

# Making the Most of the Consultation Program

**Alumni Engagement Series** 



### **Today's Presenters**

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# Chapter Consultation & Support Program

Overview

## 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** 

# 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)

### '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)

#### Standard Meetings

 Policy, procedure, competencies, coaching

#### **Focus Areas**

Chapter customization

### Goal Setting & Action Plans

• Goal setting (officers & executive committee)

### Consultations

### 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)

### 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)

# Goal Setting & Action Plans

Officer Goals

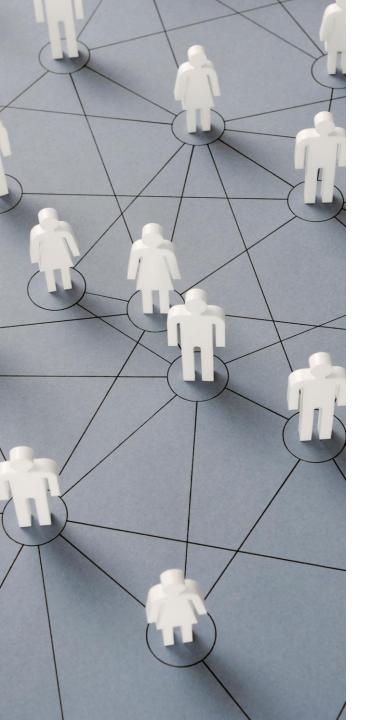
Consultant Feedback

**Action Plans** 

**Expectations** 

Follow Up Schedule

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



# 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

# 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**.

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

# 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



### 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

## 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

### 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 selfassessment (due April 30)
- Conduct year-end goal setting and budget prep for upcoming academic year



# Questions?

### Thank You

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