 minutes | Saturday, 4:20 - 5:00 p.m. |
| Action planning | 70 minutes | Saturday, 5:00 - 6:10 p.m. |
| Wrap up | 40 minutes | Saturday, 6:10 - 6:50 p.m. |

# Learning Outcomes

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

*As a result of participating in the Carlson Leadership Academy, participants will:*
- **Have a complete understanding of officer job descriptions and responsibilities.**
  - *Measurable action*: Feel energized to improve their chapter's operations
  - *Measurable action*: Have an increased likelihood to follow through on goals for their executive position and chapter.
- **Have an increased understanding, commitment, and are empowered to uphold SigEp's risk management policies and procedures.**
  - *Measurable action*: Feel energized to improve their chapter's operations.
- **Understand how to assess the chapter experience and execute strategic goals as a chapter leader to improve that experience.**
  - *Measurable action*: Develop SMART goals and action plans related to their position.
  - *Measurable action*: Have an increased pride in SigEp because of the people they met and the things they have learned.
- **Understand how they can assess and build their skills as an organizational leader on the topics of:**
  - Strategic thinking and planning.
  - Critical assessment.
  - Development of an action plan.
  - Managing a team.
  - Building a coalition of people to help achieve goals.
    - *Measurable action*: Foster strong team dynamics through organic interactions and time together.
    - *Measurable action*: Feel energized to improve their chapter's operations.
    - *Measurable action*: Develop SMART goals and action plans related to their position.
- **Learn best practices in chapter operations in relation to their position.**
  - *Measurable action*: Feel motivated to improve from awareness of successful operations through awards and recognition.
  - *Measurable action*: Have an increased likelihood to follow through on goals for their executive position and chapter.
- **Become more aware of resources provided by volunteers and the Headquarters staff.**
  - *Measurable action*: Utilize resources provided by volunteers and the Headquarters staff to achieve goals while in office.
  - *Measurable action*: Have an increased pride in SigEp because of the people they met and the things they have learned.

# Curricular Underpinnings

Overall, the curriculum is rooted in the concept of challenge and support to help participants reason through potential obstacles, but to do so in a safe space to practice. This is intended to highlight for participants what they don't know while helping them overcome this shortcoming.

Friday night is intended to set the paradigm for the program and discuss the value of Carlson when done right. Officers should come with baseline knowledge of their role and responsibilities associated with their position. Saturday will focus on addressing issues officers will face and developing the necessary knowledge and skills to do so.

Saturday's sessions are rooted in Kolb's Experiential Learning Model to provide a more experiential learning opportunity for officers and rising leaders to gain knowledge and skills to address real issues they will face in their tenure. The curriculum guides participants through each issue as follows:
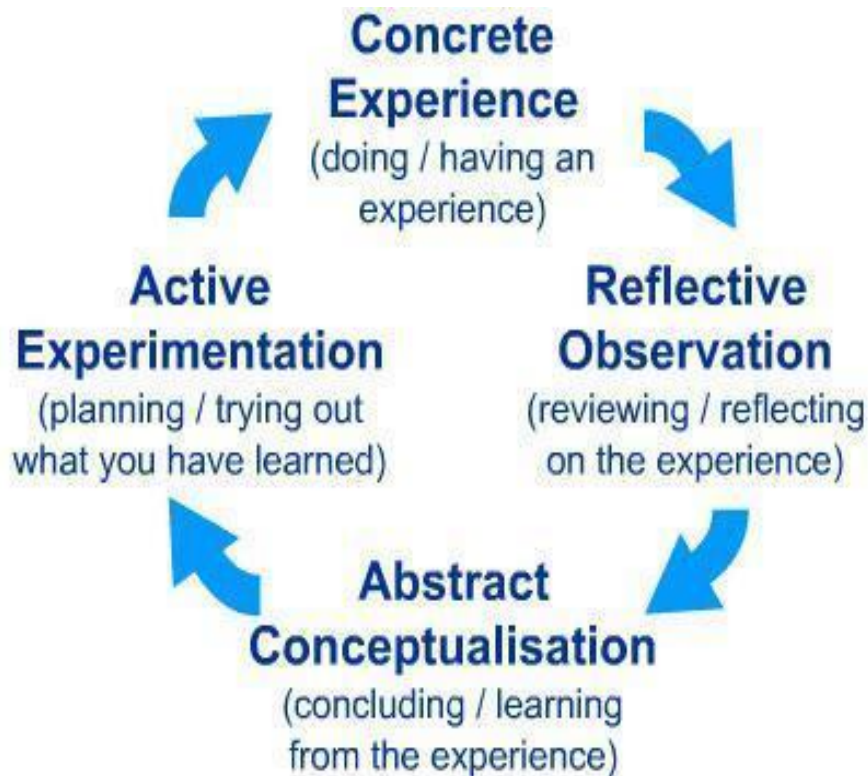
# Issue Session Elements

Saturday's sessions will use the same four elements of curriculum to break down each issue the officers will be addressing:

| Issue overview & description | Application activity | Issue reflection & action planning | Reference to resources |
|---|---|---|---|
| This portion guides participants to recognition of the issue, what causes the issue, who and what is affected by the issue, etc. | This is a hands-on and engaging approach to addressing the issue. This portion of the curriculum focuses on engaging participants to reason through and address the issue hands-on. | It is important to give them time to unpack the issue and start to apply the learning to their position in the chapter. | This directs participants back to resources that will help them overcome these obstacles and issues. This is primarily contents of the officer guide, but there may be additional outside resources that are applicable to addressing the given issue. |

# Content Sessions Structure Overview

***The following are notes for the facilitator on the overall structure of the sessions and content.***

The structure of the Vice President of Programming track is structured in a way that each component builds on one another and utilizes the work from the prior sessions. This is done to mirror the sequence in which officers are likely to come across these issues, to demonstrate priority and to enable as much interaction and participation as possible.

**Session Format**

Each session is best thought of as a phase. The content of each phase is related to an issue or set of issues that a vice president will face during his term and an activity is paired with each to provide the opportunity for participants to gain practice working through issues. The phases/sessions will be a little bit fluid, but rest assured, there will be clear delineations that enable you to transition from one session to the next.

# Session: Introductions, overview and paradigm setting

| Time: | 30 minutes |
|---|---|
| **Purpose:** | • Introduce participants and facilitators.<br>• Provide an overview of the program and schedule. |
| **Session objectives:** | • Participants will build relationships with facilitators and participants.<br>• Participants will understand the curriculum overview and the value of Carlson. |
| **Materials & equipment:** | • Flip charts.<br>• Masking tape. |
| **Session outline:** | • Introductions. (15 minutes)<br>• Program overview. (5 minutes)<br>• Session overview. (5 minutes)<br>• Wrap up. (5 minutes) |
| **Pre-session prep:** | • Review facilitator guide and prepare introduction activity. |

**Introductions (15 minutes):**
- Facilitator introductions (5 minutes)
    - Facilitators will introduce themselves and cover the following items:
        - Who are you?
        - What do you do professionally? How does that relate directly to this session (if applicable)?
        - Undergraduate institution?
        - Where do you volunteer, or what is your involvement with SigEp?
        - Why are the Carlsons and this particular session important to you?
- Participant introductions (10 minutes)
    - Facilitator note (optional): If you have a favorite name game or ice breaker, please feel free to facilitate that here.
    - Have participants get into groups of six.
        - Within these groups, have participants introduce themselves:
            - Name
            - Chapter
            - Biggest thing they're looking forward to during the Carlson program
            - One challenge in the chapter they're looking to learn how to overcome and improve the chapter experience

**Program overview (5 minutes):**

- Ask the participants the following question: Why did you choose to spend your weekend here at Carlson?
    - To better understand your position
    - To become a better officer
    - To network and get ideas from other chapters
    - To be set up for success for the upcoming year
    - Maybe your Regional Director or chapter volunteer wouldn't leave you alone about coming...
- Now that we know what brought you all here, let's talk about how we're going to ensure that you all get everything that you want out of this experience.
    - While we will cover some of the basics pertaining to your position, most of our time will be spent tackling tough issues that you're going to face this year. We surveyed outgoing chapter officers and asked them: "What do you wish you'd known, or been taught, prior to your time in office?", and developed the curriculum for this weekend based on what your peers and predecessors told us.
    - Highlight the materials (participant/officer guide) that they have received and explain how they will use them throughout the weekend. Don't lose this participant guide!
    - Create and set up the "parking lot" flip-chart and hang it in the back of the room. Explain that if questions come up that aren't directly relevant to the topic being addressed at that time, then you'll put them in the parking lot and revisit them later. Let them know that they should feel free to add to this list as ideas come to mind.
    - Create and set up a "lightbulb" flip chart. Explain that this should be utilized whenever the group comes to a collective realization about a new idea or exciting concept. This serves as a place to capture moments when the lightbulb goes off for the group and will be easy to garner more takeaways at the end of the weekend.
- We need to set some ground rules for the weekend to ensure that we can make the most of our time together. What expectations do you all have of us and of each other?
    - Be prepared.
        - Bring paper/your participant guide, and a pen
        - Have your goals ready to discuss
        - Have questions, and ask them
    - Be engaged.
        - While you're here, spend your time with brothers from other chapters, particularly the guys in this room holding the same position as you.  Don't spend all your time with chapter brothers - you can see them at home.
        - Network with your peers and share ideas
        - Keep your cell phones away
        - Contribute to the group

- o   Be respectful of each other.
  - o   Don't be afraid to ask tough questions. We're here to ensure that you walk away ready to tackle the next year head on and we need to leave no stone unturned.
- What types of topics do you definitely want to cover this weekend?
  - o   Chapter wide service learning programming
  - o   Brotherhood event ideas
  - o   BMP programming ideas
  - o   Recruitment event ideas
  - o   How to increase attendance at events
  - o   Social events at third-party vendors
  - o   Good alcohol-free programming

**Session overview (5 minutes):**
- Provide an overview of what will be covered in this track (tonight and throughout the day tomorrow).
- If there are any topics they identified above that aren't covered in the curriculum, add them to your "parking lot" to revisit later.

**Wrap-up (5 minutes):**
- Ask the participants to share their biggest takeaways from the tonight's session. Also capture any lightbulb moments
- As a facilitator, share your favorite memory from Carlson and why you personally believe it was beneficial to your undergraduate experience to get the group excited for tomorrow.
- Remind them one more time to complete their homework regarding SMART goals.

Remind them that breakfast will start promptly at 8:00 am, to be sure to have their participant materials ready for the day, and to bring their nametags with them to breakfast. Their nametags will be scanned into breakfast - they need to ensure that they get scanned in so they are not assessed a $25 no-show fee for missing breakfast.  If they are late, they will not get scanned and will be charged.

# Session: Responsibilities of the Vice President of Programming

| Time: | **30 minutes** |
|---|---|
| Purpose: | ● Provide an overview of the Vice President of Programming role.<br>● Discuss engaging with external stakeholders.<br>● Understand difference between coordinate and facilitate. |
| Session Objectives: | ● Participants will understand each of the responsibilities of their role. |
| Materials and Equipment: | ● Flip charts.<br>● Post-it notes.<br>● Masking tape.<br>● Participant guides.<br>● PowerPoint slides.<br>● A/V equipment. |
| Session Outline: | ● Responsibilities of the Development Committee. (10 minutes)<br>● Officer guide breakout. (20 minutes) |
| Pre-Session Prep: | ● Prepare any necessary flipchart content.<br>● Ensure all A/V equipment is properly functioning.<br>● Review session content and pages used in the participant guide. |

### The Responsibilities of the Vice President of Programming (10 minutes):
- Prepare a flip chart labeled "Responsibilities of the VP Programming". During the following discussion, capture their thoughts on the flipchart.
- Direct them to the list of responsibilities in their officer guide
- Ask the group: "You all ran for this job under some pretense of what you expected the position to be like and the corresponding roles and responsibilities. What do you think are the 5 main responsibilities of the VP Programming?."
- Ideally, you arrive at some version of the following points below:
    o Appoint and manage the programming committee.
    o Create and manage the chapter's master calendar.
    o Coordinate all events and schedule with your college/university.
    o Build partnerships and develop service learning and philanthropic programs with other organizations on your campus and in your local community.
    o Help in the logistical planning of events in coordination with other chapter officers and ensure they align with SigEp's values and mission.
    o Collaborate with the vice president of member development and vice president of recruitment in supporting the coordination and execution of their events.

- o Work directly with risk management chairman to ensure all policies are upheld and ensure proper execution of risk management at chapter events.
  - o Support the chaplain in planning Rituals to secure space, if necessary, and ensure the dates of Rituals stay reserved on the chapter's calendar.
  - o Serve as ritualistic vice president during Rituals, meeting, and at other necessary times.
  - o Effectively document recurring events and successfully transition new vice president of programming into the role.
- Let them know this list of responsibilities can be found in their officer guide.

### Officer guide breakout groups (20 minutes):

- Break participants into small groups of 4-6 people. Give each group a flip chart page and markers. Have each group read through a section of the officer guide and present to the rest of the group a summary of their section, what their takeaways were and how it pertains to each of the main responsibilities of the position.
- Give the groups about 10 minutes to read through their portion of the officer guide and prepare their presentation for the rest of the group. Allow about 20 minutes for each group to present and open the floor to questions/comments/concerns after each presentation.
- Areas of the officer guide to assign:
    1. People
    2. Skills and Concepts – Important Concepts: The Five Areas of Development; Relevant Programming; Implementing Quality Programming; Philanthropy, Community Service and Service Learning; Avoiding over Programming, Delegate Your Way to Success, Chapter Buy-In
    3. Skills and Concepts – Important Skills: Managing Your Committee; Ensuring Member Safety; Organization; Event Planning
    4. Planning
    5. **Facilitator note:** *Review these prior to the* weekend *and be prepared to drive the conversation around each topic.*
- While groups are working, walk around and help any groups that may be struggling. Also, follow along in your version of the officer guide and help point out concepts that they may have missed.
- Encourage participants to capture any light-bulb thoughts or parking lot questions that may have come up during the discussion on the flipcharts in the back of the room to reference throughout the program. Remind everyone that you'll have time at the end of the program to revisit these concepts and questions.

## Session: Success and challenges with substance-free facilities

| Time: | 45 minutes |
|---|---|
| **Purpose:** | ▪ Review and affirm SigEp's national substance-free facilities policy with all vice presidents of programming<br>▪ Share successes and challenges with the policy after a semester operating as a substance-free facility. |
| **Program Objectives:** | ▪ Provide high-level overview of the substance-free facilities policy<br>▪ Discuss impact of policy on vice presidents of programming<br>▪ Discuss successful implementation of the policy and idea share on how to overcome existing challenges |
| **Materials & Equipment:** | ▪ Flip chart<br>▪ Markers<br>▪ Tape |
| **Session Outline:** | ▪ Policy overview – What, why, and when (5 minutes)<br>▪ Reflection – Successes and challenges (40 minutes) |
| **Pre-Session Prep:** | ○ Prepare flip charts for the list of successes and challenges portion of the activity.<br>○ Review session content and pages used in the participant guide. |

**Policy Review (5 minutes) (facilitated by staff if needed)**

- A member of the Headquarters staff chapter services team can help facilitate if necessary.

**Successful implementation and current challenges (40 minutes)**

- After reviewing the policy, it will be time for participants to discuss how it has been successfully implemented at their chapters.
- Write the word "Successes" on a flip chart and place it at the front of the room.
- Ask participants to independently brainstorm successes their chapter has had since implementing the policy.
- If the chapter is unhoused, ask them to brainstorm successes they've had with programming in the past year.
- Ask participants to share the successes their chapters will face and record them on the flip chart page. Use more than one page if necessary.
- Repeat the same exercise replacing "Successes" with "Challenges"
- Ask participants to independently brainstorm challenges their chapter will face in implementing the substance-free facilities policy.

- If their chapter is unhoused, ask them to brainstorm programming challenges they are currently facing.
- Explain that the intent of the weekend, as discussed on Friday night, is to help chapter officers do their job better. While the vice president of programming officer track will cover all types of programming—substance-free events, risk management, philanthropic events, and more. We want to help them solve their programming challenges this weekend, and we need them to be open about the difficulties their chapters will face in order to do so.
- Ask participants to share the challenges their chapters will face and record them on the flip chart page. Use more than one page if necessary.
- When the group is finished sharing, place the flip chart pages on the wall in the back of the room. Make clear that we will return to the list at various points throughout the weekend.

## Session: Hosting quality chapter events

| Time: | 75 minutes |
|---|---|
| **Purpose:** | ▪ Address need to develop wholesome events that aren't driven by alcohol consumption.<br>▪ Understand the various types of programming available for them to facilitate as vice president of programming. |
| **Program Objectives:** | ▪ Identify root of issue/obstacle to host numerous quality programming events<br>▪ Understand key types/best practices for fun chapter events that don't require alcohol.<br>▪ Share event ideas and prepare to execute one or more |
| **Materials & Equipment:** | ▪ Flip chart<br>▪ Markers<br>▪ Tape<br>▪ Cell phones (ideally all participants). |
| **Session Outline:** | ▪ W.I.I.F.M. Introduction (5 minutes)<br>▪ Issue Overview & Description (10 minutes).<br>▪ Application Activity: Programming Exchange (45 minutes).<br>▪ Issue Reflection & Action Planning (10 minutes).<br>▪ Reference to Resources (5 minutes). |
| **Pre-Session Prep:** | o Prepare flip charts for the "what, why and who" portion of the activity.<br>o Create flip charts for "types of non-alcoholic events" and "factors that make them appealing and successful" session.<br>o Review session content and pages used in the participant guide. |

### WIIFM Introduction (5 minutes)

▪ Write the letters "WIIFM" largely on a flip chart and post it at the front of the room.
▪ Ask for a raise of hands of how many people know what those letters stand for.
▪ Explain that these letters stand for "What's in it for me?"
▪ Ask participants why we might be starting with WIIFM?
   o Chapter members' likelihood of attending or not attending an event can often be boiled down to this question.
      ▪ What is going to motivate someone to come to this event or program?
      ▪ What benefit do they have in attending?

- Explain that participants should keep this concept and simple question in mind as they plan, assessment, and improve their programming. Asking this simple question can be applied to planning for all types of programs
  - (i.e. How do I benefit from attending a social event? How do I benefit from participating in service learning? How does our chapter benefit from participating in other organizations philanthropy efforts?")
- Keep this flip chart at the front of the room for the remainder of the session.

## Issue Overview & Description (10 minutes)

- The Issue: ***Hosting fun, high-quality substance-free chapter events that add value for brothers and guests.***
- Use the questions below to facilitate a group discussion. Record the answers on a flip chart. What, why, and who should each have a flip chart for answers. If they get stuck, sample answers are provided below.

| | | |
|---|---|---|
| **What?** | *What is the ideal if this issue is resolved?*<br><br>*What does success look like?* | ● Adds fun and value to brothers' college experiences.<br>● Stronger relationships among brothers and members of other organizations.<br>● Attracts PNMs interested in a different type of fraternity experience.<br>● The chapter has a well-balanced calendar of events.<br>● Positive reputation with campus peers/faculty and staff.<br>● Fewer situations where possible risk management issues might occur. |
| | *What are the potential obstacles to resolving this issue?* | ● Getting chapter members to buy into having more events without alcohol.<br>● Getting sororities/other organizations to partner with the chapter.<br>● Potential for low attendance to the events.<br>● Chapter members who value alcohol more than SigEp dropping the chapter.<br>● Lack of understanding what relevant and fun programming could be for chapter members. |
| | *What are the implications if this issue is not addressed?* | ● Having an overwhelming number of events focused around alcohol.<br>● Increased risk due to lack of balance in events. |

|  |  | • Potential for cultural deterioration due to focus on social events strictly about alcohol.<br>• SigEp becoming a drinking club.<br>• Lack of strong relationships between chapter members because people aren't interacting on a consistent basis. |
|---|---|---|

| **Why?** | *Why does this issue exist?* | • Members join on a message of an experience focused around alcohol.<br>• The chapter is only holding socials and events with alcohol.<br>• Brothers don't seem open to having non-alcohol events.<br>• Lack of expectation setting during recruitment and the Sigma Challenge.<br>• Chapter glorifies stereotypes of "frat" culture.<br>• Misalignment with Ritual and values.<br>• Campus norms -- the social expectations of being "Greek". |
|---|---|---|
|  | *What are the surface issues?* |  |
|  | *What are the big picture issues?* |  |

| **Who?** | *Who does this issue impact?* | • Chapter members.<br>• Guests of members who attend events.<br>• Potential new members<br>• University partners |
|---|---|---|
|  | *Who is involved in addressing this issue?* | • Vice President of Programming.<br>• Executive board.<br>• Programming committee.<br>• Alumni & volunteers. |

Explain that for the rest of the session, they will be learning how to effectively address the issue (i.e. the "how" of the issue.)

**Application Activity: Programming Exchange (45 minutes)**

**Instructions**

- **Begin by framing the activity:** *We'll now dive into addressing the obstacle by ensuring that you all are able to develop quality events that brothers will be excited about.  In order to do this we should first:*
  - *List value-adding substance-free chapter events that exist.*
  - *Identify the key factors that make a substance-free chapter event appealing and successful.*
- **Create two flip charts** and have participants define the types of chapter events and key factors that make them successful. They should look something like this:
  - **Types of chapter events:** philanthropy events, service learning events, socials/mixers, brotherhood events, development events, campus-wide activity events, campus-wide speakers.
    - ▪ ***Facilitator note***: Feel free to provide multiple examples from this list/ask questions to clarify and get strong responses.
  - **Factors that make them appealing and successful**: Fun! Stress to participants that events need to be fun. Programming is not a choice between alcoholic events and boring events; substance-free events need to have appeal to the average chapter member. Remind participants of WIIFM. Other factors include: Planned well in advance, allow brothers to build relationships, sometimes involve other student organizations, focus on the interests of brothers, serve a "higher purpose," provide a unique opportunity, include food/giveaway.
- **Transition to the activity:** *Now that we've talked about types of chapter events and factors that make them successful at a broad level, we're going to dive into specific events using our best resource, each other.*
- Direct participants to the Chapter Events Worksheet on **pages 4-5** in their participant guides and have each fill out the content for the two best programming events in each area that their home chapter puts on. (event, event purpose, SWOT of each event)
- Have participants also identify areas of need for chapter programming on **page 6**.
- **Separate participants into groups of 3-5, ensuring that chapter brothers are splitting up**, and let them know that: *Now we're going to exchange programming ideas within groups*. Each group will have about 10 minutes to share. Also, ensure that participants take their cell phones with them to use for the activity. Let them know that they'll be able to take pictures of other brothers' best programming ideas to take back to their chapter.

- **Instruct participants to:**
    - Take turns sharing their two best programming ideas with the group (1-2 minutes each) and explain why your chapter programs the way it does on **page 7**.
    - Ask any quick questions to fully understand each program.
    - Provide feedback to your partner on how their programming calendar could improve on **page 7**.
    - Write down any notes/take a picture of programs that they're interested in taking back to their chapter.
- ***Facilitator note***: *Feel free to adjust time as necessary between 3-7 minutes for each rotation. Have the participants change groups 3-4 times depending on available time.*

### Debrief Questions

- Why did we do this activity?
- What was the best idea that you learned about?

### Quick Reflection and Action Planning (10 minutes)

- Have participants open to the *Issue Reflection and Action Plan Worksheet* on **page 8** in their participant guide and answer the questions listed here individually:
    - *What were the main lessons I learned from this activity and/or discussion?*
    - *Which of these events would I most like to implement in my chapter?*

- On **page 10**, have participants complete the Quality Chapter Event Planning worksheet. After participants have completed worksheet and planned an event, have a few participants share their event plans with the large group. Encourage the rest of the group to provide feedback.

**Reference to Resources (5 minutes)**

- Direct participants to the following sections of the Officer Guide that specifically help address this issue.
  - **Implementing Quality Programming Guide:** *You can use this section to help you begin building out an action plan that will help you turn the ideas from the activity into actual events at your chapter.*
  - **Skills and Concepts:** *This section has a number of concepts that will help you be more effective in implementing new programming.*
- Also, direct participants to the following resources that will be helpful in addressing this issue.
  - **Use your committee and brothers in the chapter**: Poll the chapter and get insight on what type of programming they would like to see. You can provide a list of event options for brothers to vote on to help generate interest and ensure that you provide relevant programming during the academic year.
- Finally, provide the information of people who would be helpful resources in addressing this issue. Example resources include:
  - Other executive board members.
  - Specific committee members.
  - Regional Director.
  - Mentor to the Vice President of Programming.
  - Fraternity/sorority life advisor.
  - Leaders in other student organizations.
  - General chapter members.

# Session: Moving from Policy to Practice
## *(President and Vice President of Programming)*

**Facilitator note:** This session will take place immediately following the lunch. It will be facilitated by a member of SigEp's member safety team or headquarters staff. It will be a joint session with the chapter president track and volunteers will be encouraged to attend. Prior to lunch, please give participants an overview of this session and instruct them to stay in the banquet room following lunch.

The session will include:

- Complete review of SigEp's risk management policies.
- Interactive session explaining and walking through supporting resources for member safety available at sigep.org.
- Discussion about substance-free facility expectations and the six AVC events that can involve alcohol at the facility.
- A case study that allows chapter presidents, Vice Presidents of Programming, and volunteers to walk through ways to identify and address member safety concerns.


While you do not have a formal facilitation role for this session, please attend and pay close attention to the content. Participants will use and apply what they learned from this session during your remaining sessions for the afternoon.

When you return to your room, use the following questions and wrap-up to quickly debrief the session. (Note that they will have already wrapped up the session and had a few debrief questions in the joint session.)

**Debrief Questions**

- What were your major takeaways from the presentation during lunch?
- Why did you all participate in the joint session following lunch?
- Was there anything new or different from that session that you didn't know before?
- What was the most useful portion of the previous session? How will you apply the lessons you learned back at your chapter?

## Session: How to host a social event at a third-party alcohol vendor

| Time: | 40 minutes |
|---|---|
| **Purpose:** | ▪ Teach participants how to host events with alcohol outside of the chapter facility—that follow SigEp's risk management policies. |
| **Program Objectives:** | ▪ Review SigEp's third-party venue policies and procedures<br>▪ Explain steps needed to host an event at a third-party vendor<br>▪ Empower participants to host the majority of their chapters' social events that involve alcohol at a third-party site |
| **Materials & Equipment:** | ▪ PowerPoint presentation and video capability<br>▪ Flip charts<br>▪ Marker |
| **Session Outline:** | ▪ Review SigEp's risk management policies (recap post lunch session)<br>▪ Review third-party event procedure (25 minutes)<br>▪ Third-party event brainstorm (15 minutes) |
| **Pre-Session Prep:** | ▪ None |

## *(Facilitated by MST-trained facilitator)*

### Review third-party event procedure (25 minutes)
- At lunch, the facilitator will have reviewed SigEp's risk management procedures, walked through supporting resources, and walked participants through a case study.
- Now that participants are aware of the policies, the intent of this session is to walk participants through how to implement an event at a third-party site and to begin brainstorming venues for events near their campus.
- The following two pages contain a resource available at SigEp's website called *SigEp Third-Party Vendor Policy Checklist*. It shows participants the requirements that SigEp has of third-party vendors as well as the chapter's requirements while hosting an event at a third-party site.
- The participants also have these policies in their participant guide.
- At least one of the facilitators for this session will be Member Safety Team (MST) trained and will be familiar with the third-party vendor sites policies. If not, a member of the Headquarters staff will prepare the facilitation team to facilitate this session.
- This session is very straightforward—simply walk participants through each step of the policies, answering questions as they arise.

- o Note: The "facilitator notes" at the end of this section contain a list of common objections and reactions that participants may have to the concept of hosting most events that involve alcohol at third-party sites—and how to overcome those objections.

# SigEp Third-Party Vendor Policy Checklist

Using a licensed and insured <u>third-party vendor</u> for an event where alcohol will be served is the safest and most effective method for either an undergraduate chapter or AVC hosting an event. A third-party vendor is an alcohol service provider that manages the distribution of alcohol at a function.  Third-party vendors can be either businesses or individuals; chapters can either host events with third-party vendors at the third-party or hire individual third-party vendors to serve alcohol at an event. Examples of third-party vendors are licensed bartenders, catering services, restaurants or bars that have a valid liquor license *and* own insurance with liquor liability coverage.

Your undergraduate chapter or Alumni and Volunteer Corporation will be in compliance with the risk management policies of the National Fraternity if you hire a "third-party vendor" to serve alcohol at your functions <u>only</u> <u>when</u> you can document the following checklist items.

By initialing each item below the applicable party is agreeing to the terms or conditions outlined below.

**THE VENDOR MUST**:
1. Be properly licensed by the appropriate local and state authority. This might involve both a liquor license to sell on the premises where the function is to be held


2. Provide copies of their state and local licenses.
    a. *undergrad/alumni - please attach those to this form and retain it for your records*


3. Be properly insured with a minimum of $1,000,000 of general liability insurance, verified by a properly completed certificate of insurance prepared by the insurance provider


4. Provide a "certificate of insurance" that shows evidence that the vendor has, as part of their coverage, "off premise liquor liability coverage and non-owned and hired coverage."


5. Provide a certificate of insurance that names as additional insured (at a minimum) the    local chapter and/or Alumni Volunteer Corporation (AVC) hiring the vendor as well as the national fraternity with whom the local chapter or AVC  is affiliated.
    a. *undergrad/alumni - please attach a copy of the certificate of insurance to this form and retain it for your records those to this form*
6. Agree to cash or credit card sales only, <u>collected by the vendor</u>, during the function.


7. Assume all responsibilities that any other purveyor of alcoholic beverages would assume in the normal course of business, including but not limited to:

A.  Checking identification card either upon entry and/or before alcohol is served;
B.  Not serving minors;
C.  Not serving individuals who appear to be intoxicated or incapacitated;
D.  Maintaining absolute control of all alcoholic containers present;
E.  Collecting all remaining alcohol at the end of a function (no excess alcohol—opened or unopened—is to be given, sold or furnished to the chapter);
F.  Removing all alcohol from the premises if event is not held at a third party vendor restaurant or bar.


**THE UNDERGRADUATE CHAPTER OR ALUMNI/VOLUNTEER CORPORATION MUST:**

When hosting a Third-Party Vendor event, the undergraduate chapter or alumni group must comply with both SigEp's Risk Management Policies as well as the following supplemental risk management policies:

**SigEp's Third-Party Vendor Supplemental Risk Management Policies**

1.  Undergraduate chapters must create a guest list to host an event and the total number of attendees (members and guests) cannot exceed three times the chapter size *or* the occupancy fire code limit for the venue. At alumni sponsored events, a guest list is not required but the total number of attendees cannot exceed the occupancy fire code for the venue.

2.  Members and guests must show proof of legal drinking age by providing a picture ID with a birth date.
3.  Members and guests who are of legal drinking age should receive something to identify that they are 21 years old or over. (e.g., wristbands)
4.  Non-alcoholic beverages and food should be available to guests at the event.

5.  Make sure you are in compliance with all campus policies and procedures.

**Depending on who is hosting the function, this form must be signed and dated by either the undergraduate chapter or alumni <u>and</u> the vendor. In doing so, both parties understand that only through compliance with the both SigEp's Risk Management Policies and these supplemental policies will the undergraduate chapter and/or alumni group be in compliance with the national fraternity requirements.** <u>This document and all the attachments should be retained for at least three years following the event.</u>

_____        _____
Chapter or Alumni representative printed name/title        Vendor's printed name/Company
name

_____        _____
Chapter or Alumni representative signature & date        Vendor's Signature & date

## Third-party site brainstorm (15 minutes)

- Now that participants have been educated on the third-party venue procedures, they will begin to plan holding an event at a third-party venue.
- The participant guides have a section dedicated to this planning on <mark>pages 13 and 14</mark>.
- Explain that participants will have 10 minutes to fill out the "Third-party Venue Brainstorming" section of their guide.
- They will then have approximately 15 minutes (until the end of this section) to share ideas with others in small groups.)

***Facilitator notes:***

- Participants may push back on the concept of hosting most of their events at third-party venues. Expect that—emotional responses mean participants are being honest and care deeply about their chapters. Both are good signs of an honest dialogue, which can lead to change. Below are some common objections and how to overcome them:

| | |
|---|---|
| ***Indignation****: "You can't expect us to actually have every event at a third party venue!"* | ● Refusal to believe this is a fairly common response. Allow participants to vent if needed. Then remind them that many SigEp chapters have followed the policy, and any chapters who refuse to follow the policy face repercussions including closure—and all that we can do is figure out how to maximize the experience while following the policy.<br>● Holding events at third party venues are safer, and oftentimes more enjoyable, than events at a chapter house.<br>● Chapters have addressed this by managing their chapter's expectations by communicating the number of social events that they will host for the semester. |
| ***Cost:*** *"We can't afford to have more than [number] events per semester anymore!"* | ● Another common response at the prospect of changing chapter practice. Some chapters may want to hold fewer events under this policy. However, there are other options. Chapters can raise dues, can hold cheaper events in other areas of operation, or have fewer events with alcohol in the first place.<br>● A best practice is to present the chapter with options, e.g. "Would you prefer to have the same number of socials per semester but raise dues by \$___, or would you prefer to keep dues the same and have ___ fewer socials per semester," and allow the chapter to vote.<br>● Remind the participants that earlier in the day, we reviewed a strong list of alcohol-free events to make sure the chapter can have fun without alcohol. |

| | |
|---|---|
| ***Travel:*** *"We're in the middle of nowhere; hiring transportation to the events will cost too much!"* | ● Remind participants to actively research various transportation companies.<br>● Remind them that the prices they have seen may have been based on a one-time deal; companies may be willing to reduce costs if a chapter agrees to use the same transportation system multiple times per semester.<br>● Rideshare programs continue to expand and there may be an opportunity to develop a contract with them. |
| ***Nowhere to go:*** *"Our town doesn't have any third-party venus."* | ● Remind participants to use their Greek life and/or student life staff. They will likely know the area, will know where other chapters (sororities included) hold their third-party events, and will want to help the chapter follow the policy. |
| ***But:*** *"Can we still have events with alcohol at satellite/annex/live-out houses?"* | ● The substance-free facilities policy only prohibits events with alcohol at property "owned, operated, or leased" by the chapter. If members of a chapter happen to live in a house owned by a landlord and that they rent as individuals, that house does not fall under the definition of "chapter facility."<br>● Events involving alcohol can be held at those houses—as long as alcohol distribution is handled by a third-party alcohol vendor (e.g. licensed bartender) or through a BYOB system as outlined in SigEp's risk management policies.<br>● This session was intended to teach how to hold an event at a third-party vendor, which is an option many of our chapters consider simpler than a BYOB event and prefer to host. |

## Session: Elevating Service & Philanthropy Programming

| Time: | 40 minutes |
|---|---|
| **Purpose:** | • Learn how to create impactful programming for service and philanthropic purposes. |
| **Program Objectives:** | • Identify key factors of impactful service and philanthropy.<br>• Identify areas of improvement for current programming. |
| **Materials & Equipment:** | • Service and philanthropy case studies. (1 per group)<br>• Flip chart.<br>• Markers.<br>• Tape. |
| **Session Outline:** | • Issue Overview & Description. (10 minutes)<br>• Application Activity. (15 minutes)<br>• Issue Reflection & Action Planning. (10 minutes)<br>• Reference to Resources. (5 minutes) |
| **Pre-Session Prep:** | • Participants are in groups with materials. |

### Issue Overview & Description (10 minutes)

- Introduce the issue that the group will be focusing on in this session: ***Elevating service and philanthropy programming***
- Use the questions below to facilitate a group discussion. Record the answers on a flip chart. What, why, and who should each have a flip chart for answers. If they get stuck, sample answers are provided below.

| | | |
|---|---|---|
| **What?** | *What is the ideal if this issue is resolved?*<br><br>*What does success look like?* | • Chapter members are engaged in service learning and philanthropy that makes a positive impact both in the community and on individual members; service learning especially should teach chapter members something as they are doing it<br>• Potential new members see, and take part in, service learning as a part of the recruitment process. |
| | *What are the potential obstacles to resolving this issue?* | • Chapter members viewing service and philanthropy as a "check box" activity/requirement<br>• Members are not passionate about the cause/organization<br>• Members claim to be too busy. |

| | What are the implications if this issue is not addressed? | • Service and philanthropy is not a priority by the chapter<br>• Members are just "going through the motions" when attending service and philanthropy programs<br>• Members only gain value, and develop relationships, through alcoholic social events. |
|---|---|---|

| | Why does this issue exist? | • Quality programming is not provided<br>• The importance of service and philanthropy are not discussed so the value is not recognized by members<br>• The meaning of service and philanthropy are misunderstood by members<br>• Service and philanthropy events are focused on the activity, not the cause being addressed |
|---|---|---|
| **Why?** | What are the surface issues? | |
| | What are the big picture issues? | |

| | Who does this issue impact? | • Chapter members.<br>• Other campus organizations.<br>• Local community service organizations<br>• Organizations who benefit from philanthropy |
|---|---|---|
| **Who?** | Who is involved in addressing this issue? | • Vice President of Programming.<br>• Executive board.<br>• Programming committee. |

Explain that for the rest of the session they will be learning how to effectively address the issue (i.e. the "how" of the issue).

**Application Activity: Elevating service and philanthropy programming (15 Minutes)**

- Begin by having participants define the difference between service and philanthropy:
  - Service is the time and effort to support a cause of issue (i.e. volunteering as a dog walker for stray dogs at a local animal shelter)
  - Philanthropy is a monetary activity that benefits a cause or issue. (i.e. fundraising to benefit cancer research)
- Have participants break up into small groups of 4-5 members. Assign each group a case study. Explain that they will serve as "event consultants" and are tasked with providing a solution to elevate the programming.
- Remind students of the event assessment model they used previously. As they tackle their case study, have them go through the same questions:
  - What is the purpose of the event or service opportunity?
  - What is to be achieved at this event (or this service opportunity)?
  - How do you define success of the event (or service opportunity)?
- Groups should complete the following in their case study:
  - Identify the issue with the event or service opportunity
  - Determine appropriate improvement for the event or service opportunity
- The case studies will cover the following topics:
  - **Page 15** *Case Study 1:* The American Alpha chapter has had a long-term service partnership with a local elementary school to mentor youth after school in low-income schools. There is a chapter requirement that members participate for a specific amount of hours each semester. In the last two years, members have felt unmotivated to complete their service hours and only go so they are not sent to standards board for violating a chapter requirement.
  - **Page 16** *Case Study 2:* The American Beta chapter is considered one of the top student organizations on campus and prides themselves in participating in and supporting many other campus organizations' philanthropy events. Another fraternity is holding a philanthropy beer pong tournament where the entry fees are donated to a local non-profit organization. The chapter is split in whether they should participate in the event.
  - **Page 17** *Case Study 3:* The American Gamma chapter holds an annual philanthropy kickball event that benefits the local Big Brothers Big Sisters (BBBS) agency. The service and philanthropy chair is very passionate about BBBS and has served as a big brother to a student in the afterschool program for two years. However, the service and philanthropy chair is one of three members who are actively and regularly involved with BBBS. Chapter members are required to support and attend the annual kickball event but are not fully engaged leading up to or during the event.

- o ***Page 18*** *Case Study 4:* The American Delta chapter has changed their service partner three times in the last four years. The chapter struggles to create buy-in from members to engage in on-going service and members struggle to find value in participating in service activities.
  - o ***Page 19*** *Case Study 5:* The American Epsilon chapter is very present in participating in campus philanthropy activities sponsored by student organizations like fraternities and sororities (e.g. dodgeball, cornhole, flag football), but members' motivation to participate primarily focuses on the athletic aspect of the events and less on the cause the events are benefitting. The chapter lacks a defined cause of their own.
- ▪ After 5-10 minutes, have each group present the issue and their proposed solution.

## Issue Reflection (10 minutes)

- ▪ Debrief questions:
  - o Why is it important that we talk about service and philanthropy in our programming?
  - o While service and philanthropy is not explicitly stated in our mission of "Building Balanced Men", how do these activities relate to our mission and values?
  - o Based on our case studies, what are the elements that make up meaningful service and philanthropy experiences for members?

## Reference to Resources (5 minutes)

- ▪ Direct participants to the following sections of the Officer Guide that specifically help address this issue.
- ▪ Finally, provide the information of people who would be helpful resources in addressing this issue. Make sure they capture these issues under the last question (*What resources do I have to help me address this issue?*) on their ***Issue Reflection and Action Plan Worksheet on page 8*** in their participant guide.

# Session: Identifying Issues and Buying in to Risk Management

| Time: | 40 Minutes |
|---|---|
| **Purpose:** | ▪ Enable participants to confidently improve member safety. |
| **Session Objectives:** | ▪ Participants can identify key missteps in risk management practices. <br> ▪ Participants know proper procedures, and can articulate the value to peers in order to generate buy-in. |
| **Materials & Equipment:** | ▪ Flip chart. <br> ▪ Markers. <br> ▪ Tape. <br> ▪ Scenario Questions. |
| **Session Outline:** | ▪ Issue overview and description. (10 minutes) <br> ▪ Activity: Identifying issues and generating buy-in. (10 minutes) <br> ▪ Assessing risk in programming. (10 minutes) <br> ▪ Issue reflection & action planning. (5 minutes) <br> ▪ Reference to resources. (5 minutes) |
| **Pre-Session Prep:** | ▪ Ensure that you have scenario questions organized and prepared for the groups. <br> ▪ Prepare flip chart with four areas being discussed during case study. |

## Issue Overview & Description (10 minutes)

▪ Introduce the issue that the group will be focusing on in this session:
**_Getting chapter members bought into, and putting on events that follow SigEp's risk management policies._**

▪ Use the questions below to facilitate a group discussion. Record the answers on a flip chart. What, why, and who should each have a flip chart for answers. If they get stuck, sample answers are provided below.

| **What?** | *What is the ideal if this issue is resolved?* | ● The chapter executes risk management policies and sees the value of doing so as a group. <br> ● Brothers hold one another accountable for upholding policies. <br> ● Positive reputation with campus peers/faculty and staff. |
|---|---|---|

| | What does success look like? | • Fewer situations where risk management issues might occur.<br>• Members and guests feel safe at all SigEp events and aren't made subject to harm. |
|---|---|---|
| | What are the potential obstacles to resolving this issue? | • Identifying risk management issues prior to events/crisis situations.<br>• Getting chapter members to buy-in to having more events that fully align with policy.<br>• Getting sororities/other organizations to partner with the chapter if it fully aligns with risk management policies.<br>• Potential for low attendance to the events. |
| | What are the implications if this issue is not addressed? | • Risk to the health and wellbeing of members and guests.<br>• Potential university sanctions/removal from campus.<br>• Fraternity sanctions/charter action. |

| | Why does this issue exist? | • The chapter isn't following risk management policies and doesn't see value in them.<br>• Chapter doesn't see value in operating within risk management policies.<br>• Chapter perpetuates unsafe "party culture" and negative fraternal stereotypes.<br>• Misalignment with Ritual and values.<br>• Campus norms dictate decision making. |
|---|---|---|
| **Why?** | What are the surface issues? | |
| | What are the big picture issues? | |

| | Who does this issue impact? | • Chapter members.<br>• Guests of members who attend events |
|---|---|---|
| **Who?** | Who is involved in addressing this issue? | • Vice President of Programming.<br>• Risk management chairman.<br>• Executive board.<br>• Programming committee.<br>• Standards board. |

Explain that for the rest of the session they will be learning how to effectively address the issue (i.e. the "how" of the issue).

**Application Activity: Risk Management- Identifying Issues and Generating Buy-In (10 Minutes)**

- Provide a walk up – We just did a case study with your chapter president and volunteers where we identified risk management issues at events, the alternatives to breaking policies, the benefits to following policy and the obstacles. Let's zoom into the obstacles.
- We all know the hardest part of this is getting the chapter bought into change. But we have to understand the obstacles. What are the common obstacles you will get from members to following policies (list on flip chart).
- Make sure that the group is specific about policies that the obstacles stem from while they are identifying them. Provide a couple of examples if the group struggles to begin identifying obstacles.
  - Policy  – Against hazing.
    - Obstacle 1 – Everyone else on the campus does it.
    - Obstacle 2 – No physical harm took place and the members consented.
    - Obstacle 3 – There's a good outcome behind it, so it's okay.
  - Policy – On Alcohol and Drugs.
    - Obstacle 1 – Everyone is going to drink; this is college.
    - Obstacle 2 – It's more cost effective if the chapter pools money to buy alcohol.
    - Obstacle3 – Having closed parties without drinking games isn't realistic to have on the campus.
    - Obstacle 4 – Recruitment will suffer if we don't use alcohol during the process, and it helps vet out men who aren't able to "hold their liquor."
    - Obstacle 5 – Marijuana is legal in the state; therefore, members should be able to make their own personal choice.

*Facilitator note* – *Ensure that the group spends enough time identifying obstacles since they will be used in the next section. Feel free to use multiple flip charts during the process.*

- After the large group has finished the identification process, break them into groups, give each group 1-3 of the obstacles they listed and have them develop ways to overcome these obstacles. This should include a list of talking points for each.
  - Participants will have room to take notes, create talking points, and write down their specific obstacles on Identifying Issues and Buying into Risk Management worksheet on **page 20** of the participant guide.
- After 8-10 minutes, have each group present what they came up with to the large group.
- Next, take the most popular obstacle and role-play the conversation as a large group.

- o You or another facilitator should be the brother presenting the obstacle.
  - o Ask for a volunteer to play the Vice President of Programming overcoming the obstacle.
- ▪ After you have gone through 2 or 3 role-play conversations as a larger group, break up into pairs and have participants each switch-off role-playing obstacles with one another. Then have the pairs find another partner, following the same step with two new obstacles.
- ▪ Following the activity walk through, use these debrief questions:
  - o Why did we take the time to do this activity and walk through the role-play scenarios?
  - o How do we apply these lessons to our own chapter experience?
  - o What were the big take-aways from this activity?
  - o What do you think is the ideal approach for having these conversations? (Clarify for them to think outside of simply tactical points to overcome the obstacle, but rather think about factors like mental, emotional and spatial aspects of conversation. Example: Have the conversation in private, ensure that you're not upset emotionally and aren't trying to "pick a fight".)
  - o Knowing that we were "role-playing" here, how would you approach these conversations differently in reality?
  - o What do you think the biggest obstacle is going to be going back to your chapter? Do you feel comfortable handling it?
  - o Who can help you have these crucial conversation and how?

## Assessing Risk in Programming (10 minutes)

- ▪ Direct participants to the Member Safety Assessment on **page 21** in their participant guide.
- ▪ Explain that now that they have the knowledge of risk management policies, they are responsible for assessing and implementing policy into their chapter's programming.
- ▪ They should spend a few minutes assessing their programming and identifying immediate member safety needs.
- ▪ If need be, they can work in pairs or small groups to start this process.
- ▪ While they will likely not be able to complete the assessment process for all of their programming, they should utilize the "Assess, Explain, Feedback, Address, Finalize" model when they go back to their chapter. This is a great exercise to complete with their programming committee.

## Issue Reflection and Action Planning (5 minutes)

- ▪ Have participants open to the *Issue Reflection and Action Plan Worksheet* in their participant guide and answer the questions listed here individually:
  - o *What was the issue we were addressing?*
  - o *What were the main lessons I learned from this activity and/or discussion?*

- o *Is it realistic that this issue would take place in your chapter?*
  - ▪ If yes, how can I work to overcome this issue when I return to campus? List out specific action steps.
  - ▪ If this is currently not an issue, what can I do as a leader to ensure we avoid this issue?
- o *What resources will you use to address this issue?*
- ▪ After participants have completed their *Issue Reflection and Action Plan Worksheet*, have a few participants share their answers with the large group.

## Reference to Resources (5 minutes)

- ▪ Direct participants to the following sections of the Officer Guide that specifically help address this issue.
  - o **Member Safety Resource:** You can use all of these to help you understand more fully and implement proper risk management procedures.
  - o **Skills and Concepts:** This section has a number of concepts that will help you be more effective in implementing policies and procedures.
- ▪ Also, direct participants to the following resources that will be helpful in addressing this issue.
  - o **Use local support**: Many universities provide support/education/training on risk management policies and best practices, take advantage of them.
- ▪ Finally, provide the information of people who would be helpful resources in addressing this issue. Make sure they capture these issues under the last question (*What resources do I have to help me address this issue?)* on their **Issue Reflection and Action Plan Worksheet** in their participant guide. Example resources include:
  - o Regional director/member safety director.
  - o Other executive board members.
  - o Specific committee members.
  - o Member safety team.
  - o Mentor to the Vice President of Programming.
  - o Fraternity/sorority life advisor.
  - o General chapter members.

# Session: Action planning

| Time: | 70 minutes |
|---|---|
| **Purpose:** | ● Create or refine goals and action plans for this calendar year.<br>● Receive feedback on goals and action plans from their peers. |
| **Session objectives:** | ● Participants have well developed goals and corresponding action plans relevant to their position.<br>● Participants network with other officers to gather best practices. |
| **Materials & equipment:** | ● Flip charts.<br>● Masking tape. |
| **Session outline:** | ● Creating an action plan. (20 minutes)<br>● Action plan creation. (20 minutes)<br>● Discussion and brainstorming. (30 minutes) |

## Creating an action plan (20 minutes):
- By this point, all of the participants should have their goals written and reviewed, whether they brought those goals with them to Carlson or created them Friday night post-session. Reinforce that if they walk away without concrete and tangible goals, they haven't maximized their Carlson experience.
- Also reinforce that they have started to create action plans throughout the day today.  List things they have done at the end of sessions that will set them up for success when they get home.
- Lead a discussion on what makes some goals successful and what causes other fail.
    - o Have the participants reflect on goals that they've set in the past, either for themselves or their chapter, that they didn't accomplish. Why didn't they accomplish their goals?
    - o Remind the participants of what makes a goal SMART and the importance of having written goals. Refer them to the resource on **page 25**
    - o A goal without a plan is nothing more than a wish. Hope is a poor strategy for success. To achieve any goal, you need to have a plan of how you're going to get there.
    - o Getting buy-in to your goals is not always easy, but it can be if you can articulate the clear path to achieving those goals and be open to feedback.
        - ▪ You might have excellent goals that can lead to positive change for your chapter, but if you try to tackle them alone, you will fail. Build a coalition, set expectations with them and ensure they have direction to help you tackle your goals.
        - ▪ Work the halls within the chapter, and get guys bought into your goals.
    - o When leading a team, you need to regularly check-in with your team members to ensure they are following up on their commitments. This follow-up will ensure the progress you expect is being made.
- With the rest of our time this afternoon, we'll be creating action plans for the participants to take back to their chapters to get feedback on, build consensus around, and ultimately implement.

- At its simplest, an action plan is just "how do I get stuff done to accomplish my goal?". The plan outlines all the steps necessary to accomplish the goal and serves a project management tool to track progress. Refer them to the resource on **page 26.**
- The following are elements of a basic action plan which we will be using shortly. Walk participants through each aspect:
  o Deadline: when does this task need to be accomplished to stay on track?
  o Task: what exactly needs to get done? EX: if the SMART goal is to create and implement a comprehensive communications plan, perhaps a task would be "Meet with the VP programming to get a calendar of chapter events".
  o Owner: who is responsible for getting this task done? Remind participants that they should <u>not</u> be the owner of every task. What can or should a committee member own?
  o Who is involved?: whose help is needed to complete this task? Also remind participants that this is super important to build a coalition of support. They need to be involving these individuals in the process and giving them plenty of advance notice of when they need their help and for what.

**<u>Action plan creation (20 minutes) and Discussion and Brainstorming (30 minutes)</u>**
- You're now going to have participants begin creating action plans for the goals they set. First, instruct participants to go back and review their SMART goals. Do they want to make any adjustments based on what they learned today? Do they want to create a new goal(s) based on what they learned?
- Have participants work alone on their action plans using the worksheets found in their participant guide on **pages 27-31**. Announce to all of them that you will be roaming around the room to help and answer any questions that they have while they're working.
- Once they finish, have everyone find a partner to share their action plans and get feedback.
- If time allows, let several participants present their SMART goal(s) and corresponding action plan(s) to the group.
- Ask the group for their thoughts on the time they spent formulating their plans. Was this easy or pretty difficult? Did they have any big revelations? Was there something else they came across that they thought was important to include in their plan?
- Have each participant commit to the following things:
  o Share their action plans and goals with their fellow executive board members
  o Present their goals to the chapter

Share their goals with chapter volunteers and the Regional Director for support and accountability.

# Session: Wrap up

| Time: | 40 minutes |
|---|---|
| **Purpose:** | ● Participants have the opportunity to discuss any final questions or concerns they have about their positions and term in office. <br> ● Participants leave the officer tracks excited to accomplish their goals. |
| **Session objectives:** | ● Wrap up the weekend by closing on a positive note and completing all conversations and talking points from the session. |
| **Materials & equipment:** | ● Flip charts <br> ● Masking tape |
| **Session outline:** | ● Facilitators choice activity(s). (30 minutes) <br> ● Final thoughts. (10 minutes) |
| **Pre-session prep:** | ● Review the "facilitator's choice" facilitation options and choose which of the wrap up activities you'd like to lead the group through. |

**Facilitator's Choice (30 minutes):**
- At the end of the weekend, we want to give you the freedom to end your session in any way you see fit based on how your conversations have gone with your group. Below are a few options you can utilize to wrap-up your time. If you have an idea separate of what's listed below, feel free to use that too.
  - Parking Lot Debrief
    - Throughout the course of the weekend, the participants have brought up many topics that could've derailed conversation and you put them in the parking lot to revisit them. This is your opportunity to go back to those topics and ensure that the participants don't leave with any lingering questions.
    - End the conversation by asking the group if there is anything else that wasn't in the parking lot that they still want to discuss.
  - Further discussion on hot-button issues
    - Give the participants the opportunity to continue asking questions about any major issues that they are facing in their chapter.
    - Address any and all questions for which you feel comfortable.  If something comes up that you don't feel like you can answer (or don't feel comfortable answering), please find a staff member and they can help the participant with the question.
    - Potential issues:
      - Substance-free housing: The chapter doesn't like how a substance-free facility has changed their social experience.support and thinks that implementing it will kill their chapter.
        - As a fraternity, we need to ensure that our focus isn't solely on alcohol and that we're offering beneficial

developmental opportunities. The chapter house should be conducive to learning and fostering meaningful relationships, rather than a bar. Removing alcohol from our facilities sets the expectation that SigEp is focused on our values and providing valuable developmental programming through the BMP.

- Over 90% of men living in fraternity facilities are under 21 years old. Our chapter facilities must be spaces where it is easy to do right and hard to do wrong, and we should be creating spaces where our younger members have the opportunity to make healthy lifestyle decisions and are in a positive atmosphere, not a negative environment where it's easier to do wrong.
- Social events with alcohol can certainly still be held, just not at the chapter facility. Our VPs of Programming have learned how to host fun third-party venue events this weekend. Your chapter will still have the opportunity to hold social events, just not at the house. Which is easier for you - you don't have to clean up after the party and you don't assume any of the liability for the social.

- Substance free facilities arewill be cleaner and more conducive to a positive living environment - which will lead to more bothers being willing to live-in, and therefore create a better environment for brothers to relax without the fear of living in a dirty environment.
- BMP: The BMP just hasn't been working at their chapter and it seems more like another class than a fraternity.
  o Open the discussion up to the group about exciting things that other chapters do in their programs to make it less academic.
- BMP App: It seems like the BMP app is just another way for Headquarters to spy on us and get us in trouble.
  o Headquarters isn't in the business of getting chapters in trouble. They're there to help and support chapters and the BMP app is one way of doing that.
  o Headquarters doesn't have the time to look at every chapter's BMP in the app. They trust that you will use the way that it's intended.
  o Chapters asked for the app at the 2015 Conclave when the BMP was made mandatory. It is designed with chapter needs in mind-- not the needs of Headquarters.

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

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

- - Make sure they walk away from the group feedback session knowing that they should always be providing constructive feedback with potential solutions or recommendations for change.
  - o "Wanted" boards
    - ▪ Introduce the concept of the "Help Wanted" board: A place to allow participants to continue networking and maximizing their strengths
    - ▪ Create several flip charts around the room with areas where a VPP may need help (ex: event planning, delegation, increasing attendance, etc)
    - ▪ Officers who feel that they have a best practice to share to help other chapters overcome the issue, should share the following information on a post-it note and have them post on that flip chart:
      - Name.
      - Chapter.
      - Email address.
    - ▪ After everyone has added their post it to any appropriate flip charts, instruct participants to take pictures of any where they need help.  EX: if the participant struggles with design, take a picture of the post its on that flip chart.  They should use those brothers as a resource over the coming year.
  - o Facilitator topic
    - ▪ If you have any final leadership lessons, or life lessons, you want to share that you believe would be of value to the participants in your session - use this time to tell your story

**Final Thoughts (10 minutes)**:
- Wrap up the weekend with any takeaways that the participants have.
- Walk through any final "lightbulb" moments that the participants had.
- Give your final thoughts on the weekend as a call to action to take back to their chapters.

# NOTES

# NOTES

# NOTES

# NOTES

# VICE PRESIDENT OF PROGRAMMING

## OFFICER GUIDE

SigEp | Building Balanced Men

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# INTRODUCTION

Congratulations on being elected the Vice President of Programming for the upcoming term. This opportunity comes with a responsibility to oversee chapter operations and coordinate all programming for the organization. As the Vice President of Programming, you can significantly influence chapter morale through successful events and help ensure that members are provided with well-balanced programming opportunities during their time in school.

## The Ideal

The ideal Vice President of Programming is a leader who excels at managing a committee and delegating tasks to execute large-scale events effectively. He is also effective at organizing and creating a cohesive chapter calendar that prioritizes the needs of members and makes the most of their time by providing diverse programming opportunities that are safe and beneficial.

## Impact

Because the Vice President of Programming role coordinates chapter programming and oversees operations, the impact of the position affects many areas of operations. If effective in your role, your work will improve the chapter experience and lead to higher morale, increased participation, more buy-in to SigEp's mission of "Building Balanced Men."

The impact will affect members individually by giving them unique opportunities to grow and interact with other brothers, provide opportunities to partner with and serve the campus and community, and participate in events that allow us to live our values and build strong relationships with one another.

## 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, both personally and as an organization, outlined above. Should you have questions or need support, contact your regional director.

# PEOPLE

## Introduction

Your role and the people that you work with will be integral to your success. The following section provides an overview of your job description and responsibilities, the programming committee, volunteer support, and the audiences that you will be working with.

## Your Job Description

At the most basic level, you are responsible for coordinating all chapter activities and managing the planning and execution of events. You are the chief operating officer of the chapter, ritualistic vice president, and assume all duties in the absence of or the disability of the president.

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

## Key Roles:

**Chief Operating Officer**: You will play the main role in coordinating and scheduling a cohesive and balanced list of programs and events that accomplish organizational goals and align with SigEp's mission and values.

**Event and Program Director**: Your role also serves to improve and enhance the membership experience by supporting other areas of operations. This includes providing opportunity for service learning, philanthropy, and building of strong relationships through diverse events coordinated with other executive officers.

**Risk and Crisis Manager**: You should have a risk management chairman and need to work with your committee to ensure that brothers and guests are put in safe situations whenever they are attending a SigEp event.

**Ritualistic Vice President**: Assist in the execution of the Ritual by helping to plan and participating in the Ritual as the vice president.

## Key Responsibilities:

- Appoint and manage the programming committee.

- Create and manage the chapter's master calendar.

- Coordinate all events and schedule with your college/university as necessary.

- Build partnerships and develop service learning and philanthropic programs with other organizations on your campus and in your local community.

- Help in the logistical planning of events in coordination with other chapter officers and ensure that they align with SigEp's values and mission.

- Collaborate with the vice president of member development and vice president of recruitment in supporting the coordination and execution of their events.

- Work directly with risk management chairman to ensure that all policies are upheld and ensure proper execution of risk management at all chapter events.

- Support the chaplain in planning Rituals to secure space and ensure the dates of Rituals stay reserved on the chapter calendar.

- Serve as the ritualistic vice president during Ritual Rites of Passage, meetings and at other necessary times.

- Effectively document recurring events and successfully transition new Vice President of Programming into the role.

If you effectively execute these key responsibilities, it will greatly improve the organization both in terms of operational excellence as well as in making a strong positive impact on your chapter brothers, campus and local community.

## Committee Structure

Managing the programming for an entire chapter can't be done alone. One of your first steps as the Vice President of Programming should be to appoint a programming committee.
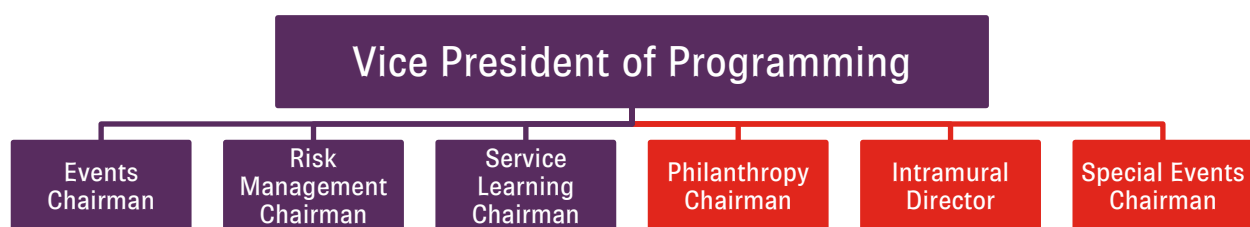


Every chapter should have at least one individual serving in each of the roles designated in purple. Though filling every position is optional, Vice Presidents of Programming are often most effective when they successfully leverage other team members to achieve chapter goals. If possible, resist the urge to do everything yourself. Every chapter member has a talent. Find the brothers whose talents have the ability to help you and encourage them to contribute.

Think about your chapter's current structure for the programming committee and compare it to the ideal. If you take the time to fill your committee and define the roles of each member early, it will pay off throughout the remainder of your time as Vice President of Programming.

**Events Chairman**: The events chairman should serve as the point person managing general week-to-week events on the chapter's calendar. Other members of the committee can work with him to plan and execute social events, brotherhood events, etc.

**Risk Management Chairman**: Should focus on the logistics and personnel necessary to align with SigEp's Risk Management Policies in order to keep members and guests safe at all events.

**Service Learning Chairman**: Provides opportunities for members to learn and grow by serving others on campus and in the community. The service learning chairman should work with your local Big Brothers Big Sisters agency in building a partnership and look for ways to provide education and reflection activities to support personal growth for brothers through direct service.

**Philanthropy Chairman**: The philanthropy chairman coordinates events and activities to seek donations and promote awareness for SigEp's national service and philanthropy partner, Big Brothers Big Sisters of America, as well as other local philanthropic endeavors.

Intramural Director: Coordinates the registration and activity of chapter members in college/university intramural sports.

**Special Events Chairman**: Manages chapter events that take place outside the scope of normal chapter events. These could include: golf tournaments, semiformal/formal events, large-scale university wide events, etc.

## Audiences

In your role as an executive officer, you will have the opportunity to interact with many different "audiences." These are individuals or groups that you will work with consistently during your term in office. Because of this, you should start by understanding who your key audiences are, and how they ideally interact with the Vice President of Programming.

### Chapter Members

- Description: General chapter members are your key  audience. Your role directly affects the chapter and college experience of all brothers in the chapter.

- Relationship/Interaction: You should work with and support your committee in putting on events that will benefit all chapter members. Although you should not be directly planning every event, you should have a good pulse on the needs of chapter members and execute events throughout the year to support them.

## Campus Community

- Description: College undergraduates are naturally curious about Greek life, and you have an opportunity to shape how they view SigEp on your campus.

- Relationship/Interaction: You should work with your committee to create a number of events open to the entire campus each term, ideally finding other organizations to partner with. These can include philanthropy/service events, educational speakers, campus-wide competitions, etc.

## Vice President of Member Development

- Description: The vice president of member development manages the planning and execution of the Balanced Man Program and all development events for the chapter.

- Relationship/Interaction: You should meet with the Vice President of Member Development prior to the beginning of each academic term to map out dates and times for specific events to ensure there is no overlap. You should also specify which large events each of your committees will be working on and overlap within the scope of your roles.

## University Faculty and Staff

- Description: The university faculty and staff involved with the chapter will vary depending upon your campus; the chapter can involve fraternity and sorority life professionals, faculty fellows, student activities staff, faculty advisors, etc.

- Relationship/Interaction: Build a relationship with the key faculty and staff that interact with the chapter. Our key university staff should be aware of the programs that the chapter executes during the year, and ideally be engaging by helping with key programming events that take place on campus.

## Alumni/Volunteers

- Description: In your role, you will interact with members of the chapter's Alumni and Volunteer Corporation and other local volunteers and alumni.

- Relationship/Interaction: You will interact with alumni/volunteers throughout your time in office. This may include providing updates on chapter events to the AVC, notifying local alumni about upcoming events that they may attend, working with the AVC president and chapter counselor, etc.

## Parents and Families

- Description: Perhaps no one is as invested in the health of your chapter as its members' parents. They may even choose to become chapter volunteers or donors if you are able to engage them through specific events.

- Relationship/Interaction: You can make a huge impact by providing wholesome ways for parents and family to engage with the chapter each term. This can include events during homecoming, parents/family weekend, etc.

## Local Community

- Description: As a member of your campus community, you also have the ability to work with members and organizations in your surrounding area.

- Relationship/Interaction: Find organizations that share a common cause and work to partner with them in providing service to your local community. You can also engage local businesses in supporting the chapter's philanthropic work and find outlets in the community to provide space for other chapter events like Ritual, retreats or social events.

# SKILLS AND CONCEPTS

## Introduction

The following sections outline the most important skills and concepts that will be necessary in your role as the Vice President of Programming:

## Important Concepts

### The Five Areas of Development

**Why it's important**: Providing programming for specific areas that are relevant to a brother's life improves the SigEp experience and helps him get the most out of it.
**Explanation**: As you work to plan events, remember that activities should focus around the six areas of development as noted below:

- SigEp: 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.

- Intellectual: 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. 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.

- Physical Health & Wellness: Many students enter college with a sound body but don't make it a priority as other things 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. Programming in this area should cover physical, nutritional, sexual and preventative health.

- Leadership: 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 making a difference in student organizations and academic colleges.

- Professional: 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.

## Relevant Programming

**Why it's important**: Providing relevant programming improves the SigEp experience for members.

**Explanation**: Make sure that events are going to be useful for the target audience. A few ways to accomplish this:

- Keep older members engaged by asking them to help plan and execute programming. Sit down with older members and have a brainstorming session to find fun activities for the chapter.

- Get feedback from the chapter on what is/isn't relevant for them. This can be done through formal surveys using tools like Survey Monkey or Google Forms, as well as informal surveys in person, which are engaging and reduce the feedback loop.

- Always assess the "why" behind the "what" for events and activities to ensure that each aligns with our Cardinal Principles.

## Implementation Quality Programming

**Why it's important**: Many chapters lack an organized approach to implementing programming at their chapter.

**Explanation**: The following diagram outlines the process by which chapters can improve the quality of their programming:

| Assess | → | Plan | → | Prepare | → | Lead | → | Evaluate |
|--------|---|------|---|---------|---|------|---|----------|
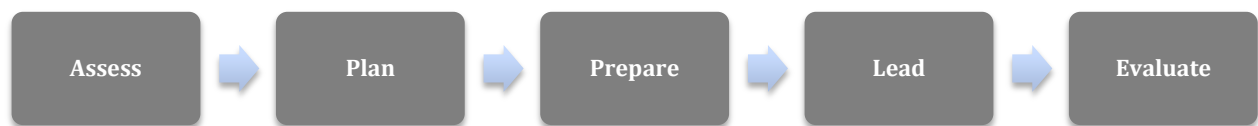
The graphic above outlines five steps to help execute quality programming.

Use the Implementing Quality Programming Guide as you actually implement this process at your chapter. 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 participants, look back at the activity and assess strengths and weaknesses. Make a list of these items and keep notes for the future.

## Philanthropy, Community Service and Service Learning

**Why it's important**: Being able to identify the differences and create programs that are truly beneficial is key to the chapter experience that you provide.
**Explanation**: The three concepts are similar and connected, but also share unique characteristics.

- Philanthropy: Usually focused on raising monetary donations to support a specific cause or organization.

- Community Service: Often provides a value to a community partner through unpaid volunteer work.

- Service Learning: Combines community service work with dedicated reflection and education to help the participants grow personally and learn concepts often times related to civic engagement.

You should work with your committee to provide service learning opportunities to the chapter and combine philanthropic endeavors with direct service, whenever possible.

## Avoiding Over Programming

**Why it's important**: SigEp chapters have a lot going on – recruitment events, challenge meetings, social events, etc. Therefore, it is easy to put too much on the calendar and schedule events that are poorly attended/not seen as valuable by members.
**Explanation**: Avoid over programming by coordination of the chapter calendar in advance and collaboration among executive board members to provide joint programming.

- Coordinating the calendar in advance: This allows you to space out large-scale events and ensures that specific months and weeks on the calendar aren't oversaturated with programs.

- Collaboration among executive board members: Work with other leaders to have events that encompass multiple areas of operations. Examples include:

  - A service learning event that doubles as a BMP challenge meeting.

  - A recruitment/brotherhood event.

  - A sorority social focused on philanthropy and service.

## Delegate Your Way to Success

**Why it's important**: A single person cannot run the programming of an entire chapter. Vice Presidents of Programming that try to do everything by themselves burnout and are ineffective in their role. Being able to know what should be delegated to other members and ways to go about doing that are essential for the Vice President of Programming role.

**Explanation**:  Your effectiveness in delegating responsibilities is only as good as the person that you have completing tasks. Make sure to select reliable and hardworking committee members who have clearly defined roles. This will allow them to stay on track and will allow you to manage the entire calendar of events, rather than focusing directly on each program and event that takes place.

## Chapter Buy-In

**Why it's important**: Chapters operate smoothly with strong programming when members are excited and want to participate, and when they know the "why" of the program.

**Explanation**: Get input from members about the activities and events that they want to see and participate in, and work with your committee to deliver events that brothers are interested in and excited about.

- <u>Empathize</u>: Seek first to understand, "Why are people not interested in a specific program or type of event?"

- <u>Educate</u>: If you see value in putting on an event, make sure to show other members how it can be beneficial for the chapter.

- <u>Seek out key individuals</u>: Get buy-in from key leaders (both formal and informal) first, then work with them to gain more support.

- <u>Show the value</u>: After getting a core group to buy-in, make sure that you stress the benefits and value that are derived from implementation.

- <u>Make it stick</u>: Once you have buy-in, continue to educate and stress the value routinely.

# Important Skills

## Managing your committee

**Role**: Chief operating officer.
**Responsibility**:  Appoint and manage the programming committee.
**Purpose**: Ensure that the chapter's events operate smoothly with multiple chapter members supporting their execution.
**How to**: There are a number of different management styles and integral parts to being an effective manager. For your role as the Vice President of Programming, some of these management skills will be more important than others. Here are the four steps that should guide your management of the programming committee:

- Leading by example: To set the tone for your committee you should exemplify the characteristics that you want them to embody: Timeliness, organization, follow through, etc.

- Communication: Be clear in setting specific expectations and deadlines with the committee, replying to emails/calls quickly, and ensure that you listen to the ideas, needs and feedback of each committee member.

- Empower your committee members: Make sure to give praise and encouragement to each member and provide constructive feedback when necessary.

- Management balance: Finding a balance between autonomy and accountability will be essential for your management of each individual. Some individuals will need more check-ins and structured oversight than others will. Work with each brother and have candid conversations to find what works best for them.

## Ensuring Member Safety

**Role**: Risk and crisis manager.
**Responsibility**: Work directly with the risk management chairman to ensure that all policies are upheld and ensure proper execution of risk management at all chapter events.
**Purpose**: The health and safety of our brothers is one of the most important aspects of brotherly love and fraternal life as a whole.
**How to**: To ensure that the chapter's members and guests are kept safe you should:

- Know the policies: Thoroughly read SigEp's risk management policies and watch this video that explains them.

- Build procedures: Utilize the Chapter Risk Management Procedures document to build customized procedures for your chapter to ensure you're following the risk management policies.

- Use the resources to hold safe events: When planning an event, use SigEp's Social Event Planning Guide, Sober Monitor Guide and other resources on the member safety page.

- Manage Crises: Should an incident occur, follow crisis management guidelines and ensure that you call the crisis hotline (1-800-767-1901) immediately.

## Organization

**Role**: Chief operating officer.
**Responsibility**: Create and manage the chapter's master calendar and coordinate all events and schedule with your college/university as necessary.
**Purpose**: When planned and organized effectively, programming events and activities become a well-integrated part of the chapter calendar. If events are not well coordinated, they contribute to an over-programmed calendar leading to poorly attended events that don't add substantial value to the overall college experience.

**How to**: As a leader you will have your own process for keeping things organized, but there are key steps that will set you and your committee up for creating a cohesive and well organized development program.

- Plan in advance: Begin planning large-scale events, reserving meeting space, and scheduling programming committee meeting times at least one term in advance. Meet with the committee and map out meeting times and event dates for the upcoming term. You should also meet with the vice president of member development and vice president of recruitment to make sure event dates, Ritual and development meetings do not conflict.

- Leverage technology: Almost every university utilizes a web-based platform that includes an electronic calendar (Google calendar, blackboard, Microsoft Outlook, etc.). Take advantage of this and use it for scheduling and communicating development events.

- Scheduling space: Your university will have a system for student organizations to reserve university academic and recreational space. Ensure that you are proficient in using the system and that you work with your committee to reserve necessary space.

## Event Planning

**Role**:  Event and Program Director.
**Responsibility**: Help in the logistical planning of events in coordination with other chapter officers and ensure that they align with SigEp's values and mission and collaborate with the vice president of member development and vice president of recruitment in supporting the coordination and execution of their events.
**Purpose**: Chapter events can be some of the best times in a brother's chapter experience. To ensure this you need to have strong event planning skills.
**How to**:

- Use event planning resources: Use the Implementing Quality Programming Guide resource at the end of this guide as you plan as well as the Social Event Planning Guide.

- Follow the framework: Use Assess, Plan, Prepare, Lead and Evaluate as a structure to create and execute quality events.

- Create a plan and accountability: Work with your committee to divide responsibilities for the event and a timeline for completion. Make sure that each task has a specific owner.

- Communicate well in advance: Begin marketing the event as soon as it is fully scheduled. Also, have regular check-ins with those involved in the planning process to make sure that all tasks are completed on time leading up to the event.

- Plan for the unexpected: There will always be a risk of something going wrong. Prepare for these unexpected issues by considering things like: timing of activities and planning schedule, weather, budget, risk/crisis incidents, etc.

# PLANNING

## Introduction

Proper planning is essential for all chapter leaders. This section provides an outline and initial steps for what you will need to do to plan your year as the Vice President of Programming.

## First Steps

Below is a list of the first steps a Vice President of Programming should take in the position. Remember, they do not have to be completed in this exact order, but all should be done in a timely manner after being elected.

- Attend the officer transition retreat. Be sure to work with the previous Vice President of Programming to understand successes, failures and learning opportunities he experienced.

- Appoint your programming committee (You may also appoint ad hoc committees to serve a specific role for the chapter).

- Read and be familiar with Sigma Phi Epsilon's Risk Management Policies. All chapter events must abide by these criteria.

- Review the Social Event Planning Guide to understand all policies and procedures of Sigma Phi Epsilon. Constantly be monitoring the chapter's risk exposure.

- Review and be familiar with *The Ritual and Guide of Sigma Phi Epsilon Fraternity*. You are the ritualistic vice president.

- Set up a weekly meeting time with the programming committee. This meeting should occur at least one day prior to the regularly scheduled executive board meeting. Each chairman can report his progress for your report during executive board and chapter meetings.

- As you meet with the programming committee, ensure each chairman understands the expectations of his position. Each chairman should set both short-term and long-term goals for his term. Your role will be to follow up and help provide resources, support and encouragement.

- Become familiar with SigEp's web site, www.sigep.org.

- Become familiar with your campus and IFC risk management policies and procedures.

- At your weekly chapter meetings:
  - Report on all events occurring within the programming committee.
  - Provide calendars for all members outlining upcoming events.
  - Serve as ritualistic vice president.

# A Year in the Life

As the vice president of programming 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 frame when specific tasks are completed over the course of an academic year.

*Note: Development programming and university calendars vary widely by chapter and school. The calendar below reflects steps that apply regardless of chapter-specific programming; however, some timelines and dates will differ.*

| Task | Timeline |
| --- | --- |
| Elections. | Late November |
| Verify committee structure and appoint committee members. | Early December |
| Review SigEp's risk management policies and other resources on SigEp's website. | Early December |
| Meet with previous Vice President of Programming and begin individual transition. | Early December |
| Attend executive board transition retreat. | Mid-December |
| Mark upcoming year's major programming, recruitment, development events on the chapter calendar and reserve meeting spaces on campus. | Mid-December |
| Set and review goals with each committee member. | Winter break |
| Coordinate a time for weekly programming committee meetings for the upcoming term. | Winter break |
| Hold first programming committee meeting in preparation for academic term. | January |
| Attend Carlson Leadership Academy along with committee members and others interested in programming. | February |
| Support programming during formal recruitment process. | February |
| Meet weekly with the programming committee. | Weekly |
| Update and manage the chapter calendar in consultation with the rest of the executive board. | Continuously |
| At weekly chapter meetings: report on all events occurring within the programming committee, provide calendars for all members outlining upcoming events and serve as ritualistic vice president. | Continuously |
| Meet and begin supporting possible successors for Vice President of Programming role. | Continuously |
| Work with the chaplain to plan, execute Rites of Passage and hold members accountable through membership lapsing. | Continuously |
| If applicable, appoint and onboard new members of the programming committee to serve for the upcoming term. | April |
| Execute final events for the term and review all programming activities to ensure that they are improved in the future. | Early May |
| Work with other chapter leaders to hold appropriate ceremonies and events to honor and support graduating seniors in their future | May |

| | |
|---|---|
| endeavors. | |
| Hold remote or in-person committee meetings to ensure members are planning effectively for the upcoming term. | June/July |
| Coordinate programs and events for the term with other executive board members and reserve meeting spaces on campus. | June/July |
| Hold first programming committee meeting of term and review goals/expectations. | Early August |
| Meet with those interested in Vice President of Programming role, ensuring that the most qualified and best candidates are aware of the responsibility and prepared for the role. | September/October |
| Organize all development materials and begin planning for transition of new Vice President of Programming. | October |
| Support candidates and provide insight during chapter elections to ensure the best candidate is selected for the Vice President of Programming roles. | November |
| Meet with next Vice President of Programming and begin individual transition. | Early December |
| Attend executive board transition retreat with incoming officers. | Mid-December |
| Support new Vice President of Programming as he transitions and answer questions/provide insight to help him in his role. | Continuously |

# CONCLUSION AND RESOURCES

## Summary

The role of the Vice President of Programming is one of the most integral to the chapter experience, and when done well it can lead to incredible leadership skills building, and satisfaction through providing brothers with an exceptional fraternity experience. To be successful you must stay organized, plan in advance, select a strong committee and work effectively with them, and ensure that the chapter's programs and events aligns with the Cardinal Principles embodied by our Ritual and Founder's vision.

## 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 Vice President of Programming. Below is a list of these that you should take time to research and understand:

**Implementing Quality Programming Guide**
This document walks through a framework for planning, executing and assessing programming.

**Balanced Man Program Guide**
This comprehensive resource walks through the entire philosophy and structure of the BMP. You should be familiar with it due to your large amount of interaction and collaboration with the vice president of member development.

**Balanced Man Program Structure**
This document gives a brief overview of the BMP showing the connection between the philosophy and process of the program, as well as how the Ritual, mentoring and challenges flow together. It will be useful as you help schedule and support the vice president of member development.

**Big Brothers Big Sisters Community Partnership Page**
This page provides an overview of the ways you and your chapter can get involved with a Big Brothers Big Sisters agency in your local community.

## Member Safety Resources

All of the following resources can be found on SigEp's Member Safety Page:

**Risk Management Policies of Sigma Phi Epsilon Fraternity**
This document outlines the fraternity's policies. Failure to comply with the policies signifies a conscious decision to forfeit insurance coverage and can result in individual and chapter disciplinary action.

**How to Utilize Member Safety Resources to Plan Safe Events**
A step-by-step process to use six key resources that will help you plan a safe event.

**Sober Monitor Resource**
This resource provides guidelines and expectations for sober monitors/officers who manage events.

**Event Contract and Third Party Vendor Checklist**
The Fraternal Information and Programming Group (FIPG) and SigEp's insurance broker recommends   chapters utilize the checklist when planning third party vendor events in order to document compliance with SigEp's risk management policy.

**SigEp Chapter Risk Management Procedures Template**
This document is a customizable resource that your chapter can use to develop member safety procedures on your campus.

**North American Interfraternity Conference BYOB Guidelines**
Guide designed by the NIC to assist chapters in planning and implementing safe BYOB events.

**Guidelines for Designated Driver Programs**
This guide provides information about designated driver programs and their use in event planning.

**Tailgating Best Practices**
Tailgating has become a popular part of sport and entertainment events. However, there are risks involved in the hosting of tailgating events. This resource provides guidance and best practices for safe tailgating.

**Security Vendor Checklist**
It is recommended that you hire professional security for your events.  This checklist will help you hire security that is adequately bonded and professional, and will provide the best risk management strategy for your event.

**Crisis Management Guidelines**
As a chapter officer, you must be prepared to meet the needs of any crisis we face. This page includes some basic guidelines in case of an emergency.  Review this plan with the chapter before a problem occurs.

# IMPLEMENTING QUALITY PROGRAMMING GUIDE

The following document will help you develop strong programming by walking through a process of implementing quality programming.

## Areas of Development

As you work to plan events remember that activities should focus around the six areas of development as noted below:

**SigEp**: Knowledge and understanding of the Fraternity.

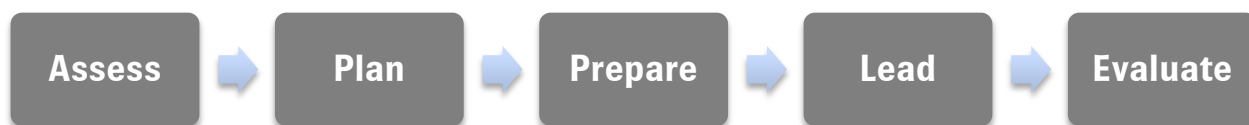**Sound Mind**: Intellectual and academic growth and performance.

**Sound Body**: Physical health and wellness.

**Personal**: Emotional and cultural growth.

**Leadership**: Growth and experience as a leader.

**Professional**: Preparation for career success.

## Implementation Quality Programming Process

**Assess** → **Plan** → **Prepare** → **Lead** → **Evaluate**

**Assess**: Know what you want participants to get out of each event that you plan and ensure that you and your committee develop a balanced programming schedule.

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

## Instructions

Use the resources that follow to help guide you through these five processes. You can also use the frameworks presented in each to develop your own customized resources. For example, you can create your own project schedule using Excel or Google Sheets and make updates to it along with your committee to stay up-to-date on the progress of the project planning and execution for a specific event.

# Assessing Your Current Programming

*It is important to assess the current state of your programming within the framework of these six core areas, for both under and upperclassmen.  Spend some time writing down your current programs in each area as well as the strengths and challenges you face.*

| UNDERCLASSMEN | | | | | |
|---|---|---|---|---|---|
| **SigEp** | **Sound Mind** | **Sound Body** | **Personal** | **Leadership** | **Professional** |
| Current Programs: | Current Programs: | Current Programs: | Current Programs: | Current Programs: | Current Programs: |
| Strengths/Challenges | Strengths/Challenges | Strengths/Challenges: | Strengths/Challenges: | Strengths/Challenges: | Strengths/Challenges: |

| UPPERCLASSMEN | | | | | |
|---|---|---|---|---|---|
| **SigEp** | **Sound Mind** | **Sound Body** | **Personal** | **Leadership** | **Professional** |
| Current Programs: | Current Programs: | Current Programs: | Current Programs: | Current Programs: | Current Programs: |
| Strengths/Challenges | Strengths/Challenges | Strengths/Challenges: | Strengths/Challenges: | Strengths/Challenges: | Strengths/Challenges: |

## PROGRAMMING EVENT DESIGN (ASSESS AND PLAN)

| | |
|---|---|
| **Type of Program:** | |
| **Underclassmen or Upperclassmen:** | |
| **Name of Program:** | |
| **Brief Description of Program:** | |
| **Purpose and Relevancy of Program:** | |
| **Key Stakeholders:** | |
| **Estimated cost of program:** | |

# PROJECT SCHEDULE FOR PROGRAMMING EVENT (PREPARE AND LEAD)

| ✔ | Project Task | Committee Member Responsible | Date Task Due |
|---|---|---|---|
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# PROGRAMMING EVENT EVALUATION

## (EVALUATE)

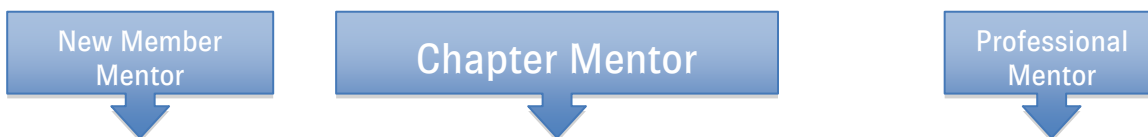| | |
|---|---|
| **Name of Program:** | |
| **Brief assessment of event:** | |
| **Greatest success of event:** | |
| **Reflect on greatest obstacles/mistakes:** | |
| **How could the event be improved in the future?** | |
| **Specific changes to make:** | |
| **New thoughts/ideas to enhance event:** | |

## Connecting Philosophy to Process

The Balanced Man Program's philosophical tenets, or "why", correspond directly with five processes necessary to implement the program effectively. The process encapsulates "how" the philosophy is enacted within the program.

| PHILOSOPHY | PROCESS |
|---|---|
| Equal Rights and Responsibilities | Single-Tiered Membership, No Pledging, No Hazing |
| Continuous Development | 4 Self-Paced Challenges, Defined Minimum/Maximum Timeframes |
| Accountability | Membership Lapsing |
| Living the Ritual | Ritual Experience Through Rites of Passage |
| Mentoring | Formal/Emphasized Mentoring Program |

## Program Structure

The program's structure is meant to provide meaningful development throughout a man's collegiate experience by providing consistent mentoring and exposure to the Fraternity's values. The structure is built out in a linear progression, emphasizing the growth and continuous pursuit of excellence along with the commitment to a single-tier of membership and equal rights and responsibilities among all members.

| New Member Mentor | Chapter Mentor | Professional Mentor |
|---|---|---|

| Sigma Challenge | Six – Eight weeks | Epsilon Challenge | 28 – 80 weeks |
|---|---|---|---|
| Phi Challenge | 12 – 52 weeks | Brother Mentor Challenge | Until graduation |

# CRISIS MANAGEMENT GUIDELINES

At the chapter level, the president of the chapter should take charge in any crisis. The president should consult with volunteers, Headquarters staff and other members who possess more expertise or insight. The final decision, however, must rest with the president. All chapter officers should know where to find a copy of the chapter's emergency procedures.

## CRISIS HOTLINE NUMBER:   1-800-767-1901

1. The president (or officer next in line if the president is not present) takes charge.
2. Call emergency number(s), usually 9-1-1, so appropriate emergency personnel (police, fire, and ambulance) can respond. Cooperate fully with the needs of any public safety organization seeking to help you or protect your safety.
3. Restrict access to the chapter house at once. The president must have complete control of the situation, and be aware of who is in the area. Permit only your members and appropriate officials to enter.
4. Assign one or more responsible members to calmly be at the door.
5. Do not tamper with any part of the area involved in the incident specifically which might be construed as evidence or involved with the incident.
6. Call the Crisis Hotline number, 1-800-767-1901, to report incident.
7. Notify your chapter counselor.
8. Assemble your members in a group (in case of fire, assemble outside, in front near the street). All should remain calm. Explain there is an emergency, but that it is under control. Remind members that only the president or chapter counselor/key volunteer can speak for the Fraternity—members are not to speak to anyone (including friends, girlfriends, parents, the university) about the crisis.
9. Do not discuss details, speculate on events or otherwise elaborate on the situation. Often, litigation follows crisis. Statements made could later be used in court.
10. Contact appropriate campus officials:
    Campus official name/title: _____
    Home/work/cell telephone: _____
11. Fully cooperate with appropriate authorities.
12.  All clothing with the Fraternity's name should not be worn during the investigation period.
13. Submit all requested information about the incident to Kathy Johnston, Member Safety Director, in a timely manner (**Kathy.johnston@sigep.net** or 804.286.2191).

## Dealing with the media

If contacted, only the president or chapter counselor should speak for the chapter. Avoid "no comment" as it leads to speculation. Instead, make a simple statement: *"We are aware that an incident occurred and are cooperating fully with the police and university officials who are investigating."* Keep repeating the above statement if you are pursued further. Do not give in because you are asked the same question several different ways. Never release names or

admit liability. Depending on the circumstances, the Headquarters staff may take over any direct contact with the media including the issuance of a press statement.

## Serious injury or death of a member

DO NOT NOTIFY THE PARENTS. Medical or police personnel who are trained in this will notify the family. You should always have parent/guardian information on file available to proper authorities. After you know that the family has been notified, it is appropriate for a chapter representative to call and share your concern.

In the event of a death, do not remove any personal items from the room. Do not let members enter the room. Allow only authorized personnel to enter the room. If possible, keep the door locked. Ask the family what their wishes are in regard to the member's possessions. You may offer to pack them in boxes, but it is more likely that the family will want to do this themselves. Before they arrive, be sure that any borrowed items are returned. When the family arrives, have empty boxes available and offer your help. Understand that this is a difficult time for them and they may want privacy.

Coordinate member attendance at the funeral or memorial service. Along with your chapter counselor, discuss with the family or the family's clergyman the possibility of conducting Sigma Phi Epsilon's memorial service, which is available through Headquarters.

In the case of serious injury or illness, find out the visitation wishes of the family and coordinate this with members of the chapter.

## Follow up

University staff is usually available for member counseling and general assistance. Individual and group counseling is strongly recommended after a death or serious injury.

# FINAL WORD

Again, congratulations in being elected as the Vice President of Programming. Your work this year will forever change your college career, provide you with invaluable leadership experience, and allow you to impact the lives of your chapter brothers in a positive way. As a final note, remember and take to heart these words from the installation ceremony of newly elected officers:

> *You are the newly chosen leaders of your Chapter of Sigma Phi Epsilon. In your hands largely rest the destinies of your chapter during the coming year. Your brothers have expressed their respect for your ability and their confidence in your integrity. We look to you for guidance, direction and leadership.*
>
> *Your leadership shall assure that harmony and cooperation shall always prevail among us. Your spirit of service, your devotion to duty, your willingness to serve and sacrifice will be the qualities that give force and direction to our aims and aspirations.*
>
> *May your terms in office come to the close with these words surging in your hearts:*
>
> > *Well done, thou good and faithful*
> > *servant; thou hast been faithful over*
> > *a few things:  I shall make thee a ruler*
> > *over many things.[1]*

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[1]Matthew 25:21

# 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.

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## 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.*

**Underwritten by:**

Markel Corporation
Glen Allen, VA

"
*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.*
"

RUCK LEADERSHIP INSTITUTE

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