



Delta Sigma Pi

DISTRICT DIRECTOR MANUAL

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Section 1: Duties and Expectations of a District Director

Specific Duties and Responsibilities of District Directors

- Continually monitor chapter performance by maintaining regular contact (by telephone, mail or electronic mail) with the president and/or other officers of those chapters. Be responsive and open to text messaging and video chat which are popular forms of communication among college students.
- Personally visit the chapter at least three times each academic term or more often if deemed necessary to provide needed assistance. These visits are designed so the District Directors may offer local recommendations to improve the chapter and its operations.
 - Visits are not limited to chapter or executive meetings. The most engaged District Directors mix up chapter interactions with social, community service and professional events and attend a pledge meeting or event.
 - Attend Pledge Ceremony and Initiation; if you cannot attend, find an alternate alumni member well in advance of the event and notify the chapter president.
- Within seven days after visiting a chapter or having significant contact with a chapter by telephone or mail, communicate to the Regional Vice President a summary of the current operations of the chapter, including appropriate recommendations for follow up action.
- 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.
 - Review the chapter's bylaws and policies and procedures at least once a year.
 - Review the chapter's pledge education program each semester.
- Complete Certified Deltasig Leader (CDL) certification.
- Recommend to the Regional Vice President specific assistance or disciplinary action that may be required to assist a chapter to improve its performance or correct violations of Fraternity laws and policies. District Directors have no disciplinary powers but may recommend to the Regional Vice Presidents what disciplinary action be taken on a chapter.
- Provide positive feedback and compliments to the chapter beyond constructive feedback—just as important.
- Work with the Chapter Advisor and involved faculty and college officials, to develop a good working relationship between the Fraternity and the college/university.
- Actively encourage the chapter to participate in Fraternity-wide programs such as the Chapter Management Program, leadership programs, the Leadership Foundation, community service and the awards programs.
- Encourage the chapter to send an official delegate to each Provincial Council Meeting and Grand Chapter Congress.
- Monitor a chapter's CMP and help them remember important deadlines. Provide encouragement and direction for completing requirements and awards.
- Review national award applications prior to chapter submission.
- Assist provincial and regional officers in the dissemination of information about the programs, goals and objectives of the Fraternity.
- Solicit feedback and suggestions and forward these to the Regional Vice President and Provincial Vice President.
- Serve as a role model for Fraternity initiatives and at Fraternity events. The example District Directors provide can be very positive.

- 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 members.

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 ensure 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.

Section 2: Chapter Visits

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.

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 three 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 could be to a chapter executive committee meeting to review all areas of chapter operations and to make recommendations for improvement.
3. A third visit may be at another chapter event focused on building the relationship with the chapter.

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. It is important to have enough chapter visits of a variety of types to build rapport and trust with the chapter.

Too many visits may make a chapter feel like they are being micromanaged. Have a conversation with your Regional Vice President if a chapter has extenuating circumstances that require more attention. 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 www.dsp.org/cmp) 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 www.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.

"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 Central Office staff.

If a serious problem is observed, immediately call the Regional Vice President and Central Office staff 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.

Section 3: Working with the University/Chapter Advisor

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.

Section 4: General Support for District Director Role

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. 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.

Characteristics of a Successful Chapter

- Open and close all appropriate meeting with Ritual.
- Weekly business meetings start promptly at a designated time.
- Chapter surveys determine popular events and new ideas.
- Strong committee system—all brothers assigned to at least one committee.
- Ongoing fund raising projects.
- Involved Chapter Advisor.
- Professional looking recruiting and promotional materials.
- Strong reputation with the Dean's office.
- Structured transition period with job descriptions written for each officer.
- Written chapter goals.
- Chapter programs and award recognizing outstanding performance.
- Effective use of parliamentary procedures.
- Complete calendar finalized and distributed at beginning of each term.

- Ongoing recruiting publicity.
- Thoroughly memorized and practiced Ritual ceremonies.
- More prospects during recruiting than pledges in a pledge education program.
- Written agenda used at chapter meeting.
- Apply for national Fraternity awards.
- Publish a newsletter at least once each semester/quarter.
- Have strong attendance at regional and national Fraternity events.
- Interacts with other chapters.
- Early preparations between school sessions.
- Regularly updates chapter website and visits www.dsp.org.

Characteristics of a Struggling Chapter

- Contains cliques, factions.
- Little knowledge of Ritual.
- Little contact with other chapters.
- Limited attendance at regional or national events.
- No, or loosely enforced, attendance policy.
- All efforts directed towards recruiting and pledge education.
- No transition.
- Chapter dominated by alumni members.
- No committee system.
- In-fighting among Executive Committee members.
- Uses programs of local alumni chapter as replacement for own.
- No delegation of duties.
- Poor attendance at meetings.
- Few social activities to promote brotherhood.
- Poor reputation on campus.
- Little respect from faculty.
- No desire by members to run for office or participate on committees.
- Poor education of pledges on the necessities of running a good chapter.

How to be an Effective Leader

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 an alumnus member, 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 wellbeing 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 commonalties 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)

Risk Management, Insurance and Conduct

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 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 www.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](#)
[Volunteer Leadership Manual](#)

Regional Vice President

Provincial Vice President

Central Office Staff

[Fraternity website](#)

Additional Information

Sample District Director Report:

District Director Name: _____

Chapter served: _____

Season/Year: _____

Instructions: Mark "Yes" on those lines you have completed the task or attended an event. Specify the date for those events or meetings attended. Feel free to provide any additional information you deem appropriate.

1. ___ I have seen and verified that pledges were provided with the printed copy of the chapter's approved pledge education program from the Hub.

2. ___ I have seen and verified that pledges were provided with the current and most recent **Pledge Education Manual** and that it is new and unused.

3. ___ I have attended the following meetings or events within the current or most recent academic year:

Event Type	Attendance (Yes/No)	Date if Attended
Pledging Ceremony		
A pledge meeting		
Initiation		
A chapter business meeting with Ritual		
An Executive Committee meeting		
An Officer Transition meeting		
Meeting with Chapter Advisor or other faculty		
A chapter recruiting event		
A chapter professional, service, fundraising or similar event		
A chapter social, banquet, homecoming, Founders' Day event		
LEAD School		
LEAD Provincial Conference		
Grand Chapter Congress		
Area or Regional Conference		
National Officer Training meeting or retreat		
An alumni chapter meeting or event		
Other (please specify)		

4. ___ I have reviewed, discussed, and corrected any terminology mistakes with the chapter.

5. ___ I have reminded all officers that each of their positions has an officer packet online outlining important duties about their position and requested that they review it individually and use it during transition discussions.

6. ___ I have recently read and feel knowledgeable about all sections of the Risk Management, Insurance and Conduct Policy and the Standard Pledge Education Program Policy and other general policies pertaining to collegiate chapters.

7. ___ I have reviewed, taught, or counseled the chapter on the following areas of risk management and conduct:

- ___ alcohol and drugs
- ___ hazing
- ___ harassment and discrimination
- ___ insurance, large events
- ___ overall policy

8. ___ I have reviewed, taught, or counseled the chapter on the proper way to use the Ritual challenge and any other Ritual procedures as needed.

9.a. ___ I have reviewed the chapter budget with the Executive Committee or VP-Finance and President.

9.b. ___ I have ensured that two signatures are on check payments (not the VPF) or any other forms of payment and no credit cards are present in the chapter name or used by the chapter.

10. ___ If the chapter is on Guidance, Probation or other assistance or discipline actions, I have reviewed the terms of action with them and am aware of their current status in meeting the requirements.

11. ___ I have verified that the chapter's bylaws and policies were reviewed and updated by the chapter and reviewed the chapter's bylaws and policies and procedures.

12. ___ I have ensured that the chapter understands that their Chapter Advisor position is to be on the election ballot along with collegiate officer positions and have stressed the importance of maintaining good communications with the Chapter Advisor and all faculty.

13. ___ I have reminded chapter members of the attendance obligations outlined in Ritual and have encouraged them to ensure their local attendance policy reflects these obligations.

14. ___ I have conveyed my support and availability to the entire chapter, pledge class, and Chapter Advisor so they are aware they may approach me with any questions or concerns and understand I am here to help them.

15. ___ I have reviewed the Chapter Management Program (CMP) and have verified the chapter has a good understanding of what they need to accomplish to achieve the levels of CMP.

Semester Report:

What are the strengths of the chapter?

What areas need improvement?

What assistance do you need from me and/or the Central Office?

Are there any specific educational or training topics you would like to see at LEAD events to aid in your District Director role?

Goal Setting:

Do you have any personal or chapter goals for the upcoming semester or term?

Briefly describe how you will meet those goals or help the chapter meet theirs.