



**Sigma Nu Fraternity**

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# **Making the Most of the Consultation Program**

**Alumni Engagement Series**

# Today's Presenters

**Austin Lloyd (Arkansas-Fort Smith)**  
**Director of Chapter Services**

**Ryan Perry (Southern Mississippi)**  
**Associate Director of Chapter Services**





# Chapter Consultation & Support Program

## Overview

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# Chapter Consultation & Support

## Direct Support (live, events)

- Leadership Consultant Program
  - Biannual on-site consultations
  - 2-3 days per chapter/colony each fall and winter/spring
- College of Chapters
  - Commanders, January (Roanoke)
- Sigma Nu Institute
  - Officers, January (virtual)

## Resources (on-demand, self-service)

- Officer Resource Pages
- **Officer Manuals**
- Best Practices Library
- Pursuit of Excellence Program
  - Annual assessment, planning, goal setting, awards, minimum standards, and continuous improvement



# Leadership Consultant Program

## Overview

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# Personal Trainer Approach

## Standard Level of Service – All Consultations

- Review of policy, procedure
- Ensuring a minimum level of service and consistency for all chapters and campuses

## Adaptability Based on Chapter Wants & Needs

- Chapters self-select timely and relevant add-ons to the basic experience
- Focus on goal-setting and improvement
- On-site consultations and follow up are grounded in organization's assessment and standards (PEP)



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# **'24-'25 Chapter Support**

## **Fall '24**

- **Virtual Check-Ins (early August)**
- **In-Person Consultations (September – November)**

## **Spring '25**

- **In-Person Consultations (January – mid-April)**
- **Virtual Check-Ins (late-April)**



# Consultations





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# Standard Elements

- **Top chapter officers**

- Review ABC's of position
- Identify what they do best, where they can improve the chapter within their "sphere of influence"
- Set goals to make those changes

- **Advisors to the Chapter**

## **Key groups**

- Executive
- Candidate (New Member)
- Chapter
- Standard Workshop (rotating)

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# Focus Areas (Custom to Chapter)

## **Additional Officer / Committee Meetings**

### **Workshops**

- **One-on-One, Executive, Committee, or Chapter**
- **Educational, Informational, Practical (creation of procedure, policy, process)**
- **Improve chapter operations and member experience in specific ways (grouped to align with divisions of Pursuit of Excellence Program)**

## **LEAD Facilitation**

- **Whole chapter or appropriate cohorts (e.g., candidate class)**

### **Action Plans**

- **Develop/update PEP-focused action plans for operations (officer or committee specific)**

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# Goal Setting & Action Plans

Officer Goals

Consultant Feedback

Action Plans

Expectations

Follow Up Schedule

**Improving upon officer and chapter goals. Drives follow up by consultant, advisor(s), other officers.**



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# Follow Up

## **Immediate and ongoing**

- **Officer Competency Form, goals, and notes from officer meetings distributed to all officers and advisors**

**Email, phone, tele / videoconference conducted on a mutually agreed upon schedule**

- **Based on Chapter/Officer goals, regular “to-do” items**

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# What Students Are Saying

*The consultation and support program allows for a better relationship between [the General Fraternity] and a specific chapter. **Due to the limited interaction between the two, the consultation/support program really allows for the chapters to get to know members of the General Fraternity and create (what I hope) is a friendly and comfortable relationship.***

*The **support we receive from the General Fraternity is unparalleled.** After attending College of Chapters and experiencing multiple consultations, **it is my belief that we are given the tools to succeed at a high level.***

*Each visit leaves the chapter **reinvigorated** with the mission of Sigma Nu and **desire to see the chapter fulfill that mission.***

\*\*All quotes on this page are from the LCVS. All **emphasis** has been added for effect

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# What Advisors Are Saying

*It's always wonderful working with a headquarters that trains their consultants to **have real conversations**. I love nothing more than working with Fraternity and Sorority headquarters that view the FSA and University as a **partnership in the development of our Greek students**.*

*This still remains **one of the best consultation programs in the business** – many steps ahead of your interfraternal peers.*

*Easily the **most organized and thorough from start to finish** – so much to be proud of from an organizational standpoint.*

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# Volunteer Engagement

With the Consultant  
&  
To Support the  
Consultation





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# Before the Consultation

- **Opportunity to make connections between volunteers and staff (consultant)**
  - **Consultant email introductions over the summer (early July)**
- **Set up a meeting during the consultation (on-site or phone/virtual)**
  - **Announcement of consultation dates (when staff will be in town)**
    - **Shared by early August and early January**
  - **Consultant outreach to volunteers before academic term begins to set up one-on-one meetings**
- **Questions year-round on operations, best practices, chapter-specific information, finance and reporting updates**

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# During the Consultation

## Meeting with Chapter Advisor, Advisory Board Chairman, and/or AAB Members:

- **Advisor job description and expectations**
- **Alumni Advisory Board health/participation level**
- **Verification of advisor names and positions**
- **Connection to the local Division Commander**
- **Questions, troubleshooting, and best practice sharing with the advisor**
- **Familiarity with the Alumni Best Practices Library**
- **Receipt of regular communication from SNHQ**
- **Review of Chapter/Officer strengths and weaknesses**

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# After the Consultation

- **Review consultant follow-up messages**
  - **48 hours out – sharing of officer meeting notes, goals, and resources**
  - **1-2 weeks out – consultation recap and request for progress and continued follow-up frequency & medium**
- **Review officer meeting notes (competency form, resources, and goals)**
- **As needed, connection with local Division Commander to assist with AAB training, recruitment, ongoing assistance**
  - **Connections with staff experts on specific issues**
- **Complete follow-up survey (Leadership Consultant Visitation Survey)**

# Fall vs. Winter/Spring

## Fall

- Review Pursuit of Excellence Program ratings and feedback
- Support Chapter in conducting Strategy Session
- Ensure continuity and updates to chapter plan through officer elections & transitions

## Winter/Spring

- Prepare for the Pursuit of Excellence Program annual self-assessment (due April 30)
- Conduct year-end goal setting and budget prep for upcoming academic year



# Questions?

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# Thank You

**Todd Denson**  
**Director of Alumni Advisory Programs**  
**540-600-3019**  
[todd.denson@sigmanu.org](mailto:todd.denson@sigmanu.org)

**Austin Lloyd**  
**Director of Chapter Services**  
**540-600-3012**  
[austin.lloyd@sigmanu.org](mailto:austin.lloyd@sigmanu.org)

**Ryan Perry**  
**Associate Director of Chapter Services**  
**540-319-3003**  
[ryan.perry@sigmanu.org](mailto:ryan.perry@sigmanu.org)

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