

Northeastern Provincial Vice President: Dan Collins

Report for the 2018 Provincial Council

Fall 2017 Travel and Major Conference Calls

Date of Visit	Event	Location
9/14 – 9/17/2017	Board Meeting & National Leadership Retreat	Cincinnati, OH
10/13 – 10/15/2017	Cincinnati LEAD School	Cincinnati, OH
10/16/2017	Gamma Visit	Boston, MA
10/30/2017	Board Call	Conference Call
11/1/2017	Provincial Leadership Team Call	Conference Call
11/16/2017	Lambda Tau - Initiation	Waltham, MA
11/18/2017	Phi Chi - Initiation	Kingston, RI
11/18/2017	Xi Phi - Initiation	Boston, MA
12/2/2017	Gamma - Initiation	Boston, MA
12/9/2017	Boston Alumni Chapter Holiday Gathering	Woburn, MA
1/12 – 1/14/2018	Provincial Leadership Retreat	Burlington, MA
1/19 – 1/21/2018	Board Meeting	Oxford, OH
2/9 – 2/11/2018	Northeastern LEAD Provincial Council and Conference	Danvers, MA

Provincial Goals

Volunteer Development: Many new volunteers have joined the leadership team this year throughout the province either as a new leader, or as a returning leader in a new role. In certain areas we struggle finding brothers taking on volunteer roles. The respective leaders have continued to work to identify potential candidates, and have explored various approaches to ensure support for the chapters.

Leadership Training: Existing training programs such as the CDL program have been recommended as a base program for leaders, and additional communication tools such as “Slack” have been set up to help foster communication between peers. A Provincial team retreat is being held January 12-14 for PVP/RVPs, and on February 11 at the Northeastern LEAD Provincial Conference we will be holding a leadership training event for District Directors, other existing leaders, and those interested in joining the leadership team.

Expansion: Promote and explore opportunities for expansion as they arise and ensure sufficient support is available to assist. Two Colonies are established and are continuing to progress. Capital University in Ohio was established in the fall, joining an existing colony at Rutgers-Newark formed last spring.

Chapter Operations - CMP, Awards, & Ritual: The provincial leadership team is monitoring CMP performance this year to identify areas for added emphasis and aiming to improve overall CMP performance. Additionally, in conjunction with national initiatives, ongoing discussion and emphasis has been placed on providing initiation guidance and support to chapters. Promotion of chapter awards will begin in the spring with the goal for every region to have a winner for each collegiate award category, and an increase in the total number of applications.

Committee Goals: The provincial committees are working with the national committee chairs to support national goals and implement provincial goals.

- Professional Development - Offer presentation opportunities for collegiate brothers at the Northeastern Provincial Conference, and incorporate added opportunities for industry/career informational interviews with alumni.
 - The professional development committee offered a resume table at Cincinnati LEAD, providing attendees an opportunity for LinkedIn profiles and resume review. A similar table will be held at the Boston LEAD Provincial Conference expanding to also include feedback on individual's elevator pitches, and opportunities for Q&A/interviews with alumni business professionals.
 - Chapter led programming integrated into the agenda for the Boston Provincial conference. A call for presentations email resulted in a range of ideas being submitted and several sessions either directly added, or combined into existing sessions.
- Community Service - Communicate the National Service initiatives within the province and lead service activities at provincial events.
 - Primary focus is the national initiative with Ronald McDonald House, and we continue our Pop Tab collections. Additional local initiatives are planned for future conferences.
- Awards Committee - Increasing awareness and quality of award applications.
 - COY nominees were invited and encouraged to participate in a webinar reviewing the application.
 - Promotion of chapter awards and scholarship opportunities to begin in the spring.
- Alumni Development - Increase awareness and participation of alumni chapters and work in tandem with professional and service committees to promote volunteer opportunities at events and locally.
 - Alumni forums were held at LEAD to share best practices and gain feedback on ways to increase member retention

Provincial Highlights

Cincinnati LEAD School / Cincinnati Alumni Chapter Tours: Solid attendance at the event coincided with an outstanding level of discussion/engagement by brothers during and between sessions. In conjunction with LEAD, the Cincinnati Alumni Chapter planned and promoted several add on events including tours of local business/service opportunities, but the highlight was organizing Central Office tours for attendees of the LEAD School. Much credit goes to them as the feedback was excellent and it was attended by over 1/3 of all LEAD School attendees.

Chapter presentations at spring LEAD: We are continuing our history of having chapter led programming at LEAD following positive feedback in the past and opportunities for chapters to share their best practices and preferred topics. Several new or creative ideas have been received and it has resulted in some interesting blends for sessions.

Chapter Discipline: An unfortunate increase in chapter discipline occurred this semester in line with societal changes occurring in the Greek life domain. These situations frequently originated from

university investigations which were subsequently sent to us. Some situations were complex with ongoing alcohol/hazing investigations to be resolved, while others were violations of pledge education policy requirements or recruiting practices to be corrected. Continued discussion and emphasis on risk management education is planned for discussion by the leadership team to help educate chapters.

Expansion

Rutgers -Newark Colony (Empire) – established in May 2017. The Colony President attended Grand Chapter and has established strong support from their faculty advisor. Due to university policy, the colony had to wait through a probationary period which limited them to tabling for the fall semester, creating some difficulties with engagement. However, the desire and support exists and they are looking forward to growing and holding more events for the spring term.

Capital University Colony (East Central) – established September 2017. The colony's efforts this semester focused on the initial creation of the colony and learning about the Delta Sigma Pi chartering process. The two founders have the support of the university through their advisor and Deltasig volunteers have been identified to provide guidance and support. Communication this semester was initially inconsistent but has improved since, with a plan in place heading into the spring semester.

Capital Regional Vice President Report: Monica Monroe

Fall 2017

Regional Overview

Capital region has been bustling this semester! Coming from GCC this past August, I feel like there was a great recharge throughout the region and each chapter has been working extremely hard to better their presence in their local schools, regional activities, and national events. Unfortunately, there have been several instances where we have had to deal with/currently dealing with disciplinary actions towards chapters that have been accused of misconduct- due to the ongoing nature of the investigations from the schools involved, there has not been a resolution of any of the allegations as of yet.

The primary focuses of the Fall semester were: to adapt to the new leadership roles and see where we needed to improve, and to see what chapters wanted from the new leadership team and how we could help them improve and achieve their goals.

Adapting has not been too complicated, seeing as how we have kept the same District Directors on this semester, saving one. James Maddison University has been without a DD the entire semester, but not due to lack of effort. Each senior DD has been extremely active in their communication and interactions with their chapters, which has had very positive impact on chapter communication and CMP efforts.

As far as putting the new leadership team to work by helping chapters, as mentioned above, we are starting to see more leadership involvement and congealment between the chapters and their DD's. The goal is to constantly keep improving the communication of the leadership team and the chapters so that there is more unity and strength in the region.

Regarding the disciplinary actions: we did have one chapter that has been put on temporary suspension by the school while an investigation of misconduct is being done. We also have another chapter that has been notified of misconduct allegations by the school, however, the school is letting them operate as normal until the investigation is over.

Despite the negative actions we have seen, the region has had many positive things happen as well! Record-breaking fundraisers, participation in national community service events and goal-driven achievement with CMP. Although recruitment was down this semester, we still welcomed 73 new brothers in the region!

Notable Travel & Planned Travel*

Date of Visit	Chapter	Event	Location
09/12/17	Shepherdstown Alum	Alumni Meeting	Shepherdstown, WV
09/19/17	Epsilon Kappa	Pledge Pinning Ceremony	Shepherdstown, WV
09/25/17	Omicron Chi	Meet the Chapter	Frostburg, MD
10/08/17	Iota Kappa	St Baldrick's Fundraiser	Harrisonburg, VA
10/13/17	Omicron Chi	Meeting with Chandler Loveday	Frostburg, MD
11/07/17	Shepherdstown Alum	Alumni Meeting	Shepherdstown, WV
11/10/17	Epsilon Kappa	Initiation	Shepherdstown, WV
11/18/17	Gamma Sigma	Initiation	College Park, MD
12/05/17	Epsilon Kappa	New Officer Installation/ Graduation Ceremony	Shepherdstown, WV
01/12/18	Northeastern Province	Team Retreat	Burlington, MA
02/09/18	Northeastern Province	Northeastern LEAD Provincial Conference	Boston, MA
10/26/18	Northeastern Province	LEAD School	Cleveland, OH

*Does not include all phone/e-mail communication

Capital Region Leadership Team

Role	Name	School	Chapter
District Director	Neda Delavarpour	University of Maryland	Gamma Sigma
	Chris Pitzer	Shepherd University	Epsilon Kappa
	Vacant	James Madison University	Iota Kappa
	Marvin Boone	Howard University	Iota Rho
	Guy Dorsainville	George Mason University	Mu Tau

	Stacy Jordan	George Washington University	Xi Rho
	Phylicia Jackson	Frostburg State University	Omicron Chi

Regional Goal Summary

Build a more unified leadership team – In Progress

- Mostly all of the District Directors stayed in their same positions this semester.
- One position remains open at JMU; this is under review still
- Have more frequent one on one communications with individual leadership members: i.e. phone, e-mail or in-person conversations.
- Tentative Regional DD meeting to be held spring 2017

Create a platform for more unified undergraduate chapter communication & activity- In Progress

- Five out of the seven schools in the region are within about an hour drive or less of each other, the other two schools are within a 2-4 hour drive.
- Each chapter has mentioned they would like to see more inter-chapter activities in the region.
- There is interest in hosting joint initiations for Fall 2018 semesters.
- There is also interest in holding joint philanthropy and social activities in the future.

Review alumni structure & recruitment- In Progress

- **DC Metro Alumni**
- Cultivate more local alumni involvement
- Recruit recent graduates to attend regular chapter meetings and to be active in their roles
- **Shepherdstown Alumni**
- Increase national fraternity involvement
- Recruit recent graduates to attend chapter meetings and to actively take a role in the chapter
- Increase community presence
- Increase interest in the undergraduate chapters
- Promote chapter cohesiveness and unity.

Individual chapter SWOT analysis:

Chapter: Epsilon Kappa

District Director: Christopher C. Pitzer

Strengths of the chapter:

The chapter is focused and has set the goal of attaining Chapter of Recognition. This will be a step up from their current Accredited Chapter. Reviewing the CMP, they are close to completing Chapter of Recognition and even close to Chapter of Excellence. It should also be noted the chapter President and SVP are an integral part of this push. I feel their energy is helping push the chapter to this level. The Chapter Advisor is also a major strength for the chapter. Dr. Martz is extremely involved and can be a huge benefit if the chapter utilizes him.

Areas for improvement:

Ritual memorization, some members are focused and on task while others are a little off.

Additional thoughts:

Planning is needed with the chapter officers to make sure there is a good transition once Dakota and Kahlen depart this spring.

DD Goals: Spend more time with the Chapter. Meetings are a small problem being at 2045, but will see if Dakota can set something up earlier in the day. Increase communication with Dakota and the chapter. Review the updated Policies and Procedures.

Chapter: Gamma Sigma

District Director: Neda Delavarpour

Strengths- Great at collaborating with outside organizations, particularly on their campus and in their college.

Weaknesses-Not particularly communicative with DD. Doesn't readily ask for help when unsure of policies/procedures.

Opportunities-Utilizing their growing alumni network more effectively.

Threats-Their college is competitive. Sometimes it's hard for them to compete with resources at their University.

Additional comments: I'm glad that they attempted to memorize initiation this year. They had been hesitant in the past and that was one of our goals from last year.

Chapter: Mu Tau

District Director: Gayatachew Dorsainville

of Collegiate Brothers: 35 (Total w/ Fall Initiates)

of Active Brothers: 35 (see above)

of Brothers graduating this semester: 15 (4-Jan); (1-May); 6-Jun)

of Brothers initiated this semester: 8 (Fall)

of Brothers who attended LEAD: 1

Strengths:

- Strong brotherhood
- Efficient in time management of meetings
- Organized and productive events
- Transparent communication between membership

Weaknesses:

- Chapter focus on trials, while done well, weakens the bond of fraternity
- Focus on quantity and not commitment

Opportunities (financially, recruitment, operational improvement, etc):

- Partner with the School of Business and Regional Chapters to develop relationships
- Participate and send more (at least 10 - 15 members) to Spring LEAD.
- Focus more on intra-relationships and less on trials to motivate brothers and to encourage accountability.

Threats/Concerns:

- A lack of business school partnership may have future impact.
- Overly active calendar tires the membership
- National and Regional participation reduces visibility for all the good works Mu Tau does on the campus.

Goals:

- Chapter of Excellence this year.
- Getting more involved in the School of Business by cosponsoring events with them.
- Building relationships with nearby chapters and attend more LEAD events

Additional Comments / Notes of Importance: None.

Chapter: Xi Rho

District Director: Stacy Jordan

Strengths:

- Good recruiting ability

- Good core of members
- Officers willing to listen to new ideas

Weaknesses:

- Lack of faculty relations
- Small participation in national events (GCC, LEAD)
- Fundraising
- Robert's rule of order during meetings
- Not having a good knowledge of setting up initiation

Opportunities:

- Improve cmp performance
- Improve faculty relations
- Host events for the region
- Ability to have alumni to provide assistance (professional programming)

Threats:

- School environment (strong code of conduct policy)
- Gpa may restrict people from pledging
- Chapter has families (which can be a little cliques)

Chapter: Omicron Chi

District Director: Phylicia Jackson

Strengths:

- Willingness to learn and grow;
- Open to change

Weaknesses:

- Organization
- They are not proactive more reactive and unprepared
- Effective communication
- Attendance is low for many brothers
- Attending Fraternity events, LEAD, GCC etc. only 1 active brother has attended any of these events and he will be graduating.

Opportunities (financially, recruitment, operational improvement, etc):

- Recruitment needs to be continuous
- Educational and operational improvements
- Finances are improving and if they stay on the right track they will continue to improve. Commitment Bonding

Threats/Concerns:

- Recruitment has consistently been low, while the recruited the largest pledge class to date since I have been the DD, this class was mainly upperclassmen.
- Campus Presence is still very low. The brothers do not promote the Fraternity on campus, I have told them they should dedicate time every week to talk to at least 1 new person about the fraternity. I have also suggesting hosting monthly DSP info nights for the COB throughout the entire semester not just recruiting time.

Goals:

- Focus on Recruiting, we will be placing more emphasis on recruitment in the spring semester. Team Bonding – adding more social/bonding events for the brothers

Chapter: Iota Kappa

District Director: N/A

Strengths:

- Chapter unity
- Great philanthropy/ community service presence on campus

Weaknesses:

- Secluded/ keep to themselves from the rest of the region
- Poor/ low attendance to national events. 2017 was the first GCC participation for the chapter in over a decade.
- Poor ritual knowledge, no desire to learn/memorize for comp acknowledgement.

Opportunities:

- Educational and operational improvements
- Better impression on the school of business as a professional organization
- Focus more on ways to educate pledges/brothers on current national events/policies.

Threats:

- Currently suspended from campus with a pending investigation of the chapter.
- Lack of education of up to date national policies and information.

East Central Regional Report
Fall 2017
James Kuhn (RVP)

Regional Summary

The East Central Region, as a whole, seems strong. About half of the chapters are exceptional with fantastic operations and events. The remaining chapters have some struggles, but seem to be turning the corner. One of those chapters is on CMP Guidance, but has submitted all necessary CMP items this semester. A different chapter is currently on fraternity and university suspension until Fall 2018 and will be on probation until Fall 2019. However, this chapter's leaders are currently in the process of addressing the issues that placed them on suspension and have been open to suggestions from and discussions with fraternity and university leadership. The region boasts the outstanding Cincinnati Alumni Chapter that took home many Provincial awards at Grand Chapter Congress and helped make the Fall LEAD School in Cincinnati an amazing and memorable one. Finally, a colony was opened at Capital University in Columbus, Ohio.

Fall 2017 Travel/Visits

<i>Date(s)</i>	<i>Event(s)</i>	<i>Location</i>
9/15-17/2017	National Leadership Retreat	Cincinnati, OH
9/21	Meeting w/ Theta Pi District Director (DD) and Chapter Advisor	Bowling Green, OH
10/11	Xi Upsilon Chapter Visit	Huntington, WV
11/5	Meeting w/ Capital Colony Student Leaders Nu Chapter Visit	Columbus, OH
11/11	Alpha Upsilon Chapter Visit Cincinnati Alumni Chapter Central Office Open House	Oxford, OH
12/2	Theta Pi Initiation	Bowling Green, OH

Anticipated Spring 2018 Travel/Visits

<i>Date(s)</i>	<i>Event(s)</i>	<i>Location</i>
1/12-14/2018	Northeastern Provincial Leadership Retreat	Boston, MA
Late January	Theta Pi Chapter Visit	Bowling Green, OH
2/9-11	Northeastern Provincial LEAD	Boston, MA
Late February	Alpha Omicron Chapter Visit Capital Colony Visit	Athens, OH Columbus, OH
Mid-March	Michael P. Hayes 5K Epsilon Tau Chapter Visit	Oxford, OH Dayton, OH
Late March	Theta Lambda Chapter Visit Alpha Theta Chapter Visit	Cincinnati, OH

Regional Leadership Team

<i>Position</i>	<i>Name</i>	<i>Chapter</i>	<i>School</i>	<i>Location</i>
District Directors (DD)	Julie Hermes+	Nu	Ohio State University	Columbus, OH
	Sammy Geroulis	Alpha Theta	University of Cincinnati	Cincinnati, OH
	Mary Miracle	Alpha Omicron	Ohio University	Athens, OH
	Mathew Whited+	Alpha Upsilon	Miami University (OH)	Oxford, OH
	Theo Oltmann	Epsilon Tau	Dayton University	Dayton, OH
	Kyle Rinderle	Theta Lambda	Xavier University	Cincinnati, OH
	Natalie Schneider*+	Theta Pi	Bowling Green State University	Bowling Green, OH
	Ollie Moses	Xi Upsilon	Marshall University	Huntington, WV
	Monica Ramey+	Capital Colony	Capital University	Columbus, OH
Awards Committee Chair	Sam Shaheen			
Awards Committee Members	Elizabeth Mahar			
	Kevin Wright			
	Emily Mott*			
	Savannah Claywell*			

*Denotes no previous position experience

+Denotes new to chapter

Regional Goals/Initiatives

- ***Intra- and inter-regional communication***
 - I am looking to encourage and improve communication and collaboration between chapters (alumni and collegiate) within the region as well as with nearby chapters in neighboring regions. I am working to consolidate various East Central Facebook groups and promote the sharing of ideas/activities/events within what has become the main Facebook group (East Central Region – Delta Sigma Pi). I would like to branch out to other forms of social media to provide various avenues for brothers to quickly communicate. I have also been encouraging brothers to join/follow the national fraternity's social medias.
- ***Chapter, personal, and professional growth***
 - Depending on each chapter's unique situations, I am assessing where I see opportunities for improvement while also addressing where they would like to see their chapters go. In short, no matter how many things a chapter does well, I am looking for them to challenge themselves to seek improvement before it is needed.
- ***Adherence to ritual***
 - With memorization of ritual being more prominent in CMP credit, adherence to the spoken word of ritual is being addressed by creating a ritual that looks and feels more professional. However, this has created nervousness among brothers about their ability

to memorize ritual with some brothers stating that they considered not taking officer roles in order to avoid being on the ritual team. Therefore, my goal for adherence to ritual has somewhat shifted to alleviating that apprehension. I would also like to ensure the physical actions of ritual receive attention as well.

- **Risk Management**

- I would like to emphasize to chapters the importance of understanding risk management and see that they are taking a proactive approach as a chapter to ensure they are adequately managing their risk. I would like for brothers to understand that the responsibility falls on everyone and not just the executive committee.

High Risk Items

I am currently unaware of any physically risky activity taking place in the region. However, I will make note of a couple items that will require attention in the coming months:

- Alpha Omicron will be building their case as to why they should be allowed to resume operations on campus. This will include what they have learned from their suspension, what they have done to address allegations against the chapter, and how they plan to ensure proper operation of the chapter.
- Capital Colony has experienced what seems to be a breakdown in communication in their first semester as a colony. I, along with the District Director and other fraternity leadership and staff, will be working to understand how/why this breakdown has occurred.

Chapter Summaries/SWOT Breakdown

Nu – Ohio State University

➤ **Strengths**

- Financial Management
- Brotherhood
- Alumni Relationships
- Community Outreach – Fundraising and Professionally

➤ **Weaknesses**

- Stuck in some old ways
- Fraternal competition
- National event participation

➤ **Opportunities**

- Faculty Relationship Management
- On track for Chapter of Excellence
- LEAD fund and financing of trips for brothers

➤ **Threats**

- Social Probation

- Recruitment Competition (3 other competing business fraternities on campus)
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- **Notes**
 - During my chapter visit, I learned that the chapter does many things exceptionally well. However, this has led them to feel they have nothing to gain from involvement at national events. I challenged them to not only think of what they can gain at these events, but what they can offer as well. I believe they can offer plenty of helpful insights to their fellow brothers. Hopefully, by working with their Chapter Advisor and DD, they will see the added value in participating in national events.

Alpha Theta – University of Cincinnati

- **Summary**
 - I did not visit Alpha Theta this semester. However, I am aware that they are an exceptional chapter with very few flaws. I have learned through various brothers that they excel in operations, CMP reporting, ritual adherence, and alumni relations. Brothers regularly volunteer to help with Cincinnati Alumni Chapter events. Communication between me and their DD has been lacking and although it doesn't seem to be hurting the chapter's performance, I am aware that I must do a better job of maintaining this relationship. A SWOT analysis was not provided by the DD.

Alpha Omicron – Ohio University

- **Summary**
 - I did not visit Alpha Omicron this semester. As they are on suspension until Fall 2018, I chose to defer my visit to the Spring when they are closer to needing to file for reinstatement with the university. I also felt this would allow them more time to better understand how detrimental their actions were to their chapter. The chapter was able to send six brothers to LEAD School in Cincinnati this semester.

Alpha Upsilon – Miami University (OH)

- **Strengths**
 - Brotherhood
 - Alumni Network
- **Weaknesses**
 - Public, chapter-sponsored professional events
 - Local Alumni Involvement
 - Faculty Relationship Management
- **Opportunities**
 - Creating signature professional events that are open to students outside of the chapter
 - Leveraging faculty brothers looking to be more involved

➤ **Threats**

- Competing business fraternities

➤ **Notes**

- During my chapter visit, I learned how highly selective and competitive both the chapter and the Farmer School of Business are. However, the Farmer School of Business has somewhat hindered the chapter in their ability to provide a signature professional event for all students. The school provides a high volume of outstanding speakers and professional events that students love to take part in. Therefore, the chapter is essentially competing with the school for event attendance. Therefore, they place their efforts into more brotherhood and community service-type events. It seems their professional events that are not sponsored by the school are more for the benefit of brothers than the general student population. For example, their “Fall Trip” is coordinated to visit a city with heavy university/brotherhood networks.
 - Fall Trip is coordinated around the weekend of the school’s fall break. This is why only one brother attended LEAD School in Cincinnati.
- A situation was addressed earlier this semester where the Pledging Ceremony was recorded due to the chapter’s inability to secure an alumni brother to verify ritual memorization. The chapter was unaware that their DD wasn’t required to attend and that they were to secure an approved alumnus to attend ritual for verification. They assumed the DD was required to attend since their previous DD of 3 years had always attended. The chapter has been made aware of their mistake and have been educated on how to go about securing alumni in the future.

Epsilon Tau – Dayton University

➤ **Summary**

- I did not visit Epsilon Tau this semester. Through CMP reporting, I am aware that they are a very good chapter. I have heard very little from their DD this semester. However, I am aware that they have had some brothers volunteer to help with Cincinnati Alumni Chapter events and sent three attendees to LEAD School in Cincinnati. Communication between me and their DD has been lacking and although it doesn’t seem to be hurting the chapter’s performance, I am aware that I must do a better job of maintaining this relationship. A SWOT analysis was not provided by the DD.

Theta Lambda – Xavier University

➤ **Strengths**

- Membership size: Theta Lambda ended the Fall 2017 semester with 108 members, 22 of which were newly initiated in the Fall. Given an estimated undergraduate business enrollment of 1,230, this is approximately 8.8% of the eligible population.

- Events: The Chapter consistently holds more than the required number of events required by Delta Sigma Pi. Community Service and Professional Events, in particular, are diverse in type and scope.
- **Weaknesses**
 - Meeting Management: The Chapter does not use Roberts Rules of Order and meetings are lax.
- **Opportunities**
 - CMP: Following a 2017 academic year CMP percentage of 85.37%, officers set the goal of Chapter of Recognition for the 2018 academic year. This goal remains possible as of December, but the new Officers (elected in November) will need to be diligent to ensure timely submissions to prevent any more late submissions.
 - University Funding: The University Student Council provides funds to all clubs and organizations through a request process before the start of each academic year. The Chapter is effective in requesting funds for all Chapter operations. The Chapter could take more advantage of this system by either lowering local dues for members and/or funding large-scale events such as a prominent speaker.
- **Threats**
 - University control of Chapter money: The University handles the accounts for all clubs and organizations. Requesting payment for dues and initiation fees generally take a minimum of 2 weeks. This often causes these to show up as late in HUB. It is important to regularly remind Central Office of this lengthy process; and remind the Chapter to send Central Office the request form with a time stamp so that appropriate approval is granted in HUB and late fees are not charged.
 - Potential hazing attempts: The Chapter has a history of “minor” hazing of pledges directly before Initiation. The Chapter has had Pledges walk in a line with hand on shoulders around campus within the hour preceding Initiation. Mary Miracle and/or myself have attended all Initiations since Fall 2016 and stayed with the Pledges to ensure no such activity occurred; therefore, it is possible this activity has stopped, but certainly merits awareness.
- **Notes**
 - National Attendance: The Chapter has greatly improved attendance at National events since 2016 academic year (0 attended LEADs and 1 attended GCC). During 2017 academic year, 7 attended Jacksonville LEAD School and 9 attended Northeastern LEAD Provincial Conference in Pittsburgh. So far, the 2018 academic year has seen 2 attend GCC and 15 attend Cincinnati LEAD School.
 - Staff Consultation Visit: The Chapter received a Staff Consultation visit on November 19-20. My impression is the visit was productive. Since the visit occurred toward the end of the academic year, I will be following up with the new Officers in the Spring and ask their thoughts on the visit.
 - SWOT analysis and notes provided by DD.

- I did not visit Theta Lambda this semester.

Theta Pi – Bowling Green State University

➤ **Strengths**

- Ritual memorization
- Brotherhood
- Reputation preservation
- Pledge selectiveness

➤ **Weaknesses**

- Fraternity event participation
- Bylaw familiarity
- Cliques
- Chapter traditions

➤ **Opportunities**

- Mentorship Program to encourage alumni and faculty involvement
- Organizing college/university-wide public speaking events
- Fundraising events to benefit those wanting to attend LEAD
- Improving brotherhood events to mitigate cliques

➤ **Threats**

- Competing organizations
- Funding from university for LEAD has been cut due to chapter being reclassified as a Greek organization.
- Career Accelerator – Helps students find jobs

➤ **Notes**

- Chapter President and VP of Finance were voted to become yearlong positions beginning Fall 2018
- SWOT analysis provided by DD
- I attended Initiation this semester and stomping from previous semesters had ceased. However, you could still hear feet shuffling.
- I met with the DD and Chapter Advisor at the beginning of the semester to discuss their roles and responsibilities as this was both of their first semester in these roles.
- I did not make my official chapter visit to Theta Pi this semester.

Xi Upsilon – Marshall University

➤ **Strengths**

- Brotherhood

- Faculty support
- Fundraising
- **Weaknesses**
 - CMP Guidance
 - Advanced planning
 - Local alumni population
 - Officer transitions
- **Opportunities**
 - Alumni involvement
 - Potential Honorary Brother (Brad Smith, Intuit CEO and Marshall graduate)
- **Threats**
 - Competing organizations
- **Notes**
 - During my chapter visit, a lot of different things were covered and many people in the chapter seemed to be overwhelmed at times with all of this “new” information. However, they seemed very enthusiastic about making needed changes. They are definitely doing much better now than they were a few years ago and are on their way to being an Accredited Chapter for the first time in a while. They have sent brothers to the past 3 national events. Communication between me and their DD has been.

Capital Colony – Capital University

- **Summary**
 - The Capital Colony is just finishing its first semester. Although student leadership has experience with social fraternities and sororities, they don’t seem to have the experience of starting an organization from the ground up. Unfortunately, many of the students interested in joining are in their senior year. Accompanied by the Central Office staff and other fraternity leadership, I hope to work with the school administration to identify younger underclassmen interested in joining in order to allow a stable base of membership that the colony can build on.
 - Communication with current student leaders has been difficult and ineffective at times.

Cincinnati Alumni Chapter

- **Summary**
 - The Cincinnati Alumni Chapter (CAC) has been very busy as of recently. On top of their regular meetings/events, they have organized four Central Office tours since mid-September. These include one for the National Leadership Team during the National Leadership Retreat, 2 bookending LEAD School in Cincinnati (the first of which was part of their Queen City Quest event of multiple business tours), and one to celebrate Founder’s Day.

- The CAC has also regularly enlisted the help of the four local collegiate chapters in order to strengthen the bond between collegiate and alumni brothers.

Jen McCanty – RVP Eastern Region – Regional Report Fall 2017

1. Overview of Region

District Directors - Eastern Region		
Name	Chapter	School
Chelsea Rosengarten	Alpha Gamma	Penn State
Fran Doyle	Beta Nu	University of Pennsylvania
Linda Oakes	Beta Xi	Rider University
Kristina Moses	Epsilon Sigma	LaSalle University
Christina Wilson	Eta Xi	Philadelphia University
Alexandra Lipari	Mu Omega	The College of New Jersey
Daniel Palo	Omicron Omega	University of Delaware
Dan Marder	Rho Tau	Rutgers
Brennan Azevedo	Zeta Pi	St Joe's

Committees - Eastern Region		
Name	Committee	Role
Lindsey Fonseca	Awards	Lead
Mary Miracle	Awards	Member
Cassie Jacobs	Awards	Member
Liz Calloway	Social Media	Lead

Chapter / Event	Visits - Eastern Region			
	RVP		DD	
	Fall	Spring Planned	Fall	Spring Planned
Leadership Retreat	✓		<input type="checkbox"/>	
Provincial Retreat	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>
Cincinnati LEAD	✓		<input type="checkbox"/>	
Boston Provincial LEAD		✓		<input type="checkbox"/>
Alpha Gamma	✓		<input type="checkbox"/>	✓
Beta Nu		✓	✓	<input type="checkbox"/>
Beta Xi		✓	✓	
Epsilon Sigma		✓		✓
Eta Xi		✓	✓	
Mu Omega		✓	✓	<input type="checkbox"/>
Omicron Omega		✓	✓	
Rho Tau		✓	✓	<input type="checkbox"/>
Zeta Pi		✓		✓

**Note - all chapters have been in regular communication with DD and/or RVP via phone and/or email*

Thus far, the chapters have been quite receptive to the presence of their new leadership teams and District Directors. Most DDs have been able to get on campus, and those that have – typically visited more than once. All have touched base with their presidents and execs, and have been in regular communication. DDs who have not yet attended are planning to attend next semester. The chapters have strong collegiate leaders within their organizations and DDs cite commitment and passion in their presidents/exec teams as real strengths. Across the board, the chapters are hosting a variety of events to appeal to all members and provide useful and varied insights. Community service seems to be an especially strong point among the region. An effort has also been made for professional events to be more engaging and exciting with varied events among chapters. No issues reported to date with risk management. However chapters would benefit from earlier submission of events and maximization of CMP – it would be great for all of their hard work to be properly acknowledged! This is a point we will be working on for spring.

2. Strengths

- a. As mentioned above, the chapters have a strong focus on community service and a desire to give back. Additionally, the variety of social activities has been impressive. It was also great to hear how many different bonding experiences and events the fraternity hosts socially – events such as (TopGolf, brunch, laser tag, rock climbing, bowling, formals, potlucks. Additionally, the re-focus of professional events at the forefront has been strong. Passionate and committed collegiate leaders are also strengths.

3. Areas of Improvement

- a. One of the areas where chapters throughout the region would benefit from enhancement is fundraising. Ideas either lacked creativity, did not generate sufficient funds, or were overshadowed by fundraising for other organizations. The chapters have recognized this issue and are brainstorming on new partnerships and ideas to enhance this area. The chapters are also working on improving attendance at meetings and events (including National events).

4. Opportunities

- a. Paying stronger attention to CMP and memorization was a theme. Some DDs are trying to encourage additional organization, communication and memorization practices within the group, beginning early in the semester. Focusing more on ensuring everything is submitted in a timely fashion, making sure appropriate number of pins and manuals are ordered - and in advance - are also opportunities for the chapters.
- b. General opportunities include: Becoming the premier business fraternity and/or premier business organization on each campus. Initiating additional faculty; ensuring their Advisors are the best fit for their chapters / taking action if not. Making the most of the larger fraternity outside of their chapters; partnering with other chapters for events where possible. Reminding and encouraging more senior brothers of what they got out of the fraternity and the importance of giving back and continuing the strong chapter legacies / Fraternity reputation as a strong/professional institution. Feeling comfortable with the HUB. Ensuring a focus on diversity as well - whether it be majors, gender, race,

ethnicity etc. Ensuring there is a continuous focus on these efforts and that diversity of thought is encouraged and welcome. Scholarship applications & applying for awards are also opportunity areas.

5. Threats

- a. Certain chapters may want to keep an eye on growing too fast. While expanding is great - they need to be able to remain organized and manage this growth so that the chapter still remains a cohesive unit. (Stemmed more from chapters taking on back to back large pledge classes) - seems to be getting through these growing pains at this point. Finding the ideal amount of growth each semester will help alleviate the threat mentioned here.

6. Expansion

- a. There has been mention of considering Monmouth as a future colony.
- b. Stockton is also a campus we may want to consider.

7. Goals

- a. Looking forward, there are a number of goals the eastern region is striving for. The first goal is that each chapter be visited at least once a semester in person by their DDs and at least once a year by their regions. Especially when leadership teams are new, this will be helpful in building rapport and creating a solid foundation for the relationships going forward. Membership growth is also an area to focus on. While some chapters within the region need to be sure they can handle their growth, it is important for all to review their target numbers and ensure they have a growth plan, and target, that is right for their chapter. Membership engagement is at the forefront of president agendas across the chapter. They are working with their teams to ensure varied and interesting events and encouraging attendance through methods such as top down example setting and encouraging more senior brothers to set a high bar. This is an area the region plans to continue to focus on through 2018. Membership education is also on the agenda. Chapters have already started scheduling ritual presentations with their DDs. The goal is to ensure confident knowledge of risk management rules, policies and procedures so that all members may be active in ensuring safe and compliance along with the professionalism and fun that comes with being a member of the Fraternity.

Report of Empire Regional Vice President: Jackie Napalan - Fall 2017

Summary

The Empire Region began the academic year with strong start at Grand Chapter Congress. Alumni volunteers and collegiate chapter leaders discussed ideas and shared success stories during the regional caucus. The NYC Alumni Chapter hosted a picnic for the Empire Region the following month and the Colony at Rutgers University-Newark and several other collegiate brothers attended. Although last year's regional picnic was larger in terms of attendance, the growth of the interchapter relations is apparent as the chapters have been proactively planning joint activities and events with one another over the past semester.

Communications between national leadership, local alumni leaders and collegiate chapters have significantly improved, and we will continue to strive for better interchapter relations and LEAD attendance. By collaborating, the chapters can think strategically about what works and what does not work - it drives them to innovate to increase operational efficiency while developing brotherhood and fraternity spirit within their organization. The majority of chapters were assigned District Directors who have previously served in the past, allowing the officers access to seasoned mentors for advice and guidance.

The regional priorities will be developing chapter officers, meeting CMP requirements and attending regional/national conferences. The cost of flying to Cincinnati deterred many of the chapters to attend the Fall 2017 Northeastern LEAD. The Empire Region should see a larger turnout given the proximity of Provincial LEAD next semester. The collegiate chapters overall are on the right track. The alumni volunteer leaders will continue to meet one-on-one, send reminders and provide key updates to ensure they are track to meet their goals.

Fall 2017 Travel / Scheduled Conference Calls

Date of Visit	Chapter	Event	Location
8/18/17 – 8/20/17	National	Grand Chapter Congress / Empire Regional Meeting	New Orleans, LA

9/6/17	Pi Phi	Call with District Director	TC
9/11/17	Pi Psi	Call with District Director	TC
9/12/17	Northeastern Province	Call with Provincial Vice President	TC
9/24/17	New York City Alumni / Empire Region	Collegiate & Alumni Regional Picnic	New York, NY
10/4/17	Rutgers-Newark Colony	Meeting with Faculty Advisor and Officers	Newark, NJ
10/13/17-10/15/17	Northeastern Province	LEAD School / Empire Regional Meeting	Cincinnati, OH
10/25/17	New York City Alumni	Happy Hour	New York, NY
10/31/17	Kappa Rho	Initiation	Garden City, NY
11/1/17	Northeastern Province	Leadership Team Conference Call	TC
11/10/17	Pi Phi	Initiation	Pleasantville, NY
11/11/17	Upsilon Omega	Initiation	Stony Brook, NY
11/18/17	Zeta Eta	Initiation	Jersey City, NJ
11/29/17	New York City Alumni	Dinner	New York, NY
12/8/17	Pi Psi	Initiation	New York, NY

Spring 2018 Travel / Scheduled Conference Calls

Date of Visit	Chapter	Event	Location
1/12/18-1/14/18	Northeastern Province	Leadership Retreat	Boston, MA
1/15/18	Pi Psi	Meeting with District Director	New York, NY
1/16/18	Pi Phi	Meeting with District Director	New York, NY
1/17/18	Upsilon Omega	Meeting with District Director	New York, NY
1/18/18	Zeta Eta	Meeting with District Director	New York, NY
1/19/18	Rutgers-Newark Colony	Meeting with District Director	New York, NY
1/24/18	New York City Alumni	Seasonal Social	New York, NY
2/9/18-2/11/18	Northeastern Province	Provincial LEAD / Empire Regional Meeting	Boston, MA
2/27/18	New York City Alumni	Happy Hour	New York, NY
3/21/18	New York City Alumni	Professional Event	New York, NY

4/22/18	New York City Alumni / Empire Region	Community Service	New York, NY
TBA	Rutgers-Newark Colony	Meeting with Officers	Newark, NJ
TBA	Kappa Rho	Initiation	New York, NY
TBA	Pi Phi	Initiation	Pleasantville, NY
TBA	Upsilon Omega	Initiation	Stony Brook, NY
TBA	Zeta Eta	Initiation	Jersey City, NJ
TBA	Pi Psi	Initiation	New York, NY
5/16/18	New York City Alumni	Chapter Meeting	New York, NY

2017-2018 Empire Leadership Team

Role	Name	School	Chapter
District Directors	J. McCall Martorelli	Rutgers University-Newark	Colony
	Juan Viruet	St. Peter's University	Zeta Eta
	Aakoo Hans	CUNY - Baruch	Pi Psi
	Fiana Sandy	Pace University	Pi Phi

	Sarah Santhouse	Adelphi University	Kappa Rho
	Will Greenberg	Stony Brook University	Upsilon Omega
Awards Committee	Kristen Brown	Chair	N/A
	Alexa Hassaram	Member	

Regional Goal Summary

Improve chapter operations - In Progress

- Create a forum and channel of communication for chapter presidents (preferably on Slack)
- Continue to support collegiate leaders and prepare them for upcoming officer transitions
- Provide more guidance on how chapters can keep up with CMP requirements

Identify and train next generation of volunteer leaders – In Progress

- Seek additional opportunities for alumni with interest in potential service
- Discuss ways to involve outstanding collegiate members on a national level
- Explore potential of holding a regional leadership team retreat or dinner

Explore potential growth opportunities in region – In progress

- Continue to guide the Colony at Rutgers University-Newark through the petition process and participate in LEAD and other regional events

Promote better affiliation between the collegiate chapters and the local alumni chapter – Improving

- Create regional networking events that are open to both collegiate and alumni brothers to foster interchapter relations (e.g. resume workshop, speaker panels, etc.)
- Continue to keep track of all graduating seniors to ensure any leaders are identified and also in contact with their respective alumni chapter in the city of their new careers
- Created a Facebook group for the Empire Region to share events and ask questions

Increase quantity and quality of Awards Applications – Improving

- Four out of five chapters submitted a COY nominee
- Encourage more collegiate chapters to apply for awards and send reminders

Chapter Overview

The Colony at Rutgers University-Newark

Strengths:

- Support from faculty advisor
- GCC and LEAD participation
- Communication with Central Office and District Director

Opportunities:

- CMP reporting to better reflect progress on charter petition
- Identifying future leadership and recruitment
- Fundraising for LEAD

Notes of Importance:

The Colony's President attended Grand Chapter Congress and distilled the desire to meet their charter requirements to the rest of the colony members. The university has created a new guideline for student organizations and requires all clubs to go through a semester-long probationary period to generate interest. This allows the colony to prepare a strategy for long-term growth and create a foundation. The downside is that the Colony is only able to participate in tabling, which is inhibiting their ability to keep current members engaged. Their faculty advisor, Joseph Market, is a strong supporter and is looking forward to seeing their growth for the Spring term.

Zeta Eta Chapter at St. Peter's University

Strengths:

- Professional and service events
- Overall operations & CMP reporting
- Brotherhood and fraternity spirit
- Support from university administration
- GCC participation
- Interchapter relations

Opportunities:

- Memorizing of the ritual
- Collaboration with alumni
- Fundraising for LEAD

Notes of Importance:

The Zeta Eta Chapter has been a leader within the Empire Region for the past year. They not only have efficient operations, but they also have a strong sense of community within their chapter. The chapter is looking to engage interested students outside of the typical recruitment season, which will increase retention during recruitment week. Their initiation ceremony ran well as always, but they are aiming to memorize ritual to meet new CMP requirements. Another area of improvement is alumni relations. Their District Director is an alumnus of the chapter and is assisting them with engaging alumni through a mentorship program, which can help them create connections and may subsequently lead to potential sponsors down the line.

Pi Psi - Baruch College of the City of New York (CUNY)

Strengths:

- Professional and service events
- Brotherhood and fraternity spirit
- LEAD participation
- Desire to achieve

Opportunities:

- Communication with the university and the fraternity
- Overall operations & CMP reporting
- GCC participation
- Memorizing of ritual
- Interchapter relations

Notes of Importance:

The Pi Psi Chapter has hosted very successful professional events and is a high profile student organization on their campus. The chapter was recently assigned a new District Director, who helped found and install a colony in Maryland. The Pi Psi Chapter will benefit from his experience and he can guide the chapter to better operations and communication with the university and the fraternity. Baruch College is under scrutiny due to a recent alcohol-related death of a student who was a part of a social fraternity. As a result, the Office of Student Life is becoming more vigilant on event reporting to mitigate risk of hazing and improper conduct. The Office of Student Life is asking Delta Sigma Pi to attend university-hosted risk management trainings and requesting dates and details for both chapter and pledge events. The chapter will be set for success if they are able to maintain both university and CMP requirements. This will require careful execution of their strategic plans to ensure the university has a log for their events.

Pi Phi - Pace University Westchester

Strengths:

- Desire to achieve
- Brotherhood and fraternity spirit
- LEAD participation

Opportunities:

- Execution of ritual
- Relationships with business professors
- Experiencing difficulties in recruitment

Notes of Importance:

The Pi Phi Chapter is currently on CMP guidance until summer 2018 and was struggling with recruitment a year prior. This past semester they were able to significantly increase their chapter membership. Their president has slowly fostered a sense of community within their chapter. They have made significant improvements since their last consultation visit, and their focus will be on operations and mentoring the newly initiated brothers going forward. Their ritual ceremony lacked preparation, likely because the officers have been preoccupied with driving organizational change. Nonetheless, they have a strong desire to achieve and are improving one step at a time.

Kappa Rho - Adelphi University

Strengths:

- Overall operations & CMP reporting
- Professional and service events

- Brotherhood and fraternity spirit
- Engagement with their District Director
- GCC participation

Opportunities:

- LEAD participation
- Relationships with business professors

Notes of Importance:

The Kappa Rho Chapter has been excellent at managing demanding requirements from the university. Delta Sigma Pi must adhere to the same rules as social fraternities on their campus, which sometimes affects member participation on chapter events. The chapter president has done a great job at communicating with their new District Director, along with delegating tasks to respective officers. The chapter successfully memorized ritual for the first time this Fall and are setting the standard of operational excellence for the region. The chapter has strong relationships with the administrative staff at the university and would like to identify more professor faculty initiates to align further with the school of business.

Upsilon Omega at Stony Brook University

Strengths:

- Overall operations & CMP Reporting
- Brotherhood and fraternity spirit
- Memorizing of ritual
- Interchapter relations
- National and regional event participation

Opportunities:

- Engaging members and identifying prospective chapter leaders
- Freshmen and sophomore recruitment

Notes of Importance:

The Upsilon Omega Chapter has continued their momentum since their installation one year ago. Most of the founding members have graduate or about to graduate, and it can be challenging instill the same drive to the newer members. Their focus will be on engaging members, especially given their officer terms are yearly. Officer transitions will be key to their continued success. Their President has required that each of officer create a “guidebook” to ensure each officer has all the resources they need to succeed, in addition to the officer packet provided by the National Fraternity. Overall, they are inspiring other chapters in their region with their excellent operations, national and regional participation, and memorization of ritual.

- End Report -

Report of New England Regional Vice President: Daniel DelPiano

Fall 2017 Summary

Chapter Operations and CMP seem to be at a good state for most chapters. We had one chapter fail to attend a LEAD School and several had the opportunity to travel to different Provinces. Overall the New England Region was represented at 4 of the 5 LEAD Schools. Initiation Ritual being moved to Tier 1 did create problems for a few chapters as only 7 of the 10 chapters were able to memorize ritual. However there were several exceptional Initiation Ceremonies.

Fall 2017 Travel

Date of Visit	Event	Location
9/13	Phi Chi Meet the Chapter and Chapter Meeting	South Kingston, RI
9/15 - 9/17	National Volunteer Leadership Retreat	Cincinnati, OH
10/13 - 10/15	Cincinnati LEAD School	Cincinnati, OH
10/16	Gamma Meeting with Officers	Boston, MA
11/4	Nu Sigma Initiation	Bristol, RI
11/13	Pi Rho Initiation	Amherst, MA
11/16	Lambda Tau Initiation	Waltham, MA
11/18	Phi Chi Initiation	South Kingston, RI
11/18	Xi Phi Initiation	Boston, MA
11/29	Theta Iota Initiation	Storrs, CT
12/2	Gamma Initiation and Banquet	Boston, MA

Fall 2017 New England Leadership Team

Role	Name	School
District Director	Katie McGeary	Gamma
	Deborah Lang	Gamma Upsilon

	Kelsey Stuart	Theta Iota
	Erik Budlong	Lambda Tau
	Peter LaCava	Nu Sigma
	Alex Lamphier	Xi Phi
	Tom Skinner	Xi Psi
	Paul Carpinella Liz Lockett	Pi Rho
	Gary Perez	Sigma Omega
	Patrick Johnson Jen Huynh	Phi Chi
Awards Committee Chair	Bryon Goguen	
Awards Committee Member	Tracey Schebera	
	Chris Doto	
	Courtney Corbelle	
	Hannah Demirjian	

Regional Goal Summary

- Focus on proper initiation including standardizing throughout the Region- In Progress
 - Requiring memorization of Ritual for Tier 1 of CMP will help, however there are still many differences in the way that each chapter runs initiation. Visiting 7 of the chapters for initiation this semester helped to standardize in some ways but there are still many practices that need to be standardized including the arrival time of pledges prior to initiation.
 - Continue to educate
 - Support from District Directors

- Explore potential growth opportunities in region – In Progress (remain open to future opportunities)
 - University of Rhode Island Colony was Installed in April 2017 and is now the Phi Chi Chapter
 - University of Hartford
 - School Administration shut down the interest group of students. They would not provide a reason to students or Central Office Staff.
 - Potential for expansion will continue to be reiterated during chapter visits.
- Future Goals
 - Get graduating seniors interested in becoming alumni and keeping them involved once they graduate
 - Have better awards submission with greater chapter participation
 - Redevelopment of the Rose Games planning process.
 - Shift from an event planned by volunteer leadership to one planned by chapters
 - Operate via a bid process (akin to the Halsey Tournament)
 - There remains a good amount of excitement regarding Rose Games and several chapters have expressed a desire to manage the event from start to finish by taking ownership of the structure and planning.
 - Process is to begin Spring 2018

Chapter Overview

Gamma - Boston University

Strengths

- Strong sense of brotherhood within the chapter
- Chapter Advisor who is very supportive
- Strong Fall 2017 Pledge Class
- New officers seem receptive to discussion of policies and practices to improve chapter operations

Weaknesses

- Often are not receptive to change.
- Use incorrect terminology
- Poor National Event attendance
- Communication with Volunteer Leadership

Opportunities

- Involved Chapter advisor more to help improve operations
- Aware and Involved with other Business Fraternities on campus
- Within 30 minutes of 4 other chapters
- 5 brothers who have transferred in from other chapters within the last year.

Threats

- Lack of knowledge and understanding of Policies and Procedures and Bylaws
- Resistant to elect new brothers into year long positions.
- Does not seem to have a strong connection to the National Fraternity

Gamma Upsilon - Babson College

Strengths

- Cohesive executive committee that works well together
- Information covered at Executive Committee meetings leads to efficient chapter meetings
- Most of the chapter is highly engaged and motivated
- On track to meet CMP requirements

Weaknesses

- Tend toward exclusivity mindset when extending bids. Turned away qualified candidates to keep pledge class small (Spring 2017). Corrected this semester with a larger pledge class.

Opportunities

- Good relationships with other organizations on campus, which could lead to co-hosted events or activities and name recognition.
- 4 chapters within 30 minutes

Threats

- AKPsi on campus could draw away potential recruits. The chapter has made an effort to work with AKPsi on recruiting and strives to maintain a positive relationship, though success depends on the attitude of AKPsi leadership.

Theta Iota - University of Connecticut

Strengths

- Strong sense of brotherhood within the chapter
- Recruitment
- Community Service Programs
- Well respected within the school of business

Weaknesses

- Do not seem to have a strong connection to the National Fraternity.
- Few or no committees leaving officers to do all of the work for the chapter.

Opportunities

- Very strong, large Fall 2017 Pledge Class

- Large chapter with the ability to “spread the load” could lead to very well organized and run events.

Threats

- Large graduating class with many brothers who have been very involved during their collegiate career.
- Does not perform ritual regularly at Chapter Meetings.

Lambda Tau - Bentley University

Strengths

- CMP Requirements
- Recruitment
- Professionalism
- Brand on campus
- Fundraising

Weaknesses

- Late communicating events to alumni
- Inefficient use of time during chapter meetings
- Short-term thinking without much long-term planning
- Poor attendance at national events
- Poor local event attendance (especially from seniors)

Opportunities

- Organic interest in improving brotherhood
- Inter-chapter events with Deltasigs in the Boston area
- Encouraging more brother involvement using chair positions
- Bringing on more corporate sponsors
- Improving alumni relations

Threats

- Bentley Policies do not allow freshmen to pledge fraternities
- Feeling "lack of connectedness" when big group of seniors graduate
- AKPsi on campus could draw away potential recruits

Nu Sigma - Roger Williams

Strengths

- Professional Events - 10 events during Fall semester
- Community Service - approximately 2 events per month
- Involved at the regional level - 3 brothers were members of the ritual team at Phi Chi Installation
- Officer transition is well organized. Binders are kept updated for each position from semester to semester.

Weaknesses

- Most Community service events are money based, however brothers do not attend other types of community service events
- Traditionally accept very large pledge classes without being very selective of who becomes a pledge.

Opportunities

- Provide incentive for brothers to be more involved in fundraising
- Website updated for the first time in a few years, allowing the chapter to communicate with each other and prospective members more effectively
- Added recruitment events for the first time in chapter history
- Shadowing program created for people interested in Executive Committee positions

Threats

- Did not send any members to Fall LEAD School

Xi Phi - University of Massachusetts - Boston

Strengths

- The Chapter seems to have great visibility within the business school, as evidenced by the success of fundraising and professional events that embrace the business school community at large.
- The Chapter has great camaraderie.
- The Chapter is quite diverse, which I believe is a major contributor to both the above strengths.
- Chapter members seem eager to get their hands dirty and take on projects as they pop up throughout the semester.

Weaknesses

- The Chapter seems to lack effective strategic planning strategies. Professional and service events for the semester were largely planned along the way, creating an unnecessary burden and time crunch on members trying to execute the event.
- They experience attendance issues from time to time that occasionally, lead to quorum problems and the inability for the Chapter to make decisions and govern itself.
- There seems to be a lack of attention to compliance issues in Chapter decision making, as evidenced by both the Pledge issues the Chapter encountered this past month. While the issues sorted themselves out in the end, an eye toward compliance and double-checking regs would have saved the Chapter several headaches.

Opportunities

- The Chapter's diversity, visibility and great vibe can possibly used more to the Chapter's advantage with regards to recruiting and feeding the PTBAD juice that helps create great leaders within the organization. By just continuing what they're doing and not losing sight

of what the Chapter all seems to love about being Brothers, the Chapter could see significant gains in both membership and so-called “quality” of their membership.

- By taking their core leadership and memberships’ enthusiasm to excel as an organization and applying some sound strategic planning practices, the Chapter would be able to have the ship righted from the outset of the semester, while spending much of their time during the year doing the sort of things that win chapters awards.
- By injecting more fun and social activities to the semesters’ meeting schedule, Chapters I have worked with in the past have been able to improve attendance issues- essentially by creating FOMO. Chapter members in attendance seem to genuinely enjoy hanging out with each other and coming to the meetings- if they can do more to make ghost Brothers want to attend meetings they will have a greater chance of fixing some of the attendance problems.

Threats

- I think the biggest threat facing the Chapter is the nature of being, for many, a commuter school. The school primarily operates on a four day weekly schedule, and students may be a timely trip away from campus when they don’t have to be there for class, work or other obligations. I can see how this can threaten Chapter involvement and attendance.
- While an understandable practice that I understand has a long history at Xi Phi, I do believe the every-other-week Chapter meeting schedule stands as a threat to making attendance a regular activity for those fringe Brothers who come-and-go.

Xi Psi - Bryant University

Strengths

- Rebuilding
- Spencer Polsgrove
- Communication
- Good group of Fall Initiates
- Memorization of Ritual

Weaknesses

- Apathy
- Study Abroad
- Members involved in other organizations across campus
- Lack of solid Chapter Advisor
- Poor relationship with Dean

Opportunities

- Robert’s Rules
- Meeting organization (how it runs, etc.)
- Member involvement
- Chapter meeting attendance
- “What’s in it for them” to attend LEADs

Threats

- Infighting
- Seniors not pulling their weight
- Members with their own “agenda” to running the chapter

Pi Rho - University of Massachusetts

Strengths

- Excellent communication by chapter leadership. President sends weekly emails to the chapter and meeting notes are distributed quickly to the chapter and volunteer leaders.
- Very well organized chapter. The chapter was able to change their president just weeks into the semester with no disruption and a very smooth transition.
- Officers take their positions very seriously and utilize binders to transfer knowledge post election.

Threats/Weaknesses

- The officer group expressed concern about participation by non-officers. The officers moved quickly to remove brothers who were not fulfilling basic obligations of membership, however it is a trend to watch.
- Due to the issue above and the size of the chapter there is a potential to develop cliques which could hurt unity.
- Right now they have only completed one community service event.

Opportunities

- They are a driven chapter that is very independent. Continued collaboration with volunteer leadership should help them to be creative in event and strategic planning.
- This spring is their 10th anniversary. They have a wonderful opportunity to re-engage a fairly young alumni base to drive fraternal spirit and potential fundraiser.

Sigma Omega - Northeastern University

Strengths

- The chapter is very strong with a good core group of dedicated members and a good reputation on campus. As with any chapter there are some members that are hard to engage but the majority of the chapter appears to be very active. Members are very aligned with the goals and ideas of the Fraternity and work to maintain this high level. This past year the executive board was very quick to speak with brothers when reports of unbrotherly conduct were reported. They understand the importance of how a single member's actions represents the Fraternity as a whole.

Weaknesses

- The chapter is getting larger and more established now. As a result I see more internal strife between social cliques in the chapter than I have been in the past. While the chapter seems to handle and resolve things well there have been a few times when I had to step in

to provide guidance. While I am very happy to help I think this is something to watch out for as I do not want to see these cliques begin to discourage new and existing members.

Opportunities

- The chapter has a great reputation with the school. Students have even told me that several teachers in the business school speak highly of Delta Sigma Pi. Furthermore the chapter has partnered with other clubs to co-host events on campus. They have done well to establish Delta Sigma Pi as a respectable organization on campus. This is an opportunity the chapter should cultivate going forward.

Threats

- The aforementioned example of cliques is a threat that could hurt the chapter. Another threat to the chapter could be the Alpha Kappa Psi chapter that is on campus. The relationships between the two chapters has been good but I have heard that pledges that did not get accepted into DSP have gone to AKPsi. This could pose a threat if any ex-pledges from DSP could join AKPsi with the intent to turn the chapters against each other. This is a bit far fetched but possible.

Phi Chi - University of Rhode Island

Strengths

- Executive Committee for 2018
 - Enthusiastic and a mix of old/new ecomm members
 - Asking lots of questions
- Transition meeting went well, and they have a plan for next semester
- Dean Maling Ebrahimpour is giving full support. He has been a brother since college.
- Strong interest and ability to mobilize for a fundraising culture
- Doubled the size of their chapter with their first pledge class of proactive members

Weaknesses

- New chapter growing pains, many learning curves
 - Pledging and knowledge about the process
- Asking for help (in the beginning of the semester)
- Disorganized
- Linear communication methods (social media only to send announcements)

Opportunities

- Chapter size
 - More members = better opportunities to meet quorum and get higher participation/motivation
- Changes in leadership
 - Founding members going abroad means opportunities for new leadership and ideas
- Member motivation

- Implementing points system to their policy & procedures
 - Interest in more committees and task forces to keep member engaged
- Growth in faculty initiate numbers
- Interest in working with other chapters in Rhode Island (Bryant, Roger Williams)
- Sustainable school fundraising possible through unique opportunities
- College of Business Administration relationship opportunities

Threats

- All communications are through social media, primarily Facebook
- Lack of institutional knowledge for fraternity processes and best practices
- Meeting time – potential changes because there are multiple majors with conflicting classes; if it's a mid-day time DDs will not be able to attend
- Concerns with chapter finances

NIAGARA REGION - Rich Garber, RVP

Fall Semester, 2017

FRATERNITY TRAVEL DURING THE SEMESTER:

<u>DATE</u>	<u>CHAPTER</u>	<u>LOCATION</u>	<u>EVENT TYPE</u>
8/13-8/8	--	New Orleans	Grand Chapter Congress
9/15-9/17	--	Cincinnati area	Oxford Leadership Retreat
10/13-10/14	--	Cincinnati	Northeastern LEAD
11/2-11/7	--	Wisconsin	Prospecting Visits to Deans -- 5 campuses
11/9	Cleveland AC	Sagamore Hills	Alumni chapter meeting

The region went into the new school year with four of five District Directors returning to their respective chapters, leaving vacancies at Theta Upsilon, Omicron Rho and Kappa Lambda. I was very pleased to appoint Travis Brodbeck as the District Director for Kappa Lambda at Binghamton. I expect to fill the vacancy at Theta Upsilon in January, leaving Omicron Rho as the only chapter currently without a DD. Until I can fill that position, I intend to continue conference calls with the chapter as needed.

I was not able to make visits during the fall semester but maintained regular contact with the chapters through conference calls, emails and through my District Directors. I am planning chapter visits during the week of February 5 and again during late April.

As of this writing, the Region has 37 individuals total registered for the Boston LEAD (20 from Theta Upsilon!) and four of the seven chapters having at least one Brother registered. By the date of the conference, I expect that each chapter will have at least one person registered.

Respectfully submitted,

Rich Garber, Niagara Regional Vice-President

Steel Valley Regional Report - Fall 2017 – Jason Ewing

Overview

The Fall 2017 semester was one of leadership changes for the Steel Valley region with two new District Directors and a new Regional Vice President. While there is a bit of a learning curve, continued development and new experiences will help this region continue on a successfully as it has in the past. This region is full of big chapters with the smallest membership being just over 40 brothers, and a few chapters having 80+ brothers. Such a large chapter can be a detriment if not managed properly, but I believe each chapter is doing its best to run smoothly (and improve) with best possible leadership in place.

Some semester highlights include:

- The Nu Upsilon chapter was represented at GCC over the summer and its brothers took back a new perspective and sense of encouragement from New Orleans, all the way to Morgantown, WV.
- The Lambda chapter is doing an excellent job at interacting with other chapters in the region by hosting Beta Pi in Pittsburgh and by meeting Nu Upsilon for a friendly game of paintball.
- The Theta Kappa, Beta Pi and Cleveland-Akron Alumni chapters joined together for a Founder's Day celebration. The Theta Kappa and Beta Pi chapters have held dual social events, as well.

District Directors

Name	Chapter	School
Marissa Lopez	Beta Pi	Kent State University
Sam Shaheen	Theta Kappa	University of Akron
Nancy Stacy	Nu Upsilon	West Virginia University
Jeff Laskey	Mu Pi	Penn State - Erie
Jared Etkins	Lambda	University of Pittsburgh
Kyra Pritchard	Theta Rho	Duquesne University

Regional Awards Committee

Role	Name
Chair	Karla Edwards
Member	Aimee Underwood
Member	Kristen Kralik
Member	Neely Shaw
Member	Rich Garber

Completed Travel/Communications/Events

Date	Chapter	Event/Meeting type	Location
9/11/17	Beta Pi	Phone call - school Dean	N/A
9/11/2017	Theta Rho	Phone call - DD	N/A
9/13/17	Beta Pi	Meeting w/ chapter president and school Dean	Kent, Ohio
9/18/17	Theta Kappa	Alumni Panel	Akron, Ohio
9/20/17	Nu Upsilon	Phone call - president	N/A
10/29/17	Beta Pi	Exec/Pledge meeting	Kent, Ohio
11/9/17	Alumni Chapter	Founder's Day	Akron, Ohio
11/13/17	Theta Rho	Phone call - DD	N/A
11/15/17	Beta Pi	Professional event	Kent, Ohio

*Email correspondence not listed

Upcoming/Expected Travel/Events

Date	Chapter	Event/Meeting Type	Location
January 12th-14th	N/A	Provincial Team Retreat	Boston, MA
February 9th-11th	N/A	Northeastern LEAD	Boston, MA
February/March	Nu Upsilon	TBD	Morgantown, WV
February/March	Mu Pi	TBD	Erie, PA
March/April	Theta Rho	TBD	Pittsburgh, PA
March/April	Lambda	TBD	Pittsburgh, PA

Chapter Overviews

(SWOTs provided by the District Director)

Chapter: Theta Kappa
District Director: Sam Shaheen
of Collegiate Brothers: 41
of Brothers initiated this semester: 8
of Brothers who attended LEAD: 3

Overview:

TK is doing much better than in the past and they are well off the critical status that they had been on. They are up to 41 members. They have goals and programming. They also have a lot of problems that they are working on.

Strengths:

- Fundraising – TK is running their 3rd annual Golf Outing this Spring. They make about \$ 3,000 each time they have run the event. The money goes to charity, a chapter scholarship and to chapter operations.
- Leadership – They are well organized and well run. Meetings are short and most work is done in committees. Offices change annually but internships tend to cause elections at the end of every semester. A new election for President was held last week. Allison

Muntin was elected President over a couple of older member. That indicates that the Chapter is looking for change. She won on first ballot.

Weaknesses:

- Fear of the Unknown – The chapter has been so small for so long that they are afraid to grow bigger. They are growing however. It might well be time for a winter retreat to discuss this concept and some others (participation/attendance, professional programming, recruiting, pledge education)
- Lack of true Brotherhood – they act like a club not a brotherhood. Admittedly, they have grown together a lot this semester, they do little socially and they do not involve pledged until after initiation. This area has improved over the past semester.
- Chapters Standards – The chapter needs to develop standards of performance for operations that cannot be bent by the will of members.

Opportunities:

- Coming events on the chapter radar - The chapter 50th is only 2 years away (April, 2020). They will host the 2021 GCC.
- Verge of Greatness – TK can join the remainder of the region as large, well performing Chapters all around them.

Threats:

- Good is the enemy of great!
- There are no apparent immediate threats to this chapter except their own attitudes and ideas. Overall they are a good chapter but the potential is much higher.

Chapter: Beta Pi
District Director: Marissa Lopez
of Collegiate Brothers: 147
of Brothers initiated this semester: 41
of Brothers who attended LEAD: 3

Strengths:

- Recruiting
- Number of events held
- Chapter Size

Weaknesses:

- Attendance at chapter events

- Potential bias in the recruiting process

Opportunities:

- Getting involved with different groups on campus (i.e. international office, etc.)
- New fundraising ideas

Threats:

- Not having the café when a new business building is built- lose of fundraiser

RVP Notes

Beta Pi has endured a very unique issue with its primary (and very successful) fundraiser being halted at the beginning of the semester. The proper steps are being taken to remedy the situation, as well as new fundraising options being explored. The district director is new, but was very successful and involved as a collegiate brother just a couple years ago. She has shown great initiative in continuing the success of this chapter.

Chapter: Nu Upsilon
District Director: Nancy Stacy
of Collegiate Brothers: 94
of Brothers initiated this semester: 26
of Brothers who attended LEAD: 15

Strengths:

- The chapter has been doing a great job of submitting everything on time and the executive committee has been very motivated to make the chapter thrive.

Weaknesses:

- Speaking with brothers, attendance is not satisfactory. The chapter is problem solving to figure out a way to get who have not been attending to get back involved and possible incentives for attendance.

Opportunities:

- I would like to see the chapter do more fundraising. The chapter is very big, so I would like to see them raise more money.

Threats:

- The chapter is big and keeps getting bigger. The chapter should continue to try to think of ways to keep all brothers involved.

RVP Notes

Nu Upsilon has shown initiative and enthusiasm for improving all around operations. It has grown significantly in a short amount of time. While keeping everyone involved has been a challenge, the chapter leadership is working to solve the issue. For the first time ever, this chapter has representation at GCC. It has also been increasing attendance at other national events, recently sending 15 members to the fall LEAD School.

Chapter: Mu Pi
District Director: Jeff Laskey
of Collegiate Brothers: 41
of Brothers initiated this semester: 8
of Brothers who attended LEAD: 4

Strengths:

- The only Business Fraternity on campus
- Network of Mu Pi alumni that are willing to help out and see that the Chapter is successful.
- Ownership of activities and events.

Weaknesses:

- Pledge Education started off to a rocky start, but Spring will be improved upon.

Opportunities:

- Having a good relationship with other Business Clubs on Campus that can lead to recruitment, networking, and professional activities.
- With reinforcement and education about the HUB the Chapter can use it as a tool to reach their goals.

Threats:

- No external threats

Chapter: Theta Rho
District Director: Kyra Pritchard
of Collegiate Brothers: 58
of Brothers initiated this semester: 11
of Brothers who attended LEAD: 4

Strengths:

- Chapter is on pace to become Chapter of Excellence this year
- Strong and engaged executive committee just was elected into office to start the calendar year
- Chapter has strong interest to go to Boston for LEAD, with at least 4 registered effective last Sunday

Weaknesses:

- During the fall semester, chapter hit a big roadblock around cliques in the chapter. There was a meeting to air some of the tension, and chapter is moving in the right direction with involvement
- Up until this coming semester, there was not a presence of committees, causing some of the disconnect in the chapter

Opportunities:

- Increasing alumni involvement through ongoing communications and invitations to chapter events
- Getting the investment fund and corporate sponsorship committees off the ground
- Increasing the variety in events, ie days of the week, the audience, and community involvement (ie touring Google vs on campus resume workshop)

Threats:

- Approximately 20 seniors graduating in the spring
- No one ran for the VPPA office in the fall semester, causing someone needing to be appointed in the interim; concerning that there was no interest to fill this critical position; special election will be held at first chapter meeting in January

RVP Notes

This chapter has had some participation issues and trouble keeping the older brothers involved. The district director is very active and is going an excellent job at steering this chapter in the right direction.

Chapter: Lambda
District Director: Jared Etkins
of Collegiate Brothers: 84
of Brothers initiated this semester: 20
of Brothers who attended LEAD: 3

Strengths:

- Fundraising over the past semester and strong cash position.
- Brotherly recognition at meetings (brother of the month, attendance award, etc).

Weaknesses:

- Chapter size is large, making it a challenge to keep everyone involved.

Opportunities:

- Improve pledge interviews/process. Chapter currently taking steps to improve by reevaluating current process and providing surveys for suggestions.

Threats:

- Large number of brothers graduating after spring semester.

RVP Notes

This chapter was without a district director for about half of the semester. Since the current DD is new, I will continue to engage him to make sure he has everything he needs to be successful.