



BAYARD MEMBERSHIP EXPERIENCE FACILITATOR/ACTIVITY GUIDE



NAME

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EXERCISE OUTLINE - TEAM BUILDING

Timeline: 20 - 25 minutes

Exercise Type: Discussion

LEARNING OBJECTIVES

- This exercise will serve as an opportunity for members of the new member class to share their ideas and establish what they are looking to achieve in establishing membership within Sigma Pi.
- New members will leave this exercise with a better understanding of the perception of their class when it comes to brotherhood, expectations, and opportunities for involvement.

PRE-EXERCISE REQUIREMENTS

The new member class will be expected to come to this exercise with an open mind and prepared to learn the elements of running a chapter event.

FACILITATOR NOTE

Relationships amongst the new member class will form organically as the group goes through the Bayard Membership Experience. With the assistance of this exercise the facilitator will be able to promote conversation and discussion that encompasses our core values while also facilitating connections amongst the new member class.

Below in the “Discussion Topics and Questions” section you will be able to find five series of questions that further explore the core values of Sigma Pi:

- Promote Fellowship
- Develop Character and Leadership
- Advance Heightened Moral Awareness
- Enable Academic Achievement
- Inspire Service

The New Member Educator or facilitator will be able to use each series as its own standalone Team Building Exercise where the focus will shift from questions gauging their knowledge relating to each value to taking it back to their own daily life. The member facilitating this exercise should pose each question and allow open discussion to transpire amongst the New Members and provide commentary where he can to assist in moving the conversation forward.

PARTICIPANTS

- New Member Educator
- New member class
- Executive Council

MATERIALS NEEDED

- Pen/Pencil
- Bayard Membership Accompanying Guide

EXERCISE DESCRIPTION

This exercise will take new members through a series of questions that will engage their thoughts and facilitate open conversation amongst them. During the discussions the facilitator will have the opportunity to assist the new member class in establishing relationships beyond what they may have originally created themselves.

CONTINUED



EXERCISE OUTLINE - TEAM BUILDING

AGENDA

- Review of the Exercise Description and Learning Objectives
- Discussion Topics and Questions - Series 1-5
- Exercise Debrief

DISCUSSION TOPICS AND QUESTIONS

Series 1 - Promote Fellowship

- How do you define fellowship?
- Do you promote fellowship in your daily life? If so, how?
- What is a time where you prioritized fellowship?

Series 2 - Develop Character and Leadership

- What does leadership mean to you?
- In what ways does character differ and relate to leadership?
- Who are some of the people you see as leaders in your life? Why?

Series 3 - Advance Heightened Moral Awareness

- How do you define moral awareness?
- How can you assist your peers in advancing their moral awareness?
- What is a time where you had to display heightened moral awareness

Series 4 - Enable Academic Achievement

- What to you, indicates academic achievement?
- What are steps you can take to ensure academic success?
- How have you worked with your peers to assist them academically?

Series 5 - Inspire Service

- What are service events you as an individual or a member of a group can be involved in?
- Have you personally worked in or on behalf of any service based events?
- Why should you inspire service in others?

DEBRIEF QUESTIONS

Series 1 - Promote Fellowship

- How do you feel fellowship ties into the fraternity?
- What do you hope to learn from the fraternity when it comes to fellowship?
- How can you promote fellowship outside of the fraternity?

CONTINUED



EXERCISE OUTLINE - TEAM BUILDING

Series 2 - Develop Character and Leadership

- What do you hope to achieve as far as leadership within Sigma Pi?
- How can your character directly impact the fraternity?
- How can a fraternity member develop good character and leadership attributes?

Series 3 - Advance Heightened Moral Awareness

- What does a heightened moral awareness mean in relation to fraternity?
- What steps can be taken to improve the moral awareness of the fraternity?
- How can the fraternity gauge its moral awareness?

Series 4 - Enable Academic Achievement

- What part does academic achievement play in your involvement in the fraternity?
- Why should academic achievement be a top priority for the fraternity?
- How did academic achievement impact your decision to attend your university/college?

Series 5 - Inspire Service

- How can you encourage participation in service events within your new member class?
- Why should the chapter inspire service amongst its members?
- What service goals can you set for your membership within the fraternity?



EXERCISE OUTLINE - THE HISTORY OF SIGMA PI

Timeline: 20 - 25 minutes

Exercise Type: Discussion

LEARNING OBJECTIVES

- New members should leave this discussion with a better understanding of how the Patterson Episode impacted Sigma Pi Fraternity.
- New members through questions and discussion will be introduced to the local history of the chapter (founding date, founding fathers, origin of the chapter's founding if applicable, chapter designation).

PRE-EXERCISE REQUIREMENTS

Before going through this exercise, led by the New Member Educator, new members should have also taken the time to further read the history surrounding the Patterson Episode. Sources of this information can be found on pages 36-47 of the "I Believe Manual" or on the Sigma Pi website at sigmapi.org/fraternity/the-patterson-episode.

FACILITATOR NOTE

The New Member Educator will be expected to provide an overview of the chapters local history with a focus in its founding date, the origin of the chapter's finding on their respective campus (If Applicable, this is an excellent opportunity for the New Member Educator to connect with a founding father of the chapter for their recollection of the chapter's founding if this information is not stored by the Herald), the founding fathers class of the chapter are (If the chapter has been re-founded the New Member Educator should review each class that founded the chapter), along with the chapter designation and how it relates to the rest of Sigma Pi. While the questions in the "Local Chapter Overview" section below are outlined, this is an opportunity for the New Member Educator to introduce this information to the participants and expand upon the chapter's founding and local history.

The New Member Educator will also be expected to provide ample time for the new member class to review the Patterson Episode prior to this discussion. While the questions provided in the "Discussion Topics and Questions" section will each have a correct answer they will also allow for the New Member Educator to gauge the understanding of the new member class on the topic along with whether or not they have followed the instructions for this discussion. Conversely, the "Debrief Questions" do not have a definitive answer but will allow for all participants to engage in a conversation around how learning about the Patterson Episode has impacted their perception of the event in relation to Sigma Pi.

PARTICIPANTS

- New Member Educator
- New Member Class
- Chapter Herald
- Chapter Founding Father (Recommended)
- Alumni

MATERIALS NEEDED

- Pen/Pencil
- I Believe Manual (Or Digital Source of the Patterson Episode)
- Bayard Membership Accompanying Guide

CONTINUED



EXERCISE OUTLINE - THE HISTORY OF SIGMA PI

EXERCISE DESCRIPTION

During this exercise we will take the time to further discuss what the Patterson Episode meant to the History of Sigma Pi. While the Patterson Episode was a controversial series of events during this conversation we will further explore how its happening speaks to the integrity and organization of Sigma Pi.

While the history of the national organization is important to understand, we will also delve into the history of your local chapter during this exercise.

AGENDA

- Review of the Exercise Description and Learning Objectives
- Discussion of The Patterson Episode
- Exercise Debrief
- Local Chapter Overview - The Chapter's Local History

DISCUSSION TOPICS AND QUESTIONS

The Patterson Episode

1. What three-time presidential nominee and member of Sigma Pi literary Society did Robert G. Patterson idolize?
2. When and where was Sigma Pi Literary Society founded?
3. According to Robert G. Patterson, who granted the charter of Sigma Pi Fraternity by Royal Decree?
4. When and where was Sigma Pi Fraternity supposedly founded?
5. In what publication was Patterson fraudulent history publicly discredited?
6. Which Ritual was created by Patterson and was built around his apocryphal history of Sigma Pi?
7. What year was Robert G. Patterson expelled from Sigma Pi Fraternity?

DEBRIEF QUESTIONS

1. What does the "Patterson Episode" mean to you?
 - Regarding the uniqueness of the fraternity's origin
 - Regarding Robert Patterson's persistence
2. Do you feel that Patterson's desire to create Sigma Pi validates the paths of deception that were taken to further along his process?
3. How does the "Patterson Episode" reflect the Creed, Mission, and Vision of Sigma Pi?

LOCAL CHAPTER OVERVIEW

1. The Chapter's Local History
 2. What is the Chapters Founding Date?
 3. What is the designation of your Chapter off Sigma Pi?
 - » How does that relate to the national organization of Sigma Pi?
 4. Who are the Founding Fathers of your chapter?
 5. What is the origin behind the chapter's founding?



EXERCISE OUTLINE - BUILDING & PRESENTING A BUDGET

Timeline: 25 - 30 minutes

Exercise Type: Activity

LEARNING OBJECTIVES

- Implementation of a sense of understanding when it comes to preparing a budget along with the elements that will assist in approving it by the group.
- Proper techniques when it comes to budgeting effectively and efficiently.

PRE-EXERCISE REQUIREMENTS

- New Members should come to this course with an open mind and be prepared to undergo the activity which will assist them in a conversation that will take place for them regardless of their position in the chapter.
- The facilitator should have prepared information regarding:
 - › “Local Chapter Overview Section”
- The facilitator should review the “Sample Chapter Budget” with the New Member class so they have a idea of what a well thought out budget will look like. This can be found at sigmapi.org/resources under “Financial Resources.”

FACILITATOR NOTE

During this exercise, you as the facilitator will assist the new member class in navigating their new roles as the Financial Committee of the Chapter. They will be responsible for discussing and deciding and allocating funds throughout this exercise to a hypothetical chapter budget.

The new member class will be building a budget for a Chapter of 35 men, with a local dues amount of \$600 per semester. The new member class must ensure that they allocate the budget to reflect the collection rate, the Sigma Pi Membership Dues, and the predetermined Committee budgets.

You as the facilitator will assist the new member class as they have open discussion regarding the details and questions that are listed below. The facilitator should read each question regarding the budget allocations and planning, and allow time for the class to decide on each option presented to them. Upon completion of these questions, the new member class should present their Chapter’s budget to the New Member Educator and Treasurer.

In conclusion of this exercise, the facilitator should go through each of the debrief questions with the new member class. These questions are meant to engage each member and their thoughts regarding, not only how this hypothetical budget will be built, but how they can better understand the budget.

PARTICIPANTS

- New Member Educator
- New Member Class
- Chapter Treasurer
- Executive Council (Recommended)

MATERIALS NEEDED

- Pen/Pencil
- Bayard Membership Accompanying Guide

CONTINUED



EXERCISE OUTLINE - BUILDING & PRESENTING A BUDGET

EXERCISE DESCRIPTION

During this exercise the new member class will assume the role of the Finance Committee. In their role They will work together to decide upon each question that is included in the “Discussion Topics and Questions” to create the best budget available for their chapter.

The new member class will operate under the assumption, for this exercise, that they are the finance committee for a 35 man chapter. Their decisions will impact how the budget is crafted. Upon completion of all questions the new member class will select one member to present the budget they have crafted to the Chapter Treasurer and the rest of the Executive Council.

All examples listed below in the “Discussion Topics and Questions” section are only based upon this hypothetical exercise. All return on investment (ROI)_ correlations directly pertaining to the budgeting and funding of the chapter will not necessarily yield the results displayed below.

AGENDA

- Review of the Exercise Description and Learning Objectives
- Discussion Topics and Questions - Building and Presenting a Budget
- Exercise Debrief

DISCUSSION TOPICS AND QUESTIONS

The new member class is now the **finance committee** and they are tasked with planning the upcoming fall semester budget. (if there is a large new member class, split class into groups of 5-10)

- Chapter Overview
 - › The chapter currently has 35 members
 - › Local dues for the chapter historically have been at \$600 per semester
 - › The chapter will be responsible for paying Sigma Pi \$265 per member per semester in the form of membership dues
 - › The chapter has already budgeted for public relations, community service, and philanthropy
 - » Your chapter has allocated the following to each of these committees
 - Philanthropy - \$825
 - Community Service - \$375
- New members will be responsible for selecting one of the options below for each question with the understanding that each will affect their budget differently. Be prepared to discuss why you chose each answer at the conclusion of the activity in making decisions that would best assist your committee in creating and presenting a successful chapter budget.

1. How much money, based off of dues, should the chapter expect to generate for the fall semester? (Factoring In: The finance committee should prepare this budget based off of the consideration that they will collect 80% of all chapter dues)

A. \$17,000 B. \$21,000 C. \$16,800 D. \$20,000

2. How much money, based off of the amount the chapter is obligated to pay in membership dues, will the finance committee have to account for?

A. \$9,000 B. \$9,275 C. \$10,000 D. \$8,760

CONTINUED



EXERCISE OUTLINE - BUILDING & PRESENTING A BUDGET

3. Assuming the chapter collects 80% of their Chapter Dues and pays in full their balance to Sigma Pi for membership dues the projected operating budget of the chapter and Finance Committee will now be:

- A. \$7,525 B. \$7,725 C. \$11,725 D. \$10,725

4. After the allocations to the committees (mentioned above) of Philanthropy and Community Service (Total of \$1,200) the chapter's remaining operating budget sits at:

- A. \$9,525 B. \$10,525 C. \$6,525 D. \$6,325

5. The finance committee will be responsible for allocating parts of the budget to each of the committees listed below:

- I. Recruitment II. Brotherhood III. Scholarship
IV. Social V. Public Relations VI. Fundraising

6. The chapter is planning on hosting one of their best recruitment campaigns for the upcoming fall semester. The recruitment committee has developed the amount of money they will need in order to throw the best events possible. Each option below will also have a specific return on investment (ROI) attached to it. How much will the Finance Committee plan to budget for the recruitment committee? (The average new member class at your university during the Fall semester is 23 men.) How will the committee budget?

- A. \$1,000 B. \$1,500 C. \$2,000
(ROI - 15 men) (ROI - 22 men) (ROI - 25 men)

7. The brotherhood committee has been working vigorously to improve the calendar of events that promote camaraderie within the chapter for this upcoming fall semester. Their committee feels that with a higher investment in brotherhood the chapter will see a higher return on member attendance at events. Your chapter typically has around 70% (25 members) of its members in attendance.

- A. \$2,000 B. \$2,200 C. \$2,400
(ROI - Increase in 5%) (ROI - Increase in 10%) (ROI - Increase in 13%)

8. The scholarship committee has updated their plans for improving the GPA of the chapter. They feel that with an increase in their budget amount that the chapter will see a direct correlation to the improvement of the chapter academically. (The chapter has historically sat at a 2.6 cumulative GPA. The Greek fraternity average is currently at 2.8 cumulative GPA.) How will the committee budget?

- A. \$250 B. \$500 C. \$800
(ROI - Increase of .1 (ROI - Increase of . 2) (ROI - Increase of .25
in cumulative GPA) in cumulative GPA) in cumulative GPA)

9. The social committee has come to you all to discuss the upcoming calendar year for social events. Their committee feels strongly that with an increase to their budget they will be able to help the chapter when it comes to growing and maintaining more relationships with other organizations on campus. (The chapter currently has a strong relationship with 2 other organizations within their community.)

- A. \$1,800 B. \$2,400 C. \$2,800
(ROI - 3 additional (ROI - 5 additional (ROI - 6 additional
relationships created) relationships created) relationships created)

10. The public relations committee feels there is a good opportunity for the chapter to expand its brand and image on campus. To do so they are requesting an increase in their budget for the upcoming fall semester (the average amount of engagements with the chapter's social media posts is currently around 300). How will the committee budget?

- A. \$50 B. \$75 C. \$100
(ROI - Increase of 300 (ROI - Increase of 350 (ROI - Increase of 450
engagements per post) engagements per post) engagements per post)

CONTINUED



EXERCISE OUTLINE - BUILDING & PRESENTING A BUDGET

11. The fundraising committee has been working around the clock to identify different opportunities to raise money within the community. By allocating additional funds to their budget they will be able to plan for larger events that bring in more money to the chapter. (The chapter is new to hosting fundraising events so it has not brought in any revenue from those types of events yet.) How will the chapter budget?

A. \$500
(ROI - Increase in
revenue by \$2,000)

B. \$750
(ROI - Increase in
revenue by \$2,500)

C. \$1,200
(ROI - Increase in
revenue by \$2,700)

Now that the details of your budget have been decided, present it to the participants in attendance for this exercise.

DEBRIEF QUESTIONS

- What do you as an individual member value as the top three committees of the chapter?
- If you could allocate more or less money to a certain committee, would you and why?
- Do you feel this exercise gave you a better perspective on what decisions and input go into effectively planning the chapter's budget?
- How does creating the chapter budget reflect how you may or may not do your own personal budgeting?



EXERCISE OUTLINE - RUNNING AN EVENT

Timeline: 25 - 30 minutes

Exercise Type: Activity

LEARNING OBJECTIVES

- Build the foundations for proper event planning techniques.
- To foster idea generation amongst new members for events the Chapter can conduct.

PRE-EXERCISE REQUIREMENTS

- The new member class will be expected to come to this exercise with an open mind and prepared to learn the elements of running a chapter event.
- The facilitator should have prepared information regarding:
 - › “Local Chapter Overview Section”

FACILITATOR NOTE

During this exercise, you as the facilitator will assist the new member class in navigating and hosting their first philanthropy event. The new member class will assume the role of the philanthropy committee during this activity. They will be responsible for discussing and deciding on the logistics of the event.

The new member class will be restricted to the amount, \$825, that was established during the “building and presenting a budget” exercise. The group will be responsible for maximizing their budget while incorporating as many elements as they can to host a successful event.

You as the facilitator will assist the new member class as they have open discussion regarding the details that are listed below. The facilitator should read each question regarding the logistics of the event, and allow time for the class to decide on each option presented to them. Upon completion of these questions, one member of the new member class should present their plan for a successful philanthropy event to the new member educator (vice president/philanthropy chairman).

In conclusion of this exercise, the facilitator should go through each of the debrief questions with the new member class. These questions are meant to engage each member and their thoughts regarding, not only how this hypothetical event will be run, but how they can plan and prepare for future events.

The new member educator should work with the chapter’s philanthropy chairman (and other members of the chapter if necessary) to provide an overview of the information and questions included in the chapter overview section.

PARTICIPANTS

- New Member Educator
- New Member Class
- Chapter Philanthropy Chairman
- Chapter Vice President
- Chapter Treasurer

MATERIALS NEEDED

- Pen/Pencil
- Bayard Membership Accompanying Guide

CONTINUED



EXERCISE OUTLINE - RUNNING AN EVENT

EXERCISE DESCRIPTION

During this discussion, the New Member Educator will be covering the basics of proper event planning techniques. Once this foundation has been established, the new member class take on the role of the philanthropy committee and build a philanthropy event from the ground up.

The purpose of this discussion is to provide a proper foundation on how your chapter plans events at your university. This will also allow the new members to understand how the Executive Council roles play into the various committees, as well as gain a better understanding of the chapter's budget.

AGENDA

- Review of the Exercise Description and Learning Objectives
- Discussion Topics and Questions - Running an Event
- Exercise Debrief
- Local Chapter Overview - Philanthropy and Your Chapter

DISCUSSION TOPICS AND QUESTIONS

Activity: Running an Event

- The new member class is now the philanthropy committee and they are tasked with planning the upcoming fall philanthropy event. (if there is a large new member class, split class into groups of 5-10)
 - › The budget for the event is **\$825**
 - › New members will be responsible for selecting one of the options below for each question with the understanding that each will affect their budget differently. Be prepared to discuss why you chose each answer at the conclusion of the activity in making decisions that would best assist the chapter in running a successful event.

1. Identifying Your philanthropic cause: Which organization will you run your event in favor of?

A. Donate Life

B. Make A Wish

C. American Red Cross

2. Establishing your internal guidelines - Will members of the chapter be required to attend?

A. Yes

B. No

3. Choosing your location: Where will your event take place?

A. University Quad
(Holds 100)- Free

B. University Ballroom
(Holds 250)- \$350

C. Off Campus Restaurant
(Holds 75) - \$200

4. Selecting your attendees: Who will you invite to the event? (Each selection will impact the number of people who show up to the event)

A. Sororities
110 attendees

B. Fraternities
70 attendees

C. Alumni
10 attendees

D. General Students
60 attendees

5. Deciding on the food: What food and beverages will you provide to those who attend? Options are priced at accommodating 100 Attendees. The committee may account for multiple orders of each item. (For this exercise the philanthropy committee should plan on providing at least one food/beverage item per person)

A. Chips and Sodas - \$60

B. Pizzas - \$200

C. BBQ Catering - \$280

D. Buffet Catering - \$350

CONTINUED



EXERCISE OUTLINE - RUNNING AN EVENT

6. Offering Merchandise: Will your committee plan to make Sigma Pi branded merchandise available to participants? Options are priced at accommodating 100 Attendees. The committee may account for multiple orders of each item. (Typically the chapter may be able to charge for these items, in this exercise you will have the option to utilize them as an additional marketing tool but will see no financial return.)
- A. Philanthropy Shirts - \$100 B. Pen and Notepad - \$25 C. Stress Ball - \$20
7. Advertising Options: How will your committee plan to market your event to the campus and/or community?
- A. Social Media - Free B. Flyers - \$50 C. Section in Campus Newspaper - \$100

Now that the details of your philanthropy event have been decided, present it to the participants in attendance for this exercise

DEBRIEF QUESTIONS

- What items did the chapter prioritize as part of hosting their philanthropy event?
- Should the chapter allocate a larger amount of funds to service events as opposed to other committees within the chapter?
- Should the chapter partner with another Greek or campus organization to host future philanthropic events? (Yes/No, why?)
- Can the Chapter utilize Alumni to enhance the philanthropy event?

LOCAL CHAPTER OVERVIEW

- Philanthropy and your chapter
- Historically, what has the Chapter done with their philanthropy events?
- What philanthropic cause does the chapter usually utilize on their campus?
- Does the chapter partner or work with other organizations on campus to host their events?
- What is the budget amount typically allocated for philanthropic causes?
- Where does the chapter typically host their events?
- Does the chapter typically utilize additional materials for their events? (i.e. t-shirts, food, beverages, branding materials, etc.)
- Who does the chapter typically invite?
- Is there a reason the chapter works with the philanthropic cause that it does?
- Does the chapter have any alumni that could contribute to their philanthropy event?



EXERCISE OUTLINE - NEW MEMBER ELECTIONS

Timeline: 40-45 minutes

Exercise Type: Activity

LEARNING OBJECTIVES

- New members will gain a better understanding of chapter operations when it comes to the election process.
- Parliamentary procedures will be introduced during this exercise as an opportunity for new members to engage in a means of facilitation that may or may not be unbeknown to them.
- The new member class will have the opportunity to learn about their peers and select different members for the leadership roles amongst their group.

PRE-EXERCISE REQUIREMENTS

- The New Member Educator will need to make the determination as to whether or not new members will give or provide any type of speech prior to the voting of each position. If this is the case then this event should be divided into two sessions allowing each member who was nominated to compose their own speech. New Member Educators will also need to decide prior to the exercise how many members will be able to be nominated at each role along with the allowed duration of each speech.
- For Part 2 of the Exercise the New Member Educator will also have to make the decision regarding how votes will take place. In a physical setting he may have ballots with each nominated member's name, do write in votes, or a simple hand raising. For online voting the facilitator should determine the best way to vote based off of his technological resources (ie. sending votes through private chat, text messages, GroupMe polls, etc.).
- The New Member Educator should come with the information included in the "Local Chapter Overview" section of this exercise and be prepared to present it to the new member class after concluding discussions regarding the debrief questions.

FACILITATOR NOTE

At this point in the Bayard Membership Experience the new member class should have had some time to begin to get to know each other. With getting to know each other they should have also begun to start to learn the leadership abilities that each member of the class offers. With that understanding in mind the group will now have the opportunity to put the members they feel who will lead the class best in positions to do so.

During this exercise the New Member Educator or facilitator will be in charge of running the new member elections which will navigate new members stepping into roles of leadership. The member facilitating this election process will need to make the determination (ideally, with the insight of other members of the Executive Council) as to whether or not there will be any type of speeches or opportunities to speak that will be taking place regarding the election of each position.

Typically, an election will take place as part of a meeting being run by the chapter. For this exercise you will navigate these elections as their own stand alone event.

This exercise will be run under the assumption that there will be some type of opportunity to speak on behalf of each member who has accepted his nomination. In order for a nomination to be accepted a member must receive a nomination along with a "Second" from a different member of the voting body.

Depending on the size of the new member class facilitators should consider placing a cap on the number of nominations that can be made under each position. With the cap being placed it should be emphasized to each member that nominations should be taken seriously and unfortunately, not everyone will be able to run for each position.

The member facilitating this exercise should follow the structure of this process that is outlined in the "Discussion Topics and Questions" section of this exercise.

Upon conducting this event the new member class will leave with its own Executive Council and a better idea of how the voting process occurs.

CONTINUED



EXERCISE OUTLINE - NEW MEMBER ELECTIONS

PARTICIPANTS

- New Member Educator
- New Member Class
- Executive Council (Recommended)

MATERIALS NEEDED

- Pen/Pencil
- I Believe Manual
- Bayard Membership Accompanying Guide

EXERCISE DESCRIPTION

During this exercise the new member class will have the opportunity to nominate and elect members of their class for leadership positions. These positions will be identical to the Executive Council of the chapter. The following roles will be determined during this exercise:

I. Sage	II. Second Counselor	III. Third Counselor
IV. Fourth Counselor	V. First Counselor	VI. Herald

Electing these roles within the new member class will allow the opportunity for the group to experience how an election process occurs, establish expectations amongst their class with assistance from the “Chapter Structure” course, along with preparing members who are interested in leadership roles for what they may be able to expect in the future.

AGENDA

- Review of the Exercise Description and Learning Objectives
- Discussion Topics and Questions - Electing New Member Officers - Part One
- Exercise Intermission - Break
- Discussion Topics and Questions - Electing New Member Officers - Part Two
- Exercise Debrief
- Local Chapter Overview - The Election Process in Your Chapter

DISCUSSION TOPICS AND QUESTIONS

PART ONE

You as the new member class will be electing the Executive Council of your group. In order to begin, the New Member Educator or Facilitator will make a motion to open the exercise up to the election of the Executive Council. This motion must receive a “Second” from a new member in order to pass and move forward. (A “Second” must be made on this motion.)

Once a “Second” has been made, the election process will begin with the nomination of members who will sit in the role of Class Sage. New members will now, based off of their opinion of his peers, nominate those in which they feel would best fit the position. Each of these nominations must also receive a “Second” in order to pass. This same process will transpire across each position that was previously listed in the “Exercise Description.”

New members should be aware that there may be a cap regarding how many members may be nominated for each position. They should make their decisions understanding the impact it will have on the dynamic of the new member class.

Upon reaching the cap or end of successfully made nominations for each position this part of the exercise should be concluded by allowing each member to formally accept his nomination.

CONTINUED



EXERCISE OUTLINE - NEW MEMBER ELECTIONS

EXERCISE INTERMISSION - BREAK

During this break the New Member Educator or Facilitator should take this time to allow each nominated member to compose his speech for the election. The duration of this speech should have been previously decided amongst the members of the chapter's Executive Council. (For example, each speech will last no longer than one minute.)

PART TWO

During part 2 of the exercise the election will transpire. The election process will begin with the position of the Sage. The order of those speaking can be determined by:

- The order in which they were nominated
- In alphabetical order based off of their last names
- Random selection

Each member of the class will now have one minute to speak in front of the voting body. Members who have been nominated for the position that is currently being voted upon should not be able to observe or listen to the nominee. Upon completion of all member's speeches a vote will be held to elect the person to that position.

Based on the decision of the member facilitating the exercise voting should be done through the channel in which he has identified as necessary. Votes should be tallied upon the last submission for each position. A brief period of time should also be taken in order to count the votes for the position being elected. The winner of the election for each position should be announced prior to beginning the election of the next position.

This same process should be followed throughout the election of each position of the Executive Council.

Upon conclusion of the election process, the newly elected Sage should make an inquiry from the new member class as to whether or not they are ready to close this exercise. A motion must be made and receive a "Second" from a New Member in order to pass and close the exercise.

DEBRIEF QUESTIONS

1. What are the expectations of the newly elected Executive Council?
 - › Identify 3 expectations
2. What elements of parliamentary procedure allowed for you to complete the exercise?
3. What did you learn from conducting your own new member class elections?

LOCAL CHAPTER OVERVIEW

- The Election Process in Your Chapter
 1. Does the chapter have any additional steps it utilizes in the election process?
 2. Who is the chapter's first elected Sage?
 3. Are there any requirements the chapter has in place in order for a member to be nominated or elected to the Executive Council?
 4. When do elections take place for the chapter?
 5. How long do members of the Executive Council serve in their role (per term)?



EXERCISE OUTLINE - RUNNING A MEETING

Timeline: 35-40 minutes

Exercise Type: Discussion

LEARNING OBJECTIVES

- New members will be introduced to topics that are included in meetings that are run by the chapter.
- The new member class as a whole will leave this exercise with an increased understanding of meeting structure within Sigma Pi.
- New members will establish a baseline of knowledge as far as following Parliamentary Procedures when it comes to Sigma Pi operations.

PRE-EXERCISE REQUIREMENTS

- Each new member involved should refresh/or take the time to read and develop a baseline of knowledge regarding the Parliamentary Procedure and Parliamentary Rules sections of the “I Believe” Manual.
 - › Important information in these sections are General Rules for Conducting a Meeting, Order of Business for a Sigma Pi Chapter Meeting along with a Parliamentary Rules one sheeter and Definition of Terms Used in Parliamentary Procedure.
- The New Member Educator or Facilitator of this exercise should be prepared to assist the new member class in moving the meeting along providing points of clarification where necessary but ultimately allowing the group to come to their own conclusions and decisions.
- The elected Fourth Counselor (if the chapter has not done New Member Elections up to this point someone should be picked for this role prior to the exercise) will be expected to have a roster including the first and last name of each member in his class.
- All members should come with a copy of the creed of Sigma Pi which can be found in the Accompanying Guide and/or the “I Believe” Manual.

FACILITATOR NOTE

During this exercise the new member class will have the opportunity to move through different topics of their chapter meeting.

While the typical Order of Business for a Sigma Pi Chapter Meeting includes:

- *The Opening Ceremony of the Chapter, Roll Call of Members, Reading of Minutes, Reports of Officers, Report of Recruitment Committee, Reports of Other Committee, Unfinished Business, New Business, Discussions for the Good of the Chapter, The Closing of Ceremony of the Chapter.*

Opportunities for additional topics include:

- *Formal Pledging Ceremony, Talks on General Subjects, Study of Specific Topics (History, Constitution, Ceremonies, etc.) and Personal Critiques*

This exercise will focus on following parliamentary procedures as the group navigates running their own meeting.

Upon conducting this event the New Member class will leave with its own Executive Council and a better idea of how the voting process occurs.

CONTINUED



EXERCISE OUTLINE - RUNNING A MEETING

PARTICIPANTS

- New Member Educator
- New Member Class
- Chapter Sage
- Chapter Vice President
- Chapter Secretary
- Other Chapter Members (Recommended they be included if the new member class does not have enough members to act as the Executive Council along with having general members of their own to run the meeting.)

MATERIALS NEEDED

- Pen/Pencil
- I Believe Manual
- Bayard Membership Accompanying Guide

EXERCISE DESCRIPTION

The new member class will be holding their first meeting run by their class for this exercise. By following along with the prompts and questions below the group who will be acting as their own chapter will navigate running this meeting. While this exercise does not cover each element of a chapter meeting it will introduce new members to the structure in which they will follow and/or lead themselves upon initiation.

AGENDA

- Review of the Exercise Description and Learning Objectives
- Discussion Topics and Questions - Running A Meeting
- Exercise Debrief

DISCUSSION TOPICS AND QUESTIONS

The new member class is now acting in their roles as elected officers of their own chapter. Prior to this exercise there have been meetings held where there was business that was not settled upon. During this meeting you will go through different orders of business that are typically discussed during a meeting but also practicing your ability to follow parliamentary procedures as you navigate running your meeting and solving issues that have carried over into this meeting.

THE OPENING CEREMONY OF THE CHAPTER (READ BY THE CLASS SAGE)

Read: This meeting of the (Insert Class Designation) Class is here today to discuss the business of the (insert Chapter Designation) Chapter of Sigma Pi

Instruct: A member of the new member class will need to make a motion to open the meeting for discussion of the business of the group. (Motion must receive a second to move forward and can not be done by the Sage.)

Read: Before we begin this meeting I ask that all in attendance please stand as we recite the creed of Sigma Pi.

- (Led by the Class Sage, members should recite the creed collectively.)

Read: At this point, all members may sit.

Instruct: The Fourth Counselor will now take the role.

CONTINUED



EXERCISE OUTLINE - RUNNING A MEETING

ROLL CALL OF MEMBERS

Instruct: The Fourth Counselor using the list of names of those in his class (*Refer to Pre-Exercise Requirements, this list should have been pre-generated*) will now read them off one by one. As each member hears his name he should indicate he is “here.” Any member who does not indicate themselves as “here” (*in attendance*) should be marked down as such.

Instruct: The class Fourth Counselor will now read the minutes for this meeting (*Chapters will be expected to create their own minutes for chapter meetings. During this exercise the Fourth Counselor will read the information below that is in Bold Print*)

Read:

Opening Ceremony of the Meeting

- Opened by the Class Sage

Roll Call of Members

- The following members are not present:

Reading of Minutes

Officer Reports

- Sage
 - › Scheduling visit from the Executive Office
- Second Counselor
 - › Next week we will decide on our Fall philanthropy event
- Third Counselor
 - › All members have paid off their membership dues
- Fourth Counselor
 - › N/A
- First Counselor
 - › The chapter has completed all required health and safety training
- Herald
 - › The Initiation Ceremony for the current new member class will be held three weeks from now

Discussions for the Good of the Chapter

- New members can take this time to discuss anything going on that may be beneficial to them or their class right now as it pertains to their actual lives

Closing Ceremony

Instruct: Upon the completion of reading the minutes to the chapter for today’s meeting the group may move to Officer Reports beginning with the Sage’s Report.

(Officer Reports allow the Executive Council of the group to inform the chapter on any and all information that has been discussed during the Executive Council Meeting and is necessary for the chapter or new member class to be aware of.)

OFFICER REPORTS

Instruct: Sage will read his report

CONTINUED



EXERCISE OUTLINE - RUNNING A MEETING

Read: Our Chapter Management Associate will be coming to visit us next week. During that time he will meet with each of us on the Executive Council along with each Committee Chairman. He will end the visit with a chapter meeting including all of us.

Instruct: Second Counselor will read his report

Read: Next week we will decide on our Fall philanthropy event. We have narrowed down our choice in philanthropy to Donate Life, Make A Wish, and American Red Cross. We will set aside time to go through the logistics of how we can run the best event possible then.

Instruct: Third Counselor will read his report

Read: All members have paid off their membership dues. We'll be exploring different opportunities in the community to do fundraising to help us prepare for our budget next year starting next week.

Instruct: Fourth Counselor will read his report

Read: I have no report

Instruct: First Counselor will read his report

Read: The chapter has completed all Health and Safety training. Since all members completed their training ahead of the deadline we will be hosting an additional brotherhood event next week.

Instruct: Herald will read his report

Read: The initiation ceremony for the new member class will be in three weeks All members of the chapter will be required to be in attendance.

Instruct: Upon completion of the reading of Officer Reports the chapter, assuming there are no questions, will move to unfinished business. Here the chapter will follow parliamentary procedure until the desired result has been decided upon.

DISCUSSIONS FOR THE GOOD OF THE CHAPTER

Instruct: New members can take this time to discuss anything going on that may be beneficial to them or their class right now as it pertains to their actual lives.

Instruct: Upon conclusion of any discussion that arises for the good of the chapter the new member class Sage can proceed to the closing ceremony.

CLOSING CEREMONY

Instruct: Motion must be made by a member of the group to close the meeting and discussion. (Motion must be made and seconded. Can not be done by the Sage.)

Read: If there is no further business to be discussed during this meeting I hereby declare this meeting of the (Insert Class Designation) Class of the (Insert Chapter Designation) Chapter of Sigma Pi adjourned.

DEBRIEF QUESTIONS

1. How does Parliamentary Procedure assist in running a chapter meeting?
2. Do you believe having the "Meeting Minutes" reviewed prior to conducting the meeting is a beneficial measure? Why or why not?
3. In what way does having to make a motion change the way you approach a topic of conversation?



EXERCISE OUTLINE - PREPARING FOR THE GOLDEN QUEST

Timeline: 20-25 minutes

Exercise Type: Discussion

LEARNING OBJECTIVES

- Initiate Elects will have the opportunity to learn about the essence in which their Golden Quest will revolve around, which is the “Hero’s Journey.”
- Initiate Elects will leave this exercise with the knowledge and ability to complete all of the final steps in order to initiate into Sigma Pi.
- Expectations of your membership not only as an initiated member but as a member of your class joining the fraternity will be established.

PRE-EXERCISE REQUIREMENTS

- New members will need to pay their initiation fee of \$325.
- The New Member Educator, or member within the chapter designated to do so, will need to submit an Initiate Report with all members names who have completed the New Member Experience and Initiate Elect Experience.

FACILITATOR NOTE

During this final exercise of the Bayard Membership Experience the Initiate Elect will be prepared to enter his next phase of membership as a lifelong initiated member. Here, the New Member Educator, or facilitator, will be responsible for taking Initiate Elects through all steps required to initiate into Sigma Pi while providing them the opportunity to have a better understanding of what they will learn from the ritual of Sigma Pi.

The member facilitating should first gather the group of Initiate Elects together so they are able to collectively pay their Initiate Fee. Paying this balance will grant the member access to lifetime membership and includes a membership ID card, a member certificate, a member active badge, and full active benefits all throughout North America.

Upon submission of this payment the facilitator should take the Initiate Elects through the content provided in the “Discussion Topics and Questions” section of the exercise.

While the Initiate Elect will not be given specific details of the Golden Quest of this exercise by going through and learning about Hero’s Journey he will have a better idea of what he can expect from his upcoming ritual experience. Upon completion of the video (the article is an additional piece that can be used to recap the focus of this exercise) the member facilitating should move to the debrief questions.

PARTICIPANTS

- New Member Educator
- New Member Class
- Chapter Herald
- Chapter Fourth Counselor
- Chapter Sage
- Executive Council (Recommended)

MATERIALS NEEDED

- Pen/Pencil
- I Believe Manual
- Bayard Membership Accompanying Guide

CONTINUED



EXERCISE OUTLINE - PREPARING FOR THE GOLDEN QUEST

EXERCISE DESCRIPTION

As you complete your Membership Experience, you have learned about the history of our Fraternity, our Founders, our structure as well as the local history of your own Chapter, your Founders, and operations.

This exercise is intended to assist the Initiate Elect in understanding the purpose of our Ritual, known simply as The Golden Quest.

You might ask, why in this day and age do we bother with having a Ritual? While it is easy enough to simply check a box on a computer screen to indicate that you are an active member, that impersonal action does very little to connect you beyond our letters nor to our thousands of brothers across the globe.

Simply put, Ritual can be defined as an act or series of acts regularly repeated in a set manner.

How you get out of bed, put your pants on, brush your teeth, prepare your coffee and head out the door can all be considered your “Morning Ritual”...it is a series of actions that you are used to and breaking from that ritual could throw off your day.

Likewise, the Golden Quest Ritual of Sigma Pi is a set of actions that have been defined and practiced through the lifetime of the Fraternity and something that each member experiences.

In going through the ritual of Sigma Pi you will find the following:

- A common ceremony where a new member is initiated into the secrets of the fraternity and thus accepted by all Fraternity members, regardless of Chapter affiliation.
- A physical and experiential representation of our Fraternity’s values.
- A guideline for the Chapter and Chapter members to use when making decisions, not only as a member of Sigma Pi, but in your own daily life.

As an initiated member, this will then become YOUR Ritual with the opportunity to review and study its contents.

AGENDA

- Review Learning Objectives and Exercise Description
- Assisting of Initiate Elect members in paying their Initiate Fee
- Discussion Topics and Questions - The Hero’s Journey
- Debrief Questions

DISCUSSION TOPICS AND QUESTIONS

- *The Hero’s Journey Video*
- *Reedsy - The Hero’s Journey Article*

DEBRIEF QUESTIONS

1. How can you apply the Hero’s Journey to your own daily life?
2. What elements of the Hero’s Journey do you feel make it so important?
3. What goals will you set for yourself as you prepare to initiate into Sigma Pi?
4. As a soon to be initiated member what expectations will you have for your class as you are all concluding the Bayard Membership Experience together?



EXERCISE OUTLINE - HEALTH AND SAFETY REVIEW

FACILITATOR NOTE

Tightrope Companion Course sessions are meant to help you build a more personal and meaningful context around what you learn in the Tightrope Online Modules. The Peer-to-Peer sessions should be completed as a group so you can learn together and build an understanding of how you and your peers relate to the topics. Later, you can build on that group learning by advancing to the alumni sessions, which will prompt your group to further explore the nuances of each topic with a local alumni member, advisor, or headquarters representative.

Alcohol and Other Drugs - Peer to Peer Companion Guide

Blood Alcohol Content Activity

The Culture of Drinking -Peer to Peer Companion Guide

Hazing Prevention - Peer to Peer Companion Guide

Sexual Misconduct - Peer to Peer Companion Guide

Sexual Misconduct - Peer to Peer Companion Activity Slides

Mental Health - Peer to Peer Companion Guide

Mental Health - Peer to Peer Companion Activity

