

INTERNATIONAL FRATERNITY OF DELTA SIGMA PI, INC.
MINUTES
WESTERN PROVINCIAL COUNCIL MEETING
February 9th, 2025
Portland, Oregon

A. Opening Ritual (Closed Session – Members Only)

B. Call the meeting to order

The **Western Provincial Council Meeting** of the International Fraternity of Delta Sigma Pi, Inc. was called to order according to Ritual at **9:30 a.m.** on **Sunday, February 9th, 2025**, by **Western** Provincial Vice President **Erica Kolsrud** at the **Sheraton Portland Airport Hotel** in **Portland, Oregon**.

Present and in person at this meeting were the following officers of the **Western Province**:

Erica Kolsrud	Western Provincial Vice President
Shannon Kho	Interim Bay Area Regional Vice President
Davis Levy	Desert Mountain Regional Vice President
Tim Beasley	Pacific Coast Regional Vice President
Jazzle Paraiso	Pacific Northwest Regional Vice President
Julian Reyes-Cruz	South Pacific Regional Vice President

Absent officers of the **Western Province** were:

Austin Odle	Rocky Mountain Regional Vice President
Cody Heimerdinger	Sierra Nevada Regional Vice President

Other positions were as follows:

Bill Kinsella	Chancellor
Hunter Weber	Recording Secretary

C. Roll call of the Delegates

At this time, **Kolsrud** relinquished the chair to Chancellor **Kinsella**, who introduced Secretary **Weber**. **Weber** then conducted the Roll Call of Delegates and announced 38 delegates present and eligible to vote. **Alpha Nu** moved to adopt the roll of voting delegates. The motion was seconded by **San Francisco Bay Area Alumni Chapter** and adopted. **See Addendum A for the Western Attendance Report**.

D. Adopt Agenda

Rho Phi then moved to adopt the Agenda as presented. The motion was seconded by **Eta Chi** and approved.

E. Approve the minutes of the previous Council meeting.

Lambda Mu moved to dispense with the reading of the minutes of the **2024 Western** Provincial Council Meeting and to approve the minutes as previously distributed. Seconded by **Delta Sigma** and approved.

F. Review votes taken since the last meeting.

Kolsrud reviews votes taken since the last meeting.

- Mail Vote - Fiscal Year 25 Budget
- Mail Vote - 2026 Provincial Council Meeting Location and Date Prioritization

G. Receive the Western Provincial Leadership Team Report

Eta Chi moved to receive the printed Official Reports as distributed to the delegates. **Zeta Omega** seconded, and the motion was adopted. Feedback was requested from the Province on the content of the report. **See Addendum B for the report as originally distributed. See Addendum J for notes taken of the feedback.**

H. OLD BUSINESS

Chancellor **Kinsella** then noted there was no old business and moved into new business.

I. New Business

North Hollywood then moved **the 2026 Provincial Budget**. The motion was seconded by **Rho Phi**.

The 2026 Provincial Budget was then adopted. **See Addendum C for the Proposed Provincial Budget as originally distributed.**

Nu Phi then moved **Ritual Proposal 1** [Updates to the Pledging Ceremony]. The motion was seconded by **Tau Chi**.

Ritual Proposal 1 was then adopted. **See Ritual Proposal 1 as originally distributed.**

Lambda Mu then moved **Ritual Proposal 2** [Updates to the Initiation Ceremony]. The motion was seconded by **San Francisco Bay Area**.

Ritual Proposal 2 was then adopted. **See Ritual Proposal 2 as originally distributed.**

Alpha Nu then moved **Bylaw Proposal 1** [Changes to the Policies]. The motion was seconded by **Iota Phi**.

Orange County Alumni Chapter moved to amend **Bylaw Proposal 1**. **Mu Rho** Seconded.

Amendment to: Strike "Or a majority vote of the Grand Chapter" from line 2 and unstrike "approved by the board of directors" from line 4 of section 1

Add "as a resolution" to page 3, section 2, line 11 between "for consideration" and "as hereinafter"

Add "as a resolution" to page 4, section 2, line 2 between "by mail ballot" and "as hereinafter"

Add "as a resolution" to page 4, section 3, line 12 between "for consideration" and "as hereinafter"

Add "as a resolution" to page 4, section 3, line 21 between "by mail ballot" and "as hereinafter"

Amendment to Bylaw Proposal 1 was then **adopted**. See **Addendum G** for full text of amendment.

Bylaw Proposal 1 (as amended) was then **adopted**. See **Addendum F** for **Bylaw Proposal 1** as originally distributed.

Mu Chi then moved **Policy Proposal 1** [Updates to the Collegiate Chapter Officer Structure]. The motion was seconded by **Gamma Psi**.

Zeta Omicron moved to amend **Policy Proposal 1**. **Upsilon Psi** Seconded.

- Section G. Policy 2. Item D.
 - o Strike pledge education and un-strike finance
- Section D. Policy 12. Item F.
 - o Unstrike entire line
- Section D. Policy 15. Item E.
 - o Strike entire line

Amendment 1 to Policy Proposal 1 was then **adopted**. See **Addendum I** for full text of amendment.

Desert Mountain RVP moved to amend **Policy Proposal 1**. **North Hollywood** Seconded.

- Strike Policy 9 in its entirety from Policy 9 from the Policy Proposal 1.

Amendment 2 to Policy Proposal 1 was then **failed**.

11 delegates in favor

14 delegates opposed

0 delegates abstained

Policy Proposal 1 (as amended) was then **adopted**. See **Addendum H** for **Policy Proposal 1** as originally distributed.

18 delegates in favor

7 delegates opposed
0 delegates abstained

J. General announcements

Kolsrud made announcements and then **Kinsella** invited others to make announcements.

- Kolsrud Announcements:
 - Review schedule of upcoming meetings/events
 - April 23-25 | 4/25 Alumni Day Drive
 - April 25 | Alumni Day
 - August 6-10 | Grand Chapter Congress – Palm Springs
 - October 24 | Make A Difference Day
 - November 7 | Founders' Day
 - November 7-8 | Founders' Day Challenge
- Other announcements from chapters
 - If passionate about structure of the chapter, talk to the PVP and name could be put forward to add that voice
 - Registration for GCC is open and take advantage of the early discount
 - Take a look at the candidate's beacon for GCC
 - Upsilon Psi: Encourage the chapters to reach out to their RVP for financial support of technologies like the hub

K. Adjournment

Kinsella then adjourned the **Western Provincial Council** Meeting at **11:49 a.m.** after a motion by **North Hollywood, Lambda Mu** second, was approved by consensus. **Kolsrud** then closed the meeting according to Ritual.

L. Closing Ritual (Closed Session – Members Only)

Erica Kolsrud

Erica Kolsrud, Provincial Vice President

Hunter Weber

Hunter Weber, Recording Secretary

Addendum A Western Attendance Report

#	chapter	Eligible	Chapter President		President Email	Alternate (If Submitted)	Date ADF Received	ADF Submitted By	Reason for Ineligibility
36	Alpha Nu (University of Denver)	Yes	Kjersti A. Warwick	NOT REGISTERED	kjersti.warwick@gmail.com	Evan Valdes-Halterman	1/15/2025	Kjersti A. Warwick	
40	Alpha Rho (University of Colorado-Boulder)	Yes	Myles Rubin	NOT REGISTERED	rubeam04@gmail.com	Barrett Bunham	1/10/2025	Myles Rubin	
75	Gamma Iota (University of New Mexico)	Yes	Asia Rodriguez-Garcia	REGISTERED	asiazarcedo1@gmail.com				
80	Gamma Xi (Santa Clara University)	Yes	Ryan Alapatt	REGISTERED	ryanalapatt@gmail.com				
87	Gamma Phi (University of Texas-El Paso)	No	Eduardo Ontiveros	REGISTERED	eontiveros401@gmail.com				On Probation
89	Gamma Psi (University of Arizona)	Yes	Chance Braden Baganz	NOT REGISTERED	cbaganz@arizona.edu	Ethan Chuang	2/3/2025	Ethan Chuang	
90	Gamma Omega (Arizona State University)	Yes	Josh David Snodgrass	NOT REGISTERED	ajds10@outlook.com	Katelyn LeBlanc	2/7/2025	Josh David Snodgrass	
101	Delta Omicron (San Francisco State University)	No	Kaelyn Rupprecht	NOT REGISTERED	president.dsdpd@gmail.com	Dawson Wu	2/7/2025	Dawson Wu	On Probation
102	Delta Pi (University of Nevada-Reno)	No	Jack Bowden Nowling	NOT REGISTERED	jacknowling@hotmail.com				On Probation; Past Due Balance: \$3707.28 (Current balance: \$4391.85)
104	Delta Sigma (Loyola Marymount University)	Yes	Haley Michelle Varenchik	NOT REGISTERED	haleyvarenchik@lclmud.com	David Delgado			
113	Epsilon Theta (Cala State University-Chico)	No	Jaclyn Abigail Zwellfer	NOT REGISTERED	jaclynzwellfer@gmail.com	Joaquin Gonzalez			On Probation
125	Epsilon Upsilon (New Mexico State University)	Yes	Michael Tavares	REGISTERED	michaeltavares2003@gmail.com	Kassandra Vasquez	2/4/2025	Michael Tavares	
126	Epsilon Phi (Cal State University-Sacramento)	Yes	Alexia Sophia Munteanu	REGISTERED	alexiamunteanu@gmail.com	Melissa Espinoza			
142	Zeta Tau (Cal State University-East Bay)	No	Robert Adam Goldasio	NOT REGISTERED	rgoldasio@horizon.csueastbay.edu				Past Due Balance: \$352.18 (Current total balance: \$740.70; Current past due balance: \$348.69)
147	Zeta Omega (Northern Arizona University)	Yes	Cade Clary	REGISTERED	cadeclary03@outlook.com				
162	Eta Chi (Cal State Poly University-Pomona)	Yes	Nikki Taylor Leventhal	NOT REGISTERED	nikkitt2004@gmail.com	Andrew Soel	2/4/2025	Mia Marie Doherty	
178	Theta Chi (San Jose State University)	Yes	Nathan Dakota Pham	NOT REGISTERED	nathamp3214@gmail.com				
187	Iota Pi (San Diego State University)	No	Shayla Reisieh	REGISTERED	shayareisieh@gmail.com				On Probation
191	Iota Upsilon (Cal State University-Northridge)	Yes	Leyna Do	REGISTERED	leynalnhdo@gmail.com				
192	Iota Phi (Cal State University-Fresno)	Yes	Omar Banuelos	REGISTERED	o.banuelos99@gmail.com				
197	Kappa Mu (Cal Poly State University-San Luis Obispo)	Yes	Brandon Williams	NOT REGISTERED	brandoncody2@gmail.com	Jacob Hernandez	2/7/2025	Brandon Williams	
210	Lambda Mu (University of the Pacific)	Yes	Mariana Arellano	REGISTERED	pacifodeltasigmap@gmail.com				
214	Lambda Mu (University of the Pacific)	No	Ryan Jacob Tertel	NOT REGISTERED	rtterel@sandiego.edu	Nazlie Chinchilla	1/29/2025	Ryan Jacob Tertel	On Probation
216	Lambda Sigma (Cal State University-Fullerton)	Yes	Anrika Revilla	REGISTERED	anrevilla@gmail.com				
218	Lambda Phi (Cal State University-Long Beach)	Yes	Ava Kalista Balaguer	REGISTERED	ava.kalista@gmail.com				
221	Lambda Psi (University of Hawaii-Hilo)	No	Alfred David Evangelista	REGISTERED	ade6@hawaii.edu				Past Due Balance: \$721.47 (Current total balance: \$1166.18; Current past due balance: \$630.17)
227	Mu Rho (Colorado State University)	Yes	William Tyler Argolsinger	REGISTERED	tlarg04@gmail.com				
232	Mu Chi (University of Colorado Colorado Springs)	Yes	Cerenity Faith Ford	REGISTERED	cerenityf9@gmail.com				
242	Nu Phi (University of Northern Colorado)	Yes	Keller McBride	REGISTERED	kjmc03@comcast.net	Joah Mohr	2/6/2025	Keller McBride	
246	Xi Omicron (University of California-Los Angeles)	Yes	Tarin Pisharody	NOT REGISTERED	tarinpisharody@gmail.com				
263	Omicron Psi (Washington State University)	Yes	Jack Gregory	REGISTERED	thjackson0901@gmail.com				
266	Pi Sigma (University of California-Irvine)	Yes	Thomas Gustav Wunsch	REGISTERED	thomasmwunsch2487@gmail.com				
270	Pi Chi (University of California-Santa Cruz)	No	Adaora Enyekwe	NOT REGISTERED	adaoraenyekwe@gmail.com	Denisha Agarwal			Past Due Balance: \$1224.33 (Current total balance: \$1717.32; Current past due balance: \$1360.72)
273	Rho Sigma (University of California-Santa Barbara)	Yes	Jodi Ching	NOT REGISTERED	jodiching81@gmail.com				
276	Rho Upsilon (Pepperdine University)	Yes	Vincent Vergara	NOT REGISTERED	vinvc007@gmail.com				
276	Rho Phi (Concordia University)	Yes	Madeline Hernandez	NOT REGISTERED	madeline.ah0224@gmail.com	Michael Clow	2/2/2025	Madeline Hernandez	
277	Rho Chi (University of Hawaii-Manoa)	Yes	Morina Joan Cleavenger	NOT REGISTERED	maricjcw1100@gmail.com	Sarah Eitel			
281	Sigma Upsilon (University of Washington-Seattle)	Yes	Lily Kasic	NOT REGISTERED	lykasic@gmail.com	Jonah Foss	2/5/2025	Lily Kasic	
282	Sigma Phi (Chapman University)	Yes	Desirae K. Jeffers	REGISTERED	kanatajeffers@gmail.com	Samay Bhasin	2/5/2025	Desirae K. Jeffers	
288	Tau Chi (University of California-Merced)	Yes	Cassandra Gonzalez	REGISTERED	cgonzalez3823@gmail.com				
290	Tau Omega (University of La Verne)	Yes	Eden Ricketts	NOT REGISTERED	eden.ricketts@laverne.edu				
292	Upsilon Chi (California Lutheran University)	No	Elexa Klubbenud	NOT REGISTERED	eklubbenud@calutheran.edu				Past Due Balance: \$2068.59 (Current total balance: \$2007.50; Current past due balance: \$2007.50)
293	Upsilon Psi (University of Washington-Bothell)	Yes	Mei Hanwey	REGISTERED	mhanaway30@gmail.com				
556	North Hollywood (CA) Alumni Chapter	Yes	Jami M. Ball	NOT REGISTERED	jamie.ball@disney.com	Paul Garcia	1/25/2025	Jami M. Ball	
570	Denver Alumni Chapter	Yes	Susan E. Hausman	NOT REGISTERED	shausman22@gmail.com	Nick Rizzi			
585	El Paso/Las Cruces San City Alumni Chapter	Yes	Grissel R. Rodriguez	NOT REGISTERED	grisselrodriguez@gmail.com				
607	Hawai Alumni Chapter	Yes	Stephen Sumio Nishimoto	NOT REGISTERED	stephen85@gmail.com				
676	Orange County (CA) Alumni Chapter	Yes	Timothy G. Beasley	REGISTERED	PacificCoastRVP@dsip.org	Carley Haro	1/26/2025	Timothy G. Beasley	
680	Phoenix-Thunderbird Alumni Chapter	Yes	Katie McGrath Liu	NOT REGISTERED	western.communityservice@dsip.org	David Pratt			
680	Reno Sierra Nevada Alumni Chapter	Yes	Cody Heimerdinger	NOT REGISTERED	SierraNevadaRVP@dsip.org				
710	San Francisco Bay Area Alumni Chapter	Yes	Gordon Wan	REGISTERED	gordon.wan41@gmail.com				
755	Inland Empire (CA) Alumni Chapter	Yes	Kelly A. Rupp	NOT REGISTERED	kelly.rupp@yahoo.com				
756	Sierra Nevada Alumni Chapter	Yes	Henry Lopez	NOT REGISTERED	henrylopez20@yahoo.com				
	Western Province Provincial Vice President	Yes	Erica Koberud	REGISTERED					
	Sierra Nevada Regional Vice President	Yes	Cody Heimerdinger	NOT REGISTERED					
	Bay Area Regional Vice President	Yes	Sharon Kho	REGISTERED					
	Desert Mountain Regional Vice President	Yes	Davis Levy	REGISTERED					
	Pacific Northwest Regional Vice President	Yes	Jazzie Paraiso	REGISTERED					
	Pacific Coast Regional Vice President	Yes	Tim Beasley	REGISTERED					
	Rocky Mountain Regional Vice President	Yes	Austin Ode	NOT REGISTERED					
	South Pacific Regional Vice President	Yes	Julian Reyes-Cruz	REGISTERED					

Checked in and verified
Late
Not Checked in
Left Early
Present but not eligible

Chapters to updated on Printout:	Chapters not anticipated to show:	Chapters to be eligible:	Left Early
Kappa Mu	Delta Pi	Lambda Psi	Kappa Mu (9:40am)
Gamma Omega	Zeta Tau	Pi Chi	Alpha Rho (9:49am)
Delta Omicron	Upsilon Chi	Zeta Tau	Epsilon Upsilon (10:41am)
	Theta Chi		Gamma Phi (10:41am)
	Inland AC		Nu Phi (11:01am)
			Iota Upsilon (11:07am)
			Pi Chi (11:13am)
			Denver Alumni (11:27am)
			San Francisco Bay Area (11:27am)
			Tau Chi (11:27am)
			Mu Chi (11:27am)
			Rho Phi (11:30am)
			Delta Sigma (11:31am)
			Eta Chi (11:32am)

	Starting Count:	At End Count:
Certified	38	25
Not Eligible but present	5	4
Not Checked-in	19	19
Total Chapters	61	61
Percentages	62%	41%

66% <- Quarium change

#	chapter	Eligible	Chapter President		President Email	Alternate (If Submitted)	Date ADF Received	ADF Submitted By	Reason for Ineligibility
36	Alpha Nu (University of Denver)	Yes	Kjersti A. Warwick	NOT REGISTERED	kjersti_warwick@gmail.com	Evan Valdez-Hallerman	1/15/2025	Kjersti A. Warwick	
40	Alpha Rho (University of Colorado-Boulder)	Yes	Myles Rubin	NOT REGISTERED	rubesm04@gmail.com	Barnett Burnham	1/10/2025	Myles Rubin	
75	Gamma Iota (University of New Mexico)	Yes	Asia Rodriguez-Garcia	REGISTERED	asiargarcia1@gmail.com				
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87	Gamma Phi (University of Texas-El Paso)	No	Eduardo Ontiveros	REGISTERED	eontiveros401@gmail.com				On Probation
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676	Orange County (CA) Alumni Chapter	Yes	Timothy G. Beasley	REGISTERED	PacificCoastRVP@dsp.org	Carley Haro	1/26/2025	Timothy G. Beasley	
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	Western Province Provincial Vice President	Yes	Erica Kolanud	REGISTERED					
	San Ramon Valley Vice President	Yes	Cody Heimerdinger	NOT REGISTERED					
	Bay Area Regional Vice President	Yes	Sharon Kho	REGISTERED					
	Desert Mountain Regional Vice President	Yes	Davis Levy	REGISTERED					
	Pacific Northwest Regional Vice President	Yes	Jazzie Paraiso	REGISTERED					
	Pacific Coast Regional Vice President	Yes	Tim Beasley	REGISTERED					
	Rocky Mountain Regional Vice President	Yes	Austin Ode	NOT REGISTERED					
	South Pacific Regional Vice President	Yes	Julian Reyes-Cruz	REGISTERED					

Checked in and verified
Need Alternate Form
Not Checked in
Potential Seat

Chapters to updated on Printout:
Kappa Mu
Gamma Omega
Delta Omicron

Chapters not anticipated to show:
Delta Omicron
Delta Pi
Zeta Tau
Upsilon Chi
Theta Chi
Inland AC

Chapters to be eligible:
Lambda Psi
Pi Chi
Zeta Tau

Current Count:
30 Certified
6 Need to be certified
25 Not checked-in

2025

Western Province Annual Report



DELTA SIGMA PI®



Table Of Contents

Introduction

Strategic Priorities Overview

Membership Education

Membership Growth

- **Pledge Retention and Chapter Size**
- **Hearings, Inactive Status & Voluntary Withdrawal**
- **Data Chapter Dues vs. Average Family Income**
- **Province Qualified Programs**

Member Engagement

- **Chapter Event Data**
 - Professional
 - Community Service
 - Diversity, Equity, Inclusion

Organizational Excellence



Introduction

Last year, we embraced a new format for the Provincial Report, and we're thrilled to continue it this year with additional benchmarks to guide our progress.

As we embark on another year of growth and development, we remain committed to identifying areas of improvement and leveraging our strengths. Your leadership team is working diligently with staff to combine resources and provide members and chapters with the tools they need to succeed.

In this report, you'll find data on pledge retention, dues, engagement, events, and leadership team demographics. We encourage your chapter to review this information and engage with your DDs, ADDs, RVPs, and PVP to discuss trends, identify challenges or barriers, and share ideas for improvement. Our aim is to use this document as a catalyst for meaningful conversations and actionable insights.

Here are a few highlights from the past year in the province:

- Collectively, chapters in the Western Province have over \$43,000 in Chapter Leadership Funds.
- Over \$64,000 in Chapter Leadership Funds have been utilized for scholarships and programming, reflecting strong engagement with the Leadership Foundation's opportunities.
- The province's Standards training completion rate is now at 83%, up by 8% from last year, demonstrating an ongoing commitment to excellence.
- 9 brothers were awarded scholarships from the Leadership Foundation.
- 2 Chapters won National Awards - Tau Chi for Professional Activities and Gamma Psi for Financial Operations and Scholastic Development!

Thank you to everyone who contributes to our success—from alumni leaders who volunteer countless hours to serve the fraternity to collegiate brothers who embody the purpose of Delta Sigma Pi, and our alumni chapters who exemplify the motto, "It's not just four years; it's for life."

We look forward to connecting with your chapters as we approach Provincial Council!

Fraternally,

Western Province
Leadership Team



Strategic Priorities



Goals for strategic priorities are as follows:

Member development: Increase the annual number of overall learners through live events and webinars by at least 5% each year and 50% over the term of the priorities.

Leadership Development: Provide training for chapter officers and volunteer leaders, with 95% participation

Chapter Expansion: Install or reactivate at least 30 collegiate chapters over the term of the priorities.

Membership: Increase combined fall and spring dues paying collegiate members by 10% over the term of the priorities.

Alumni Engagement: Generate trackable engagement of 30,000 alumni over the term of the priorities with an increase of 10% every year as they interact with the organization via channels including but not limited to volunteers, donors, event participants, supporters of chapter or regional activities, or otherwise engaging in national initiatives.

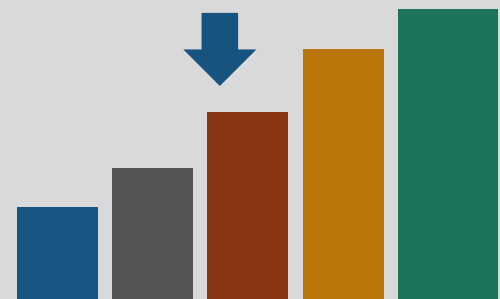
Member Retention: Engage 50% of new alumni within three years after their graduation, while retaining annually 45% of the prior year's overall engaged alumni.

Financial: Decrease financial dependence on revenue from members by annually increasing non-dues/fees revenue by 5%. On the Provincial level, this is measured by Chapter Leadership Fund dollars granted to chapters and money raised by chapters through fundraising.

Fraternal Organization: 75% of collegiate and alumni chapters achieve established minimum health indicator.



Look at the bottom of each page to see which Priority that section is supporting



Member Education

Equip members to excel as ethical leaders on campus and in the community.

Educating members to stand out as ethical leaders on campus and beyond is about educating all members (pledges, collegiate, alumni, faculty, and volunteers), providing easily available access when needed. Education should include training for all aspects of the fraternal lifecycle, including the skills needed for academic, career, and life success.

GOAL: Member Development: Increase the annual number of overall learners through live events and webinars by at least 5% each year and 50% over the term of the priorities.



Year	Annual Learners	Yearly Growth	Overall Growth
21-22	677	--	--
22-23	560	-17.28%	-17.28%
23-24	578	3.21%	-14.62%
24-25	354	-38.75%	-47.71%

GOAL: Leadership Development: Provide training for chapter officers and volunteer leaders, with 95% participation

PROVINCIAL STATUS:

38% of 440 officers
have completed their designated pieces of training

We have seen a steady decline in leaders attending events and completing officer training year-over-year. Western Province saw a growth decline of 47% from last year in relation to events, which is 7.04% worse than the National tracking of 40.67% decline.

Contributing factors could be barriers to access and entry to events and learning. Whether that be the frequency of events online, costs of traveling to in-person learnings, or dates of in-person events conflicting with other obligations.

Concerning officer training, more can be done to examine the content of current pieces of training being offered and the ROI and helpfulness of them. Additionally, we have been unable to reach out to officers who have not completed their training as the HUB reporting broke in 2023.

Member Growth

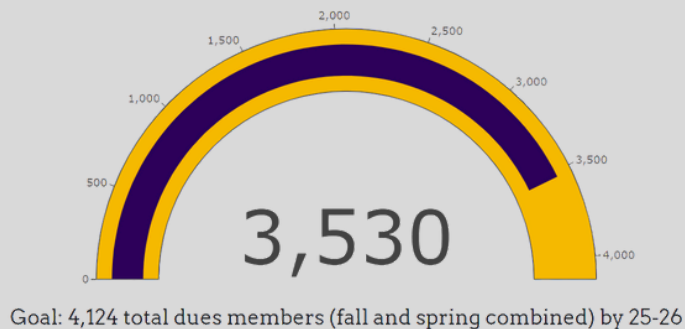
Attract and retain diverse students, alumni, and community leaders.

Increasing diverse membership in local chapters ensures unique perspectives and enhances the member experience. Opening chapters at new campuses and returning to campuses that have previously closed, enhances brand recognition and opens doors within additional communities and business communities.

GOAL: Chapter Expansion: Install or reactivate at least 30 collegiate chapters over the term of the priorities.

▲	Chapters Installed Since 7/1/21	◆	Current Startup Groups	◆	Targets for Future Expansion	◆
1	No New Chapters Yet		No Active Startup Groups Yet		Boise State University	
2					California State University-Stanislaus	
3					Central Washington University	
4					Eastern Washington University	
5					Idaho State University	
6					Montana State University	
7					Oregon State University	
8					University of Montana	
9					University of Oregon	
10					University of Utah	
11					Utah State University	
12					Western Washington University	

GOAL: Membership: Increase combined fall and spring dues paying collegiate members by 10% over the term of the priorities.



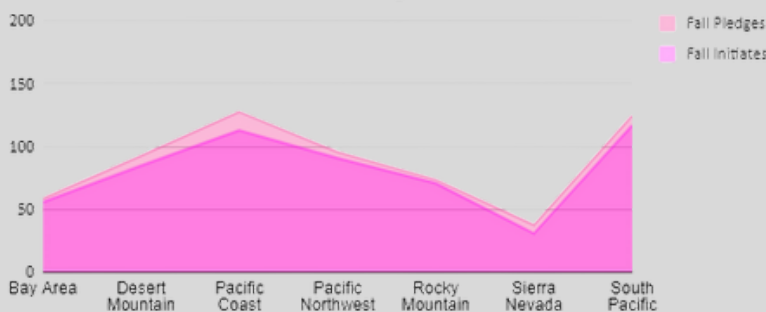
The next few pages will look at contributing factors to the membership goal. Data of Pledge Retention, Ideal Chapter Size, Hearings/VW/Inactive Status, Dues vs. Income, and Qualified Programs were examined to create a base point for chapter growth.

Those data points create a bridge to the Membership Engagement and Organization Excellence Strategic Priorities and how they factor into an overall picture of the fraternal experience.

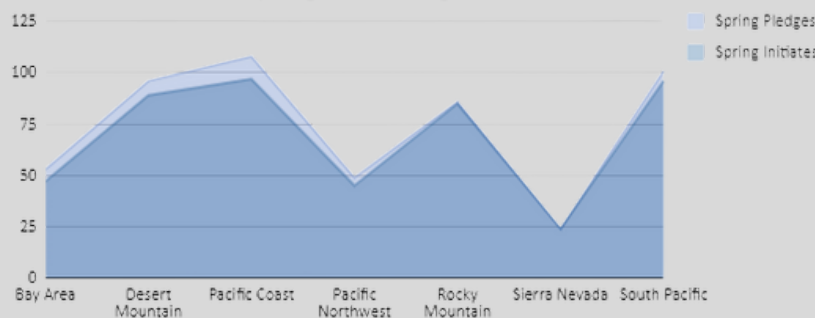
Pledge Retention and Chapter Size

The pledge retention rate within the Western Province continues to stay above 90% year-over-year. In the 2024 fiscal/academic year, the province initiated 92% of those who pledged the fraternity that year, a 1% increase from FY 2023. The Rocky Mountain and South Pacific Regions had the highest percentage with 95% retention, with the Pacific Coast and Sierra Nevada Regions the lowest with 88% and 81% respectively.

Fall 2023 Pledge Retention

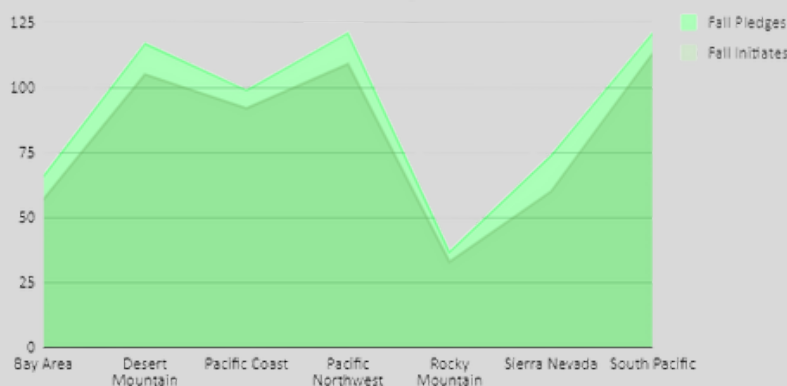


Spring 2024 Pledge Retention



The province seems to be off to a strong start for the 2024 fiscal/academic year. The fall term saw an overall 89.05% pledge retention rate, with the South Pacific Region leading at 93%. Improvements are being tracked for the Pacific Coast Region at 92% for the fall term and a decline with the Desert Mountain and Sierra Nevada Regions the lowest with 89% and 81.08% respectively.

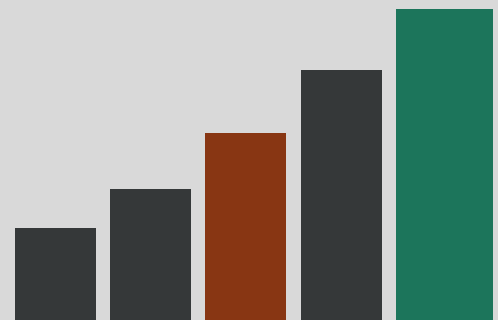
Fall 2024 Pledge Retention



Currently, 2 chapters are higher than their ideal member size, while only 3 chapters are below the ideal size. This leaves 38 chapters in the ideal member range (+/- 20 from ideal size). This is a large improvement from last year. Ideal size is based on enrollment numbers.



Sigma Phi chapter at the Pacific Coast Joint Initiation Fall 2024 at Cal State Fullerton. Over 150 brother attended to welcome 40+ new brothers in November 2024



Hearings/Inactive Status/ Voluntary Withdrawal



83% of Western Chapters had a Chancellor complete their training and had a fully trained committee by the end of the fall semester. This is up from 75% last year. Of the chapters that held a hearing, 75% were fully trained by the date of the hearing, an improvement from 61% last year.

Of the 118 hearings conducted in the last year, a staggering 68% resulted in an expulsion. There were no appeals although many could have been appealed on the basis of the Chapter Standards Committee not following policy.

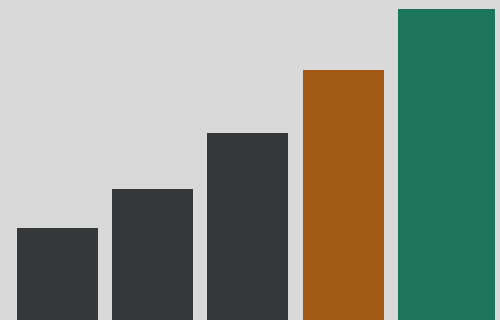
	Within Policy by semester start	Within Policy by semester end	Within policy for hearing	Hearings	Appeals	Expulsions	Suspensions	Fines	Probations	Reprimands	Not Guilty/No Penalty
Fall 24	79.07%	83.00%	75.00%	57	0	43	1	8	3	2	0
Spring 24	75.56%	88.00%	70.50%	61	0	38	0	0	10	12	1
Fall 23		75.56%	61.54%	3	0	32	0	0	2	0	6

2024 saw an decrease in Voluntary Withdrawal requests submitted. However, more were approved in 2024 than 2023.

Voluntary Withdrawl	Requests Submitted	Approved	Denied
Spring 2024	11	4	7
Fall 2024	12	1	11
Spring 2023	15	0	14
Fall 2023	17	3	12

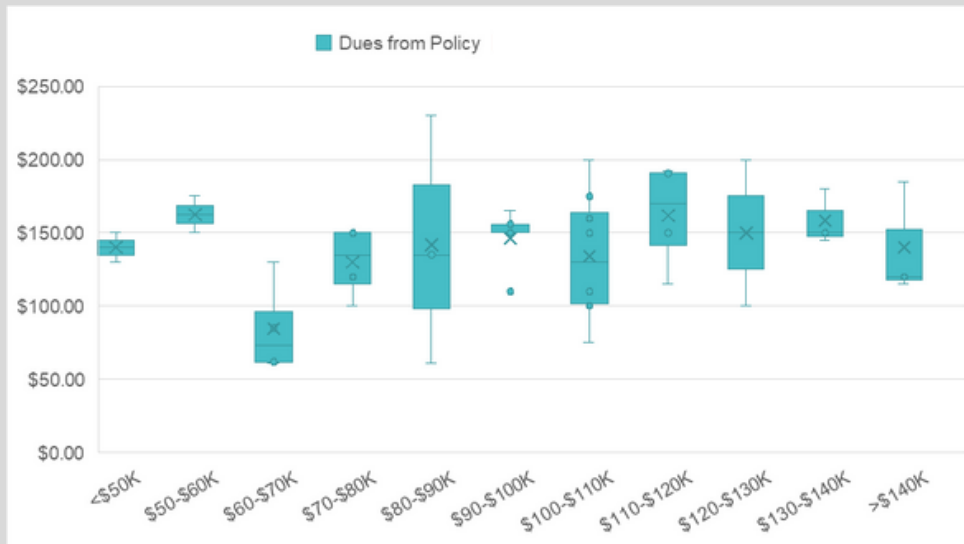
2024 saw an increase in the number of inactive status requests submitted.

Inactive Status	Requests Submitted	Approved	Denied
Spring 2024	11	4	7
Fall 2024	41	30	11
Spring 2023	26	11	11
Fall 2023	27	10	14



Chapter Dues vs. Avg Family Income

The cost of participation in Delta Sigma Pi varies across chapters within the Western Province. When analyzing the average dues reported across the province, we observed that these dues show little correlation to the Median Student Family Income* of the universities. For instance, chapters at universities with a median family income below \$50,000 reported dues averaging \$140, while chapters at universities where the median family income exceeded \$140,000 reported dues of \$142 on average. This lack of proportionality highlights a potential inequity, where chapters at lower-income universities may face a higher financial burden relative to their members' family income.



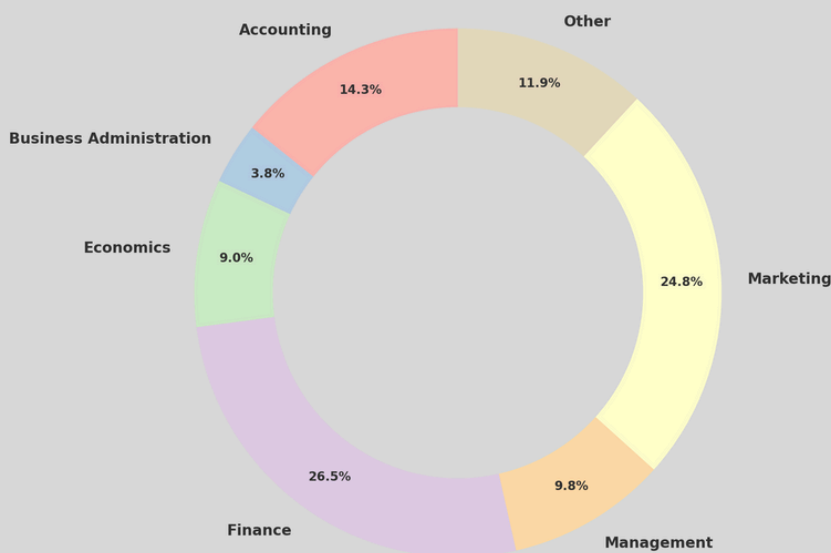
A different trend emerges when considering chapter size in relation to dues. While smaller chapters with fewer than 20 members report dues that are comparable to those of larger chapters with 60 or more members, their overall operating budgets are significantly smaller. Larger chapters benefit from economies of scale, where the cumulative dues from more members result in a much larger gross budget. In contrast, smaller chapters must operate with significantly fewer resources, even though their members face similar financial obligations. This dynamic underscores the financial challenges smaller chapters face in maintaining operations and organizing impactful programming with limited funds.



Western Province Qualified Programs



There are 111 different qualified programs represented in the Western Province. A significant 88.1% of our current collegiate members are concentrated in just six majors: Accounting, Finance, Marketing, Management, Business Administration, and Economics. This leaves only 11.9% of members representing all other programs, highlighting the underrepresentation of brothers from diverse academic disciplines.



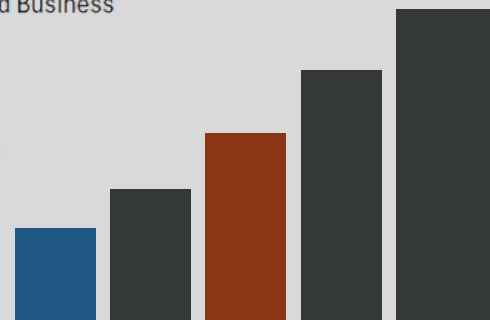
During the 2024 Fiscal/Academic Year, 20 qualified program requests were submitted in the Western Province. 15 were approved, and 5 were not approved.

Two have been submitted for the 2025 Fiscal/Academic Year, and both have been approved.

FY 24 & FY 25 Approved Programs

Chapter Name	School	Program Name
Zeta Omega	Northern Arizona	Business Analytics
Gamma Psi	Arizona	Agribusiness Economics and Man
Gamma Omega	Arizona State	Business Entrepreneurship
Gamma Omega	Arizona State	Business Data Analytics
Gamma Omega	Arizona State	Sports Business
Iota Upsilon	Cal State-Northridge	Business Analytics
Rho Upsilon	Pepperdine (CA)	Sport Administration
Lambda Phi	Cal State-Long Beach	Graduate MBA Business
Omicron Psi	Washington State	AMDT - Merchandising
Omicron Psi	Washington State	Management
Omicron Psi	Washington State	Senior Living Management
Omicron Psi	Washington State	Wine & Beverage Business Mgmt
Omicron Psi	Washington State	Agricultural and Food Business
Omicron Psi	Washington State	Economic Sciences
Upsilon Chi	California Lutheran	Accounting

And we hope to see the number continue to grow in the coming year! Chapter's SVPs can submit programs via HUB, the qualified program must meet the 50% qualification ratio as outlined on the form. We recommend checking for programs before the start of each academic year.



Member Engagement

Provide members with meaningful involvement opportunities at every stage in life.

Lifelong member engagement encompasses the ongoing interaction and emotional commitment between our members and Delta Sigma Pi. This involves developing a deeper understanding of how and why members are and want to participate, and better aligning activities with varied interests and experiences - especially offering opportunities that don't require overwhelming time, financial, or travel commitments.

GOAL: Alumni Engagement: Generate trackable engagement of 30,000 alumni over the term of the priorities with an increase of 10% every year as they interact with the organization via channels including but not limited to volunteers, donors, event participants, supporters of chapter or regional activities, or otherwise engaging in national initiatives.

9256 alumni engaged since 7/1/21 from the Western Province

Year	Total Alumni Engaged	Annual % Growth	Alumni Engaged For First Time
21-22	3,857	--	3,857
22-23	4,024	4.329%	2,207
23-24	4,160	3.379%	1,771
24-25	3,501	-15.8%	1,421

GOAL: Member Retention: Engage 50% of new alumni within three years after their graduation, while retaining annually 45% of the prior year's overall engaged alumni.

1,587 of 2,744 recent grads have engaged as alumni



There is a decline in activity from a large number of alumni chapters within the Western Province over the last few years. The hope is it is temporary and an uptick in events and engagement will happen in the near future.

The Western Province Alumni Development Chair hopes to see growth in franchised alumni chapters for the next fiscal year and would love to hear how their committee can help support chapters with alumni engagement.

Western Province Chapter's Events Data



A major theme we see within the Western Province is events that generate ROI and Real-World transferable skills. So what do we do well? Consistent programming for essential basic professional skills; resume writing and mock interviews, learning about Diversity, Equity, and Inclusion and how it applies in companies as well as our chapters, service events that give back, and alumni engagement during recruitment.

Where can we improve? At the end of each section is a recommendation for an area of improvement that we hope chapters will consider for the upcoming year.

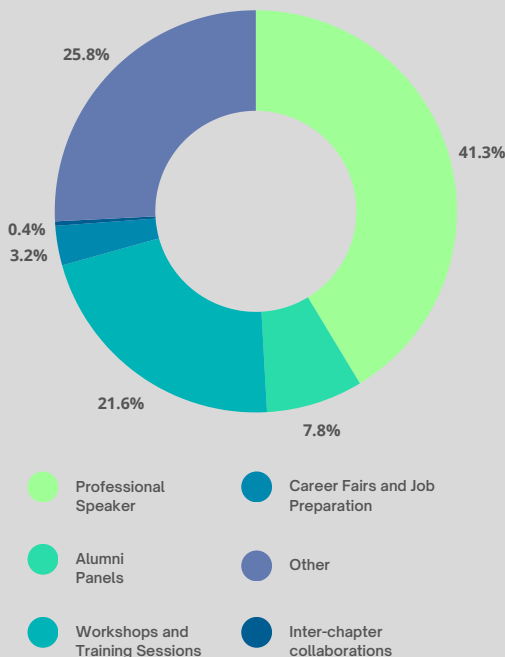
Each event data is based on forms submitted through the HUB during the Fall 23/Spring 24 and Fall 2024 Term.

Professional

In the Western Province, chapters organized a total of **283 professional events** during the fiscal year. On average, each chapter conducted approximately 6.6 professional events. Chapters held a mix of in-chapter and off-site events, with approximately 52% of events hosted within the chapter and 48% held off-site. Alumni engagement remained a strong focus, with 36 out of 43 chapters actively involving alumni in their events, showcasing a positive trend across the region. Approximately 70% of chapters included alumni in their activities. However, inter-chapter collaboration was observed in only 2% of events, highlighting an area with potential for growth.

The distribution of event types revealed a diverse array of activities. **Professional speakers made up the majority of events at 41%**, followed by workshops and training sessions at 22%, alumni panels at 8%, and career fairs or job preparation events at 3%. Inter-chapter collaborations were notably rare, accounting for less than 1% of events. Topics covered in these activities ranged from professional development and career pathways to resume building and DEI collaboration. Formats such as mock interviews, alumni panels, and workshops underscore the chapters' commitment to providing holistic professional development opportunities for their members.

As the Western Province continues to prioritize professional development, chapters are encouraged to broaden their outreach, foster deeper collaborations with alumni and other chapters, and integrate innovative formats into their programming. By leveraging the shared knowledge and experience within Delta Sigma Pi, chapters can enhance the value of their events for members and guests alike. For additional support or to share ideas, please contact David Pratt at western.professionaldevelopment@dsp.org.



Community Service

The three areas where chapters made the largest impact in 2024 include youth programs, hunger relief efforts, and environmental initiatives. Together, these areas account for about 43% of all community service in the Western Province. High-impact events included making feminine hygiene kits, organizing food drives and packaging meals for the homeless, and participating in beach cleanups. Compared to the previous year, we are seeing a notable increase in efforts focused on benefiting youth, including programs for children in hospice, literacy events, and educational outreach activities.

In 2024, chapters collectively contributed over **4,603 hours** to community service projects, building on the impressive **4,958 hours** logged in 2023. This dedication showcases the enduring commitment of brothers across the Western Province to making a difference in their communities.

Additionally, chapters continue to collaborate with other organizations and Delta Sigma Pi chapters in their regions to expand their impact. For example, the Lambda Pi Chapter at the University of San Diego volunteered at the Pacific Beach Cleanup organized by Surfrider San Diego. Members of the chapter collected trash on Pacific Beach and in the surrounding area, contributing to a cleaner, healthier environment.

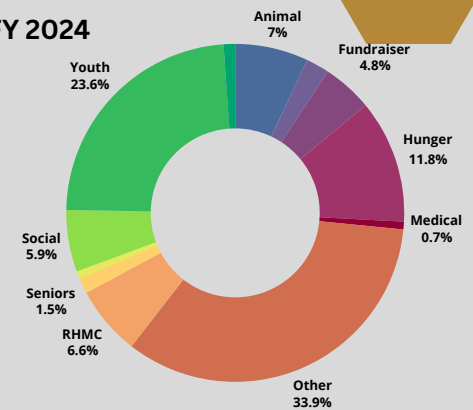
Starting in FY 2025, Delta Sigma Pi will introduce a new national service initiative focused on promoting literacy in all its forms, replacing Ronald McDonald House Charities (RMHC) as the primary national initiative. The new literacy initiative encompasses traditional literacy, financial literacy, health literacy, and other educational efforts. Chapters are encouraged to engage with local schools, libraries, and literacy organizations to coordinate impactful projects.

While we have seen a steady decline in RMHC-focused service events—dropping from 20.7% of all projects in 2023 to 10.7% in 2024—many chapters continue to participate in RMHC events through National programming. This transition highlights the need for reinvigorated local engagement alongside the launch of our new literacy-focused initiative.

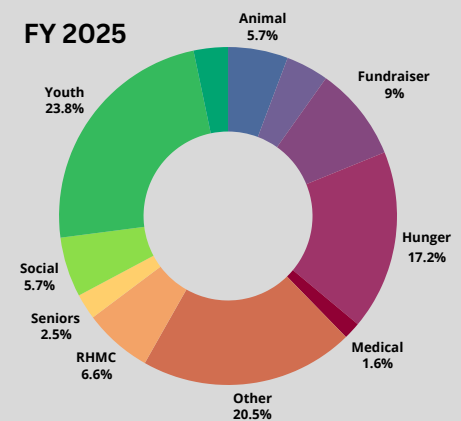
We encourage both collegian and alumni brothers to participate actively in this new endeavor and to join the Western Province Community Service Committee by contacting Katie Liu at western.communityservice@dsp.org.

Let's work together to promote all forms of literacy and demonstrate Delta Sigma Pi's commitment to enhancing educational opportunities for all.

FY 2024



FY 2025



Lambda Phi chapter
Fall 2024



Alpha Rho chapter
Boulder Marathon
Fall 2024



Gamma Psi chapter
Spring 2024

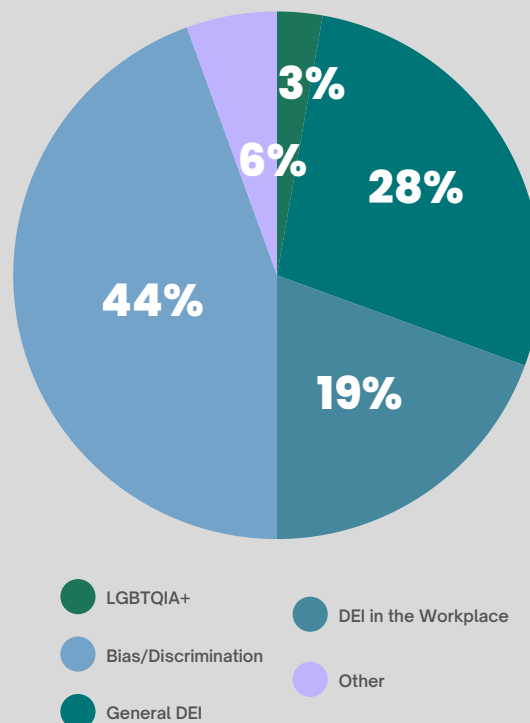
Diversity, Equity, and Inclusion

In the realm of diversity, equity, and inclusion initiatives, **36 chapters** successfully implemented at least one initiative. Among them, **27 chapters** organized diversity training events, facilitating discussions with experts on fundamental diversity, equity, and inclusion-related aspects like microaggressions, macroaggressions, unconscious bias, and stereotypes. Additionally, **three chapters** hosted panel events, where members interacted with professionals and scholars, exploring how to champion DEI in the workplace and navigate spaces lacking proper diversity, equity, and inclusion practices. One chapter stood out for sending its members to a Diversity Leadership Conference, offering a diverse range of seminars and workshops on diversity, equity, and inclusion topics.

Conversations with chapter leaders overseeing DEI initiatives revealed common challenges. Many leaders expressed difficulties excelling in their roles, given the evolving nature of these positions. Concerns about sustaining momentum amid membership and leadership turnover were prominent. Furthermore, members sought a clearer understanding of how national-level DEI initiatives align with chapter-specific efforts.

Feedback on the DEI requirement, as documented on Delta Sigma Pi's Hub platform, highlighted mixed sentiments. While many leaders appreciate the emphasis on DEI, some feel the current requirement reduces efforts to a checklist, rather than fostering a holistic and integrated approach. There is a strong desire for additional resources and support from national leadership to advance DEI initiatives effectively. Chapter leaders have proposed formalizing a DEI-specific position at the chapter level and appointing Diversity, Equity, and Inclusion Chairs for each province to facilitate collaboration and resource sharing.

Additionally, questions have been raised about how DEI is incorporated into national and regional events like LEAD and Grand Chapter Congress. Leaders hope to see a more prominent integration of DEI topics in these programs, ensuring that diversity, equity, and inclusion remain central to Delta Sigma Pi's mission and values.



Organization Excellence

Strengthen infrastructure to support priorities.

While the other three pillars are important building blocks of the growth and success of Delta Sigma Pi, ensuring organizational excellence is vital to keeping our organization thriving.

GOAL: Financial: Decrease financial dependence on revenue from members by annually increasing non-dues/fees revenue by 5%. On the Provincial level, this is measured by Chapter Leadership Fund dollars granted to chapters and money raised by chapters through fundraising

PROVINCIAL STATUS:

\$85,986.50 Granted From Chapter Leadership Funds Since 7/1/21

\$136,232.98 Raised from Chapter Fundraising Activities Since 7/1/21

GOAL: Fraternal Organization: 75% of collegiate and alumni chapters achieve established minimum health indicator.

Expectation	% Of Collegiate & Alumni Chapters Meeting Expectation
Chapter Is In Good Standing	91%
Collegiate Chapters Meeting Accredited Level of CMP Last Year	45%
In Good Financial Standing	89%
Minimum Membership Size	76%

We are excited about the direction the Western Province is headed and are confident we will see improvements year-over-year.

The Chapter Services team has been working on a new health indicator for chapters and our team is meeting with them before Provincial LEAD to discuss how our two teams can support chapters continued success.

If you think there is a data point we overlooked, please let us know so we can continue to work towards improving the province and fraternity as a whole.

Addendum C

2025-2026 Western Province Budget	Approved 2024-2025	Proposed 2025-2026
Provincial Vice President Travel Budget	\$ 2,500.00	\$ 2,500.00
RVP Travel Allowance[^]		
Bay Area Region (6 Chapters)	\$ 1000.00	\$ 1000.00
Desert Mountain Region (6 Chapters)	\$ 1400.00	\$ 1400.00
Pacific Coast Region (6 Chapters)	\$ 1000.00	\$ 1000.00
Pacific Northwest Region (5 Chapters)*	\$ 1000.00	\$ 1000.00
Rocky Mountain Region (5 Chapters)	\$ 1000.00	\$ 1000.00
Sierra Nevada Region (6 Chapters)	\$ 1000.00	\$ 1000.00
South Pacific Region (9 Chapters)	\$ 1575.00	\$ 1575.00
RVP Travel Allowance Subtotal	\$ 7,975.00	\$ 7,975.00
Provincial Leadership Meetings	\$ 2,000.00	\$ 2,000.00
Expansion (w/PVP Approval)	\$ 275.00	\$ 275.00
Other (Committees)	\$ 250.00	\$ 250.00
Total Provincial Expenses	\$ 13,000.00	\$ 13,000.00

**Hawaii comes from the National Budget of up to \$2000 for all travel expenses*

[^] Per the National Budget, there is a Provincial Travel Allotment of 37,500 to be equally divided between the five provinces leaving each province with \$7500 with an additional Regional Support solely for RVPs at 16,000, which is 500/region for 32 regions

The \$13,000 is part of the National Fraternity budget and accounts for 0.004% of Total Expenses from the National Budget.

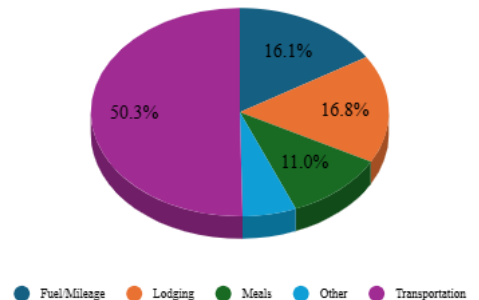
International Fraternity of Delta Sigma Pi
Western Provincial Budget
Statement of Budget and Expenses
FYE 06/30/2024
As of 1/30/2024

Description	Year to Date 2023-24	Budget 2023-24	- Variance
Western Provincial Vice President Erica Kolsrud	\$2,490.63	\$2,500.00	\$9.37
Regional Vice President Individual Travel Budgets - 1			
Rocky Mountain Region Austin Odle	\$506.21	\$610.00	\$103.79
Desert Mountain Region Davis Levy	\$732.00	\$732.00	\$0.00
Pacific Northwest Region Jazzle Paraiso	\$500.00	\$500.00	\$0.00
South Pacific Region Julian Reyes-Cruz	\$1,193.59	\$1,220.00	\$26.41
Pacific Coast Region Tim Beasley	\$976.00	\$976.00	\$0.00
Bay Area Region Mel Parazo	\$347.47	\$732.00	\$384.53
Sierra Nevada Region Cody Heimerdinger	\$617.34	\$730.00	\$112.66
Province Leadership Meeting	\$2,547.96	\$2,000.00	-\$547.96
Leadership Training	\$0.00	\$0.00	\$0.00
Long Distance Exceptional Travel budget	\$750.00	\$750.00	\$0.00
Speculative Startup Groups	\$0.00	\$0.00	\$0.00
Other - 3 -	\$246.39	\$250.00	\$3.61
TOTAL PROVINCIAL EXPENSES	\$10,907.59	\$11,000.00	\$92.41

Breakdown of expenses for FY 23-24:

Western Provincial Team Totals FY 23-24		
Category	Amount	Percentage
Fuel/Mileage	\$ 1,759.96	16.14%
Lodging	\$ 1,827.64	16.76%
Meals	\$ 1,197.56	10.98%
Other	\$ 636.67	5.84%
Transportation	\$ 5,485.76	50.29%
Total	\$ 10,907.59	100%

Western Provincial Spending FY 23-24



PROPOSAL 1

PROPOSAL 1 – Bylaws Article XVIII

SUBMITTED BY:

Tim Beasley, Pacific Coast Regional Vice President - PacificCoastRVP@dsp.org;
Carley Haro, Orange County Alumni Chapter - western.standards@dsp.org

DATE: December 22, 2024

What does this proposal do?

This proposal ensures that any policy changes that are presented to a provincial council are also presented to the Grand Chapter for review. This will prevent any policy proposals from being lost or not prioritized by sending them only to the Board of Directors for review. It will ensure that policy changes can also be implemented by the Grand Chapter. Any chapter can vote at a regular or special meeting to amend Chapter Policies and Procedures with a majority vote. This proposal would allow National Policies and Procedures to be amended by a majority vote of the Grand Chapter to match the current practice of collegiate and alumni chapters.

How does this proposal impact our organizational Strategic Priorities and Diversity, Equity and Inclusion initiatives?

This proposal supports the strategic priority of organizational excellence by allowing all members of the Grand Chapter to have a say in the Policies and Procedures of Delta Sigma Pi and allows all members to be included in the conversation for proposals that have been reviewed and approved by a provincial council.

Next Steps if Approved:

If approved by the Provincial Council, it will be debated at the 2025 Grand Chapter Congress.

History of Proposal: N/A

Positive aspects of implementing Proposal/Recommendation

Each chapter will be able to have a voice in the policies we are all expected to follow.

Any proposals approved by a majority vote of a provincial council will be able to be sent to the Grand Chapter if the proposing chapter/Provincial Vice President/Regional Vice President would like the Grand Chapter's vote on it.

Negative aspects of implementing Proposal/Recommendation

Some may feel that only the Board of Directors should consider changes to National Policies and Procedures.

This may increase the number of proposals that the Grand Chapter must review at Grand Chapter Congress.

Financial Impact:

None

Recommended implementation date and logic for selecting this date:

At the conclusion of the 2025 Grand Chapter Congress, if approved by the Grand Chapter.

Proposal Details (and/or exact Policy, Bylaw or Ritual Language proposed -- use ALL CAPS for new language and strikethrough for deletions.)

National Bylaws

Article XVIII Amendments to the Policies

Section 1. Policy Changes --- The Policies of the Fraternity, contained in the Policies and Procedures Manual, may be amended by a majority vote of the Board of Directors OR A MAJORITY VOTE OF THE GRAND CHAPTER. Unless in cases of extremely unusual circumstances, all policy amendments ~~approved by the Board of Directors~~ will become effective no sooner than the next date of implementation. Policies become effective in accordance with the implementation dates published in the policy manual. All chapters and Grand Officers shall be notified, in writing and/or by electronic means, of all such changes to the Policies.

Section 2. Changes Proposed by a Chapter --- Any chapter of this Fraternity in good standing may, by majority vote of the chapter members in good standing, propose changes to the Policies. Changes proposed by a chapter shall be presented in writing to the Provincial Vice President of the Province in which the chapter is located not less than forty-five (45) days prior to the Provincial Council meeting of the Province they are a member of. The Provincial Vice President shall notify the Delegates of the Provincial Council in writing of the proposed changes no less than thirty (30) days prior to the Provincial Council Meeting. Proposed changes approved by a majority of the Delegates of the Provincial Council, present and voting, ~~shall be presented~~ DURING THE PROVINCIAL COUNCIL MEETING CONDUCTED DURING AN ODD-NUMBERED YEAR, WILL BE SUBMITTED TO THE GRAND CHAPTER FOR CONSIDERATION AS HEREINAFTER PROVIDED IN THESE BYLAWS, OR MAY, AT THE REQUEST OF THE PROPOSING CHAPTER, BE PRESENTED IN WRITING AND WITHIN TWENTY-ONE (21) DAYS TO THE BOARD OF DIRECTORS BY THE PROVINCIAL VICE PRESIDENT. THE BOARD OF DIRECTORS SHALL HAVE SIXTY (60) DAYS AFTER RECEIPT OF THE PROPOSAL IN WHICH TO CONSIDER THE PROPOSAL. CHANGES PROPOSED BY A CHAPTER AND APPROVED BY THE DELEGATES OF THE PROVINCIAL COUNCIL, PRESENT AND VOTING, DURING THE PROVINCIAL COUNCIL MEETING CONDUCTED IN AN EVEN-NUMBERED YEAR MAY BE PRESENTED TO THE GRAND CHAPTER FOR CONSIDERATION BY MAIL BALLOT, AS HEREINAFTER PROVIDED IN THESE BYLAWS, OR MAY, AT THE REQUEST OF THE PROPOSING CHAPTER, BE PRESENTED TO THE GRAND CHAPTER

AT THE NEXT SUCCEEDING GRAND CHAPTER CONGRESS OR MAY REQUEST THAT THE PROVINCIAL VICE PRESIDENT DELIVER THE PROPOSAL TO THE BOARD OF DIRECTORS in writing and within twenty-one (21) days to the Board of Directors by the Provincial Vice President. The Board of Directors shall have sixty (60) days after receipt of the proposal in which to consider the proposal. All chapters and Grand Officers shall be notified, in writing and/or by electronic means, of all changes to the Policies within sixty (60) days of such approval.

Section 3. Changes Proposed by a Provincial Vice President or Regional Vice President ---

Any Provincial Vice President or Regional Vice President, may propose changes to the Policies. Changes proposed by a Provincial Vice President or Regional Vice President shall be presented in writing to the Provincial Vice President of the Province in which the Provincial Vice President or Regional Vice President is a member of not less than forty-five (45) days prior to the Provincial Council meeting of the Province they are a member of. The Provincial Vice President shall notify the Delegates of the Provincial Council in writing of the proposed changes no less than thirty (30) days prior to the Provincial Council Meeting. Proposed changes approved by a majority of the Delegates of the Provincial Council, present and voting, ~~shall be presented~~ DURING THE PROVINCIAL COUNCIL MEETING CONDUCTED DURING AN ODD-NUMBERED YEAR, WILL BE SUBMITTED TO THE GRAND CHAPTER FOR CONSIDERATION AS HEREINAFTER PROVIDED IN THESE BYLAWS, OR MAY, AT THE REQUEST OF THE PROPOSING PROVINCIAL VICE PRESIDENT OR REGIONAL VICE PRESIDENT, BE PRESENTED IN WRITING AND WITHIN TWENTY-ONE (21) DAYS TO THE BOARD OF DIRECTORS BY THE PROVINCIAL VICE PRESIDENT. THE BOARD OF DIRECTORS SHALL HAVE SIXTY (60) DAYS AFTER RECEIPT OF THE PROPOSAL IN WHICH TO CONSIDER THE PROPOSAL. PROPOSED CHANGES APPROVED BY THE MAJORITY OF DELEGATES OF THE PROVINCIAL COUNCIL, PRESENT AND VOTING, DURING THE PROVINCIAL COUNCIL MEETING CONDUCTED IN AN EVEN-NUMBERED YEAR MAY BE PRESENTED TO THE GRAND CHAPTER FOR CONSIDERATION BY MAIL BALLOT, AS HEREINAFTER PROVIDED IN THESE BYLAWS, OR MAY, AT THE REQUEST OF THE PROPOSING PROVINCIAL VICE PRESIDENT OR REGIONAL VICE PRESIDENT, BE PRESENTED TO THE GRAND CHAPTER AT THE NEXT SUCCEEDING GRAND CHAPTER CONGRESS OR MAY REQUEST THAT THE PROVINCIAL VICE PRESIDENT DELIVER THE PROPOSAL TO THE BOARD OF DIRECTORS in writing and within twenty-one (21) days to the Board of Directors by the Provincial Vice President. The Board of Directors shall have sixty (60) days after receipt of the proposal in which to consider the proposal. All chapters and Grand Officers shall be notified, in writing and/or by electronic means, of all changes to the Policies within sixty (60) days of such approval.

Addendum G

DELTA SIGMA PI AMENDMENT TO BYLAW PROPOSAL 1

Amendment to: Strike “Or a majority vote of the Grand Chapter” from line 2 and unstrike “approved by the board of directors” from line 4 of section 1

Add “as a resolution” to page 3, section 2, line 11 between “for consideration” and “as hereinafter”

Add “as a resolution” to page 4, section 2, line 2 between “by mail ballot” and “as hereinafter”

Add “as a resolution” to page 4, section 3, line 12 between “for consideration” and “as hereinafter”

Add “as a resolution” to page 4, section 3, line 21 between “by mail ballot” and “as hereinafter”

Proposal Details: (add/or exact Policy, Bylaw or Ritual Language proposed – use ALL CAPS for new language and ~~strikethrough~~ for deletions.)

Article XVIII Amendments to the Policies Section 1. Policy Changes --- The Policies of the Fraternity, contained in the Policies and Procedures Manual, may be amended by a majority vote of the Board of Directors ~~OR A MAJORITY VOTE OF THE GRAND CHAPTER~~. Unless in cases of extremely unusual circumstances, all policy amendments **approved by the Board of Directors** will become effective no sooner than the next date of implementation. Policies become effective in accordance with the implementation dates published in the policy manual. All chapters and Grand Officers shall be notified, in writing and/or by electronic means, of all such changes to the Policies

Section 2. Changes Proposed by a Chapter --- Any chapter of this Fraternity in good standing may, by majority vote of the chapter members in good standing, propose changes to the Policies. Changes proposed by a chapter shall be presented in writing to the Provincial Vice President of the Province in which the chapter is located not less than forty-five (45) days prior to the Provincial Council meeting of the Province they are a member of. The Provincial Vice President shall notify the Delegates of the Provincial Council in writing of the proposed changes no less than thirty (30) days prior to the Provincial Council Meeting. Proposed changes approved by a majority of the Delegates of the Provincial Council, present and voting, ~~shall be presented~~ DURING THE PROVINCIAL COUNCIL MEETING CONDUCTED DURING AN ODD-NUMBERED YEAR, WILL BE SUBMITTED TO THE GRAND CHAPTER FOR CONSIDERATION **AS A RESOLUTION** AS HEREINAFTER PROVIDED IN THESE BYLAWS, OR MAY, AT THE REQUEST OF THE PROPOSING CHAPTER, BE PRESENTED IN WRITING AND WITHIN TWENTY-ONE (21) DAYS TO THE BOARD OF DIRECTORS BY THE PROVINCIAL VICE PRESIDENT. THE BOARD OF DIRECTORS SHALL HAVE SIXTY (60) DAYS AFTER RECEIPT OF THE PROPOSAL IN WHICH TO CONSIDER THE PROPOSAL. CHANGES PROPOSED BY A CHAPTER AND APPROVED BY THE DELEGATES OF THE PROVINCIAL COUNCIL, PRESENT AND VOTING, DURING THE PROVINCIAL COUNCIL MEETING CONDUCTED IN AN EVEN-NUMBERED YEAR MAY BE PRESENTED TO THE GRAND CHAPTER FOR CONSIDERATION BY MAIL BALLOT **AS A RESOLUTION**, AS HEREINAFTER PROVIDED IN THESE BYLAWS, OR MAY, AT THE REQUEST OF THE PROPOSING CHAPTER, BE PRESENTED TO THE GRAND CHAPTER AT THE NEXT SUCCEEDING GRAND CHAPTER

CONGRESS OR MAY REQUEST THAT THE PROVINCIAL VICE PRESIDENT DELIVER THE PROPOSAL TO THE BOARD OF DIRECTORS in writing and within twenty-one (21) days to the Board of Directors by the Provincial Vice President. The Board of Directors shall have sixty (60) days after receipt of the proposal in which to consider the proposal. All chapters and Grand Officers shall be notified, in writing and/or by electronic means, of all changes to the Policies within sixty (60) days of such approval.

Section 3. Changes Proposed by a Provincial Vice President or Regional Vice President --- Any Provincial Vice President or Regional Vice President, may propose changes to the Policies. Changes proposed by a Provincial Vice President or Regional Vice President shall be presented in writing to the Provincial Vice President of the Province in which the Provincial Vice President or Regional Vice President is a member of not less than forty-five (45) days prior to the Provincial Council meeting of the Province they are a member of. The Provincial Vice President shall notify the Delegates of the Provincial Council in writing of the proposed changes no less than thirty (30) days prior to the Provincial Council Meeting. Proposed changes approved by a majority of the Delegates of the Provincial Council, present and voting, ~~shall be presented~~ DURING THE PROVINCIAL COUNCIL MEETING CONDUCTED DURING AN ODD-NUMBERED YEAR, WILL BE SUBMITTED TO THE GRAND CHAPTER FOR CONSIDERATION **AS A RESOLUTION** AS HEREINAFTER PROVIDED IN THESE BYLAWS, OR MAY, AT THE REQUEST OF THE PROPOSING PROVINCIAL VICE PRESIDENT OR REGIONAL VICE PRESIDENT, BE PRESENTED IN WRITING AND WITHIN TWENTY-ONE (21) DAYS TO THE BOARD OF DIRECTORS BY THE PROVINCIAL VICE PRESIDENT. THE BOARD OF DIRECTORS SHALL HAVE SIXTY (60) DAYS AFTER RECEIPT OF THE PROPOSAL IN WHICH TO CONSIDER THE PROPOSAL. CHANGES PROPOSED BY A CHAPTER AND APPROVED BY THE DELEGATES OF THE PROVINCIAL COUNCIL, PRESENT AND VOTING, DURING THE PROVINCIAL COUNCIL MEETING CONDUCTED IN AN EVEN-NUMBERED YEAR MAY BE PRESENTED TO THE GRAND CHAPTER FOR CONSIDERATION BY MAIL BALLOT **AS A RESOLUTION**, AS HEREINAFTER PROVIDED IN THESE BYLAWS, OR MAY, AT THE REQUEST OF THE PROPOSING PROVINCIAL VICE PRESIDENT OR REGIONAL VICE PRESIDENT, BE PRESENTED TO THE GRAND CHAPTER AT THE NEXT SUCCEEDING GRAND CHAPTER CONGRESS OR MAY REQUEST THAT THE PROVINCIAL VICE PRESIDENT DELIVER THE PROPOSAL TO THE BOARD OF DIRECTORS in writing and within twenty-one (21) days to the Board of Directors by the Provincial Vice President. The Board of Directors shall have sixty (60) days after receipt of the proposal in which to consider the proposal. All chapters and Grand Officers shall be notified, in writing and/or by electronic means, of all changes to the Policies within sixty (60) days of such approval.

Addendum H

PROPOSAL 2

PROPOSAL 2 as originally distributed

SUBMITTED BY:

Tim Beasley, Pacific Coast Regional Vice President PacificCoastRVP@dsp.org;
Julian Reyes-Cruz, South Pacific Regional Vice President SouthPacificRVP@dsp.org;
Jazzle Paraiso, Pacific Northwest Regional Vice President PacificNorthwestRVP@dsp.org;
Cody Heimerdinger, Sierra Nevada Regional Vice President SierraNevadaRVP@dsp.org;
Carley Haro, Western Provincial Standards Chair western.standards@dsp.org;
Erica Kolsrud, Western Provincial Vice President WesternPVP@dsp.org

DATE: December 23, 2024

What does this proposal do?

This proposal will restructure various aspects of the collegiate chapter officer and committee structure. We propose a restructuring of the order of succession, the removal of the Senior Vice President position, the creation of a Vice President-Recruitment and Engagement position, renaming/refocusing the Vice President-Professional Activities toward Development, redistributing several officer duties, and the creation of a standing Diversity, Equity, and Inclusion Committee.

How does this proposal impact our organizational Strategic Priorities and Diversity, Equity and Inclusion initiatives?

This proposal furthers DEI measures by creating a Standing DEI Committee at each collegiate chapter and ensures that a person is dedicated to ensuring that discussions surrounding DEI are happening regularly in chapter executive committee and general business meetings. Member engagement and organizational excellence are also impacted by making the organization more reflective of current businesses and giving officers duties that reflect business priorities.

Next Steps if Approved:

To be sent to the next Grand Chapter Congress or the Board of Directors as policy permits.

History of Proposal:

The original version of this proposal was submitted to the Western Provincial Council meeting in 2021. There it was amended and passed by a majority of the chapters in good standing to be delivered to the Board of Directors. Upon receiving the proposal, the Board of Directors referred it to the Organizational Development committee. A sub-committee was created in 2022 composed of alumni and collegiate members across the nation. The committee reviewed and edited the proposal to include a focus on DEI and reorganization of officers incorporating feedback from the DEI Task Force and the Collegiate Advisory Committee. Once the proposal was completed, it was returned to the Organizational Development committee who reviewed it and determined it was not a current priority and can be used as a reference for future governance discussions. In April 2023 the Board prioritized “Effectiveness of Chapter Operations Structure

(Chapter Officers)” as the number 3 priority. The Board of Directors never received the proposal or voted on it and it has since been closed. This is being resubmitted now to the Western Provincial Council with a few edits to show the Board that this is a priority for all members and it needs to be considered again.

Positive aspects of implementing Proposal/Recommendation

- Makes the order of succession more reflective of businesses.
- Moves the chapter operations officer higher in the line of succession.
- Encourages the chapter to create a yearlong marketing plan rather than a short-term recruitment plan at the start of the semester/quarter.
- Expands the duties of the position in charge of recruitment and makes the position more reflective of business.
- Creates a focus on professional development over activities.
- Creates a DEI committee to ensure each chapter prioritizes Diversity, Equity, and Inclusion.

Negative aspects of implementing Proposal/Recommendation

- Some chapters may push back on the change to titles and/or order of succession.
- Some chapters may fully utilize the Senior Vice President position and may not see the need for change.

Financial Impact:

Staff time on repurposing the Hub and officer training modules, while also updating National Policies and Procedures and the Chapter Bylaws template.

Recommended implementation date and logic for selecting this date:

Start of the academic year 2026-2027. This would give over a year for staff and volunteers to complete all updates to the Hub, training materials, handouts, officer guides, National Policies and all other related documents. Information about the upcoming change can be announced at the beginning of fall 2025, with informational sessions prepared for fall 2025 LEAD schools and training courses created and prepared for spring 2026 LEADs.

Proposal Details (and/or exact Policy, Bylaw or Ritual Language proposed -- use ALL CAPS for new language and strikethrough for deletions.)

National Policies and Procedures

D. Collegiate Chapters

Policy 2. Officers -

- A. Elected per National Fraternity:** The following elected officers are the minimum required of each chapter and are to be elected in the following order: president, VICE PRESIDENT-CHAPTER OPERATIONS ~~senior vice president, vice president-pledge education~~ VICE PRESIDENT-FINANCE, CHANCELLOR, VICE PRESIDENT-RECRUITMENT AND ENGAGEMENT, VICE PRESIDENT-PLEDGE EDUCATION ~~vice president-finance, vice president-chapter operations, chancellor, vice president-professional activities~~ DEVELOPMENT, vice president-community service, vice president-scholarship and awards, and vice president-alumni relations. Chapters may

elect additional officers based on their own bylaws, but only the officers listed in this subsection will receive official communications from the Central Office.

Policy 6. Vacancies—If a temporary vacancy occurs as a result of action taken through individual discipline, the president must propose an interim candidate to the chapter's executive committee for approval. A majority vote of executive committee members is required to approve the candidate as an interim officer.

If a vacancy occurs in any elected chapter office for any other reason, the chapter must hold a special election for the vacated office. Prior to holding the special election, it may be necessary for the president to appoint another member to temporarily assume the duties of the vacated office.

If the vacated office is the president, then the ~~senior vice president~~ VICE PRESIDENT-CHAPTER OPERATIONS assumes the responsibilities of the president until a new president is elected or appointed in accordance with this policy.

Policy 8. Chapter Executive Committee—The chapter executive committee establishes chapter policy, the chapter's long-range and operating plans and serves as the research and advisory committee for the chapter. At a minimum, the executive committee consists of the following chapter officers (in order of election): president, VICE PRESIDENT-CHAPTER OPERATIONS, ~~senior vice president, vice president-pledge education,~~ VICE PRESIDENT-FINANCE, CHANCELLOR, VICE PRESIDENT-RECRUITMENT AND ENGAGEMENT, VICE PRESIDENT-PLEDGE EDUCATION ~~vice president-finance, vice president-chapter operations, chancellor,~~ vice president-professional activities-DEVELOPMENT, vice president-community service, vice president-scholarship and awards, and vice president-alumni relations. Chapters may have additional officers on the executive committee based on their chapter bylaws. The executive committee may include the Chapter Advisor serving without a vote. The president is the chairman of the executive committee.

Policy 9. DIVERSITY, EQUITY, AND INCLUSION COMMITTEE - THE DIVERSITY, EQUITY, AND INCLUSION COMMITTEE OVERSEES ALL ASPECTS OF DEI IN CHAPTER OPERATIONS AND IS RESPONSIBLE FOR ANY DEI-RELATED CMP REQUIREMENTS. THE COMMITTEE WILL CONSIST OF, AT A MINIMUM, THE VICE PRESIDENT-RECRUITMENT AND ENGAGEMENT AND TWO OTHER BROTHERS, ONE OF WHICH WILL BE DESIGNATED AS CHAIR (EITHER ELECTED OR APPOINTED BASED ON THE CHAPTER'S OWN BYLAWS). THE CHAIR WILL REPORT DIRECTLY TO THE PRESIDENT.

Policy 910. Duties of the President—The president IS THE CHIEF EXECUTIVE OFFICER AND has the following duties and powers:

- a. ~~To act as the chief executive officer of the chapter.~~
- b. TO SEE THAT THE OFFICERS OF THE CHAPTER DISCHARGE THEIR DUTIES IMPARTIALLY, ACCURATELY, FAITHFULLY, AND PROMPTLY.
- c. TO ENFORCE THE STRICT OBSERVANCE OF DELTA SIGMA PI'S BYLAWS, POLICIES AND PROCEDURES AND TO ENSURE THAT ANY VIOLATIONS OF THE BYLAWS OF THIS FRATERNITY WITHIN THE CHAPTER ARE REPORTED

TO THE CENTRAL OFFICE. THE PRESIDENT HAS NO PENAL RIGHTS WHATSOEVER.

- d. To call special meetings in accordance with the chapter bylaws.
- ~~e. To see that the officers of the chapter discharge their duties impartially, accurately, faithfully, and promptly.~~
- ~~f. To enforce the strict observance of Delta Sigma Pi's Bylaws, Policies and Procedures.~~
- g. To appoint such committees provided for in the chapter bylaws.
- h. To appoint such officers provided for by Delta Sigma Pi's Bylaws, Policies and Procedures.
- i. To countersign all chapter checks.
- j. To ensure that the chapter Executive Committee develops and maintains a strategic plan, in coordination with the vice president-chapter operations. Such plan, including updates, must be submitted to the Central Office semi-annually.
- k. To serve as delegate to the Provincial Council unless unable to attend.
- l. Attend and actively participate in Presidents' Academy unless having the most urgent reason to not be present. If unable to attend, the chapter president will find one substitute from the chapter's executive committee to attend and actively participate based on the nationally recognized line of succession beginning with VICE PRESIDENT-CHAPTER OPERATIONS ~~senior vice president~~. The nationally recognized line of succession following VICE PRESIDENT-CHAPTER OPERATIONS ~~senior vice president~~ is as follows: ~~vice president-pledge education~~; vice president-finance; CHANCELLOR; ~~vice president-chapter operations~~; VICE PRESIDENT-RECRUITMENT AND ENGAGEMENT; ~~chancellor~~; VICE PRESIDENT-PLEDGE EDUCATION; vice president-professional activities DEVELOPMENT; vice president-community service; vice president scholarship and awards; vice president-alumni relations.

Chapter bylaws may provide the president with other duties and powers.

~~Policy 10. Duties of the Senior Vice President (SVP)~~—The senior vice president has the following duties and powers:

- ~~a. To assist the chapter president and temporarily assume the president's duties in his/her absence.~~
- ~~b. To oversee the recruiting activities and the pledging ceremony of the chapter.~~
- ~~c. To ensure the chapter seeks out candidates for Honorary and Faculty membership.~~

~~Chapter bylaws may provide the senior vice president with other duties and powers.~~

Policy 1311. Duties of the Vice President-Chapter Operations (VPCO)—The vice president-chapter operations IS THE CHIEF OPERATIONS OFFICER AND has the following duties and powers:

- a. TO ASSIST THE CHAPTER PRESIDENT AND TEMPORARILY ASSUME THE PRESIDENT'S DUTIES IN THEIR ABSENCE.
- b. To oversee the maintenance of all Chapter Management Program (CMP) records.
- c. To oversee the Chapter Management Program.
- d. To ensure the chapter is informed of its CMP standing and attention is called to areas in which the chapter needs improvement in areas measured by the CMP.

- e. To act as or oversee the duties of the chapter secretary, recording the minutes of all meetings of the chapter, using a standardized system for that purpose.
- f. To ensure all official communications are read into the minutes of the chapter.
- g. To ensure correspondence with the Central Office and national officers is promptly handled.
- h. To ensure the names and addresses of all nationally required officers are reported to the Central Office within fourteen days of their election or appointment.
- i. To promptly file all reports, except those designated to be the responsibility of other officers of the chapter, when due.
- j. To ensure the names of the Grand Chapter Congress delegates and alternates are submitted to the Central Office within seven days of their election, prior to the end of the academic term immediately preceding Congress.
- k. To coordinate strategic planning sessions with the chapter president.

Chapter bylaws may provide the vice president-chapter operations with other powers and duties.

Policy 12. Duties of the Vice President–Finance (VPF)—The vice president–finance IS THE CHIEF FINANCIAL OFFICER AND has the following duties and powers:

- a. To oversee the receipt and expenditure, upon duly authorized orders, of all monies of the chapter.
- b. To oversee the preparation of an annual chapter budget; monitor revenue and expenses in relation to the budget; and promptly report any variances to the chapter.
- c. To oversee the keeping of an accurate account of the receipts and expenditures of the chapter in a standardized accounting system which must be open at all reasonable times for inspection and examination.
- d. To ensure such reports as may be required by the Central Office are forwarded without unreasonable delay.
- e. To ensure the Central Office is notified if a member of the collegiate chapter is or is not in good standing upon graduation or withdrawal from the chapter in accordance with such procedures as may be prescribed by the Executive Director.
- ~~f. To ensure that badges are ordered and paid for 21 days before each initiation.~~
- g. To ensure that all financial obligations affiliated with initiations are submitted to the Central Office within seven days following each initiation.
- h. To ensure that member dues are paid to the Central Office within 30 days of the first day of classes in each academic term.
- i. To ensure all chapter disbursements are authorized by two different executive officers in which 1) neither officer is the vice president-finance; and 2) the disbursement is not payable to one of the approvers. Before approving a disbursement, the two officers should ensure that the disbursement is properly approved (chapter previously approved transaction or was already included in the approved budget) and receipts/invoices have been obtained and filed with the vice president-finance. All disbursements must be made in accordance with Policies 21 and 22, below.
- j. To ensure that payment to the Central Office for invoices covering chapter liability insurance, regalia use and the Grand Chapter Congress travel fund are promptly submitted.

- k. To ensure an independent accounting review of the chapter's finances for the prior fiscal year is completed annually by June 1. The reviewer may be a CPA, a member of the school's accounting faculty, or similar professional.

Chapter bylaws may provide the vice president - finance with other powers and duties.

Policy 14 13. Duties of the Chancellor—The chancellor is the chief judicial officer of the chapter and has the following duties and powers:

- a. To preside over the meetings of the chapter.
- b. To oversee the individual discipline process, including serving as the chair of the Chapter Standards Committee, ensuring all members of the Chapter Standards Committee have been trained in accordance with Fraternity standards and reporting hearing results to the chapter.
- c. To preside at all hearings conducted by a hearing panel.
- d. ~~To ensure that any violations of the Bylaws of this Fraternity within the chapter are reported to the Central Office. The chancellor has no penal rights whatsoever.~~
- e. To cast a deciding vote in the case of a tie, providing the chancellor has not already voted on the motion (such as in hearings or election of pledges).
- f. To serve as Ritual Chair, unless the chancellor and president agree to delegate this duty to another brother.
- g. To ensure that regalia is ordered from the Central Office at least 45 days prior to each initiation.
- h. To ensure that chapter bylaws and policy and procedures are updated and submitted to the Central Office as specified in the Chapter Management Program.

H. TO OVERSEE THE PLEDGING AND INITIATION CEREMONIES OF THE CHAPTER.

Chapter bylaws may provide the chancellor with other powers and duties.

POLICY 14. DUTIES OF THE VICE PRESIDENT - RECRUITMENT AND ENGAGEMENT - THE VICE PRESIDENT - RECRUITMENT AND ENGAGEMENT IS THE CHIEF ENGAGEMENT OFFICER AND HAS THE FOLLOWING DUTIES AND POWERS:

- A. TO OVERSEE THE RECRUITING ACTIVITIES OF THE CHAPTER AND OVERSEE MEMBER ENGAGEMENT WITHIN THE CHAPTER.
- B. TO ENSURE THE CHAPTER SEEKS OUT CANDIDATES FOR HONORARY AND FACULTY MEMBERSHIP.
- C. TO CREATE AND OVERSEE THE MARKETING PLAN OF THE CHAPTER AND ENSURE THAT THE FRATERNITY IS PORTRAYED IN A PROFESSIONAL MANNER.
- D. TO ENSURE ALL FRATERNITY MATERIALS ARE PURCHASED THROUGH A FRATERNITY LICENSED VENDOR IN ACCORDANCE TO THE DELTA SIGMA PI MERCHANDISE POLICY.
- E. TO OVERSEE THE CREATION AND MANAGEMENT OF A CHAPTER WEBSITE AS WELL AS ANY OTHER MULTIMEDIA PLATFORMS.
- F. TO OVERSEE THE SUBMISSION OF ANY PHOTOS TO THE DELTASIG MAGAZINE.

- G. TO PROMOTE APPLICABLE EVENTS TO THE CAMPUS STUDENT BODY.
- H. IF SELECTED AS A CMP SUBMISSION, TO OVERSEE THE YEAR IN REVIEW.
- I. TO SERVE ON THE CHAPTER'S DEI COMMITTEE.

CHAPTER BYLAWS MAY PROVIDE THE VICE PRESIDENT-RECRUITMENT AND ENGAGEMENT WITH OTHER DUTIES AND POWERS.

Policy 1514. Duties of the Vice President-Pledge Education (VPPE)—The vice president-pledge education IS THE CHIEF PLEDGE EDUCATION OFFICER AND has the following duties and powers:

- a. To oversee the preparation of pledges for examination and initiation.
- b. To ensure the entire planned pledge program for each academic term is submitted to the Central Office in a timely fashion or by any established deadlines.
- c. To ensure the names and personal information of each proposed initiate, including faculty and honorary initiates, are reported to the Central Office, using the officially designated membership forms and procedures, within seven days of the pledging ceremony.
- d. To coordinate with the vice president-finance to ensure the Initiation report is completed and returned, with related initiation fees, to the Central Office within fourteen days of initiation.
- e. TO ENSURE THE BADGES ARE ORDERED 21 DAYS PRIOR TO INITIATION.

Chapter bylaws may provide the vice president-pledge education with other duties and powers.

Policy 1516. Duties of the Vice President-Professional Activities-DEVELOPMENT (VPPA VPPD)—The vice president-professional DEVELOPMENT activities has the following duties and powers:

- a. To oversee the development and implementation of the chapter's professional program.
- b. To ensure that the chapter is educated on risk management issues.
- c. To promote LEAD and other National Fraternity educational programs and encourage attendance by chapter members.
- d. To coordinate chapter professional activities with the Provincial Professional Development Committee.
- e. To chair the chapter's Professional Development Committee, should the chapter choose to have such committee.

Chapter bylaws may provide the vice president-professional activities DEVELOPMENT with other duties and powers.

Policy 1819. Duties of the Vice President-Alumni Relations (VPAR)—The vice president-alumni relations has the following duties and powers:

- a. To ensure the members of the chapter are informed on activities being sponsored by alumni chapters in their local area.
- b. To ensure the members of the chapter are educated on how they can continue to be involved in the activities of Delta Sigma Pi as alumni members.

- c. To ensure that the members of the chapter understand the purpose and activities of the Delta Sigma Pi Leadership Foundation and the importance of their support of the Foundation.
- d. To ensure the activities of the chapter are communicated to the chapter's alumni, other local alumni and the Chair of the Provincial Alumni Development Committee through a chapter newsletter or other form of communication.
- e. ~~To ensure timely information about the chapter and its members is provided to the editor of The DELTASIG.~~
- f. To oversee the orchestration of Founders' Day, Alumni Day and Homecoming activities.
- g. To oversee the maintenance and accuracy of chapter member address information in the National Fraternity's database and ensure that changes are promptly communicated to the Central Office.
- h. To ensure the chapter actively seeks lost alumni and reports "found" information to the Central Office.
- i. To oversee the acquisition, organization and maintenance of chapter historical information.
- j. To coordinate, maintain and oversee mentoring relationships between collegiate members and both chapter alumni and alumni living in the local area.

Chapter bylaws may provide the vice president-alumni relations with other powers and duties.

Policy 2223. Electronic Banking and Debit Cards—Collegiate chapters are permitted to use electronic banking and debit cards, so long as all accounts are set up as business accounts. Such financial mediums are the responsibility of the chapter's Vice President-Finance. The passwords to online bank accounts must be changed each time new officers are elected, and the passwords to any accounts shall only be known by the President, Vice President Finance, and ~~Senior Vice President~~ VICE PRESIDENT-CHAPTER OPERATIONS. Read-only account access shall be established and maintained for chapter advisor/volunteer leader/staff use. Chapter credit cards are not permitted. Electronic documentation of all cash flows should be printed and retained in hard-copy format as a part of the chapter's financial records, to be audited annually. No cash withdrawals are to be made from these accounts other than for replenishing chapter petty cash and should not exceed \$50 dollars without express written authority of the President and another nationally recognized officer other than the Vice President-Finance. All receipts for cash transactions must be retained. Such transactions that do not follow this policy should be flagged by the auditor.

Policy 2324. Electronic Payment Methods—Any and all electronic payment services, including, but not limited to, Venmo, PayPal and Square, are permitted and are the responsibility of the chapter's Vice President-Finance. The passwords/controls to each of these accounts must be changed each time new officers are elected, and the passwords/controls to any accounts shall only be known by the President, Vice President-Finance and ~~Senior Vice President~~ VICE PRESIDENT-CHAPTER OPERATIONS. Read-only account access shall be established and maintained for Chapter Advisor/volunteer leader/staff use. All accounts are to be set up as business accounts. All accounts shall include "Delta Sigma Pi" and the Greek letter chapter name in their account title, such that the public is aware that it is a fraternity account. No cash disbursements are to be made from any electronic account with the exception of reversing a previous transaction. Such transactions must be authorized by the President and confirmed by the Vice President-Finance. The authorization may be electronic, but must include a description of

the payee, the amount of the payment, and the purpose of the payment. All services must be set to automatically transfer any monies received directly to the chapter's checking account, if available, or must be done manually on a weekly basis. As such, these electronic services should be used only for cash collection, not for cash disbursement. Any electronic documentation of cash flows should be printed and retained in hard-copy format as a part of the chapter's financial records to be audited annually.

E. ALUMNI CHAPTERS (SEE EE. FOR RECOGNITION PROGRAM)

Policy 9. Duties of the Vice President-Collegiate Relations—The vice president-collegiate relations has the following duties and powers:

- a. To serve as the liaison to local collegiate chapters, specifically the vice president-alumni relations and vice president-professional activities DEVELOPMENT.
- b. To ensure the members of the chapter are informed on activities being sponsored by collegiate chapters in their local area.
- c. To ensure the activities of the chapter are communicated to the collegiate chapters in their local area.
- d. To ensure the members of the local collegiate chapter are educated on how they can continue to be involved in the activities of Delta Sigma Pi as alumni members.
- e. To oversee the orchestration of Founders' Day and Alumni Day events.
- f. To coordinate, maintain and oversee mentoring relationships between collegiate members and both chapter alumni and alumni living in the local area.

Chapter bylaws may provide the vice president-collegiate relations other duties and powers.

G. PLEDGING AND INITIATIONS

Policy 2. Administering the Initiation Process—The following lists the administrative steps involved with initiations and the officers responsible for each step:

- a. ~~Senior Vice President~~ VICE PRESIDENT-RECRUITMENT AND ENGAGEMENT ensures that the names and personal information of each prospective pledge are reported to the National Fraternity prior to the Pledging Ceremony.
- b. Vice president-pledge education ensures that:
 - i. The names of each pledge are reported to the National Fraternity no more than 7 days after the Pledging Ceremony.
 - ii. All financial obligations affiliated with initiations are submitted to the Central Office within 14 days following each initiation.
- c. Chancellor is responsible for coordinating regalia shipping with the Central Office in a timely manner.
- d. Vice president-finance-PLEDGE EDUCATION ensures badges are ordered and paid for at least 21 days before each initiation each term. They ensure an official badge is leased for each initiate. If the chapter has any extra badges on hand (not borrowed or acquired from brothers), that information is to be communicated to the Central Office in conjunction with (or in lieu of) any badge order.

- e. Vice president-pledge education and vice president-finance ensure that the initiation report is completed and returned with related initiation fees to the Central Office within fourteen days following each initiation.

NOTES:

YPassed

YPassed as amended

YFailed

Addendum I

<p style="text-align: center;">DELTA SIGMA PI AMENDMENT TO POLICY PROPOSAL 1</p>
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Amendment to:

- Section G. Policy 2. Item D.
 - o Strike pledge education and un-strike finance
- Section D. Policy 12. Item F.
 - o Unstrike entire line
- Section D. Policy 15. Item E.
 - o Strike entire line

Proposal Details: (add/or exact Policy, Bylaw or Ritual Language proposed – use ALL CAPS for new language and ~~strikethrough~~ for deletions.)

National Policies and Procedures

D. Collegiate Chapters.

Policy 2. Officers -

Elected per National Fraternity: The following elected officers are the minimum required of each chapter and are to be elected in the following order: president, VICE PRESIDENT - CHAPTER OPERATIONS ~~senior vice president, vice president-pledge education~~ VICE PRESIDENT - FINANCE, CHANCELLOR, VICE PRESIDENT - RECRUITMENT AND ENGAGEMENT, VICE PRESIDENT - PLEDGE EDUCATION ~~vice president finance, vice president-chapter operations, chancellor,~~ vice president-professional activities-DEVELOPMENT, vice president-community service, vice president-scholarship and awards, and vice president-alumni relations. Chapters may elect additional officers based on their own bylaws, but only the officers listed in this subsection will receive official communications from the Central Office.

Policy 6. Vacancies—If a temporary vacancy occurs as a result of action taken through individual discipline, the president must propose an interim candidate to the chapter's executive committee for approval. A majority vote of executive committee members is required to approve the candidate as an interim officer.

If a vacancy occurs in any elected chapter office for any other reason, the chapter must hold a special election for the vacated office. Prior to holding the special election, it may be necessary for the president to appoint another member to temporarily assume the duties of the vacated office.

If the vacated office is the president, then the ~~senior vice president~~ VICE PRESIDENT - CHAPTER OPERATIONS assumes the responsibilities of the president until a new president is elected or appointed in accordance with this policy.

Policy 8. Chapter Executive Committee—The chapter executive committee establishes chapter policy, the chapter's long-range and operating plans and serves as the research and advisory committee for the chapter. At a minimum, the executive committee consists of the following chapter officers (in order of election): president, VICE PRESIDENT - CHAPTER OPERATIONS ~~senior vice president~~, ~~vice president-pledge education~~, VICE PRESIDENT - FINANCE, CHANCELLOR, VICE PRESIDENT - RECRUITMENT AND ENGAGEMENT, VICE PRESIDENT - PLEDGE EDUCATION ~~vice president finance~~, ~~vice president chapter operations~~, ~~chancellor~~, vice president-professional ~~activities~~-DEVELOPMENT, vice president-community service, vice president-scholarship and awards, and vice president-alumni relations. Chapters may have additional officers on the executive committee based on their chapter bylaws. The executive committee may include the Chapter Advisor serving without a vote. The president is the chairman of the executive committee.

Policy 9. DIVERSITY, EQUITY, AND INCLUSION COMMITTEE - THE DIVERSITY, EQUITY, AND INCLUSION COMMITTEE OVERSEES ALL ASPECTS OF DEI IN CHAPTER OPERATIONS AND IS RESPONSIBLE FOR ANY DEI-RELATED CMP REQUIREMENTS. THE COMMITTEE WILL CONSIST OF, AT A MINIMUM, THE VICE PRESIDENT-RECRUITMENT AND ENGAGEMENT AND TWO OTHER BROTHERS, ONE OF WHICH WILL BE DESIGNATED AS CHAIR (EITHER ELECTED OR APPOINTED BASED ON THE CHAPTER'S OWN BYLAWS). THE CHAIR WILL REPORT DIRECTLY TO THE PRESIDENT.

Policy 910. Duties of the President—The president IS THE CHIEF EXECUTIVE OFFICER AND has the following duties and powers:

- ~~a. To act as the chief executive officer of the chapter.~~
- b. TO SEE THAT THE OFFICERS OF THE CHAPTER DISCHARGE THEIR DUTIES IMPARTIALLY, ACCURATELY, FAITHFULLY, AND PROMPTLY.
- c. TO ENFORCE THE STRICT OBSERVANCE OF DELTA SIGMA PI'S BYLAWS, POLICIES AND PROCEDURES AND TO ENSURE THAT ANY VIOLATIONS OF THE BYLAWS OF THIS FRATERNITY WITHIN THE CHAPTER ARE REPORTED TO THE CENTRAL OFFICE. THE PRESIDENT HAS NO PENAL RIGHTS WHATSOEVER.
- d. To call special meetings in accordance with the chapter bylaws.
- ~~e. To see that the officers of the chapter discharge their duties impartially, accurately, faithfully, and promptly.~~
- ~~f. To enforce the strict observance of Delta Sigma Pi's Bylaws, Policies and Procedures.~~
- g. To appoint such committees provided for in the chapter bylaws.
- h. To appoint such officers provided for by Delta Sigma Pi's Bylaws, Policies and Procedures.
- i. To countersign all chapter checks.

- j. To ensure that the chapter Executive Committee develops and maintains a strategic plan, in coordination with the vice president-chapter operations. Such plan, including updates, must be submitted to the Central Office semi-annually.
- k. To serve as delegate to the Provincial Council unless unable to attend.
- l. Attend and actively participate in Presidents' Academy unless having the most urgent reason to not be present. If unable to attend, the chapter president will find one substitute from the chapter's executive committee to attend and actively participate based on the nationally recognized line of succession beginning with VICE PRESIDENT - CHAPTER OPERATIONS ~~senior vice president~~. The nationally recognized line of succession following VICE PRESIDENT - CHAPTER OPERATIONS ~~senior vice president~~ is as follows: ~~vice president-pledge education~~; vice president-finance; CHANCELLOR; ~~vice president-chapter operations~~; VICE PRESIDENT - RECRUITMENT AND ENGAGEMENT; ~~chancellor~~; VICE PRESIDENT - PLEDGE EDUCATION; vice president-professional activities DEVELOPMENT; vice president-community service; vice president scholarship and awards; vice president-alumni relations.

Chapter bylaws may provide the president with other duties and powers.

~~Policy 10. Duties of the Senior Vice President (SVP)~~—The senior vice president has the following ~~duties and powers~~:

- ~~a. To assist the chapter president and temporarily assume the president's duties in his/her absence.~~
- ~~b. To oversee the recruiting activities and the pledging ceremony of the chapter.~~
- ~~c. To ensure the chapter seeks out candidates for Honorary and Faculty membership.~~

~~Chapter bylaws may provide the senior vice president with other duties and powers.~~

Policy 1311. Duties of the Vice President-Chapter Operations (VPCO)—The vice president-chapter operations IS THE CHIEF OPERATIONS OFFICER AND has the following duties and powers:

- a. TO ASSIST THE CHAPTER PRESIDENT AND TEMPORARILY ASSUME THE PRESIDENT'S DUTIES IN HIS/HER ABSENCE.
- b. To oversee the maintenance of all Chapter Management Program (CMP) records.
- c. To oversee the Chapter Management Program.
- d. To ensure the chapter is informed of its CMP standing and attention is called to areas in which the chapter needs improvement in areas measured by the CMP.
- e. To act as or oversee the duties of the chapter secretary, recording the minutes of all meetings of the chapter, using a standardized system for that purpose.
- f. To ensure all official communications are read into the minutes of the chapter.
- g. To ensure correspondence with the Central Office and national officers is promptly handled.
- h. To ensure the names and addresses of all nationally required officers are reported to the Central Office within fourteen days of their election or appointment.

- i. To promptly file all reports, except those designated to be the responsibility of other officers of the chapter, when due.
- j. To ensure the names of the Grand Chapter Congress delegates and alternates are submitted to the Central Office within seven days of their election, prior to the end of the academic term immediately preceding Congress.
- k. To coordinate strategic planning sessions with the chapter president.

Chapter bylaws may provide the vice president-chapter operations with other powers and duties.

Policy 12. Duties of the Vice President–Finance (VPF)—The vice president–finance IS THE CHIEF FINANCIAL OFFICER AND has the following duties and powers:

- a. To oversee the receipt and expenditure, upon duly authorized orders, of all monies of the chapter.
- b. To oversee the preparation of an annual chapter budget; monitor revenue and expenses in relation to the budget; and promptly report any variances to the chapter.
- c. To oversee the keeping of an accurate account of the receipts and expenditures of the chapter in a standardized accounting system which must be open at all reasonable times for inspection and examination.
- d. To ensure such reports as may be required by the Central Office are forwarded without unreasonable delay.
- e. To ensure the Central Office is notified if a member of the collegiate chapter is or is not in good standing upon graduation or withdrawal from the chapter in accordance with such procedures as may be prescribed by the Executive Director.
- f. To ensure that badges are ordered and paid for 21 days before each initiation.
- g. To ensure that all financial obligations affiliated with initiations are submitted to the Central Office within seven days following each initiation.
- h. To ensure that member dues are paid to the Central Office within 30 days of the first day of classes in each academic term.
- i. To ensure all chapter disbursements are authorized by two different executive officers in which 1) neither officer is the vice president-finance; and 2) the disbursement is not payable to one of the approvers. Before approving a disbursement, the two officers should ensure that the disbursement is properly approved (chapter previously approved transaction or was already included in the approved budget) and receipts/invoices have been obtained and filed with the vice president-finance. All disbursements must be made in accordance with Policies 21 and 22, below.
- j. To ensure that payment to the Central Office for invoices covering chapter liability insurance, regalia use and the Grand Chapter Congress travel fund are promptly submitted.
- k. To ensure an independent accounting review of the chapter's finances for the prior fiscal year is completed annually by June 1. The reviewer may be a CPA, a member of the school's accounting faculty, or similar professional.

Chapter bylaws may provide the vice president - finance with other powers and duties.

Policy 1314. Duties of the Chancellor—The chancellor is the chief judicial officer of the chapter and has the following duties and powers:

- a. To preside over the meetings of the chapter.
- b. To oversee the individual discipline process, including serving as the chair of the Chapter Standards Committee, ensuring all members of the Chapter Standards Committee have been trained in accordance with Fraternity standards and reporting hearing results to the chapter.
- c. To preside at all hearings conducted by a hearing panel.
- d. ~~To ensure that any violations of the Bylaws of this Fraternity within the chapter are reported to the Central Office. The chancellor has no penal rights whatsoever.~~
- e. To cast a deciding vote in the case of a tie, providing the chancellor has not already voted on the motion (such as in hearings or election of pledges).
- f. To serve as Ritual Chair, unless the chancellor and president agree to delegate this duty to another brother.
- g. To ensure that regalia is ordered from the Central Office at least 45 days prior to each initiation.
- h. To ensure that chapter bylaws and policy and procedures are updated and submitted to the Central Office as specified in the Chapter Management Program.
- H. TO OVERSEE THE PLEDGING AND INITIATION CEREMONIES OF THE CHAPTER.

Chapter bylaws may provide the chancellor with other powers and duties.

POLICY 14. DUTIES OF THE VICE PRESIDENT - RECRUITMENT AND ENGAGEMENT - THE VICE PRESIDENT - RECRUITMENT AND ENGAGEMENT IS THE CHIEF ENGAGEMENT OFFICER AND HAS THE FOLLOWING DUTIES AND POWERS:

- A. TO OVERSEE THE RECRUITING ACTIVITIES OF THE CHAPTER AND OVERSEE MEMBER ENGAGEMENT WITHIN THE CHAPTER
- B. TO ENSURE THE CHAPTER SEEKS OUT CANDIDATES FOR HONORARY AND FACULTY MEMBERSHIP
- C. TO CREATE AND OVERSEE THE MARKETING PLAN OF THE CHAPTER AND ENSURE THAT THE FRATERNITY IS PORTRAYED IN A PROFESSIONAL MANNER
- D. TO ENSURE ALL FRATERNITY MATERIALS ARE PURCHASED THROUGH A FRATERNITY LICENSED VENDOR IN ACCORDANCE TO THE DELTA SIGMA PI MERCHANDISE POLICY
- E. TO OVERSEE THE CREATION AND MANAGEMENT OF A CHAPTER WEBSITE AS WELL AS ANY OTHER MULTIMEDIA PLATFORMS
- F. TO OVERSEE THE SUBMISSION OF ANY PHOTOS TO THE DELTASIG MAGAZINE

- G. TO PROMOTE APPLICABLE EVENTS TO THE CAMPUS STUDENT BODY
- H. IF SELECTED AS A CMP SUBMISSION, TO OVERSEE THE YEAR IN REVIEW
- I. TO SERVE ON THE CHAPTER'S DEI COMMITTEE

CHAPTER BYLAWS MAY PROVIDE THE VICE PRESIDENT - RECRUITMENT AND ENGAGEMENT WITH OTHER DUTIES AND POWERS.

Policy 1514. Duties of the Vice President-Pledge Education (VPPE)—The vice president-pledge education IS THE CHIEF PLEDGE EDUCATION OFFICER AND has the following duties and powers:

- a. To oversee the preparation of pledges for examination and initiation.
- b. To ensure the entire planned pledge program for each academic term is submitted to the Central Office in a timely fashion or by any established deadlines.
- c. To ensure the names and personal information of each proposed initiate, including faculty and honorary initiates, are reported to the Central Office, using the officially designated membership forms and procedures, within seven days of the pledging ceremony.
- d. To coordinate with the vice president–finance to ensure the Initiation report is completed and returned, with related initiation fees, to the Central Office within fourteen days of initiation.
- e. TO ENSURE THE BADGES ARE ORDERED 21 DAYS PRIOR TO INITIATION.

Chapter bylaws may provide the vice president-pledge education with other duties and powers.

Policy 1516. Duties of the Vice President-Professional Activities DEVELOPMENT (VPPA-VPPD)—The vice president-professional DEVELOPMENT activities has the following duties and powers:

- a. To oversee the development and implementation of the chapter's professional program.
- b. To ensure that the chapter is educated on risk management issues.
- c. To promote LEAD and other National Fraternity educational programs and encourage attendance by chapter members.
- d. To coordinate chapter professional activities with the Provincial Professional Development Committee.
- e. To chair the chapter's Professional Development Committee, should the chapter choose to have such committee.

Chapter bylaws may provide the vice president-professional activities DEVELOPMENT with other duties and powers.

Policy 1819. Duties of the Vice President-Alumni Relations (VPAR)—The vice president-alumni relations has the following duties and powers:

- a. To ensure the members of the chapter are informed on activities being sponsored by alumni chapters in their local area.
- b. To ensure the members of the chapter are educated on how they can continue to be involved in the activities of Delta Sigma Pi as alumni members.
- c. To ensure that the members of the chapter understand the purpose and activities of the Delta Sigma Pi Leadership Foundation and the importance of their support of the Foundation.
- d. To ensure the activities of the chapter are communicated to the chapter's alumni, other local alumni and the Chair of the Provincial Alumni Development Committee through a chapter newsletter or other form of communication.
- e. ~~To ensure timely information about the chapter and its members is provided to the editor of The DELTASIG.~~
- f. To oversee the orchestration of Founders' Day, Alumni Day and Homecoming activities.
- g. To oversee the maintenance and accuracy of chapter member address information in the National Fraternity's database and ensure that changes are promptly communicated to the Central Office.
- h. To ensure the chapter actively seeks lost alumni and reports "found" information to the Central Office.
- i. To oversee the acquisition, organization and maintenance of chapter historical information.
- j. To coordinate, maintain and oversee mentoring relationships between collegiate members and both chapter alumni and alumni living in the local area.

Chapter bylaws may provide the vice president-alumni relations with other powers and duties.

Policy 2223. Electronic Banking and Debit Cards—Collegiate chapters are permitted to use electronic banking and debit cards, so long as all accounts are set up as business accounts. Such financial mediums are the responsibility of the chapter's Vice President-Finance. The passwords to online bank accounts must be changed each time new officers are elected, and the passwords to any accounts shall only be known by the President, Vice President Finance, and ~~Senior Vice President~~ VICE PRESIDENT - CHAPTER OPERATIONS. Read-only account access shall be established and maintained for chapter advisor/volunteer leader/staff use. Chapter credit cards are not permitted. Electronic documentation of all cash flows should be printed and retained in hard-copy format as a part of the chapter's financial records, to be audited annually. No cash withdrawals are to be made from these accounts other than for replenishing chapter petty cash and should not exceed \$50 dollars without express written authority of the President and another nationally recognized officer other than the Vice President-Finance. All receipts for cash transactions must be retained. Such transactions that do not follow this policy should be flagged by the auditor.

Policy 2324. Electronic Payment Methods—Any and all electronic payment services, including, but not limited to, Venmo, PayPal and Square, are permitted and are the responsibility of the chapter's Vice President-Finance. The passwords/controls to each of these accounts must be changed each time new officers are elected, and the passwords/controls to any accounts shall only be known by the President, Vice President-Finance and ~~Senior Vice President~~ VICE PRESIDENT - CHAPTER OPERATIONS. Read-only account access shall be established and maintained for Chapter Advisor/volunteer leader/staff use. All accounts are to be set up as business accounts. All accounts shall include "Delta Sigma Pi" and the Greek letter chapter name in their account title, such that the public is aware that it is a fraternity account. No cash disbursements are to be made from any electronic account with the exception of reversing a previous transaction. Such transactions must be authorized by the President and confirmed by the Vice President-Finance. The authorization may be electronic, but must include a description of the payee, the amount of the payment, and the purpose of the payment. All services must be set to automatically transfer any monies received directly to the chapter's checking account, if available, or must be done manually on a weekly basis. As such, these electronic services should be used only for cash collection, not for cash disbursement. Any electronic documentation of cash flows should be printed and retained in hard-copy format as a part of the chapter's financial records to be audited annually.

E. ALUMNI CHAPTERS (SEE EE. FOR RECOGNITION PROGRAM)

Policy 9. Duties of the Vice President-Collegiate Relations—The vice president-collegiate relations has the following duties and powers:

- a. To serve as the liaison to local collegiate chapters, specifically the vice president-alumni relations and vice president-professional ~~activities~~ DEVELOPMENT.
- b. To ensure the members of the chapter are informed on activities being sponsored by collegiate chapters in their local area.
- c. To ensure the activities of the chapter are communicated to the collegiate chapters in their local area.
- d. To ensure the members of the local collegiate chapter are educated on how they can continue to be involved in the activities of Delta Sigma Pi as alumni members.
- e. To oversee the orchestration of Founders' Day and Alumni Day events.
- f. To coordinate, maintain and oversee mentoring relationships between collegiate members and both chapter alumni and alumni living in the local area.

Chapter bylaws may provide the vice president-collegiate relations other duties and powers.

G. PLEDGING AND INITIATIONS

Policy 2. Administering the Initiation Process—The following lists the administrative steps involved with initiations and the officers responsible for each step:

- a. ~~Senior Vice President~~ VICE PRESIDENT - RECRUITMENT AND ENGAGEMENT ensures that the names and personal information of each prospective pledge are reported to the National Fraternity prior to the Pledging Ceremony.
- b. Vice president-pledge education ensures that:
 - i. The names of each pledge are reported to the National Fraternity no more than 7 days after the Pledging Ceremony.
 - ii. All financial obligations affiliated with initiations are submitted to the Central Office within 14 days following each initiation.
- c. Chancellor is responsible for coordinating regalia shipping with the Central Office in a timely manner.
- d. Vice president-finance **PLEDGE EDUCATION** ensures badges are ordered and paid for at least 21 days before each initiation each term. They ensure an official badge is leased for each initiate. If the chapter has any extra badges on hand (not borrowed or acquired from brothers), that information is to be communicated to the Central Office in conjunction with (or in lieu of) any badge order.
- e. Vice president-pledge education and vice president-finance ensure that the initiation report is completed and returned with related initiation fees to the Central Office within fourteen days following each initiation.

ADDENDUM J

Feedback on the Western Provincial Report

Requested report Feedback:

Pledge Program and Recruitment:

- Liked to see how everyone else was doing since sometimes they can't compare around them
 - o They can see struggles or improvement
 - o Would they like to see it broken out by region or chapter
 - Would be great to have it by chapter
- Separated by each semester to compare on semester

Chapter Size:

- Would like to see some of the data on chapter size to know how they can compare
- Qualified programs match chapter size as well. Currently it does not count those items, just the college of business. Chapters would like to see that in the report
- Having some majors outside of the college of business makes it difficult to recruit and having that affect their size wouldn't be beneficial.
- One chapter recommended an opt in option for this.
 - o Ideal chapter size in college of business
 - o Ideal chapter size outside with qualified programs (opt in for more data)
- Having the RVP helps to analyze based on chapter culture and size to report

Hearings and Standards Program

- General reasons as to why those hearings might have happened
 - o Participation
 - o Dues
 - o X other reason
- Chapters care about this data
- Would be interesting to see the terms of behavioral correcting measures
- Some feel neutral

Chapter Dues:

- Thinks the dues should be less with the consideration to books rooms on campus as well. This can put more stress on chapter
- Loves seeing the metric because it supports the conversation if they should increase or decrease based on what others do
- Larger and smaller chapters have the same amount
 - o Should larger be less?
- Would like to see a broken-down metric to see where they should allocate some of the dues

Economic Pressures:

- Likes metric but better scale would help to know what states students are from (out of state students vs in-state)

Qualified Programs:

- Loves the metric but it would be great to get it broken down by region in a bar graph portion
- Likes to see the approved programs, but what about showing the non-approved programs, so they don't try and recruit that
 - o Note that it does depend on chapter because some universities may qualify
- Clarification is on if the 51% qualification is still the case for approved programs

Events:

- Should be broken down so they can see what others would be
- Would love to see more descriptions on what those events would look like
- The visual item colors are hard to read and need to consider accessibility

Community Service:

- A small description for these graphs. They want to learn more about each section
- Would like to see the top two events based on school size, location, etc.
- Do chapters have access to this raw data?
 - o No
 - o They would like to see better descriptors and pull their own analysis.

DEI Events:

- Some head nods about caring for the program
- Colors are hard to read
- Better descriptors since DEI is so broad and not many specifics
 - o When they read LGBTQIA, what are they doing with that? Parades?
- With the Pie chart, it would be better to use a different graphic to analyze the data
 - o Suggested matching the same graph for the retention report
- Would like to see some counts instead of just generalized percentage

Other Provinces and what would be helpful:

- Would love to see a further analysis on financial information to see how other campuses are comparing financial wellness and pressures
 - o Revenue and expenditures
- Itemized list on what chapters are spending budgets on and if it should be added to their budget as well.
- Could we build a cashflow statement
 - o Omicron Psi offered to help

- Forecast to see what we are expecting on a 3-year average
 - o Major agreement
- Also include accredited and excellence and recognition
- See what scholarships and award are being handed out by chapter
- Would like to see other scholarships that students are receiving
- Wants to see a statistic on regional engagement
 - o We want to establish alumni chapters, but can we do that if there's little engagement
- Knows there is a downturn on enrollment in universities, can we think forward with forecasting in a couple years to make sure we are keeping size up and filling their e-board
 - o With current shifting DOE changes, this would need to be a yearly process with change data
 - o Academic year snapshot during provincial council would be beneficial
- Looking to include willingness data for alumni chapters and if they can travel/engage with chapters
- Seeing data for commuter schools and non-commuter schools
- Graduation breakdown
- Chapter profile based on entire university as well at a glance.
 - o Enrollment specific
- See a percentage to see collegiates transitioning to active alumni status
 - o Help to increase motivation to become an alumni
 - o Have a page dedicated to invite these alumni back and potentially adding incentives to help
- See the target demographics about what trends with alumni involvement like age and such are to see how they can better market to those alumni
- Would like to see a published demographic data on province for alumni

CMP Feedback:

- Larger majority agreed that this form won't let us know if a chapter is healthy
- Engagement metrics would help determine and if there were caps during office tours
- Impactful events should be measured
- Member retention and knowing if dues and people not coming back
 - o Along with that, alumni coming back
- How many people are running for our exec boards
- Metric for how often collegiates go to engage with the Alumni chapters and how many
- Culture measures and how to identify that
- Seeing internships and offers is a mixed feeling on if that suggests a healthy chapter
 - o Suggested was if people found a job through DSP or if it was exterior
- Supporting other organizations as it supports their chapter and campus
- They use the recognition levels to measure if they are above or below the previous years
- Is the health indicator being too lax and would that affect involvement
- Are CMP and Health indicator mutually exclusive

- Take the feedback to the committee and not release this for a GCC and instead during a biennium
- What does the interface look like and how is the accessibility for it.
- Is there anything on a chapter level that they can do adding pressure to this process since it can affect successes.
 - They would like the investment in new technology for a better dashboard
 - Access to members and documents sent out at events like this
 - Can the province create a resolution province today to send to the board
 - We aren't able to because we accepted to agenda and there needs to be a 30-day notice
- Clarification on board meetings, frequency, and who can attend
 - What is the timeframe for communication and timeframe for notice to chapters on special meetings.