

To: **Rho Chapter Executive Council**
From: **Joseph Drain, Region II Director**
Re: **Regional Director Chapter Visit 2/1 – 2/2/2017**
Date: **January 26, 2017**

I hope you are having a great start to the year. I am looking forward to my scheduled visit to your chapter on **Wednesday, February 1st through Thursday, February 2nd**. Chapter visits are a very important function of our organization because it gives the Executive Office the opportunity to work directly with all of our chapters.

All chapters can expect at least one visit per year by their Regional Director or another member of the Executive Office Staff. During my visit, I will have my own accommodations and transportation.

PART A

All Chapters receive a PART A Google Doc prior to the scheduled visit. This document will provide our staff with all of the necessary information for the visit.

Here is the link to the Google Doc: **[Rho Chapter Visit Part A](#)**

(Please share this document with anyone you want from your chapter by sending them the link)

Please note that there are four tabs in this document:

- Part A – Chapter Data & Questionnaire
- Meetings & Contacts – All Executive Council, Committee Chairmen, chapter contacts and a listing of all requested meetings
- Meeting Schedule – Use to schedule all individual meetings; be sure to list name and position
- Assessment – Strengths/Weaknesses of Chapter, Chapter Goals and what you expect to get out of the visit

Once complete, notify your Regional Director. If you need assistance or have any questions regarding the Part A, please do not hesitate to ask.

MEETING TIPS

- Plan everything in advance
- Reserve a private location on campus or have a private room in the house with a table & chairs
- Use the Google Doc for scheduling
- Front-Fill the meetings (meaning try to schedule meetings one after the other and avoid open gaps of time)
- Be prepared to discuss your position, your goals, your accomplishments, your Standards of Excellence Expectations and your current progress
- You should **ALWAYS** bring your laptop, planner/calendar, pen/paper and any materials you are currently working on to your meeting.

WHAT MEETINGS WILL TAKE PLACE?

Sage One-on-One (60 minutes) *Sage Only*

This meeting should be the first meeting of the visit when possible. Please bring the most recent chapter bylaws and your grade report. This is an opportunity for us to discuss the chapter in-depth and one-on-one.

Executive Council Workshop (120 minutes) *All Executive Council Members*

This meeting should take place after the Sage one-on-one meeting when possible.

- 2nd Counselor, please bring committee progress updates and current projects
- 3rd Counselor, please bring budget, accounts payable/receivable & a copy of IRS Form 990
- 4th Counselor, please bring chapter calendar and attendance tracker
- 1st Counselor, please bring ritual equipment for your SOE equipment inventory
- Herald, please have access to all social media sites & website for review

Education (60 Minutes) *Neophyte/New Member Educator & Assistant Neophyte/New Member Educator*

Please bring neophyte/new member education program, calendar, etc.

Finance (60 Minutes) *3rd Counselor & Fundraising Chairman*

Please bring all fundraising information, budget, accounts payable/receivable. The Fundraising Chair will only need to be present for the first 15-20 minutes of this meeting.

Alumni (30 Minutes) *1st Counselor*

Please bring your alumni newsletter(s), alumni database and any other projects you may be working on involving alumni outreach and events.

Recruitment (60 Minutes) *Recruitment Chairman, Assistant Recruitment Chairman & Committee*

Please bring your written recruitment program, your names list, a schedule of activities and any other recruitment-related materials.

Scholarship (60 Minutes) *Scholarship Chairman*

Please bring your scholarship program, most recent grade report and any scholarship-related materials for review.

Service (60 Minutes) *Community Service Chairman, Philanthropy Chairman & ACE Chairman*

Please bring your project calendar and any service-related materials for review.

Fellowship (60 Minutes) *Social Chairman, Brotherhood Chairman & Risk Management Chairman*

Please bring your social/brotherhood calendar, written risk management plan and any other fellowship-related materials.



Ritual Equipment Inventory Check (60 Minutes) *1st Counselor and/or Herald*

Your chapter's ritual equipment will need to be visually inspected during the visit. If your equipment is stored in a remote location such as a storage unit, please factor in travel time to and from this location when scheduling this meeting.

Flex Meeting (60 Minutes) *Attendees Based on Need*

This meeting time is intended to add extra emphasis to an area your specific chapter needs to focus on. Your Regional Director may choose a topic himself, or with the guidance of the Sage. If you have a specific area you would like to focus extra time on, please contact your RD in advance of his arrival.

Housing (30 Minutes) *House Manager*

If your chapter currently has a chapter house, please schedule this meeting. During this meeting, a safety walk-through and house inspection will take place. [*If you do not have a chapter house, this meeting does not need to be scheduled]

Advisors & Volunteers (60 Minutes Each) *Faculty Advisor, Chapter Director, Campus Professional*

Please provide the contact information for each of your advisors so I can schedule a meeting with them.

Wrap-Up (60 Minutes) *Sage & 2nd Counselor*

This meeting will serve as a review of the information learned during the Executive Office visit. The Sage and 2nd Counselor will work with the Executive Office Staff member on creating an action plan.

Formal Chapter (60 Minutes) *All Chapter Members*

Please schedule a formal chapter meeting towards the end of my visit. I will do my best to accommodate the chapter's regular meeting schedule. However, that is not always possible. During this chapter meeting, I would like to see business conducted as usual.

I would like approximately 30-45 minutes to speak to the chapter about my visit, findings and updates from the Executive Office and Grand Chapter. Please reserve a room on campus that can accommodate the entire chapter and is equipped with audio/visual equipment. If the chapter meets in the chapter house, please try to get access to a projector/screen.

If the chapter is interested, I can present an educational workshop during this scheduled meeting time that will count towards the Standards of Excellence. Please schedule a call with me at least 1 week prior to my arrival to discuss this workshop if this is something you would like to explore.



ACADEMIC/FINANCIAL SUSPENSIONS

During a visit from the Executive Office, our staff will request access to the chapter's latest grade report and accounts receivable.

Any members that are below the chapter's GPA requirement (or below the International Standard/NIC Standard of 2.5) will be placed on Conduct Suspension for failure to comply with academic requirements. Any member that has an active debt with the chapter in any amount that exceeds 60 days will be immediately placed on conduct suspension for financial reasons.

POST VISITATION REPORTS

All chapters will receive an in-depth report following a visit from our staff. These reports are designed to assist the chapter in enhancing their strengths and minimizing their weaknesses. In this report, there will be requirements and recommendations for improvement. Requirements are items that the chapter is required to give their immediate attention to because something is out of compliance with the Executive Office & Grand Chapter Standards. Recommendations are suggestions for improvement and often will include best practices.

Sincerely,

Joseph Drain

Joseph Drain, M.Ed.
Region II Director
Sigma Pi Fraternity, International