

SIGMA NU INSTITUTE

"A leader's dynamic does not come from special powers. It comes from a strong belief in a purpose and a willingness to express that conviction."

— Kouzes & Posner

SPRING 2010

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OUR OBJECTIVES FOR TODAY

1. To understand the organizational structure of Sigma Nu Fraternity.
2. To learn skills and/or strategies to be a more effective officer.
3. To understand the importance of planning for the future.
4. To understand the Pursuit of Excellence Program and be prepared to utilize the program as a developmental tool for chapter progress.
5. To identify allies and friends that can assist you in your efforts.
6. To be able to add value to your chapter's recruitment, candidate education and LEAD programs.
7. To better understand the role of elected officers as leaders first.

SCHEDULE OF THE DAY

12:30 – 12:50	<i>WELCOME & INTRODUCTIONS</i>
12:50 – 1:40	<i>ORGANIZATIONAL STRUCTURE OF SIGMA NU FRATERNITY</i>
1:45 – 2:40	<i>BREAKOUTS: BEST PRACTICES (CMDRS/LT. CMDRS.) / VALUES-BASED RECRUITMENT / VALUE OF MEMBER EDUCATION (MARSHALS/LEAD)</i>
2:40 – 2:50	<i>BREAK</i>
2:55 – 3:35	<i>BREAKOUTS: LEADERSHIP (CMDRS./LT. CMDRS.) / VALUES-BASED AND VALUE-BASED RECRUITMENT / LEAD BEST PRACTICES (MARSHALS/LEAD)</i>
3:35 – 4:15	<i>PURSUIT OF EXCELLENCE PROGRAM</i>
4:15 – 4:25	<i>BREAK</i>
4:25 – 5:00	<i>BREAKOUTS: PURSUIT OF EXCELLENCE PLANNING</i>
5:00 – 6:00	<i>GOAL SETTING & WRAP UP</i>

GENERAL PROGRAMMING

ALL PARTICIPANTS

SIGMA NU FRATERNITY – ORGANIZATIONAL STRUCTURE

Session Objectives:

1. Visually demonstrate the organizational structure of the Fraternity through a flowchart.
2. Articulate the role of each entity of Sigma Nu Fraternity.
3. Identify common misperceptions and myths regarding entities of Sigma Nu Fraternity.
4. Apply the organizational structure to specific scenarios and situations.

“He who has never learned to obey cannot be a good commander.” - Aristotle

THE GRAND CHAPTER

A four day, democratic legislative convention where representatives of the Fraternity meet to determine new legislation and operational direction of the Fraternity for the next biennium.

POWERS & DUTIES

1. **Enact new legislation**
2. **Hear reports on the Fraternity’s programs, and hear reports on activities of Fraternal officers and chapters**
3. **Establish operational budget of General Fraternity for the upcoming biennium**
4. **Make amendments to The LAW**
5. **Elect new High Council**
6. **Hear an approve/disapprove of alterations to the Ritual**
7. **Hear and approve/reject appeals**
8. **Judge the qualifications of all representatives to the Grand Chapter**

CONCLAVE ATTENDANCE POLICY

“Any chapter, which fails to be represented at either Grand Chapter or the College of Chapters shall not have alcohol on chapter premises for the following academic year without the consent of the Office of the Executive Director.” (Section IX)

from the Risk Reduction Policy & Guidelines of Sigma Nu Fraternity, Inc. – As Amended by the 62nd Grand Chapter, July 2006

VOTING REPRESENTATION

GRAND CHAPTER



*Collegiate
Chapter
(2 votes)*



*Alumni
Chapter
(1 vote)*



*Grand
Officers
(1 vote)*

NOTES



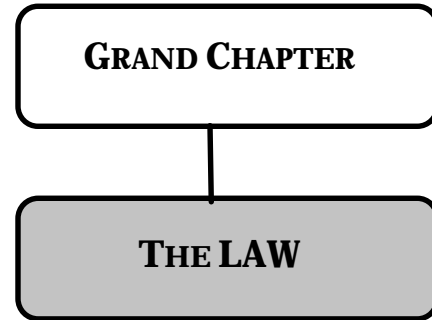
**64TH GRAND CHAPTER
BOSTON, MA
JULY 3-7, 2010**

THE LAW OF SIGMA NU FRATERNITY, INC.**THREE PARTS****1. CONSTITUTION**

- a. **The system of fundamental laws and principles that prescribe the nature, function and limits of a government or another institution; the basic principles and laws of a nation, state, or social group that determines the powers and duties of government and guarantee certain rights to the people in it**

2. STATUTES

- a. **A law enacted by a legislature**

3. TRIAL CODE**TRIAL CODE****WHAT IS IT?**

This is a part of The LAW that is designed to ensure justice to any initiated member who may be charged with an offense, violation of Sigma Nu law, chapter bylaws, or a violation of the principles of Sigma Nu.

IMPORTANT FACTS...

4 possible "causes of action," or offenses, for which a brother may be charged

Jurisdiction of trial proceedings is limited to the collegiate chapter of the defendant or High Council

The Commander shall serve as the Judicial Officer of a Trial Code, unless he is the accused or challenged as such

Any proceedings against a brother must be commenced no longer than two years after the accused has ceased to be a matriculate of the institution of the collegiate chapter

GENERAL PROCEEDINGS...**Order of Trial Proceedings:**

1. *Complaint read*
2. *A plea is enter by the Defendant (accused Brother)*

Guilty Plea

Defendant may present pertinent facts

Plaintiff may present pertinent facts

Closing statements can be made

Not Guilty Plea

Plaintiff makes an opening statement

Defendant makes an opening statement

Evidence, as in, rebuttal offered by Plaintiff

Evidence, as in, rebuttal offered by Defendant

Closing Arguments – Plaintiff has opening and closing final argument

3. *Deliberations and Verdict*

TRIAL CODE CONTINUED

REQUIRED DOCUMENTATION...

The Law of Sigma Nu Fraternity, Inc. requires the Judicial Officer to submit specific documentation of the pending Trial Code. There is an administrative component of the Trial Code that is required of the Office of the Executive Director (Headquarters).

All Trial Codes are documented by a designee of the Executive Director to ensure due process is followed and changes in membership status are properly documented (i.e. expulsion, suspension). These records are kept on file indefinitely.

*****A TRIAL CODE WILL NOT BE CONSIDERED “COMPLETE” UNTIL ALL REQUIRED DOCUMENTATION HAS BEEN SUBMITTED TO THE OFFICE OF THE EXECUTIVE DIRECTOR*****

The following pieces of documentation must be submitted to the Office of the Executive Director:

- 1) The Complaint – within three (3) days of its filing.
- 2) The Summons – Notification to the accused Brother and Trial Court of the time, date and location of the Trial. The date of the Trial must be set at least fourteen (14) days from the date the complaint was filed.
- 3) The Trial Report – “minutes” as they were recorded from the Trial along with a full report of the proceedings and an accurate copy of all tangible evidence presented at the Trial. Any evidence used against a Brother must be provided to him within four (4) days of the Trial.

Once this information has been submitted a letter will be sent in response to document the completion of the Trial Code.

MYTHS OF THE TRIAL CODE

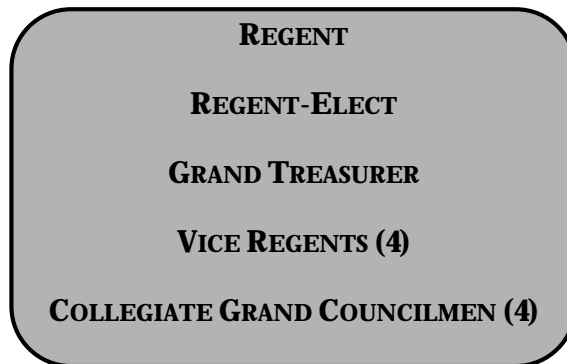
- 1) “*The Trial Code process takes too long.*” – The process is necessary to ensure all rights afforded to Brothers under The Law of Sigma Nu Fraternity, Inc. are adhered to. The time that elapses ensures that the accused Brother has adequate time to prepare a defense. With proper planning a Trial Code can be completed in a matter of weeks.
- 2) “*The process is difficult to understand*” – Contact the Headquarters office for assistance. Outlining the procedures ahead of time will streamline the process and will ensure that all elements of the Trial Code are followed.
- 3) “*Our internal judicial board can handle it.*” – Judicial Boards are necessary and appropriate mechanisms for membership accountability. However, Judicial Boards are not authorized, under The Law of Sigma Nu Fraternity, Inc., to initiate membership level verdicts in excess of 120 days. This means that the Trial Code process must be used if the offense could potentially result in the expulsion of the member or a suspension in excess of 120 days.
- 4) “*We can expel a member without using the Trial Code.*” – This is false. The Law of Sigma Nu Fraternity, Inc. requires the Trial Code be the only process used to expel a Brother.

HIGH COUNCIL

The High Council is the Board of Directors of the Fraternity and is elected by the Grand Chapter. It serves as the governing arm of the General Fraternity during the period between Grand Chapters. Governance of the High Council is relegated to those duties especially prescribed by The LAW. In cases where no especial duty is prescribed by The LAW, the High Council shall act on those situations through interpretation of The LAW.

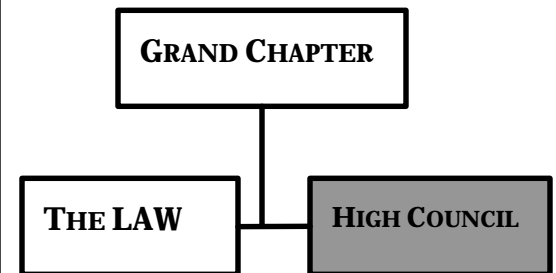
HIGH COUNCIL STRUCTURE...

11 man board – 7 alumni/4 collegiate members



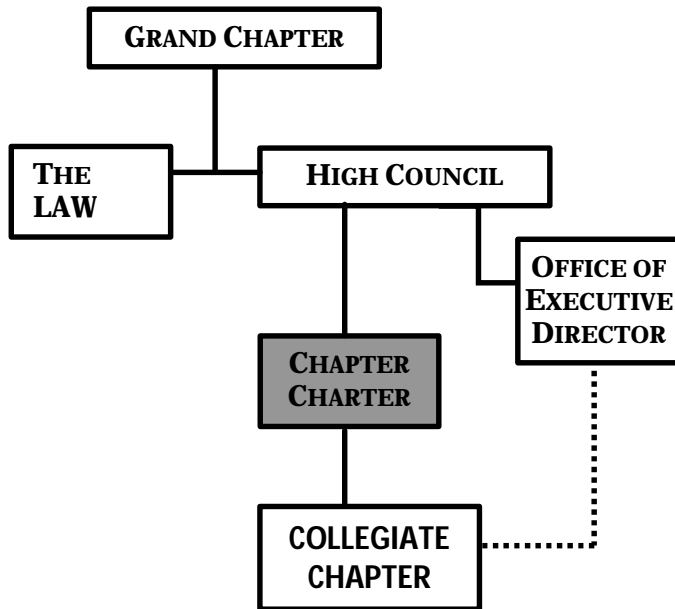
POWERS AND DUTIES...

- *Grant and issue charters for the establishment of collegiate and alumni chapters*
- *Grant Candidate Balloting Waivers to chapters, allowing chapters to establish their own balloting procedures to its membership selection rules*
- *Scholarship – "...may adopt rules and methods to encourage and ensure the maintenance of an above average scholarship standing."*
- *Hire/Appoint the Executive Director*
- *Approve the establishing of any subsidiary of the Fraternity*
- *Act on any question of Fraternity affairs between Grand Chapter not specifically delegated by The LAW*
- *Issue and enforce resolutions adopted by the Grand Chapter*
- *Issue general rules governing the operation of Chapter houses in addition to those prescribed by The LAW*



POWERS AND DUTIES... (CONT'D)

- *By unanimous vote may remove from office, suspend or expel any alumnus Brother for violation defined in The LAW*
- *Enforce the Ritual adopted by the Grand Chapter*
- *Suspend or revoke chapter charters*



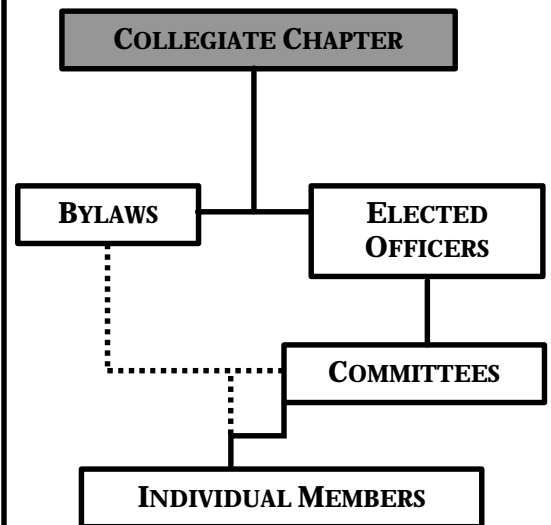
THE CHARTER

The charter is a revocable license which authorizes a group to operate as a collegiate chapter in the larger association known as Sigma Nu fraternity for as long as the Brotherhood continues to uphold and promote the principles established by the Founders of the Legion of Honor, offers worthy developmental experience for the membership, and conducts chapter affairs in a lawful, honorable and successful manner. The charter was earned by your chapter founders and has been sustained through the years by your predecessors. Although it is but a piece of parchment, its presence on the wall of your chapter house or lodge, or as a part of the décor on display at chapter meetings, serves to empower you and the other members of your chapter with all the rights and privileges of Sigma Nu membership. Of all your chapter's possessions, it is by far the most important because it legitimizes everything the Fraternity stands for and entitles your chapter to represent Sigma Nu, but only in an honorable manner, on your campus. (LEAD Phase I, Session 4)

COLLEGIATE CHAPTER

The collegiate chapter is analogous to the Grand Chapter. This level of the organizational chart represents the whole of your chapter's membership and is the governing body of your chapter.

GENERAL STRUCTURE



***The above is a basic organizational structure of collegiate chapters. ***

CHAPTER OFFICERS IN RANK ORDER PER THE LAW

- Commander*
- Lt. Commander*
- Treasurer*
- Recorder*
- Marshal*
- Chaplain*
- LEAD Chairman*
- Recruitment Chairman*
- Alumni Relations Chairman*
- Sentinel*
- Reporter*
- Chapter Historian*

NOTES

PURSUIT OF EXCELLENCE PROGRAM

Session Objectives:

1. Analyze the differences between the old and new versions of the Pursuit of Excellence Program.
2. Explain the role of the assessment team.
3. Create a Pursuit of Excellence implementation timeline for their chapter.
4. Demonstrate and articulate the role of the Pursuit of Excellence Program in chapter operations.

“Personal leadership is the process of keeping your vision and values before you and aligning your life to be congruent with them.” – Stephen Covey

The program that was approved in July 2008 by the 63rd Grand Chapter represents a significant shift, not necessarily in the standards set, but in the process of the program and the manner in which the Fraternity assesses its chapters and utilizes the results. The revised Pursuit of Excellence Program has three main standards:

- Values-Based Leadership
 - Service and Philanthropy
 - Campus Leadership
 - Values Congruent Environment
- Personal Development and Membership Value
 - Candidate Development
 - Brother Development
 - Intellectual Development
 - Alumni Development
- Operational Excellence
 - Recruitment and Manpower
 - Chapter Operations
 - Governance and Accountability

Within these standards there are a total of ten subcategories. For each subcategory there is a criterion for excellence and suggested documentation. This will serve as a guide to define excellence for our fraternity. The standards build together and those chapters which truly excel in all facets of the Fraternity will attain our highest recognition of Rock Chapter.

NOTES

PROGRAM TIMELINES

BEGINNING OF THE ACADEMIC YEAR

- Chapter conducts self assessment in August/September - utilizes prior year's feedback and information to create goals and action plans for the upcoming year
- Chapter communicates goals and action plan(s) to: General Fraternity and Leadership Consultant, Chapter Advisor/Alumni Advisory Board, Division Commander, Campus Fraternity/Sorority Advisor

DURING THE ACADEMIC YEAR

- Chapter continually evaluates progress in relation to the standards
- Chapter leadership meets with Advisors to discuss progress toward goals

END OF THE ACADEMIC YEAR

- Chapter leadership meets with Chapter Advisor/Alumni Advisory Board to review previous year.
- Chapter conducts their end of year self-assessment utilizing self-assessment guide and booklet.

OVER THE SUMMER

- Chapters evaluated utilizing submitted self-assessments/documentation and assessment team ratings.
- General Fraternity provides chapters with ratings and feedback from assessment - Chapters are recognized for their achievement in the Pursuit of Excellence.

CHANGES TO THE PROGRAM: COMPARING OLD VERSUS NEW

<u>OLD VERSION</u>	<u>NEW VERSION</u>
<ul style="list-style-type: none"> ▪ Extensive supporting documentation ▪ Does not reflect new Fraternity initiatives ▪ Focus on minimum standards ▪ Separate application for PEP and Rock ▪ Only feedback is score report and final score ▪ Yes or no checklist to meet standard ▪ No tool to engage chapter in understanding the program ▪ No timeline ▪ Reactive ▪ Six categories ▪ Total score of 110 points 	<ul style="list-style-type: none"> ▪ Reduced documentation ▪ Does include all new Fraternity initiatives ▪ Drive towards excellence ▪ Combines both criteria ▪ Feedback includes explanation of ratings ▪ Holistic chapter rating scale ▪ Includes strategy session to engage chapter in dialogue ▪ Includes timeline ▪ Proactive ▪ 3 Categories ▪ No point totaling

PURSUIT OF EXCELLENCE: FORCE-FIELD ANALYSIS

TAKEN FROM ALL CHAPTER LEAD, MODULE B, SESSION 8 (PEP STRATEGY SESSION)

Session Objectives:

1. Conduct a current analysis of where the chapter stands in a specific subcategory.
2. Compare the chapter's status quo to the program's criteria for excellence.
3. Plan for the chapter's improvement utilizing a Force Field Analysis.
4. Identify restraining and driving forces affecting a chapter's desired state.

Force-field analysis is a visual representation of the positive and negative forces at work when moving toward a goal. In any effort to reach a goal or to implement change, there are enabling and opposing forces. To reach the goal, the enabling forces must be strengthened and the opposing forces diminished. Looking at problems and goals in this way helps people bring about desired change.

How to Utilize Force Field Analysis

1. Describe the current situation – the status quo, how things are today
2. Define the desired situation – the objectives you'd like to accomplish
3. Brainstorm the driving and restraining forces in relation to the objectives
4. Develop a strategy for solution by determining which driving forces should be strengthened and which restraining forces need to be weakened
5. Check the strategy to identify if it will move the group toward the goal

**Driving Forces will be representative of the new, desired state.*

***Restraining Forces will be representative of the status quo, or what is impeding progress towards the desired state.*

CURRENT STATE:

DESIRED STATE:

DRIVING FORCES ?

? RESTRAINING FORCES

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.

CAMPUS LEADERSHIP – EXPLORING THE PEP STANDARD

COMMANDERS

VALUES-BASED LEADERSHIP

Sigma Nu transforms society through the commitment of its members to the Fraternity's founding principles, leadership and ethical living.

Values-Based Leadership focuses on the role that chapters and their members play in the communities in which they are embedded. As current and future leaders, we must model exemplary citizenship and create positive environments.

CAMPUS LEADERSHIP

Members of the Fraternity enhance their host institution by becoming engaged as leaders in campus and interfraternal activities and organizations. Through their leadership, members advance the purpose of both the Fraternity and their institution. This is recognized as a contribution to the greater good.

CRITERIA FOR EXCELLENCE

- Chapter has demonstrated a high level of involvement in campus (non-Greek) and interfraternal activities.
- Chapter sends representatives to campus-wide and IFC-sponsored leadership development programs.
- At least 80% of chapter members are involved in other student organizations.
- More than 10% of chapter members have leadership roles in other student organizations or campus programs.
- Chapter meets or exceeds all IFC and host institution expectations.
- Chapter established a positive relationship with campus fraternity/sorority advisor and other campus administrators who serve as a resource.
- Chapter hosts at least one campus-wide event or program.
- Chapter has received recognition for their involvement on campus, or has received recognition through campus or interfraternal awards programs.
- Chapter actively assisted members in becoming involved in other organizations or campus programs.
- Chapter has been a leading voice in issues facing the fraternity/sorority community.

GOVERNANCE AND ACCOUNTABILITY – EXPLORING THE PEP STANDARD

LT. COMMANDERS**OPERATIONAL EXCELLENCE**

Sigma Nu's organizational structure and internal operations will provide for the effective deployment of resources to deliver excellence in every facet of the Fraternity.

To achieve excellence a chapter must have a structure and adequate resources in place to facilitate chapter success. These structures must maintain the integrity of the values and mission of the Fraternity to ensure long-term success and development.

GOVERNANCE AND ACCOUNTABILITY

Effective governance structures and measures of accountability must be in place within the Fraternity. These measures should complement the values of the Fraternity while maintaining integrity to the purpose of the organization.

CRITERIA FOR EXCELLENCE

- Chapter utilizes the Trial Code Procedure of The Law of Sigma Nu Fraternity, Inc. when necessary to discipline chapter members.
- Chapter bylaws are current.
- Chapter has not been in violation of The Law of Sigma Nu Fraternity, Inc. or the *Risk Reduction Policy and Guidelines* in the last year.
- Chapter has not violated university policy in the last year.
- Chapter has a written Crisis Management plan and members are educated.
- Chapter has conducted Session 7: Accountability from Module B of All-Chapter LEAD Programming.
- Chapter creates a culture of accountability among its members.
- Chapter has established a system of accountability and discipline.

RECRUITMENT AND MANPOWER – EXPLORING THE PEP STANDARD

RECRUITMENT CHAIRMEN**OPERATIONAL EXCELLENCE**

Sigma Nu's organizational structure and internal operations will provide for the effective deployment of resources to deliver excellence in every facet of the Fraternity.

To achieve excellence a chapter must have a structure and adequate resources in place to facilitate chapter success. These structures must maintain the integrity of the values and mission of the Fraternity to ensure long-term success and development.

RECRUITMENT AND MANPOWER

The manpower of a chapter must be sufficient to maintain all successful chapter operations in a manner which provides a positive fraternal experience. Further, Sigma Nu will strive for growth through an innovative, values-based recruitment program that engages new members who are committed to the founding principles of the Fraternity.

CRITERIA FOR EXCELLENCE

- Chapter's recruitment efforts are focused on Sigma Nu's Values-Based Recruitment program, with particular emphasis on the values and purpose of the Fraternity.
- Chapter has a written, year-round, recruitment plan which places emphasis on the development of positive relationships on an individual level.
- Chapter has exhibited healthy growth in the previous year, and chapter maintains a healthy manpower for its campus environment.
- Chapter can articulate what type of member they target to achieve their stated purpose as an organization.
- Chapter meets or exceeds the median manpower size for the university.

CANDIDATE DEVELOPMENT – EXPLORING THE PEP STANDARD

MARSHALS

PERSONAL DEVELOPMENT AND MEMBERSHIP VALUE

Through the development of the organization and the individual the Fraternity adds value to the experience of its members by fostering the personal growth of each man's mind, heart, and character. This added value perpetuates a lifelong commitment to the organization.

Personal Development and Membership Value stresses the importance of the development of our members as candidates, members and alumni. The Fraternity adds value to the lives of its members by creating extracurricular experiences that support the mission of Sigma Nu and the educational purpose of their host institutions.

CANDIDATE DEVELOPMENT

Through a variety of learning and mentoring experiences, candidates are prepared to be active members of the Fraternity with a commitment to the values and purpose of Sigma Nu.

CRITERIA FOR EXCELLENCE

- Chapter completes all LEAD Phase I sessions and utilizes guest facilitators in the program.
- Chapter can articulate the impact of LEAD on their Candidate Education Program and Candidates.
- Chapter has clearly defined outcomes for their Candidate Education Program.
- Chapter has clear expectations of its Candidates and clear expectations for what Candidates can expect of the chapter and active members.
- Chapter utilizes the Candidate Class Retreat from LEAD Phase I.
- Chapter reinforces the messages communicated through Values-Based Recruitment with members serving as role models of the mission and values of Sigma Nu.
- Candidates complete a community service activity as part of the Candidate Education Program. Experience includes follow up discussion to help candidates understand the importance of these activities to the community and to the Fraternity.
- Candidates attend all campus based programs sponsored for new members.
- Chapter initiates at least 90% of candidates (excluding those de-pledged for disciplinary reasons).
- Chapter articulates to all members and candidates that Sigma Nu is an anti-hazing organization and all members understand the definition of hazing as described by The Law of Sigma Nu Fraternity, Inc. and the *Risk Reduction Policy and Guidelines*.

BROTHER DEVELOPMENT – EXPLORING THE PEP STANDARD

LEAD CHAIRMEN

PERSONAL DEVELOPMENT AND MEMBERSHIP VALUE

Through the development of the organization and the individual the Fraternity adds value to the experience of its members by fostering the personal growth of each man's mind, heart, and character. This added value perpetuates a lifelong commitment to the organization.

Personal Development and Membership Value stresses the importance of the development of our members as candidates, members and alumni. The Fraternity adds value to the lives of its members by creating extracurricular experiences that support the mission of Sigma Nu and the educational purpose of their host institutions.

BROTHER DEVELOPMENT

The chapter prepares brothers to be effective in leadership roles within Sigma Nu and other organizations and experiences. In addition, active members are prepared to be successful alumni.

CRITERIA FOR EXCELLENCE

- Chapter utilizes all phases of LEAD with guest facilitators.
- Chapter can articulate the impact of their LEAD programming.
- Chapter has compiled a list of possible guest facilitators and their contact information.
- Chapter attends regional Sigma Nu programs.
- Chapter attends College of Chapters and Grand Chapter.
- Chapter members attend campus or interfraternal leadership development programs (i.e. UIFI, IMPACT, Leadershape, and officer training programs).
- Chapter demonstrates a commitment to the LEAD Program through the establishment of a LEAD Committee that includes the Commander, Marshal, LEAD Chairman and at least one other brother in the chapter.
- The position of LEAD Chairman is an elected, major office.
- Chapter sponsors a brotherhood retreat on an annual basis.
- Chapter sponsors an Officer Transition session as part of its transition plan each semester.

GOAL SETTING & PRIORITIZATION

Session Objectives:

1. Explain the effectiveness of the goal setting process.
2. Predict chapter behavior through the creation of chapter goal statements.
3. Utilize SMART Goal criteria to create goal statements, objectives and action plans
4. Analyze PEP subcategory status quo and set appropriate goals for improvement.
5. Prepare for implementing the goal setting process in the future.

“If your actions inspire others to dream more, learn more, do more and become more, you are a leader.” – John Quincy Adams

WHAT ARE GOALS?

“The purpose toward which an endeavor is directed, an objective; the place to which something moves”

GOAL SETTING BARRIERS...

- *It takes time! Don't rush this process.*
- *Frustration! Everyone has an opinion and not everyone is going to agree.*
- *Too simple or too complicated! If your goals are too basic, then it probably won't show you much progress. If your goals are too complicated, then it probably won't show you much progress either. You need to find a happy medium that works best for your chapter.*
- *Dust! Too often groups go through the process of setting goals only to do nothing with them...they don't follow through. You want to avoid this at all costs; otherwise you will have to answer the question, “Why did we bother doing this?”*

NOTES

11 REASONS WHY GOAL SETTING IS IMPORTANT

- 1.** Results in a plan of action for chapter improvement and development
- 2.** Creates an awareness of mission, purpose and direction of the chapter
- 3.** Allows for maximum participation from members, which creates ownership
- 4.** Increases motivation by allowing members the opportunity to have his say in what the chapter is going to do
- 5.** Combats apathy by outlining responsibilities for members and clarifying the expected results
- 6.** Increases effective communication by letting every member know where the chapter is going
- 7.** Goal and objective statements provide a solid framework for planning so that members are less likely to go off on “tangents”
- 8.** Mechanism to show progress and action
- 9.** Provides for increased organizing and planning, making operations more efficient and productive
- 10.** Increases member satisfaction through measurable achievements.
- 11.** Process provides an evaluation and appraisal system.

SMART GOALS

Specific: The goal is clearly defined and easily understood, but is also very focused in the details of what is to be achieved.

Measurable: The goal describes a specific state by which success can be gauged; the goal is quantifiable.

Attainable: The goal is a state that the internal resources of the chapter are capable of achieving. Example resources include: members, monetary resources, etc.

Realistic: The goal is a state that the internal resources of the chapter are capable of achieving; taking into account the external factors that will influence their ability to do so. External factors include: other students, the community at-large, state and federal laws, parents, etc.

Time Sensitive: The goal is established to be completed by a specific date in the future.

PARTS OF A GOAL

Goal Statement – A desired future condition or state; can be long- or short-term; semi-broad in focus. In regard to the chapter, goals affect the overall progress of a general area of operations.

Objectives – Strategies needed to accomplish or meet a certain goal; have a shorter time frame than goals and are narrower in focus; are expressed in quantitative, measurable terms.

Action Plans – List of specific tasks needed to accomplish desired goals and objectives; contain not only tasks but also the person(s) responsible for completing them and deadlines for meeting them; like the goals and objectives, should be written down indicating when each task has or has not been done.

NOTES**EFFECTIVE STEPS TO SETTING GOALS**

1. Complete an operations inventory
2. Use inventory results to categorize operational areas into a S.W.O.T. analysis
3. Share the results of the inventory and S.W.O.T. analysis with the chapter
4. Have committees establish goals specific to operational area of responsibility
5. Share goals and objectives with the Chapter
6. Establish an expectation for continued progress reports from the committee to the chapter regarding their goals and objectives

CREATING AN ACTION PLAN

During this time, you and other members from your chapter will work through the goal setting process and develop a few chapter-level goals, using the worksheet below.

Goal Statement: _____

WHAT is to be done? (Goal)

HOW will it be accomplished? (Objectives – tasks and strategies to reach goal)

WHAT are the resources? (People, \$, Materials available)

WHEN will it be accomplished? (Time Period)

RESULTS expected and how measured? (Evaluation)

Goal Statement: _____

WHAT is to be done? (Goal)

HOW will it be accomplished? (Objectives – tasks and strategies to reach goal)

WHAT are the resources? (People, \$, Materials available)

WHEN will it be accomplished? (Time Period)

RESULTS expected and how measured? (Evaluation)

PRIORITIZATION

URGENT VS. IMPORTANT

	URGENT	NOT URGENT
IMPORTANT	<p><u>Quadrant I</u> Crises Pressing Problems Deadline driven projects, meetings and preparations</p>	<p><u>Quadrant II</u> Preparation Prevention Values clarification Planning Relationship Building True recreation Empowerment</p>
NOT IMPORTANT	<p><u>Quadrant III</u> Interruptions, some phone calls Some mail, some reports Some meetings Many proximate, pressing matters Many popular activities</p>	<p><u>Quadrant IV</u> Trivia, busywork Some phone calls Time wasters “Escape” activities Irrelevant mail Excessive TV Surfing the web</p>

-Adapted from: Stephen Covey, Seven Habits of Highly Successful People

COMMANDERS AND LT. COMMANDERS

BREAKOUT PROGRAMMING

LEARNING FROM EACH OTHER – BEST PRACTICES DISCUSSION

Session Objectives:

1. Identify and articulate your chapter's operational strengths.
2. Assess ideas and best practices from fellow officers.

During this time, you have an opportunity to utilize the greatest resource available to chapter officers...each other. Use this time to talk about strategies that could be used to address issues that arise within your chapter. Below is a list of topics that we encourage you to discuss. Your discussions may include additional items, but we ask that you discuss as many of the following topics as reasonably possible.

Motivating members to be involved...

Accountability – Honor/Judicial Boards...

Risk Management – How do you have “fun” and stay within the policy...

Fundraising...

Utilizing Alumni...

LEAD: Best Practices – How do you make the program effective in your chapter...

Community Service/Philanthropy – What do you do to make your efforts successful...

LEADERSHIP, ETHICS AND ACCOUNTABILITY

Session Objectives:

1. Articulate the role participants play as a leader.
2. Explain the difference between traditional and emerging paradigms of leadership.
3. Assess the current model of leadership and level of accountability in participants' chapters.
4. Demonstrate how leadership and accountability are interrelated.
5. Identify the steps necessary to implement a culture of ethical accountability.

LEAD –

LEADER –

LEADERSHIP –

Break up into groups of 3-4. In your group, take 2-3 minutes to answer one of the following questions. The facilitator(s) will inform you which question your group is to answer. Record your group's responses in the space provided below.

1. What makes a successful leader?
2. What factors lead to high levels of accountability?

LEADERSHIP

ACCOUNTABILITY

MAJOR SCHOOLS OF THOUGHT ON LEADERSHIP

TRADITIONAL PARADIGM OF LEADERSHIP

- *Leader dominated*
- *Focused on individual feats*
- *About behaviors and traits*
- *Top-down*
- *Male oriented*
- *Bureaucratic, pertinent to levels of authority*
- *Management oriented*
- *Individualistic and about self-interest*
- *Focuses on organizational goals only, not individuals*
- *About power and control*

EMERGING PARADIGM OF LEADERSHIP

- *Influence relationships*
- *A learned process, not a person*
- *Followers (Collaborators) play an active role in the process*
- *Multi-Directional vs. Top-Down*
- *Both female and male oriented*
- *Team oriented*
- *Concerned about communication*
- *Focused on pursuing mutual purposes that intend real, significant change*
- *Position not required*
- *Focus is on doing something, not on holding a position*

NOTES

ACCOUNTABILITY STRATEGIES

- ***Introduce the idea in small groups, perhaps with the officers. Get them to understand what the chapter is losing by allowing “victim” behavior to thrive.***
- ***Share the principles of accountability one on one with brothers.***
- ***Coach individuals through accountability issues***
- ***Create a Core Covenant to set the bar for how brothers will perform and work together in the chapter.***
- ***Help brothers see the reality of their situation by sharing information on where the chapter stands and its successes and failures.***
- ***Provide feedback to brothers on what they are doing well.***
- ***Help members take ownership in the chapter by getting them involved on committees and delegating responsibilities to them.***
- ***Create an award system for brothers who go above and beyond their responsibilities.***
- ***Help brothers, and the chapter, realize the hazard of negative “traditions”***

THE VICTIM CYCLE

(THE PROBLEM)

1. ***Ignore/Deny***
2. ***“It’s not my job”***
3. ***Finger pointing***
4. ***Tell me what to do***
5. ***Cover your tail***
6. ***Wait and see***

THE OZ PRINCIPLE

BY TOM SMITH

(THE SOLUTION)

See It: recognize and
acknowledge reality

Own It: accept responsibility
for the situation

Solve It: find and implement
solutions that you had
not envisioned before
and avoiding falling
below the line

Do It: have the commitment
and courage to follow
through

MYTHS OF LEADERSHIP

- **Leaders are born, not made**
- **Leadership is hierarchal, it is about having status and power and holding a position**
- **Effective leaders have to be charismatic**
- **There is only one right way to lead an organization**

LEADING ETHICALLY

- 1. *Articulating and embodying the purpose and values of the organization.***

- 2. *Finding the best people and developing them.***

- 3. *Creating a living conversation about ethics, values and the creation of value for stakeholders.***

- 4. *Creating mechanisms of dissent.***

- 5. *Making tough calls while being imaginative.***

- 6. *Framing actions in ethical terms.***

RECRUITMENT CHAIRMEN

BREAKOUT PROGRAMMING

VALUES-BASED RECRUITMENT

Session Objectives:

1. Identify the responsibilities of the Recruitment Chairman.
2. Understand how to create and implement a successful year-round recruitment plan.
3. Effectively identify and utilize all available recruitment resources.
4. Implement an effective Recruitment Committee.

THE RECRUITMENT COMMITTEE

- Chaired by the Recruitment Chairman
 - 6-8 total members, including:
 - 1 or 2 Formal Recruitment Chairmen
 - Other members-at-large (ideally from different years/classes)
 - Alumni Recruitment Advisor
 - Treasurer (Optional)
- Committee should meet weekly
 - Updates to the Master Prospect List (MPL)
 - Adding/removing names
 - Updating personal information
 - Discussing level of interest
 - Last contact and next steps
 - Assigning prospects to committee/chapter members
 - Upcoming chapter events/functions
 - Things chapter is already doing (LEAD, service, athletics, etc.)
 - How upcoming events can be used for recruitment
 - Which prospects to invite
 - How to get prospects to the event
 - Review of the Year-Round Recruitment Plan (YRP)
- Responsibilities of the Committee
 - Event planning and organizing
 - Budgeting
 - Committee should report weekly at chapter
 - Updates to MPL
 - Upcoming activities
 - Status of chapter goals
 - 5-10 minutes at every chapter meeting discussing prospects (more time when necessary)

- Motivate chapter members to participate
- Year-Round Recruitment Plan
- Year-Round Recruitment Checklist
- Chapter Recruitment Meeting

EVENT PLANNING AND ORGANIZING

Sigma Nu stands and exists for different reasons than other fraternities on your campus. Why not be different? Why do we continually throw the same recruitment events as everyone else? More than likely, we do this because it is all we know and all that we have ever done. You have to be creative to be competitive. This generation of students looks for something different -- teamwork, leadership opportunities and a chance to be involved in something that is going to better their lives.

Some things to consider when planning an event:

- **Investment**
 - You have to consider your return on investment when planning an event. Should you spend a couple of thousand dollars for a band party that is only going to attract a particular group of students and perhaps only bring a few new members? Or could you hold several, less expensive, events that will attract different groups of students and result in more members joining? We suggest

holding several, less expensive events. By holding a couple of events such as a sporting event, leadership workshop, BBQ and Community Service Event, you will be able to attract four different types of students that may bring a few new members each.

- Do the math: You hold one event that brings, let's say, three new members for a couple of thousand dollars. Or, you hold four events, each bringing three new members for the same total cost. That would be twelve total new members. Seems like an obvious choice. Broaden your horizons and be creative. Think about the amount of money you are spending versus the potential gain you may get from the event.

Values-Based Recruitment

- Sigma Nu was founded as a fraternity of honor. We still practice that in our recruitment methods. VBR provides an avenue for doing just that. You should be thinking of VBR when you plan events. Does a big blowout BBQ, with beer and scantily clad women sound values-based? You also need to think about the type of member that will attract. Is that the type of member that you would want in your

chapter? What value will he add to your chapter?

- Event planning is just as important as anything else in recruitment. The type of event determines what type of people will come, as well as what type of people will be attracted to your chapter. Perhaps the most important consideration is the message you are sending about your chapter. Is your chapter a values-based chapter? All of this can be answered by what types of events you plan and hold for recruitment.

People Join People

- Recruitment events are simply a venue for people to meet people. Create an environment where people can talk and get to know each other and you'll be on the right track.

NOTES

BUDGETING***SIGMA NU - EXAMPLE RECRUITMENT BUDGET*****FALL 20XX**

Chapter Size - 40 Men

Recruitment Goal - 15 Men

<i>Expense</i>	<i>Description</i>	<i>Cost</i>
Formal Recruitment Events		
Flag Football @ City Park	Football Supplies, drinks	\$50
BBQ at Chapter Home	Hot dogs, drinks, & supplies	\$165
River Cats game	25 @ 5\$ each - Invite Only	\$125
Year-Round Recruitment Events		
Beach Bonfire	Firewood	\$35
Monday Night Football	Snacks & Soda	\$30
Marketing and Advertising		
Facebook	Run for 20 days	\$30
Posters	50 - 11"x17" color posters	\$50
Table Tents	75 Black and white	\$10
Pamphlet	100 purchased from HQ	\$30
Recruitment Fees		
IFC Formal Recruitment Fee	Due September 1 to IFC	\$50
Scholarships		
Freshman Scholarships	3 \$50 scholarships	\$150
Incentives		
Team Recruitment Program	6 Sigma Nu wallets (\$15 each)	\$100
Bid Night		
Bid Night Food	Snacks & Soda	\$175

Recruitment Budget Total **\$1,000**

RECRUITMENT INCENTIVES

Chapter complacency and lack of motivation are the biggest hindrances to chapter recruitment. If you find that motivation is lacking and complacency is a mainstay you may want to try to incorporate or implement one or several of the following recruitment incentives as a possible solution:

REDUCING DUES FOR SUCCESSFUL RECRUITMENT.

- By bringing in more members you obviously will be bringing in more funds. Proper budgeting will allow you to be able to reduce dues of those dedicated members. For example, if your chapter charges \$500 per semester for dues, offer \$50 off per new member that an individual successfully recruits.

TEAM RECRUITING

- Split the chapter up into teams and make recruitment a competition. Elect team captains and hold a draft to pick chapter members to be on teams. Encourage each team to be creative in the ways and ideas they use to recruit new members. Whichever team recruits the most new members, wins the competition. Gift certificates, money or being exempt from house chores often make great awards for winning teams.

HIRE A RECRUITMENT TEAM

- Many of our chapters *hire* members to spend their summer recruiting; making calls, visits, and/or taking potential new members to dinner. This often makes the Recruitment Chairman's position much more appealing due to the compensation. This may include monetary compensation as well as free/reduced housing during the summer.

These are just a few ideas to be creative and innovative. Successful recruitment means being different from what every other chapter on campus is doing. You will certainly have an advantage if you are innovative and creative on your campus.

SOME OTHER AWARDS AND INCENTIVES:

- Discounted dues/rent
- Scholarships
- Gift certificates
- Sigma Nu merchandise
- Priority housing/room selection
- Exemption from house duties and chores
- House room first picks
- Insurance, conclave or Headquarters dues covered by the chapter
- Big Brother or Candidate Father first picks
- T-shirts, sweatshirts, Sigma Nu memorabilia, etc.

Try it, be creative. Kick the lack of motivation and complacency to the curb and remember the VBR format, have fun, get the leg up and beat your competition!

NOTES

MASTER PROSPECT LIST (MPL)

A critical component of year-round recruitment is the Master Prospect List (MPL), a simple tool used for organizing and tracking prospects. Chapter members should always have access to the MPL. One way this can be accomplished is to post the MPL in a common area such as the chapter room (ideally a place that only brothers have access to) or on a brothers-only listserv. Provide weekly updates (electronic or otherwise) of the information to the rest of the chapter and verbally discuss any important changes to the MPL at chapter meetings.

THE MPL

- o Name / Contact information
- o Year, age, hometown, interests, etc.
- o Level of interest / Prospect level (high, medium, low)
- o Most recent contact; by whom
- o Next steps:
 - Delegate contact names
 - Follow-up!

Thorough follow-up consists of continuous communication with each person until one of two things happen:

- 1) He joins
- 2) We can say with certainty that, by his choice or ours, he will not join

It is every member's responsibility to add names to the MPL. It is the responsibility of the Recruitment Chairman to delegate contact names to members for follow up. Make sure to track and share information learned about prospects with the rest of the chapter.

The number of names on your MPL will directly translate into the number of candidates your chapter recruits.

SAMPLE MASTER PROSPECT LIST

CONTACT	PMQ	LAST	FIRST	PROSPECT	PHONE	E-MAIL	YEAR	REFERRED BY	ORGANIZATION	GPA	NOTES	NEXT
call 11/18/08	Y	Bateman	Patrick	high	111-555-2517	new@gmail.com	soph	Evelyn Woods	Alpha Xi Delta	3.83	transfer	wait
Fb 12/17/08	N	Callahan	Thomas	med	111-555-0701	new2@gmail.com	frosh	Richard Hayes	Alumnus	3.57	legacy	BID
						-	-					
						-	-					
						-	-					
						-	-					
						-	-					
						-	-					

Alumni and Recruitment

What are some ways we can get our alumni involved with recruitment?

- Alumni Recruitment Advisor
 - Works with the Recruitment Chairman
 - Attends Recruitment Committee meetings
 - Helps the chapter engage other alumni in recruitment
 - Helps to ensure continuity from year to year
- Active participation
 - Alumni events
 - Networking sessions (LEAD)
 - Alumni-hosted recruitment events
 - Preference or Bid dinners
- Referrals
 - All chapter alumni
 - All local alumni within region
- Financial
 - Recruitment scholarship
 - Sponsorship (T-shirts, events)

Chapter Recruitment Meeting

The chapter recruitment meeting should take place at least once each semester, outside of weekly chapter meeting (work with the Commander to schedule), and should take approximately two hours depending on how in-depth the meeting goes. Holding a chapter recruitment meeting every semester is a critical element in your chapter's recruitment success. Facilitator and participant notes, as well as PowerPoint slides are available from the Fraternity's web site to assist with this meeting.

OBJECTIVES OF THE CHAPTER RECRUITMENT MEETING:

1. Get the chapter thinking about recruitment.
2. Communicate that recruitment is everyone's responsibility
3. Self-evaluate the chapter
4. Define the type of men the chapter seeks
5. Conduct a recruitment skills workshop
6. Set chapter recruitment goals
7. Evaluate follow-up methods

To accomplish these objectives, we recommend using Sigma Nu Fraternity, Inc.'s Chapter Recruitment Meeting Presentation, Individual Recruitment Skills workshop and/or other appropriate "MENU" workshops as offered by the chapter's Leadership Consultant. These options will ensure that all of the objectives are accomplished. Additionally, these can be adapted to focus on the specific needs of your chapter.

NOTES

VALUE-BASED VS. VALUES-BASED RECRUITMENT

Session Objectives:

1. Explain the difference between value-based and values-based recruitment
2. Identify and articulate the value a participant's Sigma Nu chapter brings to a potential member
3. Use General Fraternity recruitment resources
4. Prepare participants to discuss with their chapters how to add value to the recruitment process

VALUES

1. **Why did you join Sigma Nu?**
2. **What role did the Fraternity's values and/or your own values play in your decision?**
3. **What specific value did you expect to receive from joining Sigma Nu?**
4. **What value did you actually receive? Were there differences between what you expected and what you received?**

VALUES DEFINED:

- **What does my Greek community value? What do I, as a member, value?**
- **What are examples of actions that align with our (Sigma Nu's) values?**
- **What actions do we participate in that are not in alignment with our values?**

VALUES AS PART OF RECRUITMENT – THE REALITY OF MY CHAPTER

- 1. What specific value do we offer men in our fraternity? What tangible benefits do they enjoy?**
- 2. When we recruit, are we articulating the values that prospective members can expect to receive? How can we do this more effectively?**
- 3. How do we deliver this value to men who join? Does it become a reality? Do our members get what they are promised when they join?**

Is my chapter currently delivering on value that is expected? YES NO

WHAT AM I GOING TO DO ABOUT IT?

NOTES

RECRUITMENT RESOURCES

THE RECRUITMENT CHAIRMAN'S MANUAL: This is the theory behind values-based recruitment. Your Recruitment Chairman should read this when he gets elected. For example, the Recruitment Chairman can use this manual to educate his committee, the chapter and candidates to ensure the theory behind VBR is worked into the chapter's recruitment programming and interactions.

THE RECRUITMENT BLUEBOOK: This is the cornerstone of your recruitment program. If you use nothing else from this brochure, use the Bluebook. This will walk your Recruitment Chairman and his committee through the process of creating a comprehensive year-round recruitment plan. Just about everything I could tell you about HOW to recruit is contained within the Bluebook. The Bluebook has numerous downloadable plug-and-play documents available to accompany it.

THE RECRUITMENT SKILLS WORKSHOP: This workshop breaks down individual recruitment skills – from how to introduce yourself to a guy you've never met, to how to talk about the fraternity, to managing a group situation, to asking a guy to join. Facilitating this session is a great way to get your chapter ready for recruitment before each semester/term. It can be facilitated by your Recruitment Chairman and his committee or your Leadership Consultant.

BECOMEASIGMANU.ORG: This is Sigma Nu's national prospective member website. If your chapter doesn't have a website, it's not very good, or it's not updated on a regular basis, you can advertise this web address and direct your potential members to this site. Featured on this site are forms for alumni to submit referrals, a prospective member questionnaire, a section for parents, and even a dropdown box with a link to your own chapter's website (if it's on file with Headquarters)! Even if you have a good website, you can still put up a link directing traffic to becomeasigmanu.org and take advantage of these valuable tools.

10% CHALLENGE: This is a challenge to your chapter to increase the number of men you recruit and initiate by 10% from the previous academic year—only for those chapters who accept the challenge. All you have to do to sign-up is create a year-round recruitment plan based and e-mail it to the Director of Recruitment. Those chapters who sign up and achieve the 10% Challenge will be recognized at convention each year.

MARKETING MATERIALS: Brand-new, innovative, and hot off the press, Sigma Nu's marketing materials are the newest addition to VBR, and they are now available to your chapter along with detailed instructions on how to customize and print them for your chapter to use. With a stylish design and the Become Something More, Become a Sigma Nu theme, these new resources give your marketing a consistent, professional feel and will make it easy for your Recruitment Committee to launch an effective marketing and advertising campaign.

NATIONAL RECRUITMENT DAYS: Do you ever wish your chapter could do a better job tapping into the pool of graduating high school seniors? The concept behind National Recruitment Days is to do just that, planning a social event with chapters and alumni from a local area that high school seniors are invited to; giving them a chance to meet some local Sigma Nu's and learn about the fraternity. By the time they get to college, Sigma Nu will already have the recruitment edge having met and talked to them before they ever hit campus.

NOTES

MARSHALS AND LEAD CHAIRMEN

BREAKOUT PROGRAMMING

CANDIDATE EDUCATION

SIGMA NU – ANTI-HAZING...

The chapter does not conduct hazing. Hazing is defined as:

“...any action taken or situation created, intentionally, whether on or off fraternity premises, to produce mental or physical discomfort, embarrassment, harassment or ridicule. Such activities may include but are not limited to the following: paddling in any form; creation of excessive fatigue; physical and psychological shocks; quests, treasure hunts, scavenger hunts, road trips or any other such activities carried on outside or inside the confines of the chapter house; the wearing of public apparel which is conspicuous and not normally in good taste; engaging in public stunts and buffoonery; morally degrading or humiliating games and activities; late work sessions which interfere with scholastic activities; and any other activities which are not consistent with fraternal law or policy or the regulations and policies of the education institution.”

The willingness of any individual to participate in any hazing activity does not excuse any hazing violation.

***from Risk Reduction Policy & Guidelines of Sigma Nu Fraternity, Inc. – Section V*

NOTES

SAMPLE CANDIDATE PROGRAMS

Below are two sample candidate programs, one for eight weeks and one for eleven. Use these as a resource in planning your own calendar for the semester. Before the Candidate Program begins, sit down with a calendar and work the activities listed below into days that fit with your chapter's schedule.

8 WEEK PROGRAM

Week 1-

LEAD Session: Orientation
 Candidate Meeting
 Set Meeting Times and Locations
 Set Study Hours and Location
 Give Overview of Candidate Education
 Distribute LEAD Phase I Manuals, and
 Chapter Candidate Notebook

Week 2-

LEAD Session: Fraternity
 First Candidate Retreat
 LEAD Session: Leadership & Working in
 Groups
 Candidate Meeting
 Elect Candidate Officers
 Assign Big Brothers
 Study Hours

Week 3-

LEAD Session: History
 Brotherhood Night
 Candidate Meeting
 Plan Community Service Project and
 Fundraiser
 Study Hours

Week 4-

LEAD Session: Int'l Org. & Ch. Ops.
 LEAD Session: Risk Reduction
 Candidate Meeting
 Social Event with Fraternity/Sorority New
 Member Class
 Study Hours

Week 5-

LEAD Session: Ethics
 LEAD Session: Values
 Candidate Meeting
 Meet with Faculty Advisor
 Shadow a Chapter Officer for a Week
 Brother Night: Cookout
 Study Hours

Week 6-

LEAD Session: Leadership: The Basics
 Candidate Meeting
 Social Event with Fraternity/Sorority New
 Member Class
 Candidate Class House Project
 Study Hours

Week 7-

LEAD Session: Project Management
 Candidate Meeting
 Candidate Class Service Project
 Brotherhood Night: Bowling
 Study Hours

Week 8-

LEAD Session: Ritual-The End . . .
 The Beginning
 Candidate Class Fundraiser
 Alumni Weekend
 Initiation Ceremony

11 WEEK PROGRAM**Week 1-**

LEAD Session: Orientation
 Candidate Meeting
 Set Meeting Times and Locations
 Set Study Hours and Location
 Give Overview of Candidate Education
 Distribute LEAD Phase I Manuals, and
 Chapter Candidate Notebook

Week 2-

LEAD Session: Fraternity
 First Candidate Retreat
 LEAD Session: Leadership & Working in
 Groups
 Teams Course/Ropes Course (if available)
 Candidate Meeting
 Elect Candidate Officers
 Assign Big Brothers
 Study Hours

Week 3-

LEAD Session: History
 Brotherhood Night
 LEAD Session: Community Service
 Candidate Meeting
 Plan Community Service Project and
 Fundraiser
 Study Hours

Week 4-

LEAD Session: Int'l Org. & Ch. Ops.
 Candidate Meeting
 Brotherhood Night: Cookout
 Study Hours

Week 5-

LEAD Session: Risk Reduction
 Candidate Meeting
 Shadow a Chapter Officer for a week
 Meet with Faculty Advisor
 Social Event with Fraternity/Sorority
 New Member Class
 Study Hours

Week 6-

LEAD Session: Ethics
 Candidate Meeting
 LEAD Session: Time Management
 Study Hours

Week 7-

LEAD Session: Values
 Candidate Class Service Project
 Study Hours

Week 8-

LEAD Session: Leadership: The Basics
 Candidate Meeting
 Candidate Class Fundraiser
 Alumni Weekend

Week 9-

LEAD Session: Project Management
 Candidate Meeting
 Candidate Class House Project
 Study Hours

Week 10-

Chapter Retreat
 Study Hours

Week 11-

LEAD Session: Ritual-The End . . .
 The Beginning
 Brotherhood Night
 Study Hours
 Initiation Ceremony

LEAD PHASE I: THE WAY OF HONOR

SESSION DESCRIPTIONS

Phase I establishes a foundation of knowledge for all new members including Sigma Nu's history, mission, why it exists and its structures and policies. As participants progress through each of the sessions, they will begin to understand who they are as men, leaders and brothers.

INTRODUCTION

- This session will serve as an introduction to the LEAD Program and the expectations of fraternity membership. Candidates will begin creating a community through interactive activities and Candidate Class goal setting.

SESSION 1 – FRATERNITY

- What is fraternity? Why do fraternities exist? What stereotypes of fraternities do new members bring with them from high school and the media? Candidates will learn about the origin and history of fraternities, the responsibilities that come with fraternity membership and hot topics in Greek life.

SESSION 2 – HISTORY

- Learning the history of Sigma Nu and why we were founded is the core of our fraternity. Candidates will learn about the three founders and the challenges they faced in establishing Sigma Nu and fighting hazing at Virginia Military Institute. Emphasis will also be given to the history of the local chapter. Initiates and alumni will share what makes them proud to be brothers of Sigma Nu.

SESSION 3 – LEADERSHIP AND WORKING IN GROUPS

- Learning to work together as brothers and as a Candidate Class is vital. It will determine how successful you are later in your individual leadership positions and as a chapter. Communication, teamwork, and learning about each other. Candidates will experience all this and more while completing an outdoor teams course.

SESSION 4 – SIGMA NU: INTERNATIONAL ORGANIZATION & CHAPTER OPERATIONS

- Sigma Nu is bigger than you, bigger than your chapter. This session will focus on the entire brotherhood, more than 170 chapters and 200,000 members strong. Candidates will learn how Sigma Nu's High Council (governing board) is organized, how Headquarters operates, how their chapter runs, how chapter elections are set up and duties of chapter officers.

SESSION 5 – RISK REDUCTION

- Candidates will learn the basics of Sigma Nu's *Risk Reductions Policy and Guidelines* test their knowledge and participate in an online education program (GreekLifeEdu).

SESSION 6 – VALUES

- What values are most important to you? How did you develop your values? How do the values of Sigma Nu (Love, Honor and Truth) fit into your daily life? Candidates will examine their values and how they can better live up to them on a daily basis.

SESSION 7 – ETHICS

- What are the basic expectations when it comes to fraternity membership? How should we act? What is acceptable? What isn't? Candidates will learn about the North-American Interfraternity Conference's Basic Expectations of Fraternity Membership, face a number of ethical dilemmas, come up with solutions and discuss the Sigma Nu lifestyle.

SESSION 8 – LEADERSHIP: THE BASICS

- What is leadership? Is there a difference between leadership and a leader? How is leadership defined by Sigma Nu? How important are followers in the leadership process? These are just a few of the questions that will be addressed in this session.

SESSION 9 – PROJECT MANAGEMENT

- The success of all projects is determined by attention to details and teamwork. Candidates will examine their experiences in project planning and learn the essential steps in planning.

SESSION 10 – RITUAL: THE END...THE BEGINNING

- Why do you really want to become a Sigma Nu? What can you add to the brotherhood? Participants will reflect on their experiences as Candidate in Sigma Nu and what is possible in their journey to knighthood. It's time to put everything they've learned to use.

(OPTIONAL) SESSION 11 – COMMUNITY SERVICE

- What is Community Service? How is it different from Philanthropy? Why are both important to Sigma Nu? Why do we do service? Candidates will learn the answers to these questions; focus on the five elements of service and work to select a long-term service project.

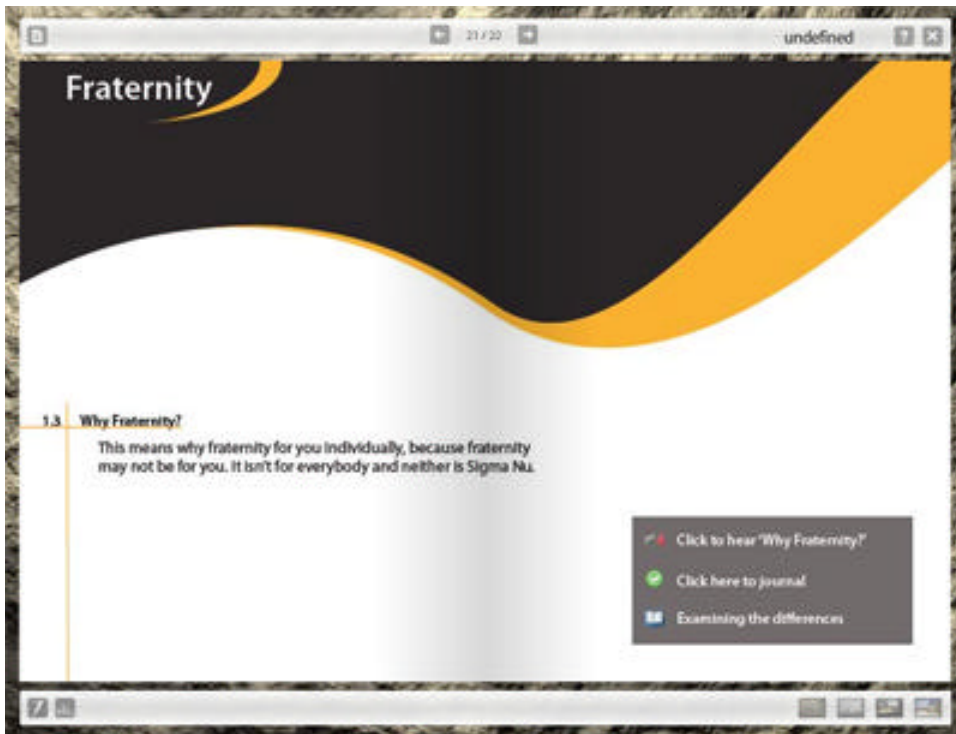
(OPTIONAL) SESSION 12 – TIME MANAGEMENT

- This session features practical time management tips for first year students. Specific strategies will be presented for combating procrastination, maximizing time and setting priorities.

THE LEAD PROGRAM

The redesigned presentation of the LEAD Program breaks sessions into two (2) equally important and distinctive components.

1. Online portion: Accessed via the Members Area and completed by students on an individual basis.
 - a. Participants are expected to log in and complete the online portion of each session prior to attending the facilitation. During the online portion of the session, participants will engage the session content in an interactive format that includes videos, audio voiceovers, activities, handouts, journaling exercises and quizzes.
 - i. Participants are expected to print all relevant handouts from the online portion to bring to the facilitated portion.
 - ii. Completing this portion of the session will provide a knowledge base from which the participants will relate and build upon in the facilitated portion.



2. Facilitated portion: Completed in a workshop/discussion setting which is attended by all phase participants.
 - a. Participants are expected to attend the facilitated portion of the session. This should be scheduled and announced in advance to allow time for participants to engage the online portion of the session.

FACILITATORS

The online content is accessible via the Members Area. All undergraduates and alumni with a valid Members Area account have access. Any non-member "Guest Facilitators" needing access can fill out a form on the Fraternity's web site to request access.

Phase I-IV online materials and accompanying Facilitator Manuals are available now. Online portions of Phases I-IV can be accessed via the Members Area; to access the online content, log in to the Members Area and select LEAD > LEAD Phase #. A new browser window should appear and the program will begin to load. Please allow a few moments for the program to fully load. Phases I-IV online content includes the first (online) portion of all sessions. **Guidance notes for the second (group-facilitated) portion of each session are provided in the new Facilitator Manuals on the Fraternity's web site.**

HOW DOES THE ONLINE PROGRAMMING WORK?

All sessions for Phases I-IV of the LEAD Program now have two (2) distinct components.

- Online portion: Accessed via the Members Area and completed by students on an individual basis.
 - Participants are expected to log in and complete the online portion of each session prior to attending the facilitation. Online sessions are self-paced and may take anywhere from 20-60 minutes to complete, depending on the user. During the online portion of the session, participants will engage the session content in an interactive format that includes: videos, audio voiceovers, activities, handouts, journaling exercises and quizzes.
 - Participants are expected to print all relevant handouts from the online portion to bring to the facilitated portion.
 - Completing this portion of the session will provide a knowledge base from which the participants will relate and build upon in the facilitated portion.
- Facilitated portion: Completed in a workshop/discussion setting which is attended by all phase participants.
 - Participants are expected to attend the facilitated portion of the session. This should be scheduled and announced in advance to allow time for participants to engage the online portion of the session.
 - Completion of the online portion builds a base of knowledge from which participants can relate to the interactive, hands-on, and application approach of the facilitated portion.
 - Guest facilitators are highly encouraged for every session of the program. Guest facilitators could take the form of alumni; College/University faculty, staff and administrators; community members; and any "experts" in a field related to the session content.
 - Facilitators should relate the discussions and information presented in the facilitated portion back to the online experience.

LEAD OVERVIEW

PHASE	# OF SESSIONS	MANAGING OFFICER	GUEST FAC.	FORMAT	RETREATS
PHASE I THE WAY OF HONOR	10 2 OPTIONAL	MARSHAL	3/10	ONLINE CONTENT (IND.) AND FACILITATED WORKSHOP GROUP	2 RETREATS
PHASE II THE LIFE OF LOVE	8	LEAD CHAIRMAN	6/8	ONLINE CONTENT (IND.) AND FACILITATED WORKSHOP (GROUP)	KICKOFF AND CELEBRATION RETREATS
PHASE III THE LIGHT OF TRUTH	7 MODULES; PART. SELECTS PROJECTS	LEAD COACH/ ADVISOR	PROCESS 7 MODULES	ONLINE CONTENT (PRIMER INFO) AND LEADERSHIP LAB	KICKOFF AND CELEBRATION RETREATS
PHASE IV THE END... THE BEGINNING	6	LEAD COACH/ADVI SOR; SENIOR BROTHER	6/6	ONLINE CONTENT (IND.) AND FACILITATED WORKSHOPS (GROUP)	KICKOFF AND CELEBRATION RETREATS
ALL- CHAPTER	3 EACH SEMESTER/ TOTAL OF 6 PER YEAR	COMMANDER	3/6	WORKSHOPS; BROTHERHOOD BUILDING	OPTIONAL CHAPTER RETREAT

LEAD COMMITTEE OVERVIEW

*-PRIMARY; ^-SECONDARY

ROLES	CMDR	LEAD CHAIR	MARSHAL	LEAD COACH/ ADVISOR	LEAD COMM. MEMBER	ADVISOR	GEN. MEMBER	GEN. MEMBER
ORDERS MATERIALS	^	*	^					
REPORTS SESSIONS	^	*	*					
PROMOTES LEAD IN CHAPTER	*	*	^	^	^	^	^	^
MEETS WITH GUEST FACILITATORS	*	*	*	^	^			
MEETS WITH GREEK ADVISOR	*	*	^	^		^		
RECRUITS GUEST FACILITATORS	*	*	*	^	^	^	^	^
FINDS LOCATION FOR PHASE I			*		^			
FINDS LOCATION FOR PHASE II		*			^			
COMPILES GUEST FACILITATORS	^	*	^					
SENDS THANK YOU NOTES	^	*	^	^				
ATTENDANCE SHEET AND POSTS	*	*	*		^			
CANDIDATE CLASS RETREAT	^	^	*					
PLANS LEAD COMMITTEE RETREAT	^	*	^	^	^			
TALKS TO MEMBERS WHO MISSED	*	*	*	^	^			
DEVELOPS IMPLEMENTATION PLAN FOR OTHER PHASES	*	*	*	*	*	*	*	*
ORDERS CERTIFICATES FOR PARTICIPANTS WHO COMPLETE PHASE	^	*	*	*	*	^		

NOTES

SUPPLEMENTAL RESOURCES

SUPPLEMENTAL RESOURCES

EFFECTIVE MEETINGS

TYPES OF MEETINGS...

- 1. INFORMATIONAL:** typically a small meeting with just a few participants; general sharing of information between participants; may involve a some clarification questions; Examples – delegation of tasks and progress updates
 - 2. STRATEGIC:** could include many participants or just a few; vetting and scrutinizing of ideas and strategies; brainstorming; intent of reaching some strategic decision on how to move forward; Examples – strategic planning and goal setting meetings
 - 3. HYBRID:** involves aspects of both information and strategic meetings; Example – weekly Chapter meetings as officers provide reports and updates and Chapter makes decisions regarding various operational tasks and needs
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AGENDAS

BASIC AGENDA OUTLINES: STRATEGIC AND HYBRID MEETINGS

STRATEGIC MEETINGS

Roll Call
Review Previous Mtg.
Progress Updates
Next Steps
Questions/Comments
Next Meeting
Adjourn

HYBRID MEETINGS

Roll Call
Call to Order (Ritual)
Reading and Approval of Previous Meeting Minutes
Reading of Agenda
Major Announcements
Old Business
New Business
Comments
Adjourn (Ritual)

***This agenda outline is similar to that prescribed in The LAW. In conducting your chapter meetings, it is important that The LAW be adhered to as closely as possible.*



EFFECTIVE MEETING SKILLS

PLANNING: *The main key to any meeting is preparation. First, make sure there is a need for the meeting. No one wants to go to a weekly meeting, just because it is time for a weekly meeting. Assess the need for the meeting, and if you can establish a clear reason and need for it, your meeting should proceed as scheduled.*

Next, you should prepare an agenda. You will need to assess if this meeting requires a formal agenda, or if you can simply keep the agenda yourself to assist you in guiding the conversation. However, for those meetings in which you will use a formal agenda, be sure to solicit input from others several days in advance. This will give others an opportunity to get points on the agenda as well as the allotted time to discuss them.

INFORMING: *For those meetings utilizing a formal agenda, distribute the agenda ahead of time. A minimum of 24 hours in advance is ideal to ensure that participants have a chance to review what will be discussed and what decision will need to be made by the end of the meeting.*

When you are informing meeting participants, make sure you are informing the relevant people. For example, if you're have a strategic meeting about next Fall's recruitment, then the likely participants will be the recruitment committee members; therefore, you probably don't need to send the agenda of that meeting to members who are not on the committee. However, ALL meeting agendas should be copied to the Commander and Lt. Commander.

PREPARING: *Prioritize your agenda so that the most important items are addressed first. By first deciding how items should be ordered, you'll know what items deserve the most time. However, an agenda must be flexible, and if you need to spend more time on a particular item than you've allocated, then be ready to do so. The important thing is that by the end of the meeting you reach a decision on the most important items.*

STRUCTURE AND CONTROL: *Once you are actually running the meeting, it is important to have an element of structure and control. As the meeting leader, you are the one who must establish this structure so the meeting runs the way it should.*

At this point, everyone attending should know the purpose of the meeting, whether it is to review projects, brainstorm ideas or talk about a new idea. Whatever the purpose, make sure that you stick to it. It is frustrating when we go off topic, because, then, we rarely accomplish what we need to.

SUMMARIZING AND RECORDING: *Make sure that the "next steps" are recorded, noting who is responsible for completing tasks and by when. Also, be sure to distribute minutes of the meeting within 48 hours of the meetings conclusion.*



DELEGATION: A LOST ART

“Don’t tell people how to do things; tell them what to do and let them surprise you.” – George Patton

PHASES OF DELEGATION

PHASE 1 – PREPARATION

Establishing the goals of the delegation, specifying the task to be completed, and deciding who should accomplish it

PHASE 2 – PLANNING

Meeting with the chosen member to describe the task (what and why) and asking them to come up with an action plan (how)

PHASE 3 – DISCUSSION

Reviewing the objectives of the task as well as the member’s plan of action, any potential obstacles, and ways to avoid or deal with the obstacles.

PHASE 4 – AUDIT

Monitoring the progress of the delegation and making adjustments in response to unforeseen problems (coaching)

PHASE 5 – APPRECIATION

Accepting the completed task and acknowledging the member’s efforts

7 THINGS TO KEEP IN MIND ABOUT DELEGATION...

Unless you can articulate what is wanted in terms of the end result, the process will fail.

You must stretch the capabilities of your committee; don’t just repeatedly assign the same tasks to the same people.

Make sure you tell the chosen member WHY the task you’ve delegated to him is important.

Do not revoke the delegation...it undermines initiative.

Do not accept unfinished or unsatisfactory work.

Completed work should be measured against the desired result, not the way in which the results were achieved.

Publicly recognize their efforts and assign them additional responsibilities to continue to show your confidence in them.



DELEGATION CHECKLIST

PREPARATION PHASE

1. Specify the job to be delegated – Expected results; Materials, resources, and information needed; Relevant policies and procedures to be considered; Time frame for the project; Others involved in the project
2. Decide to whom the task will be delegated – Consider members' abilities, knowledge, interests, experience, attitudes; confidence and developmental goals; Consider members' current workloads; Consider the types of tasks and/or projects that members are currently working on

PLANNING PHASE

1. Explain the reasons for delegating to this person
2. Describe the project clearly (i.e. the expected results), including how the project fits in the larger scheme of things. Ask the member to prepare a plan of how the job could be accomplished and to specify what obstacles he anticipates as well as ways to avoid, or deal with, these obstacles
3. Establish a meeting time to discuss the member's ideas and determine how long the meeting will last
4. Arrange for the meeting to take place in a non-threatening location

DISCUSSION PHASE

1. Discuss the member's plan of action and ways of overcoming potential obstacles
2. Specify the resources that will be made available and make any necessary introduction to others who will be involved in the project
3. Tell the member how much authority you will confer
4. Discuss how much follow-up to expect; establish checkpoints
5. Emphasize the member's responsibility for the outcomes

AUDIT PHASE

1. Make sure that needed materials and resources are available to the member
2. Discuss problems and progress at designated checkpoints as needed
3. Offer encouragement; do not revoke the delegation or begin to perform certain elements of the task yourself

APPRECIATION PHASE

1. Do not accept unfinished, inaccurate, unprofessional, or off-target work
2. Show an interest in the results; reward the member for achievements
3. Accept your own accountability – Don't blame him if you messed up
4. Review the delegation process and what has been learned



DELEGATION WORKSHEET

PROJECT: _____

TASK	EXPECTED RESULTS	PERSON DELEGATED TO	CHECKPOINTS	PROGRESS NOTES



SAMPLE DISCUSSION QUESTIONS

FROM THE PURSUIT OF EXCELLENCE STRATEGY SESSION

The Strategy Session is designed as an All-Chapter LEAD session to be conducted by chapters at the beginning of each academic year, or semester. The session helps to explain the revised program and engages chapter members in the strategy and problem solving process to create direction for the chapter's continued improvement.

VALUES-BASED LEADERSHIP

SERVICE AND PHILANTHROPY

- Imagine the brothers in our chapter committed to individual community service, looking forward to helping others and feeling good about making a difference. With that in mind, how can we encourage brothers to make community service and philanthropy a priority?

CAMPUS LEADERSHIP

- Imagine more of our brothers serving in leadership roles in other student organizations on campus. Think about the chapter's improved reputation, the value the chapter's members are adding to the campus and the level of respect that others have for the brothers. With that in mind, how can we promote the value of getting involved in campus organizations?

VALUES CONGRUENT ENVIRONMENTS

- Consider the values of Sigma Nu – Love, Honor, Truth – and what they mean to you as a brother and a person. What can we do to create a chapter environment that supports and promotes those values?

PERSONAL DEVELOPMENT AND MEMBERSHIP VALUE

INTELLECTUAL DEVELOPMENT

- Imagine our brothers excelling academically, our chapter placing in the top ___ in GPA of all fraternities on campus. Imagine candidates doing well academically. With those images in mind, how can we better support our brothers academically?
- How can we promote the intellectual development of our brothers?

CANDIDATE DEVELOPMENT

- How can we involve brothers that are role models in the Candidate process?

BROTHER DEVELOPMENT

- Imagine a better, more effective LEAD Program; something that brothers look forward to participating in, something that will help them learn about themselves and their brothers, an experience that will challenge them and help brothers develop ideas to move the chapter forward. What would we need to create this in our chapter?

ALUMNI DEVELOPMENT

- Consider what it would be like if we had four times (4x) as many alumni visit the chapter or participate in the chapter's alumni activities each year. Imagine these events drawing alumni from all ages, professions and locations around the state and country. With this in mind, what would we need to do to make this a reality?

OPERATIONAL EXCELLENCE

RECRUITMENT AND MANPOWER

- Imagine our chapter with (insert number) more members. Members who are solid brothers, who are involved in the chapter, involved on campus, excel academically, pay their bills and believe in the values of Sigma Nu. What do we need to do to recruit the number and quality of men we need for our chapter to thrive in the future?

CHAPTER OPERATIONS

- What should be included in the chapter's Operating Plan (Chapter Plan)?

GOVERNANCE AND ACCOUNTABILITY

- What can our chapter do to create a stronger sense of accountability?



NOTES
