



Delta Sigma Pi

America's Foremost Professional Business Fraternity for Men and Women

Report of the Western Provincial Vice President

Crystal Justice
January 2020

SUMMARY

While Grand Chapter Congress seems like it was just days ago...we have had an exciting semester! I am happy to report that each region has an elected Regional Vice President leaving GCC:

*Bay Area Regional Vice President – Nyonohse Wreh
Desert Mountain Regional Vice President – David Pratt
Pacific Coast Regional Vice President – Jen Lee
Pacific Northwest Regional Vice President – Sam Clark
Sierra Nevada Regional Vice President – Cody Heimerdinger
South Pacific Regional Vice President – Erica Kolsrud
Rocky Mountain Regional Vice President – Nick Rizzi*

We are lucky to have an experienced team of leaders for the Western Province with most regional vice presidents returning. Nick Rizzi has joined the team as Rocky Mountain RVP and brings a wealth of experience to the team from his experience as National Collegian of the Year!

Jack Welch has been quoted as saying, "Change before you have to." The past 6 months have been a time of change for our organization as we have done a wholistic review of our ritual, pledge program and risk management policies. As an organization, we have continued to look towards the future to ensure that we will be viable and still thriving in 10 and 20 years from now. This doesn't mean that change is easy and I am proud of the leadership team in the Western Province and how they have lead during these changes and will continue to lead the Province.

PROVINCIAL PRIORITIES

We have continued to see a large amount of risk management violations throughout the entire province. Several chapters have received discipline (warning letters, probation, suspension, and charter revocation) this semester by not following the approved pledge program, not following our risk management policy in regards to hazing, alcohol and sexual harassment. These continual issues put all chapters within our organization at risk and risks our overall reputation.

As a province we have set goals for the following in Risk Management and Discipline:

- Have District Directors meet with chapter advisers to collaborate and ensure all potential risk management and operational areas are reviewed.*



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- *All Regional Vice President's will meet with District Director's one on one to review our current risk management policy and expectations.*
- *Create a monthly post on our social media platforms in regards to risk management.*
- *Have each chapter send at least one person to the Risk Management, Ritual and Pledge Education sessions during our fall LEAD Schools and Spring Provincial Conferences.*

Our hope is to encourage a proactive conversation for risk management and hazing with these activities.

Here is a recap of our current risk management, discipline, and assistance actions within the province:

- *Phi - USC (revocation of charter) – Leadership has been working with the school for the past year and a half in order to try to find a way for Delta Sigma Pi to remain on campus given the schools current policy to not allow for an organization with membership requirements and a ritual. We have not been able to come to an agreement and are working with the chapter on next steps. The Board of Directors is has approved the revocation of the chapter's charter due to not being able to operate on campus.*
- *Epsilon Phi – CSU, Sacramento (suspension) – The chapter is on suspension for risk management violations, hazing and not following the approved pledge program, by the university and Delta Sigma Pi. The leaders of the chapter are now working on drafting their letter to the school asking for permission to return back to campus.*
- *Lambda Chi – UC-Riverside (suspension) – The chapter is suspended pending investigation of post initiation hazing activities.*
- *Nu Rho – UC-Davis (revocation of charter) – The chapter was placed on a cease and desist letter from the university with the university revoking their registration status in November. The chapter has chosen not to appeal this decision from the university and the Board of Directors has approved the revocation of the chapter's charter.*
- *Theta Chi – CSU, San Jose (probation) – The chapter is on probation for risk management violations including hazing allegations and not following the approved pledge program.*
- *Lambda Phi – CSU Long Beach (probation) – The chapter is on probation for risk management violations including hazing allegations and not following the approved pledge program.*
- *Omicron Sigma – CSU, San Diego (guidance) – The chapter is on probation for risk management violations including not following the approved pledge program.*
- *Gamma Iota – University of New Mexico (guidance) – The chapter is on CMP related guidance.*
- *Upsilon Psi – University of Washington – Bothell (guidance) – The chapter is on CMP related guidance.*

We have seen a continued interest in expansion throughout the province at universities such as Boise State University, University of Nevada – Las Vegas, CSU – Stanislaus, Azusa Pacific



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University, CSU – Bakersfield and more. We are excited about these possibilities and are continuing the goal of furthering our organization.

The Western Province has continued to set operational excellence as a goal by maintaining high levels of execution in CMP. We have set up a de facto provincial committee with David Pratt (Desert Mountain RVP), Erica Kolsrud (South Pacific RVP), and Patrick Bonfrisco (Past Western PVP) as committee chairs who are managing our weekly CMP race that tracks the current approved items within CMP. This race is being tracked by the province and then by each region with each chapter. This is then promoted by email and social media within the province. They are also sending out monthly emails reminding chapters on what they should be submitting and tips on CMP submittals.

PROJECTS

Over the past year I have been working with Grand President, Tricia Smith, and a small group of national leaders and staff to re-write our Risk Management and Insurance policy. Revising this will allow for us to be more modern and adaptable in this policy. We have submitted a proposal for approval by the Board of Directors, with additional resource documents continuing to be created at the recommendation of the Board of Directors and Regional Vice Presidents. This proposal is to be reviewed at the January 2020 Board of Directors meeting.

PROVINCIAL GOALS & PROGRESS

Member Education

- Goal #1 – Have training offerings for all collegiate and alumni chapter officers
 - Status: in progress
- Goal #2 – Have 90% of District Directors participate in one of the many trainings offered by Delta Sigma Pi (VOLT, National Volunteer Leadership Training, Certified Deltasig Leaders, Volunteer Leadership Trainings and Online Training Modules)
 - Status:

Region	DDs with Training	Total # of DDs	% with Training
Bay Area	4	6	66%
Desert Mountain	1	6	16%
Pacific Coast	7	7	100%
Pacific Northwest	2	3	66%
Rocky Mountain	3	4	75%
Sierra Nevada	4	5	80%
South Pacific	13	13	100%
Provincial TOTAL	33	44	75%



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- Goal #3 – Have all leadership do Risk Management training through Tightrope
 - Status: in progress

Membership Growth

- Goal #1 – Continue growth within the province by finding 2 colonies to add to our 48 chapters
 - Status: In progress with serious interest at UNLV, CSU-Stanislaus and University of Oregon
- Goal #2 – Reinforce our national goal of 90% of chapters having 30 members or more by focusing on recruitment practices, pledging process and chapter operations.
 - Status:

Region	Chapters with 30 members	Total # of Chapters	Percentage
Bay Area	6	6	100%
Desert Mountain	5	6	83%
Pacific Coast	7	9	77%
Pacific Northwest	3	3	100%
Rocky Mountain	5	5	100%
Sierra Nevada	5	6	83%
South Pacific	10	11	91%
Provincial TOTAL	41	46	89%

Member Engagement

- Goal #1 – Coach and train all chapters on inputting all alumni who are attending events at a collegiate chapter in the Hub.
 - Status: in progress
- Goal #2 – Educate our chapters on current attrition levels by improving reporting and having trial training at LEAD events and local conferences.
 - Status:
 - Held “Trial or Not to Trial” session at Portland LEAD School. This session was facilitated by RVP Erica Kolsrud and had positive reviews. This session will be facilitated by National Scholastic & Awards Chair, Tim Beasley, at the Spring Provincial Conference in Denver, CO this spring.

Organizational Excellence

- Goal – Educate collegiate chapters on what Chapter Leadership Funds are, how to communicate them to alumni. Goal is to have each chapter have \$300 donated at the end of the biennium (this will fund one Grand Chapter Congress registration)



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- *Action Steps: Regional Vice Presidents & District Directors can inform chapters of the CLF website and the tools that are available to use on there; utilize the letter templates on the CLF website; create a social media post each month to promote the CLF fund on the provincial facebook page; reinforce the CLF through our CMP monthly email update and encourage chapters to send a message on how to market CLFs and promote them to alumni.*
- *Status:*

- *Chapters with the Largest funds available:*
 - *Epsilon Theta (CSU – Chico) - \$1440*
 - *Gamma Omega (ASU) - \$1170*
 - *Kappa Mu (Cal Poly – San Luis Obispo) - \$720*
 - *Rho Phi (Concordia) - \$579*

- *Regional Recap:*

	<i>Number of Chapters with Monies in CLF</i>	<i>Number of Chapters with \$300 in CLF</i>	<i>Percentage of Chapters (by Region) with \$300 in CLF</i>	<i>Total in Funds by Region</i>
<i>Bay Area</i>	<i>1</i>	<i>1</i>	<i>16%</i>	<i>\$720</i>
<i>Desert Mountain</i>	<i>3</i>	<i>3</i>	<i>50%</i>	<i>\$1979</i>
<i>Pacific Coast</i>	<i>6</i>	<i>2</i>	<i>22%</i>	<i>\$1143</i>
<i>Pacific Northwest</i>	<i>1</i>	<i>0</i>	<i>0%</i>	<i>\$90</i>
<i>Rocky Mountain</i>	<i>2</i>	<i>2</i>	<i>40%</i>	<i>\$795</i>
<i>Sierra Nevada</i>	<i>4</i>	<i>2</i>	<i>33%</i>	<i>\$1891</i>
<i>South Pacific</i>	<i>11</i>	<i>2</i>	<i>18%</i>	<i>\$1825</i>
<i>Province</i>	<i>28</i>	<i>12</i>	<i>26%</i>	<i>\$8443</i>

BEST PRACTICES

Utilizing our committee structure has been a great help throughout this past biennium and we are continuing this trend through the next biennium. See below for highlights from all committee's:

- *Community Service Committee – Chairperson Cristina Gao*

Cristina has taken over as chair of this committee this biennium. She has served on the committee and has helped market and execute our service events at LEADs during the past biennium. Cristina hails from the Orange County Alumni Chapter.



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We are excited to have her join the team of committee chairs. Our provincial goal is to see an increase in chapters participating in provincial community service events over last year.

We had a wildly successful service event at our fall LEAD School in Portland. We had 24 chapters participate in our Cards for Humanity service event where gift cards are donated for local disaster relief. We collected over \$1,000 for the American Red Cross!!! We also hosted a Coin Drop for the Leadership Foundation where 44 chapters participated and donated \$453.45. All monies were donated in the name of the Epsilon Upsilon chapter who won the coin drop contest. Our last service event in Portland was to bring wish list items from the Ronald McDonald House's wish list for donation to the Portland Ronald McDonald House. Twelve chapters participated in donating bags of items for donation!



- *Scholastic Development & Awards Committee* – chairperson Patrick Bonfrisco

Patrick has moved from the Community Service chair position into Scholastic Development & Awards Committee chair. Throughout this year Patrick will be working with the Province Committee members to ensure that we are reviewing all awards applications. We have the following goals for the committee:

- *Collegian of the Year – Have a chapter Collegian of the Year chosen for EVERY chapter (this goal has been met.) Ensure each region has a Regional Collegian of the Year chosen.*
- *Awards – Increase chapter submittals year over year.*



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- *Alumni Development Committee* – chairperson Isha Shah

Isha joins the group of provincial committee chairs this year and comes to us from the Bay Area Alumni Chapter. The province has the following goals for the Alumni Development Committee:

- *Reach out to collegiate chapters VP – Alumni Relations:*
 - *Give advice on how to engage alumni to come to events and which events are appropriate to invite alumni brothers to attend.*
 - *Encourage alumni chapters to send emails to graduating seniors from local chapters on the transition to alumni life and how alumni chapters operate.*
 - *Continue to promote and help coordinate volunteer leadership training events within the province.*
 - *Track ten-year alumni recognition status. Reach out to local chapters on those that are upcoming.*
- *CMP Committee* – chair people David Pratt, Erica Kolsrud, and Patrick Bonfrisco

The CMP committee has continued to focus on operational excellence in our province by sending out monthly emails about what items should be submitted that month to stay on track for CMP submittals and tips on how to improve your chapter's CMP submittals.

This committee also creates our weekly CMP race graphics and social media post for us promote within the province as well as by region. This has continued to keep our chapters engaged and having fun with CMP. We see these posts shared during officer reports, updates to alumni and more! Congratulations to the Pacific Coast region to having the most approved items year to date!



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Report of the Desert Mountain Regional Vice President

David Pratt
January 2020

SUMMARY

The Desert Mountain Region experienced a great Fall semester and is on track to accomplish many of its goals for the 2019-2020 year.

Our District Director team is as strong as ever, with all six positions being filled with experienced and capable leaders.

Travel to DSP events has been great across the region. The region sent 32 attendees to Portland Fall LEAD school and is looking forward to sending high attendance numbers to the Western Provincial Conference, with the region already having 75 registrations to date and the Gamma Psi chapter already having 40 brothers registered!

Prior to the official year, the Desert Mountain Region sent 47 returning brothers to Grand Chapter Congress in Atlanta. Gamma Psi sent an incredible 34 people, winning the national travel award accordingly. The region was also proud to win several provincial awards at Grand Chapter Congress!

CMP remains an important aspect of operations for Desert Mountain. All six chapters remain eligible to be Accredited level or higher in CMP.

In addition to CMP, Risk Management has remained a key focus and education has improved across the region.

Lastly, I am proud to report that all six chapters nominated a COY this Fall. All six nominees submitted applications on time, giving the Desert Mountain Region a 100% application rate.

In addition to what is written above, below is a detailed summary of our goals and progress in accordance with our National Strategic Priorities.

Fraternally,

A handwritten signature in black ink, appearing to read "David Pratt".

David Pratt



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REGIONAL PRIORITIES

The Desert Mountain Region has proven strong over the last few months.

When starting the Fall semester, three out of the six District Direct positions needed to be filled with new leadership. As of this report, all six positions are once again filled with strong and capable District Directors. One of my priorities has been assisting those new District Directors to become familiar with the role and ensure they see success as DSP leaders.

Another priority for the Region has been risk management. The Region is on its way to having all chapters be in perfect standing with the fraternity, with only one chapter currently on Guidance.

Finally, all chapters are working hard on CMP, striving to be better than they were the year before.

PROJECTS

My main personal project has been compiling important documentation and information, and organizing it on a chapter level via a Google Drive. My goal is to have an organized and cohesive group of electronic documentation to help future RVP's and DD's in our Region have a good understanding of chapters, past and present.

Another project I have been working on is transitioning our Regional Initiation from the Spring semester to the Fall Semester. This has officially been communicated to all chapters in the Region and planning is in motion. I believe this change will line up nicely with the new pledge program changes taking effect Fall 2020.

REGIONAL GOALS & PROGRESS

Member Education

- *Goal - Assist chapter leadership in understanding ritual changes and how said changes impact their local initiations.*
 - *Status - I held productive phone calls with the District Director and President of each chapter. All six chapters in the region held appropriate initiations and fully comprehended the changes that were made to ritual. This goal is COMPLETE.*



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- *Goal – Work with each District Director to ensure a confident understanding of bylaws, policies and procedures, the pledge program, risk management, etc.*
 - *Status - My DD team is fantastic. Each District Director has a strong understanding of our fraternity and the documentation that contains the answers to frequently asked questions. This goal is COMPLETE.*

Membership Growth

- *Goal - Work with the Alumni Chapters (Phoenix-Thunderbird and Duke City) to ensure a stable future.*
 - *Status - The alumni chapter engagement and structure in our region need some support. This goal is IN PROGRESS – see below:*
 - *In regards to the Phoenix-Thunderbird alumni chapter, I am currently holding the role as President hoping to seek out an individual willing to get the chapter to a sustainable membership.*
 - *In regards to the Duke City alumni chapter, I am also working to ensure our this recently new (within the past few years) alumni chapter continues to meet the minimum standards while seeking out a membership to help grow the chapter.*
- *Goal – Further communication with Grand Canyon University with the intent to schedule a meeting with key faculty and/or administration.*
 - *Status – IN PROGRESS – I am hoping to get a meeting on the books this Spring. I am hoping that by getting a few key faculty or administration to understand the benefits of Delta Sigma Pi that our fraternity will be more appealing to the University at large.*

Member Engagement

- *Goal - All chapters in region send at least three attendees to Portland Fall LEAD.*
 - *Status – 4/6 chapters completed this goal with a total of 32 attendees from the Region. Gamma Psi did an incredible job sending 18 people. Zeta Omega also did a great job sending 7.*

Chapter	# Attendees
Gamma Psi	18
Zeta Omega	7
Gamma Omega	4
Epsilon Upsilon	3
Gamma Phi	0
Gamma Iota	0



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- **Goal - All chapters in region send at least five attendees to Denver LEAD Provincial Conference.**
 - *Status – Desert Mountain currently has 75 total people traveling to LEAD in Denver. Four chapters have already met their goal. Gamma Psi has done a phenomenal job with registrations and has a whopping 40 people registered to date! Zeta Omega and Gamma Iota have also done extremely well sending 15 and 14 respectively to date, and a great job to Epsilon Upsilon for reaching the goal of 5+.*

Chapter	# Attendees
<i>Gamma Psi</i>	<i>40</i>
<i>Zeta Omega</i>	<i>15</i>
<i>Gamma Iota</i>	<i>14</i>
<i>Epsilon Upsilon</i>	<i>6</i>
<i>Gamma Phi</i>	<i>0</i>
<i>Gamma Iota</i>	<i>0</i>

Organizational Excellence

- **Goal - All chapters reach Accredited level in CMP.**
 - *Status –IN PROGRESS*
- **Goal – All chapters remain in good standing with the fraternity.**
 - *Status – IN PROGRESS*
 - *Gamma Psi completed probation and completed Guidance as of 1/7/2020*
 - *Gamma Iota remains on Guidance in hopes of improving CMP performance*

OUR DESERT MOUNTAIN DISTRICT DIRECTOR TEAM

As I have said time and time again, I am very thankful for the District Directors that give their time and effort to our fraternity and our chapters. The 2019-2020 Desert Mountain District Director team is:

*Gamma Psi - Mike Mallonee
Zeta Omega - Josh Brungardt
Gamma Iota - Sunny Loera
Gamma Phi – Grissel Rodriguez
Epsilon Upsilon – Grissel Rodriguez
Gamma Omega - Connor O’Gorman*



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Report of the Pacific Coast Regional Vice President

Jen Lee
January 2020

SUMMARY

The Pacific Coast Region continues to make headway in achieving its goals. Our efforts are aided by an experienced, and largely stable leadership team with most returning and a few with expanded roles and newcomers. Our

Overall, the chapters in the region have proven to be operationally strong this year – leading the provincial CMP race! Unfortunately, a few chapters have had setbacks in this area, including one due to chapter disciplinary issues.

REGIONAL PRIORITIES

The Pacific Coast Region has continued to made progress toward its overarching goals and has made several adjustments this to address concerns brought forward from the previous year.

The Pacific Coast Region's priorities stem from the following overarching goals set at the beginning of the 2017-2019 biennial Regional Vice President term – all of which tie back to the National Strategic Priorities, which are noted in the goals section below.

- 1. Foster relationships between the chapters and build back regional cohesion*
- 2. Provide chapters with the necessary support needed for each of the chapters to succeed in the way that they want to succeed and reach the goals they want to achieve.*
- 3. Invest in the regional leadership team to develop a cohesive team that works together, rather than in silos*
- 4. Plan for potential/future transitions or growth in the leadership team by building a "pipeline" of leaders for the region & promoting new leadership opportunities within the region and beyond.*
- 5. Encourage the region to represent itself proudly at the Provincial and National levels of our Fraternity*
- 6. Promote operational excellence across the region*

As we continue to move forward with these priorities, paramount among them is continue growing and fortifying the region's leadership team to provide a consistency in the leadership presence in this region.



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PROJECTS

Created as a new goal last year, the leadership team continued with the effort this year to conduct New Member Orientation for all newly initiated brothers after Regional Initiation using a more concise presentation this year. The hope is to continue this in Spring as well.

We also continue to collect anonymous feedback from all chapter members who wish to provide it about their own areas of strength and areas of growth, as well as feedback on the performance of leadership team. This feedback continues to help guide the support that we strive to provide the chapters in the region.

In order to ensure that our leadership team is best equipped to support each other and the chapters, the team will be looking to meet approximately quarterly for training, reviewing feedback provided, setting and discuss progress made toward individual goals, and sharing ideas.

REGIONAL GOALS & PROGRESS

Member Education

- *As mentioned previously, paramount in our ability to further education our members, we continue to invest in our regional leadership team*
- *Following Regional Initiation this past fall semester, we presented a brief New Member Orientation presentation to the entire region.*
- *As part of Omicron Sigma's probation, members of the leadership team executed the chapter's pledge program in order to educate the chapter.*
- *To align with the Provincial goal, all District Directors are required to complete CDL training.*

Membership Growth

- *For chapters that have experienced low retention/high attrition rates, we have focused with them on correcting those trends.*

Member Engagement

- *The Pac Coast Region continues to track attendance and participation at National/Provincial and Regional events to measure year over year trends and continued growth.*
- *Planning is underway for the regional brotherhood event, Pac Coast Cup, which is scheduled for Saturday, 4/4 in the Inland Empire area which will help create opportunities for building cohesion within the region.*



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Organizational Excellence

- *The Pacific Coast Region has been working hard to keep the lead in the CMP race – coming out of the game strong in 1st place and has yet to lose its lead in the race.*
 - *Unfortunately, there are at least two chapters to date that are very likely no longer eligible to achieve for Chapter of Excellence – specifically due to missing Fall LEAD School and another for chapter disciplinary issues.*
- *All chapter members are invited to complete an anonymous feedback survey twice a year regarding their chapter as well as about the leadership team.*

BEST PRACTICES.

A best practice and tradition in the Pacific Coast Region is to conduct a regional initiation each fall with all chapters that are able to participate. This is to ensure that at least once per year, every chapter observes Initiation ritual conducted correctly.

Continuing to ensure that no one person on our leadership team is spread too thin, the leadership team continues to as balance non-chapter specific DD work as evenly as possible and bringing in additional assistance as needed. These additional individuals include:

- *Paul Dawson, serving as chair of this year's Pac Coast Cup (formerly, Brotherhood Games) collegiate planning committee, in addition to taking a more visible role as the region's Awards Committee Chairperson.*
- *Whitney Mardis, assisting at Lambda Pi specifically with fulfilling the terms of their CMP-related guidance.*
- *Patrick Bonfrisco, assisting with Omicron Sigma's probation terms requiring an appointed alumnus to conduct their Fall term pledge program.*



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Report of the Pacific Northwest Regional Vice President

by Sam Clark
January 5, 2020

SUMMARY

I was reelected as the RVP for the Pacific Northwest Region at the 2019 Grand Chapter congress in Atlanta Georgia after serving for 1 year of the previous Biennium.

During this year I have made several changes to my district director assignments based on need of the chapters and vacancies. I believe that a total review of all Bylaws and Policies & Procedures documents would be extremely beneficial for all chapters in addition to a full overview of the CMP program to level set expectations and goals for each individual executive team. Additionally, one overall struggle I see across the region is the need for more financial scrutiny and oversight as well as the need to transition away from the Venmo platform.

I am excited to work for this region and continue to see it grow in 2020.

SIGNIFICANT TRAVEL

<u>DATE</u>	<u>LOCATION</u>	<u>EVENT</u>
September 28 – 29	Cincinnati, OH	National Leadership Retreat
October 25-26	Portland, OR	Western LEAD School Conference

FUTURE TRAVEL

<u>DATE</u>	<u>LOCATION</u>	<u>EVENT</u>
Feb 28- Mar1	Denver, CO	Western LEAD Provincial Conference
Spring TBD	Pullman, WA	Omicron Psi Initiation/Visit
August 14 – 16	Cincinnati, OH	National Leadership Retreat
November 6-7	Salt Lake, UT	Western LEAD School Conference

REGIONAL GOALS & PROGRESS

District Directors

- **GOAL**
 - Have all District Directors assigned to all collegiate chapters by the start of the school term.
 - Progress: Complete



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National Events Attendance

- **GOAL #1**
 - Have all Collegiate Chapters have at least 2 representatives at LEAD School & LEAD Provincial Conference
 - Progress: see below

Chapter Name	2019 LEAD Provincial Attendance	2019 LEAD School Attendance
Omicron Psi	4	11
Sigma Upsilon	1	1
Upsilon Psi	12	2

- **GOAL #2**
 - Have all Colligate chapters have at least 1 representative at the 2019 GCC.
 - Progress – Did not meet, All chapters had registered a delegate however Omicron Psi delegate dropped out the week before the event.

Chapter Management Program (CMP)

- **GOAL:** All chapters achieve accredited chapter status for the 2018-2019 school year.
- **Progress –** Did not meet, Upsilon Psi did not reach accredited status.

Bylaws / Policies & Procedures

- **GOAL:** All chapters will do a complete overview of their Bylaws and Policies documents to ensure accuracy
- **Progress –** all chapters have submitted documents, none have done an overview with their RVP or DD, and some still have changes required from the national reviews that were completed earlier this year

EXPANSION (if applicable)

- Boise, ID has been a school that has expressed interest several times in the past however we have never been able to produce a strong foothold there. Dale is working on establishing a contact at the school.
- Oregon is a priority area for me we have had several alumni and collegiate reach out with interest.
- Central Washington university had a meeting with a chapter consultant in fall 2019 about opening a perspective chapter as well.

DISCIPLINE AND ASSISTANCE ACTIONS AND ISSUES (if applicable)

- Upsilon Psi was placed on guidance at the beginning of the 2019-2020 school year for failure to meet accredited status in the CMP.
- Omicron Psi is being placed on guidance for operations concerns in winter 2020.



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Report of the Rocky Mountain Regional Vice President

Nick Rizzi

January 2020

SUMMARY

The Rocky Mountain Region has been adjusting to the transition of a new RVP for my first term. We have nearly successfully filled all District Director Positions, with just Alpha Rho still available for a District Director. Interest has been shown that I'm hoping to fill!

As we move into this next year, our major focuses will be on a leadership pipeline. Currently all chapters are fairly stable and on track, with excellent chapter leaders in place. We would like to continue this and lay the foundation for continual successful transitions, making regional goals easier to achieve.

REGIONAL GOALS & PRIORITIES

Member Engagement - Leadership Funnel

- *At the moment, we have an open space for a DD and at least 1 DD that has been consistently serving looking to be replaced. My goal is to really focus on new students coming out of chapters as Assistant DD's, getting them ready for placement.*
- *This would involve the DD team working closer to the chapters in the region as a whole since I do not want people to DD their own chapter.*
- *Cross training and collaboration between the team and introductions to new chapters.*

Member Education - Transitions and CMP

- *It is my belief that part of our issues regarding CMP achievement may stem from poor or hard transitions between chapter leadership. We will seek to:*
- *Utilize Brother Kolsrud's transition framework for chapters*
- *Train DD's on proper transition meetings to run the chapters themselves*
- *Make sure this is consistent for every leadership switch. Every time.*
- *Have an DD's Tier 2 renewed and certified by GCC*

PROJECTS

I have been working with a few brothers who are interested in taking on more responsibility, but are not quite interested in the DD position yet. We have been seeking to make a sort of "support committee" that we can use for help with things like Awards and organizational projects. My goal is to push their attention towards expansion. I know that has been a priority in RMR and I would love to see a relationship with a new eligible school form while I am RVP.



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BEST PRACTICES

Right now, we are still developing some best practices for our region as a new and seasoned team continues to learn to work together. We have been utilizing slack within our DD group to communicate, ask questions, and get help. The team is fantastic about helping each other and being available to ask questions always.

I am looking forward to 2020 to add even more here in my next report!



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Report of the Sierra Nevada Regional Vice President

Cody Heimerdinger

January 2020

SUMMARY

The Sierra Nevada region had a great start to the 2019-2020 fiscal year. First, I want to start off by thanking my regional leadership team of District Directors for everything that they do and the support that they provide for their respective chapters.

The region has retained 5 District Directors from the prior year, while attaining 2 new District Directors. There are also several interested training opportunities to become a District Director to help lead/consult a chapter whether it be a small commitment or a larger commitment. I am currently also in the process of seeking a new District Director to take over leadership of the Delta Pi chapter for the Spring 2020 semester. Brittany has done amazing job with the chapter, and is very well-appreciated by the chapter. If anyone is interested in this opportunity, please do not hesitate to reach out to me.

As Regional Vice President, my travels throughout the region during the Fall 2019 semester took me to Fresno, Stockton, Manteca, Davis, Sacramento, and Reno. I attended and observed chapter/pledge meetings and connected with various collegiate officers at specific events. I have also had the pleasure to sit down with Chelsey Fix, Educational & Leadership Consultant to go through the strengths, weaknesses, and areas of growth for each chapter.

A couple of chapters were required to go through disciplinary procedures.

- It is unfortunate to report that the Nu Rho chapter at UC Davis lost their university recognition for a period of five years. The chapter has chosen not to appeal this decision from the university and the Board of Directors has approved the revocation of the chapter's charter. Let this be a warning **to all chapters** to not do anything outside the scope of the approved pledge education program. It only takes one person to report what might seem like to be the littlest thing to start a university investigation which may reveal several other major issues resulting in a decision to revoke the chapter's charter.*
- The Epsilon Phi chapter at California State University-Sacramento is currently finishing up their one-year period of suspension. The Epsilon Phi chapter has drafted and submitted a letter to the university requesting to be once again recognized on campus starting the Spring 2020 semester. If approved, will work with a team of alumni, approved by myself and PVP Crystal Justice, to re-build the chapter and provide the education that the chapter needs to be, once again, a thriving and healthy organization at CSU-Sacramento.*



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The Lambda Mu chapter successfully hosted the Sierra Nevada Regional Initiation on the University of the Pacific, Stockton, California campus while also coordinating a very well put together inter-chapter mixer immediately after the event. The following chapters who attended the regional initiation were Iota Phi, Tau Chi, Lambda Mu, and Epsilon Theta. The regional initiation welcomed over 30 new brothers to the region. The Delta Pi chapter organized a local initiation, welcoming six new brothers to the region. The Western LEAD School in Portland, Oregon was attended by 6 out of the 7 collegiate chapters, with the Tau Chi chapter at UC Merced earning the award for most collective miles traveled of brothers in attendance. The Sierra Nevada region was also the region with the largest attendance at the Western LEAD School.

REGIONAL PRIORITIES

Regional Awards – To encourage high quality award applications to be submitted. The Sierra Nevada region has a diverse awards team. Thank you to all that serve on this committee.

District Director one-on-ones – Schedules calls with each District Director in the region to review the health and well-being of each chapter in the region. During these calls will focus on the new pledge education program to be implemented Fall 2020 and the new risk management format to better equip the team to address these changes with their chapters.

Expansion Efforts – There have been a couple of serious interests within the region to establish a chapter at the following universities: California State University-Stanislaus and University of Nevada, Las Vegas.

Alumni Chapter Engagement – Mid-Semester check-ins with each alumni chapter to encourage participation in the alumni chapter recognition program.

Organization Excellence – Encourage all chapters to submit Accredited, Chapter of Recognition, and Chapter of Excellence items regardless of their current status. Identifying those areas of CMP that are most likely to be missed and develop a strategy with the current chapter leadership District Director team.

Chapter Leadership Funds - Educate collegiate and alumni chapters on what Chapter Leadership Funds are, with the Provincial Goal in mind to have each collegiate chapter have \$300 donated at the end of the biennium.

Certified Deltasig Leader and other Volunteer Leadership Training Opportunities – To encourage all alumni volunteers (District Directors, potential District Directors, Committee Members, Alumni Chapter Members) to pursue these trainings to keep up-to-date on all things Deltasig and better assist chapters with education, growth, engagement, and organizational excellence.



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Report of the South Pacific Regional Vice President

Erica Kolsrud

January 2020

SUMMARY

The South Pacific Region is experiencing a year of growth, accountability and adaptation for the 2019-2020 year.

With recent ritual and pledge program changes, chapter leaders were encouraged to have open discussions with their chapters, District Directors and RVP. Both changes have proved to have growing pains, but leadership continues to keep lines of communications open and welcomes questions and discussion.

Over the summer, executive committees provided their 2019-2020 academic year goals and SWOT analyses. These reports were given to District Directors to help better prepare them for the upcoming year. Then, the District Director Team met in July for leadership training, to discuss the region as a whole, and brainstorm ways to help and support chapters achieve their goals. The team will also be meeting in February to do additional training and prepare for the remainder of the year.

At Grand Chapter Congress, ten collegiate chapters were recognized for their 2018-2019 CMP achievements, two alumni chapters were recognized for reaching Gold Level and one alumni chapter was recognized for reaching Silver Level. In addition, fraternity awards were presented and the region saw two provincial award winners and one national chapter award winner. Additionally, South Pacific District Director, Jami Ball, was named National District Director of the Year.

For the third year, a regional conference was held for team building, leadership and officer specific sessions. Loyola Marymount was gracious enough to host and over 90 brothers from thirteen collegiate chapters were in attendance (two from other regions). Current District Directors and other local alumni gave the presentations, with Western Provincial Vice President Crystal Justice giving the keynote.

In December, the charter of the Phi chapter (USC) was revoked, by the Board of Directors, due to current university policy that prohibits ritual and membership requirements. Leadership and staff worked over the last few years to try and reach an agreement and unfortunately were not able to at this time.

Congratulations to the Eta Chi chapter, who celebrated their 50th anniversary in November and an early congratulations to the Iota Upsilon chapter, who will celebrate their 40th anniversary in April.

I applaud the chapters for continuing to grow and challenge themselves year after year. I look forward to what the second half of the year will bring.

REGIONAL PRIORITIES



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Each chapter executive committee does in-depth reports at the end of academic years and provide rankings in areas of operations. From here, the regional leadership consolidates them into larger themes and brainstorms ways to help support chapters for the upcoming year.

Currently our priorities are:

1. CMP – How can we support them in achieving their chapter CMP goal
Currently we utilize the monthly emails from the provincial CMP committee, mid-year CMP check point, focused reminders on high risk items (Pledge Ceremony, Financial Items, Ritual) and ways to reward chapters for their success.
2. Finances – Help chapters with financial records and budgeting
Chapters are having trouble with the year-end financial review, budgeting and finding alternatives to Venmo for collection of money. Leadership is currently exploring ways to help the chapters with financials.
3. Pledge Program – Educating and following the pledge program
Over the past few years, it was discovered chapters were deviating from the standard pledge program. The most common deviation was additional events and incorrect brother interviews. Leadership continues to make proper education of the pledge program a priority by checking in with VPPE's throughout the process and holding training for the VPPE's. Our next focus will be centered on the roll out of the new pledge program for Fall 2020.
4. Risk Management – Education of the Risk Management policy and creating an environment of self-reporting.
There continues to be Risk Management concerns with chapters. More can be done to educate members on the policy.

Lambda Phi (CSULB) is currently on probation until June 2020 for severe hazing and risk management violations.

Iota Upsilon (CSUN) completed their probation in June 2019 for severe violations and most recently completed guidance in December 2019.

Verbal warnings were given to Eta Chi (Cal Poly Pomona) and Rho Chi (Hawaii-Manoa) for Pledge Program Violations.

PROJECTS

One of the biggest issues we hear from chapters is about low participation of members, leading to attendance policy changes every semester/quarter. The hurdle chapters face is not being clear with expectations of membership during recruitment and pledging periods as well as lack of execution of attendance policy. We will continue to work with chapters to find viable long-term attendance policies and evaluate information being presented during recruitment.



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At our regional leadership team meeting in July, it was discussed that District Directors should review chapters bylaws and policies/procedure document to see where improvements can be made or outdated practices are still present.

REGIONAL GOALS & PROGRESS *

*In relation to the fraternity Strategic Priorities

Member Education

- 90% Chapter Officers participating in leadership training:
All eleven collegiate chapters attended some type of leadership workshop this fall (Fall LEAD, or Regional Conference). All eleven collegiate chapters had an attendee at 2019 Grand Chapter Congress and 2020 Presidents' Academy. While most Alumni Chapters have officers with CDL training, more can be done to support them and their success and will be a focus in Spring 2020.
- 90% District Directors participating in leadership training:
All District Directors in the region are CDL Tier 1 certified; eight are CDL Tier 2 certified. The regional leadership team also has two meetings/trainings a year. District Directors were asked to complete Risk Management training through the learning module, Tightrope.

Membership Growth

- Expansion:
The South Pacific Region has grown at a steady rate. The region has added five collegiate and two alumni chapters since 2011. The region did lose one chapter due to boundary lines and one chapter due to university policies in the last five years.

Current colony possibilities: Azusa Pacific University, Cal State Channel Islands, Cal State Dominguez Hills, and Cal State Los Angeles.

Alumni Chapter expansion possibilities: Santa Barbara area and Honolulu-Oahu (refranchise).
- Collegiate chapters have 30 active members:
The region has four chapters that hover around 30 due paying members. One chapter is currently below 30.

Six chapters are currently below their ideal size, based on enrollment numbers. However, two of those chapters were recently/currently are on probation which resulted in a lost pledge class. Another chapter is in its second year of existence and continues to grow.

Member Engagement

- Collegiate:
Many chapters are recruiting well, but executing poorly. Meaning that membership expectations are not being clearly communicated during recruitment and pledge period and



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the best events are during the formal recruitment period and then taper off. It is a goal of the region to work on improving member engagement and recruitment practices.

- **Alumni:**

The South Pacific Region continues to have success in finding ways to engage alumni. For the last three years the region has used Alumni Chapter District Directors as Assistant District Directors at collegiate chapters to help them train for a year under seasoned DD's and create a pipeline of future leaders. The awards committee, for the past three years, has invited the previous years Regional COY to serve on the committee for the COY award selection to great success. The Leadership Foundation is promoted through social media and collegiate chapter newsletters to alumni. And all alumni chapters had a seated delegate at the 2019 GCC and Provincial LEAD.

Focus will be made with alumni chapters and working with VPARs to engage more alumni in Spring 2020.

Organizational Excellence

- **CMP:**

There has been a drastic improvement in CMP performance over the past three years in the region. At the end of 2016, only 55% of chapters reached a Tier. For the past two years, all chapters eligible (not on probation/suspension) reached Chapter of Recognition or Chapter of Excellence. Continued focus is placed on CMP education since it is not transitioned well. Chapters are also discussing rewards for reaching the higher tiers and brainstorming continues after the region voted against an endowment fund based on CMP performance.

- **Executive Committees:**

A focus in the region is continued improvements of officer transition. In the fall, a regional conference is held with officer specific sessions and continues to garner positive feedback. Additionally, chapters are being asked to evaluate their current officer, chair and committee structure to ensure job roles are clearly defined and all members are contributing to the success of the chapter.

BEST PRACTICES

Communication, accountability and flexibility are key for success. This region has had fires, earthquakes, volcano eruptions, hurricanes and shootings in the past eighteen months and I continue to be amazed at the support and resilience brothers show during these times. When chapters and brothers have faced these, others immediately respond with "what can we do to help" or "we can make our campus available for their events".



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Listen. Sometimes the best thing I can do is to sit and listen to others. Listen to their ideas without feedback or judgment, listen to them share their bad day or bad meeting, listen to their goals or frustrations. I am lucky to have brothers who will do this for me.

I would certainly be remiss if I did not give credit to my incredible District Director team and regional committees and chairs. Thank you for all you do and know I appreciate your time, support and knowledge.

CHAPTER	DISTRICT DIRECTOR	Awards Committee
Delta Sigma (LMU)	Alex De Souza	Matt Temple – Chair
Eta Chi (Cal Poly Pomona)	Louise Santos	Adrian Avalos
Iota Upsilon (CSUN)	Jami Ball	Melinda Cooper-Polakoff
Lambda Phi (CSULB)	Rick Boner	William Kinsella
Lambda Psi (Hilo)	Krystle De Los Santos	Deniece Santos
Xi Omicron (UCLA)	Alexa Whitelaw	Erica Verderico
Rho Sigma (UCSB)	Yared Wolde-Mariam	Mike Woolson
Rho Upsilon (Pepperdine)	Whitney Massey	Eryn Yuasa (COY award only)
Rho Chi (Manoa)	Krystle De Los Santos	Marketing Chair: Katelyn Mauricio
Tau Omega (La Verne)	Paul Garcia	
Upsilon Chi (Cal Lutheran)	Lynnette Servaes	
Los Angeles Alumni Chapter	Sam Brenner	