



# **Delta Sigma Pi**

# **VOLUNTEER**

# **LEADERSHIP**

# **MANUAL**

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# Volunteer Leadership Manual

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# INTRODUCTION

"What if they can't relate to me?"

"Am I too old? Too young?"

"How did these people get into my chapter?"

"Do I have the time to dedicate to a group of college students?"

"How do I balance my family, work, and community commitments...along with my desire to serve Delta Sigma Pi?"

*"We don't always know whose lives we touched and made better for having cared, because actions can sometimes have unforeseen ramifications. What is important is that you do care and you act."*

*-Charlotte Lunsford*

Once you get past some of the gut-level apprehensions and take time to examine your home and work commitments, you're on your way to effective volunteering! This manual is designed to help our most important resource, our Delta Sigma Pi volunteers.

This could possibly be one of the most utilized manuals in your resource file. As you glance through the topics in the table of contents, you might find it beneficial to first read through the entire manual as you prepare to work with our Delta Sigma Pi chapters and our many alumni and collegiate members.

## RELATIONSHIPS WITHIN DELTA SIGMA PI

### Volunteer Leaders: Skills Needed in Delta Sigma Pi

#### **Ability to:**

Listen, analyze, think clearly and creatively, and work well with people individually and in a group.

#### **Willing to:**

Prepare for and attend meetings, ask questions, take responsibility and follow through on a given assignment, contribute personal and financial resources in a generous way according to circumstances, open doors in the community, evaluate oneself.

#### **Develop certain skills if you do not already possess them, such as to:**

Cultivate and solicit funds, cultivate and recruit other volunteers, read and understand financial statements, learn more about the substantive program areas of the organization.

#### **Possess:**

Honesty, sensitivity to and tolerance of differing views, a friendly, responsive, and patient approach, community-building skills, personal integrity, a developed sense of values, concern for your Fraternity's development, a sense of humor.

*(Verbatim "Six Keys to Recruiting, Orienting, and Involving Nonprofit Board Members." Washington, DC: National Center for Nonprofit Boards, 1995.)*

There are many skills, traits, and characteristics, which an effective volunteer will possess. In developing this manual, we have listed the more important ones needed by Fraternity volunteers. It's unusual for anyone to have every single skill or trait listed. A useful step for Fraternity volunteers is to identify those skills they need to develop and decide on ways they can develop in those areas.

Alumni volunteers should be:

- Enthusiastic about the Fraternity
- Goal oriented
- Good listeners
- Patient/Confident of eventual success
- Friendly and courteous
- Knowledgeable about the Fraternity
- Effective at gathering and evaluating information
- Excellent communicators (tactful, diplomatic in presenting praise and criticism, good writing skills, effective public speaking)
- Empathetic
- Mature
- Timely

Remember, Delta Sigma Pi remains in the “people business” and any Fraternity representative who fails to interact with enthusiasm, friendliness, and courtesy is unlikely to be effective or successful.

Collegiate chapter members often expect volunteers to know every aspect of the Fraternity. That’s unrealistic. The following suggestions will help you become more knowledgeable in chapter operations and chapter leadership:

- Read Fraternity publications available from the Central Office or online at dsp.org on topics or areas of chapter operations you know little about or which you have not reviewed in some time.
- Attend leadership training sessions for personal development.
- Visit chapters quite different from your own collegiate experience. Observe what those chapters do especially well and imitate the good ideas, which may help other chapters.
- Meet individually with other volunteers or members of the Central Office staff to discuss Fraternity topics.
- Call the Central Office any time for information or advice on any subject. The staff is there to support you and serve your needs.

## **Board of Directors**

There are several layers of leadership functions in the Fraternity. At the highest policy development, visionary leadership, and decision making level, exists the Board of Directors.

Within Delta Sigma Pi, the Board of Directors has specific duties and powers in the Bylaws (Article IV, Section 1). The Board of Directors shall have such further powers as may be provided for or implied by the Laws of this Fraternity.

The Board of Directors has several responsibilities as outlined in our Bylaws, however, the following ten responsibilities are core to their purpose as a Board:

**1. Determine the organization’s mission and purpose.**

A statement of mission and purpose should articulate the organization's goals, means, and primary constituents served. It is the Board of Directors' responsibility to create the mission statement and review it periodically for accuracy and validity. Each individual Board member should fully understand and support it.

**2. Select the executive.**

Boards must reach consensus on the executive director’s job description and undertake a careful search process to find the most qualified individual for the position.

**3. Support the executive and review his or her performance.**

The Board should ensure that the executive director has the moral and professional support he or she needs to further the goals of the organization. The executive director, in partnership with the entire Board, should decide upon a periodic evaluation of the executive director’s performance.

**4. Ensure effective organizational planning.**

As stewards of an organization, Boards must actively participate with the staff in an overall planning process and assist in implementing the plan's goals.

**5. Ensure adequate resources.**

One of the Board's foremost responsibilities is to provide adequate resources for the organization to fulfill its mission. The Board should work in partnership with the executive director and development staff to raise funds for the organization.

**6. Manage resources effectively.**

The Board, in order to remain accountable to its donors, the public, and to safeguard its tax-exempt status, must assist in developing the annual budget and ensuring that proper financial controls are in place.

**7. Determine and monitor the organization's programs and services.**

The Board's role in this area is to determine which programs are the most consistent with an organization's mission, and to monitor their effectiveness.

**8. Enhance the organization's public image.**

Clearly articulating the organization's mission, accomplishments, and goals to the public, as well as garnering support from important members of the community, are important elements of a comprehensive public relations strategy.

**9. Serve as a court of appeal.**

Except in the direst of circumstances, the Board must serve as a court of appeal in personnel and discipline matters. Solid personnel and discipline policies, grievance procedures, and a clear delegation to the executive director of hiring and managing employees will reduce the risk of conflict.

**10. Assess its own performance.**

By evaluating its performance in fulfilling its responsibilities, the Board can recognize its achievements and reach consensus on which areas need to be improved. Discussing the results of a self-assessment at a retreat can assist in developing a long-range plan.

(Adapted from *"Ten Basic Responsibilities of Nonprofit Boards."* Washington, DC: National Center for Nonprofit Boards, 1988.)

### **Individual Board Member Responsibilities**

- Attend all Board and committee meetings and functions, such as special events.
- Be informed about the organization's mission, services, policies, and programs.
- Review agenda and supporting materials prior to Board and committee meetings.
- Serve on committees and offer to take on special assignments.
- Make a personal financial contribution to the organization.
- Inform others about the organization.
- Suggest possible nominees to the Board who can make significant contributions to the work of the Board and the organization.
- Keep up-to-date on developments in the organization's field.
- Follow conflict of interest and confidentiality policies.
- Refrain from making special requests of the staff.
- Assist the Board in carrying out its fiduciary responsibilities, such as reviewing the organization's annual financial statements.

(Verbatim from *"Ten Basic Responsibilities of Nonprofit Boards."* Washington, DC: National Center for Nonprofit Boards, 1988.)

## Regional Vice Presidents

Regional Vice Presidents are important volunteers within the Fraternity as they have responsibility for the guidance and leadership of all collegiate and alumni chapters within their regions. They will appoint District Directors, will conduct educational conferences as directed by the Provincial Council and will promote the expansion and reactivation of chapters and award programs within their Regions. The Regional Vice President will be accountable to their respective Provincial Vice Presidents. A Regional Vice President will perform such other duties as may be assigned by the Provincial Council or the Laws of the Fraternity.

## District Directors

District Directors are also key volunteers within the Fraternity and have very specific roles and responsibilities. The broadest perspective is outlined in the Delta Sigma Pi Bylaws, Article IX.

**Section 1. Appointment and Tenure of Office** --- A District Director may be appointed by the Regional Vice President to be in charge of each District for a term expiring June 30th each year and may be removed at any time by order of the Regional Vice President or the Provincial Council. The Provincial Vice President may appoint, with notification to the respective Regional Vice President, a District Director for a District if a District Director has not been appointed by the Regional Vice President by October 15th of each year. Where there is a vacancy of a Regional Vice President, District Directors shall be appointed by the Provincial Vice President.

**Section 2. Qualifications for Office** --- All District Directors shall be Alumni Members. District Directors may be appointed to Districts within reasonable proximity of their places of residence without regard to the geographic boundaries of the Regions in which they reside. A District Director may not be appointed over a chapter in which the District Director is a Chapter Advisor and any District Director who accepts a position as a Chapter Advisor of a chapter supervised by the District Director shall automatically become ineligible for office and such office shall be declared vacant.

**Section 3. Duties** --- The duties of the District Directors shall consist of the supervision of the chapters within the Districts to which they have been appointed. They shall report directly to the Regional Vice Presidents who appointed them, the corresponding Provincial Vice President, the Grand President and the Executive Director on such forms and in such manner as may be prescribed by the Provincial Council or the Board of Directors. The District Directors shall have further duties, responsibilities and authority as prescribed in the Laws of this Fraternity.

District Directors may have additional duties and responsibilities such as may be passed by the Board of Directors from time to time.

## Specific Duties and Responsibilities of District Directors

According to the Bylaws of Delta Sigma Pi, District Directors are responsible for “the supervision of the chapters within their Districts.” This broad statement often obscures many of the implied duties District Directors assume when they are appointed. Listed below are the duties and responsibilities brothers accept when they become District Directors:

- Visit alumni and collegiate chapters. These visits are designed so the District Directors may offer local recommendations to improve the chapter and its operations.
- Visits may also result in ideas to improve the Fraternity on a national basis. Such recommendations, provided to the Regional Vice Presidents or submitted via a recommendation form to the Executive Director, give the Fraternity’s Board of Directors a much better understanding about issues of concern or areas of strength.
- Work with Chapter Advisors, as well as college officials, to develop a good working relationship between the Fraternity and the college/university.
- Serve as a role model for Fraternity initiatives. The example District Directors provide can be very positive.

- The Fraternity-wide programs implemented by Delta Sigma Pi are very important and District Directors often determine the success of these programs. District Directors who actively promote Fraternity-wide programs to collegiate and alumni chapters greatly aid the progress of the Fraternity. Some examples of Fraternity-wide programs include the Chapter Management Program, LEAD programs, Grand Chapter Congress, and the awards programs.
- Communicating on a regular and timely basis with other Fraternity leaders and the Central Office about the condition of chapters in their District is an important responsibility of District Directors.
- Recommend disciplinary action. Disciplinary action is available when chapters intentionally or negligently disregard the rules and regulations of the Fraternity. District Directors have no disciplinary powers but may recommend to the Regional Vice Presidents that disciplinary action be taken on a chapter.
- Recommend assistance actions. Chapters periodically need greater assistance to improve their operations and Chapter Assistance Actions are available to these chapters. District Directors are encouraged to recommend assistance actions to the Regional Vice President when a chapter is in need of greater assistance.
- Enforce the rules, regulations, policies, and Bylaws of the Fraternity. District Directors must be both knowledgeable about the Fraternity's requirements and must enforce those requirements at all times.
- Seek out future volunteers in women and men who are best qualified to become Fraternity leaders such as District Directors, national or provincial committee members, or even Board leaders.
- Become more knowledgeable about the Fraternity. It is an ongoing duty to give the best information possible to the Fraternity's chapters.

### **Chapter Advisors**

Chapter Advisors, as they are required to be faculty members of the Fraternity or members of the school's faculty or administration, are best equipped to know about and understand college policies affecting student groups, as well as Delta Sigma Pi issues. It is essential that chapters have Chapter Advisors to provide a liaison between the university and the chapter/Fraternity.

Strong Advisors know several chapter members on a personal basis and are in closer connection to the officers of the chapter than any other volunteer. Chapter Advisors and District Directors should be in good communication with each other. An early discussion on what each believes their responsibilities are (and should be) will aid everyone involved greatly.

Involved, knowledgeable Chapter Advisors are valuable assets to both the chapter and the Fraternity. Partnerships with other volunteers are strongly encouraged! Both the individual volunteers and the chapter benefit from strong relationships.

### **Reminders for Effective Volunteer Leaders**

Six steps have been identified which help new and experienced Fraternity volunteers enhance their volunteering and advising skills. These six steps are:

- 1) Learn as much as possible about the chapters you are serving; the history of the chapter, their programs, the leaders, and the general members.
- 2) Develop expectations for yourself and what you want to accomplish. Discuss these expectations with volunteer leaders you are working with.
- 3) Visit the chapter(s) regularly and support their events throughout the school term.

- 4) Communicate with elected Fraternity leaders and the Central Office staff on a regular basis. Check the Delta Sigma Pi website often.
- 5) Promote and participate in Fraternity-wide programs for collegiate and alumni members.
- 6) Motivate others inside and outside of Delta Sigma Pi.

**An Effective Volunteer Leader:**

- Offers ideas and suggestions on improving the chapter but does not become overly involved in planning and implementing the chapter's programs.
- Makes a good first impression with chapter members by greeting each member as they enter the meeting room.
- Works diligently to remember the names of people.
- Explains why a change is needed or should be discussed.
- Compliments people on specific achievements made.
- Talks frequently about upcoming Fraternity programs and events and is excited about their personal contributions to Delta Sigma Pi.
- Provides correct answers or sources for answers to questions posed by members, officers, and other volunteers. If an answer is unknown at the time, either provide direction for who can answer their question or send a follow-up letter, email, or call with answers.
- Asks people what they want to accomplish. Encourages them to reach their goals.
- Takes an aggressive and proactive leadership role to help members fully understand the Fraternity's rules, regulations, and policies.
- Reads messages and publications from chapters, the Central Office, and other volunteers in a timely fashion. Responds quickly to requests.
- Respects the opinions of others and tries to answer questions in a thoughtful, considerate manner.
- Participates, when possible, in all educational programs offered by the Fraternity such as Leadership and Excellence Academies for Deltasigs (LEAD Events), Volunteer Training Sessions and Grand Chapter Congress.
- Encourages collegiate members to develop new programs and events and to take "measured risks." Allows chapter members to learn by doing it themselves.

## **ADVISING DELTA SIGMA PI CHAPTERS**

### **The District Director's Role in Chapter Counseling and Consulting**

**Definition**

A primary goal of District Directors is to offer sound advice, needed support, aid and assistance to collegiate and alumni chapters. This aspect of a District Director's duties is called chapter counseling/consulting.

## **Eight Purposes/Goals of Chapter Counseling/ Consulting**

- 1) To provide chapters with needed information, required support and solutions to chapter problems.
- 2) To make suggestions and recommendations to maintain chapter strengths and improve weak areas.
- 3) To help build better fraternal spirit among the chapter members.
- 4) To offer "first-hand" observations about individual chapters to elected Fraternity leaders such as the Regional Vice President and the Provincial Vice President, and to the Central Office staff.
- 5) To recognize opportunities and challenges chapters are or will be facing.
- 6) To insure that Fraternity rules, regulations, policies and the Bylaws are followed by chapters and individual members.
- 7) To develop a good working relationship with chapter officers and Chapter Advisors.
- 8) To identify future Fraternity leaders by meeting today's alumni and collegiate members.

## **Ways to Offer Counseling/ Consulting**

District Directors can provide information and support in a variety of ways including mailings, telephone conversations, seminars, chapter visits and email. Each method of communication has advantages and disadvantages. A good mix of methods is recommended.

Consider both time and money when deciding ways to offer counseling information.

In addition to the District Director, counseling or consulting information is provided to chapters by their Chapter Advisor, the Regional Vice President, the Provincial Vice President, other Board members and the Central Office staff.

## **When to Plan Visits**

Plan a visitation schedule for the semester or quarter, shortly after being appointed.

District Directors change and update their schedule of visits as the academic year progresses. Scheduled visits are added or deleted, as the District Director becomes more familiar with the chapter members.

It is highly recommended that your first visit occur at the start of each school term. If a chapter has a "slow start" at the beginning of a term, it is much more difficult to operate.

Two decisions are made when planning a visitation schedule. These are: 1) What would you like to accomplish during each visit? 2) Have you, the Regional Vice President and the Central Office staff scheduled enough visits to provide the needed support to the chapter?

There are key times during an academic term when assistance provided by a District Director is especially effective. Some of these key times are:

- At the start of the school term, especially if the chapter has difficulty in recruiting or planning.
- Immediately prior to the pledging ceremony if the chapter has difficulty in pledge education.
- On initiation day.
- Planning meetings conducted by the chapter.
- Executive committee meetings immediately after officer elections.
- Transition of officer meetings.

Plan to make at least two visits to each chapter during a school term.

- 1) During the initial visit, chapter members rarely feel comfortable receiving recommendations from a District Director that they have just met.
- 2) A second visit should be to a chapter executive committee meeting to review all areas of chapter operations and to make recommendations for improvement.

### **How Many Visits to Make**

Regional Vice Presidents should meet with the District Director to decide how many chapter visits each should make each year. A good "rule of thumb" is to make three visits to each chapter during each semester or quarter.

Unless there are extenuating circumstances, a District Director should not make more than six chapter visits during a school term. Extenuating circumstances would include serious membership and recruiting problems, a chapter on probation or guidance, an expansion or reactivation effort, etc.

### **Needed Research for a Chapter Visit**

Chapter members will expect the District Director to know basic information about their chapter. If the District Director does not know this basic information, it will be much more difficult to have credibility with the chapter.

Chapter members will expect their District Director to know:

- Chapter's Greek letter name.
- College or university's name.
- Names of chapter officers and Chapter Advisor.
- Approximate number of chapter members.
- Chapter Management Program participation (history and current).
- Recent recognition/awards.
- Significant local history.

Central Office staff members research each chapter before they make a visit. A District Director making their first visit to a chapter should also do research in advance.

Information is available from your Regional Vice President and the Central Office staff which help describe both the chapter and the college. Helpful information for District Directors include:

- Previous reports from the Regional Vice President or District Director.
- Reports from members of the Central Office staff who have visited the chapter.
- Chapter Management Program reporting (available at dsp.org) and past CMP submissions.
- The college or university catalog.
- The five year membership and CMP reports published by the Central Office.
- The chapter's website accessible through dsp.org.

### **Scheduling a Visit**

A chapter can learn of a District Director's appointment by letter, by phone, by email or in person. It is best if the Regional Vice President first notifies the chapter of the District Director's appointment. Encourage the Regional Vice President to do so!

Regardless of how a chapter learns of a District Director's appointment, it is very effective for the District Director to send a letter of introduction to the Chapter President and Chapter Advisor.

Once a chapter has learned of their District Director's appointment, the District Director should then schedule a visit with the chapter.

"First impressions" are very important for District Directors. Your most likely first impression with the chapter members occurs when they receive notification of the District Director's appointment.

### **Consistency in Scheduling Visits**

Chapters react more favorably to District Directors who attend a variety of chapter events throughout the academic year.

It is difficult for chapter members to develop a good working relationship with District Directors who attend several events and then do not visit for several weeks or months.

District Directors, especially those in tax-related industries, often have a busy season which inhibits them from making chapter visits. The District Director should explain this time limitation to the chapter prior to the start of their busy season.

When District Directors are unable to make a visit for a significant period of time, consistent support can still be provided if the District Director regularly calls or emails the chapter.

### **Making a Visit**

For a first visit, many District Directors prefer to attend a chapter business meeting or a recruiting event. Please be prepared to speak if attending a recruiting function.

Adaptability is a key when making chapter visits. A District Director may arrive at a meeting and face issues he or she did not anticipate.

The eight goals or purposes of chapter counseling/consulting (page 7) are almost impossible to achieve in one chapter visit.

"Open-ended" questions, questions, which do not allow for a yes or no answer, can be very effective in chapter visits by allowing chapter members to express their opinions about the chapter.

At some chapter visits, the District Director may only prevent chapters from making mistakes.

The effectiveness of a chapter visit is often determined by how receptive chapter members are to the District Director's recommendations.

It is important to arrive at the meeting with "an open mind." District Directors must realize that written documents may not accurately reflect the chapter's current status or operations.

### **Helpful Consulting Hints**

The first five minutes of any chapter visit is the most important time. It is critical in those five minutes to set a friendly, comfortable environment so a productive visit can occur.

There are several steps that District Directors can take to make the first five minutes of each visit more effective. These steps include:

- Memorize the names and offices of all chapter officers before arriving.
- In the first five minutes, the District Director answers the unspoken question of "Why is she/he here?"
- Smile and mean it!
- Appear relaxed and encourage others to relax as well.
- Compliment the chapter members on how attractive the campus is or how great it is to meet the chapter members. If you saw any Deltasig promotions posted, compliment them on their recruiting and recognition efforts.

Touring the business school allows the District Director to see how the chapter is promoting itself on campus through its flyers, posters, and advertising materials.

Scheduling a private meeting – or a phone call – with the Chapter Advisor before meeting the chapter can answer many questions.

Arriving at the meeting room fifteen minutes before the scheduled starting time gives the District Director time to meet brothers and pledges in the room.

Working to get specific answers from chapter members will help District Directors make better recommendations. Vague answers from chapter members can either be a result of poor communication skills or a hesitation to be criticized.

### **After A Visit**

Review how well the chapter is operating, how productive the visit was, and what follow-up efforts should be provided.

Inform other Fraternity leaders about the visit. Submit a report to the Regional Vice President and copy the Provincial Vice President and the Central Office.

If a serious problem is observed, immediately call the Regional Vice President and the Central Office in addition to a written report. Examples of serious problems are:

- The college/university has placed the chapter on probation.
- The Chapter President has indicated that a theft of chapter funds may have occurred.
- The entire pledge class, or a large percentage, has decided not to become Fraternity members.
- Obvious financial problems and/or large debt.
- No pledge class at all or a very small one.
- Obvious risk management issues needing resolved (hazing, alcohol, harassment, etc.).

If a District Director is unsure whether a problem is serious enough to warrant a telephone call to the Regional Vice President or Central Office, it is better to be safe and call.

Suggestions that are especially important to the chapter's future success should be reinforced with the Chapter President in a follow-up letter or email. In many cases, a follow-up letter provides the only written record of the suggestions made by a District Director during a visit.

A follow-up letter is not required for all visits but should be used whenever the District Director has made several important recommendations to the chapter officers and members.

A follow-up letter can be used to:

- Motivate or encourage the chapter members.
- Answer questions that were raised and left unanswered during the visit.
- Provide written caution to a chapter to make required changes.
- Compliment the chapter on making needed improvements or changes.
- Thank the chapter for their cooperation, etc.
- Inform the Chapter President when the District Director will again visit the chapter.

### **Reporting Requirements**

District Directors should submit reports as determined by their Regional Vice Presidents. A sample District Director's Visitation Report is included in the Additional Resources section of this manual.

The opinions of the District Director are a very important part of the report. More insight is often gained there than in any other part of the visit.

The report should be sent directly to the Regional Vice President. Copies of the report, if desired, should also be sent to the Provincial Vice President.

### **Working with the Chapter Advisor**

The first key in working effectively with a Chapter Advisor is to meet with them. An early discussion on what each of you believes your responsibilities are (and should be) will aid both of you in your duties.

Meeting with the Chapter Advisor will often indicate to the District Director just how involved they are with the chapter and how they view current chapter operations.

Many Chapter Advisors are very involved with the chapters. Others serve in name only and will leave any counseling or consulting up to you. You are welcome and encouraged to help the members locate more involved Chapter Advisors.

An involved, knowledgeable Chapter Advisor is a valuable asset to both the chapter and the District Director. When this situation is present, the District Director and the Chapter Advisor can form an extremely effective partnership to support the chapter and Fraternity.

Chapter Advisors, as they are required to be faculty members (but do not have to be Deltasigs) are best equipped to know about and understand college regulations that affect student groups. District Directors rarely have access or knowledge of these regulations.

Chapter Advisors and District Directors should work to avoid giving chapter members conflicting advice or recommendations. Meeting separately with a Chapter Advisor before a chapter meeting can help avoid conflicting signals.

### **Interacting with College Administrators**

Delta Sigma Pi exists on campus to support and complement the academic mission of the host institution. We know that we are guests of the school and should do everything in our power to help our members have a good college experience.

The primary contact with the college/university should be the faculty member elected by or assigned to serve the chapter as a Chapter Advisor. Depending on school size, it is somewhat unusual for District Directors or any other Fraternity volunteers to meet regularly with the Dean of the Business School, the Dean of Students, or other college administrators. If they are interested, by all means seek them out for feedback and discussion. Delta Sigma Pi volunteers should greet administrators present at chapter events and help them feel comfortable with the members and the organization.

Strong faculty/administrator relationships are extremely important to the Fraternity. Volunteers should encourage the chapter to:

- Invite faculty and administrators to their events.
- Provide calendars of activities to the Dean of the Business School, the Dean of Students, or other administrators.
- Initiate faculty/administrators as Faculty Members if they meet the guidelines. Many chapters seek to have such an initiation every year.
- Highlight outstanding chapter programs that reflect well on the school.

College administrators often comment on the lack of time they have available. Any interactions that you have with them should respect these time demands.

## Functions of an Advisor

"Bloland's (1967) classification of three major areas of activity for an advisor (maintenance or custodial functions, group growth functions, program content functions) offered a good beginning point for considering the role of the advisor. 1) Maintenance functions included a mix of roles, some of which suggest a supervisory relationship and others which involve helping a group retain a link with its own history. 2) Group growth functions were described as facilitating roles that increase the effectiveness of the group and its members. 3) Program content functions relate to roles in which the advisor suggests program ideas or supplies expert knowledge."

"Since his 1967 writing, another function of an advisor has developed. 4) Product-oriented functions which include all those advisor efforts which relate to the task performed by the group or committee--tasks which help the organization fulfill its purpose."

### Sources:

Bloland, P.A. (1967). *Student Group Advising in Higher Education*. Alexandria, VA: American College Personnel Association.

"Group Advising--Defined, Described, and Examined" by McKaig & Policello in *A Handbook for Student Group Advisors*, Ed. Schuh, J. ACPA #43, 1987.

Examples:

### 1) Maintenance or Custodial Functions

- Ensuring budgets are properly prepared.
- Helping the officers plan the officer training and transition process.
- Serving as the institutional memory for the group and its activities. Challenging the group when they think an event is "tradition." Do you have any "first annual" events?
- Helping the chapter officers interpret the Bylaws and organizational policies.
- Attending meetings and/or communicate on a regular basis to keep up-to-date on issues and maintain relationships with the members.

### 2) Group Growth Functions

- Increasing productivity during committee and chapter meetings. Working alongside the leaders and helping them become more efficient leaders and positive role models.
- Increasing the effectiveness and self-confidence of individuals by providing constructive feedback and support.

### 3) Program Content Functions

- Providing expertise in special areas such as budgeting, recruitment, ritual exemplification, program management, etc.
- Providing referrals to campus and community resource personnel.
- Suggesting program ideas when solicited.

### 4) Product Oriented Functions

- Helping the chapter fulfill its purpose of developing friendship, scholastic development, social skills, community service, and lifelong membership.
- Utilizing personal leadership skills and experiences to help leaders complete assigned tasks and responsibilities.
- Develop historical files of written materials which provide timelines, forms, and suggestions for improvement for activities.

# VOLUNTEER LEADERSHIP

(Applies to all elected and appointed volunteer leaders of Delta Sigma Pi.)

- Leadership needs to exist at all levels, as people work toward a common vision. Leadership will come in forms such as "invisible" and "alongside." Leadership will occur through relationships rather than through structure.

The volunteer leader and collegians should take some time to create their common vision of success for their particular office, committee, or task. The collegians should feel secure that they are the leader and the volunteer works alongside them to provide support, information, and other resources to help them succeed.

Questions to consider together include:

- "At the end of this year (event) how will we know if it was successful?"
- "How can we best work together to come up with the best options for the program?"
- "How do you want to work behind the scenes together so you, as the collegian leader, are seen as the expert for this program/position?"

- *Power will be viewed not as position or hierarchy, but as a sun radiating energy. Power "over" will be replaced with power "with" and power "to."*

Because of your prior leadership experience in the chapter and/or Fraternity, your status as a volunteer leader, and your professional/volunteer experiences, collegians might easily lean on you for more support than is appropriate. Help them see that you're not their boss! While the students may look at you with the perspective of supervisee/supervisor, you should make it clear that they are the individuals "in charge." They need to know, from you, that they have the power and influence to make their chapter better.

- *Leadership will occur within a dynamic system and leading will need to come from the heart as well as the head.*

One of your primary responsibilities as a volunteer is to provide resources, referrals, and expertise. These logical, informational functions are complemented by your dedication and love for the organization. Collegians will see that you want to continue contributing to the organization through your alumni membership.

As alumni, it's funny to hear collegians talking about being around "forever." They feel so old being involved in the chapter after only one or two years of membership. As a volunteer leader, you're serving as a powerful role model of involvement. They are watching a heartfelt example of an alumnus member providing lifelong contributions to Delta Sigma Pi.

- *The focus of leadership will be on the big picture. Vision will need to be attached to the local, Greek, business, and global community.*

Even though Delta Sigma Pi is for life, many collegians see an end to their experience at graduation. Because of this temporary shortsightedness, they need help seeing the big picture surrounding chapter issues. Help make connections for them so they see how issues affect the members' experience and the well being of the chapter.

"Why is it important for every member to pay their dues on time? How does it affect the chapter? How does it affect the national organization? How do high accounts receivables challenge the health of the organization?"

"Why is risk management such an important issue to discuss as it relates to brotherhood? As it refers to safety? As it relates to a good time? As it relates to our fraternal values?"

"Why are some events considered mandatory? Does the chapter merely want people to show up or are they trying to share information that is important to every member?"

"Why is hazing unethical? Illegal? Why is it inconsistent with our Ritual? What ethical dilemmas or situations will you challenge in the workplace? How does this relate to our brotherhood?"

- *Individuals and organizations will use conflict and differences as constructive forces and minimize their negative aspects. Conflict shouldn't be seen as purely negative. Conflict can spark creativity, stimulate innovation, and encourage personal improvement.*

Conflict is inevitable! If you share that philosophy you can successfully navigate your way through organizational challenges and differences between individuals. Helping members resolve interpersonal issues and conflict will strengthen their communication and leadership skills.

Resolving conflict in committees, the executive committee, or interpersonal relationships in the chapter calls upon a variety of skills for its successful resolution. The members will utilize their communication and team building talents. They will be able to successfully work at mutually satisfying goals and acceptable closure to issues. Conflict management will be one of the most useful skills they develop in the chapter. This skill will benefit them in their personal lives and in their professional and volunteer experiences.

- *Leadership will reflect values, ethics, moral views and beliefs rather than a set of skills or behaviors.*

As the volunteer leader, you can help shape the ethical environment of the chapter. You can help the members become "devils-advocates." You can encourage them to ask probing questions and to challenge their brothers in a supportive environment. You can introduce discussions surrounding the values of the organization and show the members that these discussions don't have to be limited to the times the chapter executes Ritual.

- *Relationships must be mutual, based on trust, care, and empowerment rather than on control. People will be treated as unique. Human dignity will become the forefront of leadership.*

A quote by Martha Minow exemplifies the value of each individual in a chapter. "It is unfair to treat people differently if they really are the same; but it also is unfair to treat people the same if they really are different."

You can help the members develop cooperation in group situations and examine chapter situations from different perspectives. They will learn a lot about the diversity of ideas, opinions, and work styles in their own chapter. You can help them strengthen their delegation skills using your own examples from the work place or volunteer setting.

- *Leadership will utilize collaboration rather than competition. Leadership will be based on interconnectedness and interdependence, rather than independence and separateness.*

Sometimes collegians miss the big picture perspective when they're so engrossed in their chapter experience. We can and need to help them understand that they are part of a larger organization. They need to see how all of the chapters in Delta Sigma Pi are tied together. Try to connect them with like-chapters (commuter institution, same size membership, similar programming, small private institution, etc.). Look at the membership map on the website and find chapters in the area that could help with specific issues or activities.

Members will have an easier time finding commonalities with other chapters and can both receive and provide support from them. This will also foster a stronger Delta Sigma Pi. Equally beneficial is for the chapter to develop interfraternal relationships on campus with the other leaders of campus organizations.

- *Process will be equally or more important than the goal.*

By showing the members what they have learned through the process of goal setting, delegating, and working together, they will gain even more from the experience. One of the challenges of advising is knowing when to let the chapter learn from their mistakes. You will develop your skills in "calculated risk taking."

*(Italicized sections adapted from Dr. Kathleen Allen, University of Maryland)*

## Communicating with Today's Students

### **Encourage.**

Foster a learning environment in which everyone is a teacher and everyone is a student. Make teaching part of every person's responsibility in the chapter. Teaching shouldn't draw core people away from their tasks, but it should enhance productivity. When teaching collegians, share information and practices without dictating unnecessary rules; try to let them learn by doing. Inspire them to define their own problems and issues, engage their innovative powers, and come up with creative solutions.

### **Build.**

Create a rich information environment that facilitates ongoing learning. Does the chapter have access to the Internet? Do they have email accounts to communicate with others on campus and within Delta Sigma Pi? Provide multiple learning resources in diverse media, encourage members to set their own learning goals according to their chapter leadership responsibilities, and let them process and meet goals at their own pace.

### **Challenge.**

Spur on students with new projects that demand fresh skills. Expose them to diverse facts of campus life by allowing cross training in different committees and organizations. They will assume new responsibilities gladly and meet challenges with greater productivity and initiative when they are stronger with new skills. They will be motivated by the process of learning.

### **Communicate.**

Keep the lines of communication open. Schedule regular times for brief, detail-oriented meetings to review projects, provide updates on chapter issues, monitor results, resolve problems, answer questions, and establish and adjust goals and deadlines.

### **Motivate.**

Make communication fun and motivational. Have fun. Use the Fraternity's Motivation Presentation available through Deltasig E-Learning to aid in these efforts.

Adapted from *Generation X: The Workforce of the Future*, Rainmaker, New Haven, Connecticut, 1996 in *Training & Development*, March, 1997.

## Understanding Group Development

Now that you have some practical information about communicating with today's students, you can turn your focus to your work small group development. You are probably working with a specific committee, a task group, or the chapter Executive Committee. It's important to know how not only individuals develop but also how a group progresses through developmental stages.

Tuckman, one of the key researchers and theorists in the area of group dynamics, defined four key developmental stages to group development.

- Forming
- Storming
- Norming
- Performing

This information will be helpful to you as you work with chapter task groups, committees, and executive committee. Remember, the challenges presented by each stage of group development are **normal!** Don't try to push the group before they are ready to move forward together.

### **Stage 1: Forming**

#### Feelings:

- Fear
- Uncertainty
- Anxiety
- Caution
- Hope

Excitement  
Anticipation

Behaviors:

Little gets accomplished.  
Complaints about the group.  
Complaints about where the group is going.  
Asking, "What's in it for us?"  
Determining what first steps to take.

Issues to Address:

What's the group's purpose?  
Why are we here?  
What are we trying to accomplish?  
Do we have a leader?

There's a lot going on at this stage. Be sensitive to new members' feelings. Support the group with historical information as a guide and share your confidence in their ability. Team members have a lot of distraction which leads to a lack of task accomplishment.

**Stage 2: Storming**

Feelings:

Overzealous  
Left out  
Pressure to accomplish work  
Jealousy of leaders

Behaviors:

Increased competition and arguing  
Resistance to group formation  
Bids for power and control  
Little listening  
Relying on personal experiences

Issues to Address:

Who has power?  
How can we work together?  
How will I fit in this group?  
Will there be cliques?

Because of the lack of unity at this early stage, task completion still isn't the highest priority. Team members are communicating and are beginning to understand the motivations of one another. They are beginning to feel more comfortable about their own role in the group.

**Stage 3: Norming**

Feelings:

Pride  
Togetherness  
Sense of belonging  
Optimism  
Increased trust  
Fun

Behaviors:

Accept group and group norms  
Accept the idiosyncrasies of the group  
Emotional conflict is reduced  
Increased intimacy

Group dynamics is discussed  
Accomplish a moderate amount of work

Issues to Address:

Who are we as a team?  
Are we working together to get to our goal?  
Can we switch roles?  
Can I lead/follow?

Members will become more aware of their role in the group and discuss how people are communicating or not. They will begin to recognize when members are speaking up or need to be invited into the conversation. They are becoming more comfortable in both the roles of the leader and follower. Encourage the group to continue to notice the group dynamics and group participation level by all members.

**Stage 4: Performing**

Feelings:

Understand others' strengths/weaknesses  
Commitment  
Enthusiasm  
Satisfaction with the team's progress  
Relaxed  
Confident

Behaviors:

High performance  
Decision making norms are determined  
Diagnose and solve own problems  
Members experience personal insights (about themselves and others)  
Constructive self-change

Issues to Address:

What are the problems? How can we solve them?  
How can we bring about change?  
What are my commitments to the group?  
How can we work together even better?

The work is being done and members are feeling good about their contributions to the attainment of their goals. The team is now an effective working unit in the chapter. They are close and developing stronger relationships.

(Reference: Tuckman, B.W. (1965) Developmental sequence in small groups. *Psychological Bulletin*, 63 (21), 384-399.)

### **Volunteer Leader/Student Expectations**

Volunteers (primarily District Directors and Chapter Advisors) and students should have an open, honest relationship and have the opportunity to share ideas, receive feedback, and build trust. The responsibility of relationship building rests within each individual. In order to recognize each others' various roles and responsibilities, time should be taken to discuss expectations. Some volunteer/student partners develop a simple list of expectations for everyone such as:

- 1) Create some "How are you doing?" time.
- 2) Review the last meeting and any issues that need follow-up.
- 3) Discuss the agenda for the next meeting.
- 4) Talk about areas of concern.
- 5) Share successes.
- 6) Discuss group dynamics.

Other volunteer/student partners take more time to discuss the perceived and actual roles of the volunteer leader using a questionnaire. A sample questionnaire is provided as an example and starting-point for discussion.

## Volunteer Leader Role - Discussion Tool

The following is a series of advisory functions. Circle your level of agreement on each of the roles listed. As the volunteer, you can use this as a reality-check to help determine your primary and secondary responsibilities as a volunteer leader.

Or, you can use this tool as a discussion guide. Fill it out for yourself and have the chapter president fill it out as well and then compare notes. Where are they in sync? For what tasks/responsibilities do you disagree? How can you negotiate the appropriate roll as a volunteer leader?

(SA- strongly agree, A- agree, NO- no opinion, D- disagree, SD- strongly disagree)

In performing the role of the volunteer leader, I believe that I should:

Be a problem solving agent	SA	A	NO	D	SD
Be a counselor	SA	A	NO	D	SD
Be an information/resource person	SA	A	NO	D	SD
Be an idea resource person	SA	A	NO	D	SD
Be a sounding board	SA	A	NO	D	SD
Represent the students	SA	A	NO	D	SD
Serve as a change agent in the organization	SA	A	NO	D	SD
Interpret university policies and procedures	SA	A	NO	D	SD
Interpret Fraternity policies and procedures	SA	A	NO	D	SD
Analyze the group process	SA	A	NO	D	SD
Guarantee the success of programs	SA	A	NO	D	SD
Serve as a role model of behavior	SA	A	NO	D	SD
Attend all events	SA	A	NO	D	SD
Coordinate/advocate a balanced chapter program	SA	A	NO	D	SD
Provide continuity through the years	SA	A	NO	D	SD
Develop/plan new programs	SA	A	NO	D	SD
Educate students on issues	SA	A	NO	D	SD
Develop skills in students	SA	A	NO	D	SD
Meet bi-monthly with chairs	SA	A	NO	D	SD
Meet bi-monthly with executive team	SA	A	NO	D	SD
Communicate with Central Office (successes and problems)	SA	A	NO	D	SD
Maintain organizational records	SA	A	NO	D	SD

Work out personal conflicts between leaders	SA	A	NO	D	SD
Supervise the finances	SA	A	NO	D	SD
Organize meetings and activities	SA	A	NO	D	SD
Establish the goals and directions of the organization	SA	A	NO	D	SD
Double check program production details	SA	A	NO	D	SD
Orient new officers to their roles/responsibilities	SA	A	NO	D	SD
Maintain productive and positive energy level	SA	A	NO	D	SD
Evaluate student volunteers	SA	A	NO	D	SD
Evaluate programs	SA	A	NO	D	SD
Coordinate activities between student groups	SA	A	NO	D	SD

Please look over these roles you have just considered and list the five roles you believe to be the most important. No particular order is required.

- 1.
- 2.
- 3.
- 4.
- 5.

### **Determining Your Advising Style As A Volunteer Leader In Delta Sigma Pi**

Situational Leadership is a time-tested concept developed by Paul Hersey and Kenneth Blanchard. They developed Situational Leadership to help people attempting leadership, regardless of their role, to be more effective in their daily interactions with others. It provides leaders with some understanding of the relationship between an effective style of leadership and the level of maturity of their followers. It's based on the relationship between 1) the amount of guidance and direction (task behavior) a leader gives; 2) the amount of relationship behavior a leader provides; and 3) the readiness (maturity) level that followers exhibit in performing a specific task, function, or objective.

Imagine a chart with relationship behavior on one axis and task behavior on the other. The four leadership styles are defined by the interaction between task and relationship behaviors.



As you examine and determine the leadership style of the leader of the committee, the chapter president, or the assigned leader to a task force, think about how your advising style will adjust to their maturity level and to the approach they are taking with the group members.

## Leadership Styles

**Telling** - providing specific instructions and closely supervising work (high task, low relationship).

**Selling** - explaining decisions and providing opportunities for clarification (high task, high relationship).

**Participating** - sharing ideas and facilitating decision making (low task, high relationship).

**Delegating** - turning over responsibility for decisions and implementation (low task, low relationship).

## **Leadership Styles and Maturity Levels**

### **"Telling" is for low maturity.**

People who are both unable and unwilling to take responsibility to do something are not competent or confident. In many cases, their unwillingness is a result of their insecurity regarding the necessary task. Therefore, a directive telling style that provides clear specific directions and supervision has the highest probability of being effective with individuals at this maturity level.

#### Implications for Advising:

- Does this style fit the developmental needs of the group members?
- What type of support is the leader providing to the group members?
- What type of member would best react to this leadership style?

### **"Selling" is for low to moderate maturity.**

People with moderate maturity are unable but willing to take responsibility for projects. They are confident but they lack skills at this time. Therefore, a "selling" style provides directive behavior. Because of their lack of ability, those with moderate maturity gain from this style because it provides structure and builds self-confidence.

#### Implications for Advising

- Does the leader provide ample opportunities for the group members to ask questions?
- Does the leader provide clarification of information and tasks to the group?
- How detailed is the leader with his/her instructions?

### **"Participating" is for moderate to high maturity.**

People at this maturity level are able but unwilling to do what the leader wants. Their unwillingness is often a function of their lack of confidence or insecurity. If, however, they are competent but unwilling, their reluctance to perform is more of a motivational problem than a security problem. In either case, the leader needs to support the follower's effort to use the ability he/she already has. Therefore, a supportive, nondirective, "participating" style has the highest probability of being effective with individuals at this maturity level.

#### Implications for Advising:

- How can you best support the leader with this leadership style?
- Does the leader have strong facilitation skills, drawing on the knowledge and expertise of the group?
- Does the leader help members share their ideas in the group setting?

### **"Delegating" is for high maturity.**

People at this maturity level are both able and willing or confident, to take responsibility. Therefore, a low-profile "delegating" style, which provides little direction or support, has the highest probability of being effective with individuals at this maturity level.

#### Implications for Advising:

- What type of member do you think this leadership style would best match?
- How are the group members reacting to the leader?
- Is the leader effective?

(Verbatim from: *The Situational Leader*, The Center for Leadership Studies: Escondido, CA, 1984. "Management of Organizational Behavior: Utilizing Human Resources" by Paul Hersey and Ken Blanchard, copyright 1982.)

# FREQUENTLY ASKED QUESTIONS & STANDARD OPERATING PROCEDURES

This section attempts to answer the most frequently asked questions about the Fraternity. A summary discussion and background information are provided for each issue area. Additional sources of information are also provided if you want specific citations in the Bylaws or Fraternity policies. Specific volunteer leaders and Central Office staff members are also listed in case you need greater clarity.

## Collegiate Membership Eligibility

### Summary Discussion

Both graduate and undergraduate, full or part-time, students are eligible for collegiate membership.

Whether a student is eligible or ineligible for membership is determined by the degree program or “major” they are studying. Students who have a “major” in the college/university, school, department, or division of business or economics *are* eligible for membership.

Students in degree programs outside of the school, college, department, or divisions of business and economics *may* be eligible for Delta Sigma Pi membership. A procedure has been established to review these programs on an individual program basis. Please contact your Provincial Vice President or Central Office for more information.

Students who are pursuing a non-business major or a business minor are *not* eligible for membership.

The Bylaws of Delta Sigma Pi have a section or article devoted to Membership and Initiation.

Members of Phi Chi Theta, Phi Gamma Nu and Alpha Kappa Psi *cannot* be initiated in Delta Sigma Pi. These three business fraternities directly compete with Delta Sigma Pi. Note that Pi Sigma Epsilon members may join Delta Sigma Pi (adopted February, 1996).

Delta Sigma Pi has a number of membership classifications:

1. Collegiate Members
2. Alumni Members including Faculty
3. Honorary Members

Collegiate chapters may pledge and initiate collegiate, faculty, and honorary members.

### Background Information

"Part-time" students are eligible for collegiate membership. The chapter also has a list of approved majors for their university available within the Hub. If the chapter would like to request to add additional majors, they must complete the appropriate form to be approved by the Provincial Vice President.

### Qualified Programs

Bylaws amendments have been adopted to broaden the Fraternity's membership requirements. They address situations where colleges and universities have business degree programs outside the business and/or economics schools for administrative or organizational reasons.

The Bylaws now allow the National Fraternity to establish guidelines to evaluate degree programs outside the business and economics schools. The purpose of this evaluation is to determine if students in those programs should be eligible for membership.

The qualifications of the individual students are not considered in evaluating these degree programs. The degree program is measured on the number and content of business and/or economics courses in that degree program.

## Additional Sources of Information

- The Bylaws of Delta Sigma Pi (Article on Membership and Initiation)
- Qualified Program Policy
- Provincial Vice President, Central Office Staff

## Faculty and Honorary Membership

### Summary Discussion

Approval must be received from the Central Office before a chapter may initiate anyone into membership as a faculty or honorary member.

All faculty and honorary initiate applications need to be completed **before the Pledging Ceremony**. Failing to secure this application in a timely manner will forfeit the right to initiate the candidate on the requested date. The chapter cannot initiate any pledge or candidate without approval through the Central Office. Visit the Members Module of the Hub to submit a nomination.

The National Fraternity has established guidelines for approving faculty and honorary candidates. These guidelines are based on the stated requirements in the Fraternity's Bylaws.

Many problems are caused when chapter members ask people to be initiated without knowing if they qualify for membership. This difficult situation occurs most frequently with faculty and honorary initiates.

Three effective steps can be taken to avoid problems:

1. The guidelines for faculty and honorary membership should be read, reviewed, and followed before submitting a candidate for approval.
2. A copy of the candidate's resume should be obtained. Resumes often indicate if the candidate is a member of a competing business organization and thus ineligible for membership.
3. When chapter officers are uncertain if a candidate would be eligible for faculty or honorary membership, the Chapter President should contact the Central Office for clarifying information.

An honorary or faculty candidate may not be initiated without written approval from the Central Office. Online Membership Applications must be received at the Central Office for each faculty and honorary initiate.

The chapter initiating an honorary member should pay the members' initiation fees and the cost of leasing a Fraternity badge. No fees are to be collected from an honorary initiate.

Faculty initiates may pay their own initiation fee and badge lease expense or the chapter may pay these expenses for them. The chapter members determine who should pay these expenses, but it is generally recommended that the chapter pay these expenses.

Initiation fees for honorary and faculty initiates may vary. Check with the Central Office if you are uncertain of current fees. A Fraternity badge must be leased for all initiates.

### General Considerations

*Honorary* membership is a different classification from *faculty* membership. Honorary membership is not usually conferred upon a member of the faculty of the school, college, department or division of business administration. It is reserved for outstanding individuals in the field of business, government, industry, or education, whose professional or personal achievements (or service to the Fraternity) warrants the bestowing upon them of honorary membership in Delta Sigma Pi. Individuals such as the president or chairman of the board of a major corporation, the mayor of the city, the governor of the state, the president of the university, or an individual who has supported Delta Sigma Pi and its mission for many years, are usually excellent candidates for honorary membership. Honorary

members should not be initiated too frequently lest the "honor" of being initiated as a member of Delta Sigma Pi be diminished. Most chapters initiate no more than one or two each year.

Since the approval of a candidate for honorary membership cannot be confirmed until the application for approval has been reviewed by the Central Office staff, the candidate should not be informed that he or she is being considered until the chapter has been notified that the candidate has been approved. This will avoid embarrassment to the chapter should the candidate not be approved.

After approval is obtained, the chapter may wish to consider the possibility of conducting a pledging ceremony for this potential member. Chapters should remember, however, that the type of individual worthy of this honor usually has many professional obligations, so pledging is not mandatory. As a minimum, after approval is obtained from the Fraternity's Board, the chapter should furnish a copy of *The Crown & Delta* and other Fraternity publications when or after the candidate is informed of his/her election as an Honorary Member.

The initiation of an Honorary Member should be considered a special occasion. Chapters are encouraged to notify the Provincial Vice President, Regional Vice President, District Director, Chapter Advisor, other national officers, and alumni living in the immediate area so there will be as many members in attendance as possible. The initiation of an honorary member should be conducted in the most impressive manner possible and should be followed by a function at which the new honorary member serves as the principal speaker.

At each Grand Chapter Congress, the Fraternity initiates one National Honorary Member who is selected by the Board of Directors. This individual is usually a nationally recognized business or education leader.

### **Additional Sources of Information**

Bylaws of Delta Sigma Pi (Article on Membership)  
Central Office Staff  
Fraternity website

## **Initiations**

### **Summary Discussion**

The Ritual Book of Delta Sigma Pi contains detailed instructions and information describing how an initiation, pledging ceremony, officers' installation, and chapter business meeting are to be conducted.

Initiations conducted without regalia or Fraternity badges are not valid and must be conducted again, using the official regalia and badges.

An initiation is complete when:

- Regalia has been reserved and used
- The chapter has ordered and paid for Fraternity badges for each initiate including Honorary and Faculty
- Membership Applications have been submitted for each initiate including Honorary and Faculty (through online Pledging Ceremony Report in Members Module of the Hub)
- The Initiation Report has been completed and submitted online
- Initiation fees have been paid to the Central Office for each new initiate

Regalia trunks are requested and reserved from the Central Office. A regalia rental fee is automatically charged to all chapters twice a year. The chapter is also responsible for paying the shipping expenses.

A serious problem occurs for chapters when the chapter does not receive the regalia trunk in time for their initiation. To prevent this problem, chapters are encouraged to call the shipping chapter or the Central Office two days before their initiation if the regalia trunk has not arrived.

### **Background**

Most collegiate chapters conduct two initiations per academic year.

The Ritual Book of the Fraternity has been revised several times since the Fraternity was founded. The last change published occurred in 2011, with purple covers. Only Ritual books published in 2011 should be used and any other Ritual books must be replaced at once!

Each regalia trunk represents over a \$1,000 investment by the Fraternity. Chapters are charged for any items damaged or missing from the regalia trunk.

Chapters are encouraged to practice the initiation and pledging ceremonies before actually conducting them for new pledges or new members.

Chapters are encouraged to have two brothers memorize the same Ritual part in the event an illness or emergency prevents one brother from attending the initiation.

### **Additional Sources of Information**

Ritual Book of Delta Sigma Pi  
Risk Management, Insurance and Conduct Policy  
Regional Vice President  
Provincial Vice President  
Central Office Staff  
Fraternity website

## **Risk Management, Insurance and Conduct**

### **Summary Discussion**

The Risk Management, Insurance and Conduct Policy applies to all members of Delta Sigma Pi (collegiate and alumni), faculty members, pledges, colony members and employees – now known as organizational members.

The Individual Code of Conduct states that all members should act in a professional manner and lists proper behavior at Fraternity events. Additional Code of Conduct as it relates to Volunteers and Staff is listed in National Policies and Procedures under Section CC: Volunteer Code of Conduct.

The General Risk Management Policy is composed of five sections which deal with Alcohol and Drug Use, Hazing, Discrimination and Harassment, Chapter Houses and Meeting Facilities, and Fraternity Events.

To inform chapters of the Risk Management, Insurance and Conduct Policy provisions, an educational document has been prepared and distributed to all chapters that answers many common questions about Risk Management. It is found on the Fraternity website at [dsp.org](http://dsp.org) under Resources.

Chapters that violate the Risk Management Policy can be adversely affected when:

- Recruiting suffers because students remember the chapter only for its negative actions.
- Faculty members choose not to participate with organizations that violate college or Fraternity regulations.
- College administrators restrict chapter activities and programs as a punitive measure.
- Disciplinary action is taken by the Fraternity and/or the university.

Collegiate chapters, colonies, and pledge classes of Delta Sigma Pi are prohibited from purchasing alcoholic beverages with chapter funds. Creative ways to circumvent this restriction are also prohibited. The policy does not prohibit alcoholic beverages at Fraternity events. When alcohol is allowed at Fraternity events, it must be served by a professional bartender or it must be a Bring Your Own Bottle (BYOB) event.

The Risk Management Policy specifically prohibits hazing, discrimination, and harassment. Most states have criminal laws against hazing, underage drinking, and harassment. These laws vary greatly from state to state. The Fraternity, obviously, encourages all parties to follow the laws of their jurisdiction.

Chapters that violate the Risk Management Policy can be placed on probation by the Fraternity, may be mailed a letter of warning, or may have their charter revoked and the chapter closed. Under normal circumstances, any violations of the Risk Management Policy will be investigated by the Regional Vice President.

## **Background**

In 1991, Delta Sigma Pi adopted (and periodically updates) its Risk Management Policy to protect the Fraternity, its chapters, and its members. The Fraternity's attorneys strongly recommended that the Fraternity adopt a Risk Management Policy.

In 2008, Delta Sigma Pi added conduct as part of the Risk Management Policy, as well as enhanced many sections of the general risk management policy. At this time, guidelines for dealing with the press and a communication policy were also added.

The Fraternity's reputation can be seriously damaged by Risk Management and Conduct problems since Delta Sigma Pi advertises itself as a "Professional Business Fraternity." Delta Sigma Pi views this safety issue seriously and the Board of Directors has revoked chapter charters on several occasions when serious or repeated violations have occurred.

Discrimination and Harassment are not tolerated at any level of Delta Sigma Pi. A detailed section on sexual harassment was added to the Risk Management Policy in 1993. In 2008, the Sexual Harassment section was expanded to also include discrimination and general harassment. In 2012, the Insurance section was combined into the Risk Management section and stricter guidelines were set for chapters selling or distributing alcohol for fundraisers.

Although the National Fraternity has acquired general liability insurance for all chapters and leaders, coverage does not apply in instances of willful misconduct, gross negligence or illegal activity. The legal costs of lawsuits, even where innocence is found, can bankrupt chapters or individuals. It is thus extremely important for all brothers to adhere to the Risk Management, Insurance and Conduct Policy at all times. Information about chapter insurance coverage, and when additional coverage must be secured by a chapter, can also be found in this section. .

## **Additional Sources of Information**

Risk Management, Insurance and Conduct Policy and Risk Management Informational Document (see website)  
Regional Vice President  
Provincial Vice President  
Central Office Staff  
Fraternity website

## **Expansion and Reactivation**

### **The Purpose of Expansion or Reactivation**

Membership in Delta Sigma Pi offers significant benefits to the women and men who are initiated into the Fraternity. One goal of the Fraternity is to offer these membership benefits at as many schools as possible. Starting a new chapter (expansion) or reactivating an inactive chapter allows Delta Sigma Pi to give these benefits to many more men and women.

### **Who Can Start or Reactivate a Chapter**

Chapters have been started or reactivated by:

- \* A student or group of students who want a chapter on their campus
- \* Faculty members who believe a national business organization would benefit the students
- \* Deltasigs who have transferred to a business school without a chapter
- \* Fraternity leaders who are surprised that an excellent college does not have a chapter
- \* District Directors

- \* Regional Vice Presidents
- \* Business School Deans
- \* Deans of Students, Student Affairs, Greek Advisors
- \* Golden Council Members
- \* Central Office Staff Members

### **Summary Discussion**

A copy of the "Requirements for a Chapter Charter" may be obtained from the Central Office or on the Fraternity website under About Us/How to Join.

Student groups are called "colonies" while they are working to establish a new or reactivated chapter.

The Fraternity has developed a list of potential colleges and universities for colonization. Copies of the Potential Expansion List are available from the Central Office.

A decision on expansion or reactivation efforts is made jointly by the Regional Vice President, District Director, Board of Directors, Director of Chapter and Expansion Services and Executive Director. Depending on circumstances, expansion or reactivation efforts may proceed without full concurrence of all such parties. Each situation is unique and must be evaluated within that context.

In all cases, however, a college or university must meet these requirements before Delta Sigma Pi can establish a chapter on campus:

- \* There must be a separate College, Division or Department of Business.
- \* The school must be accredited on either a regional or national level.
- \* There must be enough business and/or economics students to support a quality chapter. The minimum requirement, which can be lowered in special cases by a vote at the National level, is 400 business and/or economics students.

### **Background**

Approximately 75 collegiate chapters are currently inactive. The potential exists to reactivate many of these former Delta Sigma Pi collegiate chapters.

Approximately 400 additional business colleges and universities meet our requirements. This is in addition to the over 280 campuses where chapters have already been established.

The Fraternity has adopted almost identical requirements for establishing or reactivating chapters.

### **Additional Sources of Information**

Bylaws of Delta Sigma Pi (Article on New Collegiate and Alumni Chapters)  
 Requirements for a Chapter Charter  
 Potential Expansion List  
 Regional Vice President  
 Provincial Vice President  
 Central Office Staff

## **Chapter Assistance Actions**

### **Summary Discussion**

Chapter Assistance Actions are designed to aid and assist struggling chapters by providing guidelines and structure for the chapter members and Fraternity volunteers. District Directors may only recommend to the Regional Vice President that a chapter be placed on Chapter Assistance. It is the responsibility of the Regional Vice President to recommend to the National Board of Directors that a chapter be placed on Assistance Action.

Chapters are reviewed annually by the Fraternity's Board of Directors. Chapters are routinely measured on these criteria:

- \* Number of members in chapter.
- \* Number of new initiates compared to annual goal.
- \* Accounts Payable to Delta Sigma Pi on June 30.
- \* Two (2) Pledge Programs per year (approved and on time).
- \* Three (3) Officer Reports per year (on time fall, winter/spring, summer).
- \* Number of professional events.
- \* Number of service events.
- \* Comprehensive strategic plans (December and June).
- \* Final CMP.
- \* Attendance at Grand Chapter Congress.
- \* Attendance at LEAD Schools, LEAD Provincials, and other regional and area conferences.

Chapters having poor performance in any of these areas may be considered for chapter assistance.

Chapter Assistance Actions may be as simple as sending a letter of concern or may be as involved as appointing a brother to supervise the chapter for a period of time (Receivership).

Chapters may be placed on an Assistance Action at any time. This process normally begins when a Regional Vice President files a Chapter Action Request Form to recommend that a chapter receive an Assistance Action.

A letter of concern is often sent to a chapter that has experienced a decline in one area of chapter operations. Letters of concern direct the efforts of the chapter members toward improving this specific area of chapter operations.

Guidance is the most common form of Chapter Assistance. In a Guidance Action, the Regional Vice President along with the Director of Chapter and Expansion Services establishes goals for the chapter. These goals are selected for their ability to improve the chapter and are described in a letter to the Chapter President.

Receivership is the most serious form of Chapter Assistance. In Receivership, the operations of the chapter are supervised by an alumni brother known as a Receiver. This action is reserved for those cases where the members are not able to remedy the chapter's problems on their own and they agree to the terms of the Receivership.

An average guidance period or Receivership lasts for one year. The time period may be extended according to provisions in the Fraternity's Bylaws.

Chapters on Assistance Actions should be visited frequently by District Directors and Regional Vice Presidents. This is especially true for chapters in a Receivership Action.

## **Background**

Extra assistance is periodically needed by many chapters to overcome operational problems.

Each year, approximately 20 Delta Sigma Pi chapters are placed on some type of Chapter Assistance Action.

Chapter members often do not understand Chapter Assistance Actions and believe that the Fraternity is criticizing them for the condition of the chapter. Overcoming this attitude by the chapter members is extremely important in making the Assistance Action effective and meaningful. The programs are designed to be helpful, not punitive.

Chapter Assistance Actions are considered by many to be a form of "preventive medicine." One goal of these actions is to reduce or even eliminate problems before they occur.

Almost all fraternities and sororities have methods for assisting chapters when they fail to meet minimum performance standards.

## **Additional Sources of Information**

Bylaws of Delta Sigma Pi (Article on Chapter Assistance Actions)  
Chapter Action Request Form  
Regional Vice President  
Provincial Vice President  
Director of Chapter and Expansion Services

## Chapter Discipline

### Summary Discussion

Generally speaking, chapters are disciplined by the Fraternity when there is a willful or unwillful serious violation of the Fraternity's rules and regulations. Chapters which are experiencing operating difficulties are normally offered a Chapter Assistance Action.

Chapters may be disciplined at any time by the Grand President/Board of Directors. The penalties of warning, probation, suspension, and revocation are used when a serious or willful violation of Fraternity law has occurred.

Chapters disciplined by the Fraternity should be visited frequently by volunteer leaders. In many cases, the survival of the chapter is in question, so extra efforts are needed to remedy the chapter's problems.

The Regional Vice President normally starts the process of disciplining a chapter by making such a recommendation and stating their specific reasons for the recommendation. This process can also begin with a complaint from a university/college, a complaint from a member, or a report from a District Director.

A **warning** is often issued for a first violation or when the violation may not be deemed very serious. It will advise the chapter on the violation and prohibit future similar actions that led to the violation.

A chapter placed on **probation** is given specific requirements to complete before the probation can be removed. These requirements are established by the Regional Vice President, Director of Chapter and Expansion Services, Provincial Vice President and either the Past Grand President or the Grand President. The Chapter President receives a letter describing the probation requirements at the start of the probation. At least one other chapter officer receives a copy of this letter. A chapter is usually placed on probation for 6-12 months. At the end of the probation period, the chapter's performance is compared to the requirements given to the chapter to see if the probation should end.

**Suspended** chapters may not conduct any activities while suspended without prior approval from the Fraternity's Board of Directors or their designated representative. Suspension is for a 90-day period often to cease activity while a complaint or serious matter is being investigated. It may also be used to eliminate activity for a school term to allow for a needed "rest" of a problem situation and time to plan for reorganization.

**Revocation** can be enacted to officially close the chapter for disciplinary or operational reasons, most often when other above methods were all unsuccessful. Once revoked no meeting or activity can be conducted in the name of the chapter or the Fraternity. Specific reactivation plans are required to re-establish the chapter at an unspecified later time, usually at least four years.

Chapter members may **appeal** a probation, suspension, or revocation to the Fraternity's Board of Directors. Appeals of charter revocations can be heard by the delegates to Grand Chapter as a chapter's final appeal.

### Background

University/college administrators expect Greek-letter organizations to discipline their chapters and members when:

- \* chapters or members damage the reputation of the institution,
- \* injure students,
- \* violate university or college regulations, or
- \* violate state laws.

Delta Sigma Pi and its chapters are often held to a higher standard than other campus organizations because we promote ourselves as “a *Professional Business Fraternity*.” Some general fraternities and sororities reorganize chapters in a two step process that Delta Sigma Pi does NOT use. First, the current chapter members are informed that they have "gone alumni" and may not participate in future collegiate chapter events. Second, the organization recruits a completely new group of students. Remember that Delta Sigma Pi does NOT utilize this method.

### **Additional Sources of Information**

Bylaws of Delta Sigma Pi (Article on Chapter Discipline)  
Chapter Action Request Form  
Regional Vice President  
Provincial Vice President  
Director of Chapter and Expansion Services

## **Alumni Programs**

### **Summary Information**

District Directors appointed to alumni chapters are to personally visit alumni chapters in their district to:

- \* Offer recommendations for improving the chapter.
- \* Provide information about the Fraternity as a whole.
- \* Motivate the members to continue their involvement with the Fraternity.
- \* Promote Fraternity-wide programs to all collegiate and alumni members.

The Fraternity's Bylaws describe the organization of alumni chapters and the requirements they must follow.

Alumni chapters must submit several items to the Central Office to remain in good standing with the Fraternity. These franchise requirements, which may vary periodically, include: a set of Chapter Bylaws, a roster of members, a list of officers, insurance fee and a franchise renewal fee and/or charter fee.

Alumni Chapter Presidents may receive update letters from the Central Office if the alumni chapter has not completed their franchise requirements for the year.

Alumni programs are coordinated by the Board of Directors and Central Office Staff. Each District Director should read the alumni information publications available through the Central Office. Chapters who have questions about their franchise requirements should contact the Central Office.

### **Background**

Delta Sigma Pi historically has a large number of alumni chapters throughout the United States either franchised or in the expansion mode.

Alumni chapters are open to any alumni member in good standing from any Delta Sigma Pi chapter.

Alumni chapters are based upon geographic areas. The larger alumni chapters are often in metropolitan areas.

The Fraternity has negotiated and/or developed several attractive benefits and services for our members. These benefits and programs include:

- \* *The DELTASIG Magazine*
- \* LEAD Programming for Personal and Career Development
- \* Insurance Discounts
- \* Car Rental Discounts
- \* Travel Assistance and Discounts

A directory of Delta Sigma Pi members is published every few years. The most recent directory, in printed and CD-ROM formats, was published in 2007.

### **Additional Sources of Information**

Bylaws of Delta Sigma Pi  
Alumni Chapter Operations Manual  
Alumni Brochures  
Provincial Vice President  
Regional Vice President  
Central Office Staff  
Fraternity website – Alumni Section and Calendar of Events

## **Delta Sigma Pi Leadership Foundation**

Fraternity volunteers should actively promote the Delta Sigma Pi Leadership Foundation. This promotion should include:

- Encouraging brothers to apply for undergraduate and graduate scholarships through the Leadership Foundation.
- Informing brothers about the Leadership Foundation's programs and activities, including LEAD events.
- Reminding chapters to have an event in support of the Foundation each school term and to establish chapter programs to promote the Leadership Foundation.
- Helping chapters establish an endowed scholarship fund on their own campus through the Leadership Foundation.
- Making a personal contribution each year, of whatever size, to the Leadership Foundation.

### **Summary Discussion**

The Delta Sigma Pi Leadership Foundation is the only charity authorized by the Fraternity to solicit funds from members. Donations made to the International Fraternity of Delta Sigma Pi are NOT tax-deductible for individual income tax purposes. Donations to the Leadership Foundation ARE tax-deductible for those purposes.

The Leadership Foundation conducts an annual fund raising campaign which is mailed from the Central Office. The Foundation Executive Vice President is responsible for organizing the annual campaign.

The Leadership Foundation has a Board of Trustees, separate from the Fraternity's Board of Directors, and they are responsible for the Leadership Foundation.

The Delta Sigma Pi Leadership Foundation offers nearly 80 scholarships annually totaling more than \$55,000 and an additional \$74,000 being paid out annually as grants to chapters and the National Fraternity for educational/professional development.

Brothers who are selected as the Collegian of the Year for their region receive a scholarship grant from the Leadership Foundation. The provincial winners (except the national winner) are offered a graduate study scholarship. The national winner is provided a grant for graduate studies.

The Foundation provides funding for a variety of educational programs including the Scholarship Key program, LEAD Schools, LEAD Provincial Conferences, LeaderShape®, Succeed Faster and Grand Chapter Congress.

### **Background**

As far back as 1945, Delta Sigma Pi began to give consideration to forming a charitable foundation to support educational and scholastic endeavors. Today, the Foundation continues a strong tradition of supporting the Fraternity and its members.

The Mission of the Foundation is exclusively charitable in nature:

"The Delta Sigma Pi Leadership Foundation exists to generate and provide financial support for Delta Sigma Pi Fraternity's educational and charitable programs, which assist members to achieve individual and professional excellence within the business community."

The three main areas of program support are: scholarships and academic achievement, leadership development and training, and personal and professional improvement.

As a charity, the Leadership Foundation has very strict limitations on what programs it can and cannot fund. These restrictions are placed on charities by the Internal Revenue Service and the U.S. Government.

The Delta Sigma Pi Educational Foundation merged into the Delta Sigma Pi Leadership Foundation in 1993.

#### **Additional Sources of Information**

Delta Sigma Pi Leadership Foundation Brochures  
Financial Statements for the Delta Sigma Pi Leadership Foundation  
Leadership Foundation Trustees  
Leadership Foundation Executive Vice President  
Central Office Staff  
Fraternity website

## ADDITIONAL RESOURCES

### Fraternity Website

dsp.org

### Delta Sigma Pi Manuals and Guides

(\*denotes available online)

Ritual Book	Community and University Service Guide*
National Bylaws*	Financial Management Guide*
Policy and Procedures Manual, including the Risk Management, Insurance and Conduct Policy*	Fundraising Guide*
Awards and Recognition Guide*	Individual Chapter Officer Packets*
Alumni Chapter Operations Manual*	Individual Discipline Policy*
Academic Achievement Guide*	Recruiting Guide*
Best Practice Manuals (Collegiate and Alumni)*	Professional Activities Guide*
Chapter Bylaws Template*	<i>The Crown &amp; Delta</i>
Chapter Management Program Guide*	Standard Pledge Education Program*
	Volunteer Leadership Manual*

### Central Office Staff

The Central Office of Delta Sigma Pi is the headquarters and administrative center for the Fraternity. Most support services are provided to volunteer leaders since they have supervisory responsibilities with the chapters. We encourage volunteer leaders to contact the staff for help in serving the members.

#### Specific Services

Volunteer leaders will receive monthly email/mail from the Central Office, which include copies of materials sent to collegiate and alumni chapters.

Chapter Management Program reports are available 24/7 at dsp.org and within the Hub for all volunteer leaders. A Central Office staff directory is available at dsp.org. This directory outlines the responsibilities of each staff member. Please review this directory and direct questions to the appropriate staff member.

The workload at the Central Office is seasonal and corresponds with the academic year (and Grand Chapter Congress, other conferences, etc.). Routine requests in May are more rapidly filled than requests in October. The Educational and Leadership Consultants, Director of Chapter and Expansion Services, Associate Executive Director, and Executive Director travel extensively during the academic year and thus responses may be delayed.

#### Background Information

The Central Office maintains the historical records and archives for the Fraternity and also has limited historical information on individual chapters. A list of the Central Office responsibilities and duties is published in the Bylaws of Delta Sigma Pi.

Tours of the Central Office can be scheduled on both weekdays and weekends. Please call well in advance to learn which dates are available for tours.

**Office Hours, Address & Contact Numbers**

8:30 a.m. - 5:00 p.m.	Eastern Time
7:30 a.m. - 4:00 p.m.	Central Time
6:30 a.m. - 3:00 p.m.	Mountain Time
5:30 a.m. - 2:00 p.m.	Pacific Time
3:30 a.m. - 12 Noon	Hawaiian-Aleutian Time
Monday through Friday	Closed on Saturday and Sunday and all major holidays.

The Central Office is closed between December 24 and January 1.

**Phone Number**

513-523-1907

**Fax Number**

513-523-7292

**Address**

Delta Sigma Pi Central Office  
330 South Campus Avenue  
Oxford, OH 45056

## Sample District Director Report

DELTA SIGMA PI  
DISTRICT DIRECTOR REPORT  
CALENDAR QUARTER ENDED DECEMBER XX, 20XX

Chapter:

School:

District Director:

### VISITATION/COMMUNICATION SUMMARY

Document dates and nature of all visits made during the calendar quarter. In addition to personal visits, describe other communication that occurred between you and the chapter during the quarter.

### ASSESSMENT OF SPECIFIC OPERATIONS

Provide your assessment of the following operational aspects of the chapter for the quarter:

- \* Recruitment
  
- \* Professional Activities
  
- \* Community Service
  
- \* Pledge Education and Initiation
  
- \* Academic Achievement/Scholastics
  
- \* Motivation/Participation of members
  
- \* Finances
  
- \* Alumni Relations/Activities

### ISSUES/CONCERNS/QUESTIONS RAISED BY CHAPTER

Document those issues/concerns/questions brought to you by the chapter and the response, if any, that has been provided by you, other national officers and/or the staff.



## Sample Letters

Here are a few sample documents often used by District Directors. These documents include: Letter of Introduction; Letter Scheduling a Chapter Visit; and Follow-up Letter to a Chapter President;

### **Introduction Letter**

*A letter of introduction should be mailed or emailed to the Chapter President when the District Director is appointed. The Chapter President's address and phone can be obtained from the Central Office.*

*In the opening paragraph, the District Director conveys enthusiasm and excitement about her appointment. This letter comes across in a friendly manner.*

*In the second paragraph, the District Director has explained her Fraternity experience without trying to portray herself as an expert. The chapter members will respond favorably to this letter.*

*The responsibility for communicating is equally divided in this letter between the District Director and the Chapter President. The excuse of "I was waiting for you to call" can be avoided.*

*Copies of this letter have been mailed to the Vice President-Chapter Operations, Chapter Advisor and the Regional Vice President.*

September 6, 2010

Mr. Steve Thomson, President  
Delta Sigma Pi  
(Address)

Dear Brother Thomson:

I was recently appointed as District Director for Omega Alpha and Sigma Sigma chapters by Northwestern Regional Vice President Joe Smith. I am very excited to be appointed as your chapter's District Director and will be visiting in the near future. In this letter, I would like to briefly introduce myself to you and the chapter members.

I was initiated in Delta Sigma Pi as a sophomore at the University of Wisconsin. During my college years, I served as President, Vice President-Professional Activities, and Newsletter Correspondent. Since graduating ten years ago, I relocated to Portland and was elected President of the Portland Alumni Chapter. On a professional level, I am employed as a database manager for the consulting firm of Smith and Jones, Inc.

As a District Director, one of my main responsibilities is to visit the chapter and provide information and support to the brothers. I would like to visit Omega Alpha in the very near future and will be calling you to see what events are already scheduled. I don't know your schedule, so if I cannot reach you by telephone before the 21st, please call me. My telephone numbers, address, and email are:

123 West Adams Street, Portland, Oregon 92777

WORK: (503) 555-0783 X42      HOME: (503) 555-1206      Email: jsj@dsp.org

Brother Thomson, I look forward to meeting and working with you and the other brothers of Omega Alpha Chapter!

Fraternally,  
Jennifer S. Johnson  
District Director

cc:      Joe Smith, Regional Vice President  
         Sandy Day, Vice President-Chapter Operations  
         Ralph Oldsmith, Chapter Advisor

## **Letter Scheduling a Visit**

*A letter scheduling a visit should be mailed well before the visit.*

*Indicate both the date and the day of the week you are visiting. This reduces the chance for misunderstandings on when the visit will occur.*

*Clearly state the purpose of the visit. Also, the potential benefits to the chapter members from the visit should be mentioned.*

*Indicate who should attend the meeting and an estimate of the length of the meeting.*

*State in the letter how you will be arriving, especially if you will need transportation to campus.*

*Ask the Chapter President to inform you of meeting time or location changes.*

*Copies of correspondence between the District Director and the chapter should be mailed to the Vice President-Chapter Operations, Chapter Advisor and Regional Vice President.*

October 8, 2010

Ms. Katherine R. Goldblatt, President  
Delta Sigma Pi  
(Address)

Dear Katherine:

One of my primary responsibilities as a District Director is to visit collegiate and alumni chapters. To meet this responsibility, I have scheduled a visit to Omega Delta Chapter on Tuesday, October 30. The purpose of this visit is to meet the brothers and review operations to identify ways to help make the chapter even better.

Ideally, our meeting will last two hours and should be attended by all chapter officers. To reduce the amount of meeting time needed, I am requesting some information from you in advance. Enclosed is a Chapter Operations Form that should be completed prior to our meeting. Please send the completed Operations Form, and any needed attachments, to me before the 30th.

My fax, email and phone numbers are: Fax: 555-456-1234 Email: [skh@dsp.org](mailto:skh@dsp.org) Phone: 555-223-5456

Another important goal of this meeting is to address topics that are important to the chapter officers. Please use the back of the Chapter Operations Form to list topics that should be addressed in our meeting. My visit will provide the opportunity for brothers to ask any questions about their respective offices, chapter operations, the Central Office, and the National Fraternity.

I will be arriving on campus no later than 6:30 P.M. for our scheduled 7 P.M. meeting. Please return the enclosed confirmation form to me when you know where the meeting will be located. If there are any changes to either the meeting time or location, please let me know by phone, fax or email as soon as possible.

Katherine, I look forward to seeing you on October 30. Thank you for your help in the arrangements!

Fraternally,  
Sandra K. Hill  
District Director

cc: Bradley J. Worth, Regional Vice President  
Steven S. Rail, Chapter Advisor  
Amanda E. Camille, Vice President-Chapter Operations

## **Chapter Follow-up Letter to President**

*There are five goals in any follow up letter with a chapter. These goals are to:*

- 1. Review the most significant matters discussed during the visit.*
- 2. Answer any questions still outstanding from the visit.*
- 3. Review specific recommendations which were made during the visit and offer to help.*
- 4. Recognize areas where the chapter is excelling and encourage chapter members to continue with their excellent results in those strong areas.*
- 5. Thank the chapter for their hospitality.*
- 6. Send a separate thank you to the Advisor(s) and/or any others who were particularly helpful to you or had specific issues you can now address.*

February 2, 2010

Ms. Lana V. Webber, President  
Delta Sigma Pi  
(Address)

Dear Lana:

Thank you for the wonderful hospitality that you and the other brothers offered me last week on my visit to Sigma Sigma Chapter. I enjoyed the meeting and was very impressed that every chapter member attended the meeting. Great job!

I noticed several surprised faces when it was announced that only four students remain in the pledge education program. Since the chapter started with fifteen pledges, this "drop out rate" should be investigated. Many chapters conduct exit interviews to find out why students have withdrawn from the pledge program. These exit interviews are similar to what companies do when employees leave the company. Lana, can the members of Sigma Sigma Chapter interview students who have withdrawn from the pledge program and find out what caused these students to end their association with Delta Sigma Pi?

Another report which caused some surprise among the members was the Vice President-Finance's report. According to that report, the chapter does not have enough money to pay its outstanding bills. The bank balance was listed at \$832.15, while outstanding bills totaled \$ 1,207.31. It was not mentioned in the meeting whether any additional fund raising projects have been scheduled to make up this shortfall. Financial problems can severely demoralize a chapter and I encourage you to take action to resolve this. Can I help in any way?

I have scheduled my next visit to Sigma Sigma Chapter for the Executive Committee meeting on Thursday, February 24 at 7:00 p.m. I would also like to spend time with the Vice President-Finance and the Vice President-Pledge Education to help identify solutions to these issues. Please have the chapter's financial records (bank books, bank statements, accounting ledgers, etc.) available for my review.

Lana, I look forward to seeing the brothers on the 24th of February.

Fraternally,  
Steven Q. Simpson  
District Director

cc: Kelly M. Sheely, Regional Vice President  
Donna Belmaine, Chapter Advisor  
Deanna Hopkins, Vice President- Chapter Operations