



PHI GAMMA DELTA

BUILDING COURAGEOUS LEADERS

Field Secretary Pre-Visit Packet

Please complete prior to the Field Secretary's arrival

Chapter of Phi Gamma Delta

| | | | |
|---------------------|--|------------------|--|
| University/College: | | Dates of Visits: | |
|---------------------|--|------------------|--|

| | |
|------------------|--|
| Field Secretary: | |
|------------------|--|

| Chapter Leader | Name & Class Year | Email Address | Cell Phone |
|--------------------------|-------------------|---------------|------------|
| Chapter President: | | | |
| Chapter Treasurer: | | | |
| Recording Secretary: | | | |
| Corresponding Secretary: | | | |
| Chapter Historian: | | | |
| Recruitment Chairman: | | | |
| Scholarship Chairman: | | | |
| New Member Educator(s): | | | |
| New Member Educator(s): | | | |
| Risk Management Chairman | | | |

| Current Membership | | | | |
|--------------------|----------|-------------|--|-------------|
| | Brothers | New Members | Alcohol Free Housing: | Exempt/ Not |
| Sr: | | | Chapter house capacity (if applicable): | |
| Jr: | | | # living in/together if no house: | |
| So: | | | Change in membership from a year ago: | |
| Fr: | | | Last time you checked your IHQ roster on phigam.org : | |
| Total: | | | Retention rate (initiates/pledges): | |
| | | | IFC avg. size: | |

| Current Finances | |
|-------------------------|--|
| \$ in Chapter Treasury: | |
| \$ owed by U-grads: | |
| \$ owed by Grads: | |
| \$ payable to IHQ: | |
| \$ to others: | |

| Graduate Role | Name & Class Year | Email Address | Cell Phone |
|------------------------------|-------------------|---------------|------------|
| Purple Legionnaire: | | | |
| BCA President: | | | |
| House Corporation President: | | | |
| Section Leader: | | | |
| Scholarship Advisor: | | | |
| Greek Advisor: | | | |

| Scholarship for Previous Term: | | | | | |
|--------------------------------|--|-------------------|--|-------------------------------|--|
| Chapter GPA: | | New Member GPA: | | GPA 2 Sem. Prior: | |
| All-Men's Average: | | IFC New Mem. Avg: | | GPA 3 Sem. Prior: | |
| All-Fraternity Average: | | % AAA eligible: | | GPA 4 Sem. Prior: | |
| Rank Fraternities: | | New Mem Rank: | | Highest rank in last 2 years: | |



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| Top Three Strengths of the Chapter: | Top Three Areas the Chapter Is Focused on Improving: |
|-------------------------------------|--|
| 1. | 1. |
| 2. | 2. |
| 3. | 3. |

| Please Provide/Show the Following to Your Field Secretary, if Available (Must Provide Bolded Items) | |
|---|--|
| Cabinet/Chapter Long-Term Goals | |
| Pledge Education Program | |
| Scholarship Plan | |
| Organization Chart | |
| Chapter Budget | |
| Roster of Brothers' involvement, <i>*note if Brother hold elected position in organization*</i> | |
| Chapter bylaws | |
| Goals for the semester/year from committees | |
| Roster with the number of service hours each brother completed last semester | |
| The total number of dollars the chapter donated last semester | |
| Roster of committees | |
| Last two copies of the chapter's graduate newsletter | |

| | What Is Your Relationship Like? | How Often Are You in Contact? |
|------------------------------|---------------------------------|-------------------------------|
| Purple Legionnaire: | | |
| BCA President: | | |
| House Corporation President: | | |
| Section Leader: | | |
| Scholarship Advisor: | | |
| FSL/Greek Advisor: | | |

THANK YOU for taking the time to complete this questionnaire.
 Your advance preparation will make the Field Secretary's visit more effective and productive.

Please be sure to give this to the Field Secretary on or before his arrival.



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Field Secretary Pre-Visit Prep Checklist

Your leadership is critical to maximizing the Field Secretary's work with your Chapter. The better the advance planning for a Field Secretary visit, the more productive his stay with your Chapter will be.

Using the Pre-Visit Checklist, work to prepare for the Field Secretary's visit now. Make sure to utilize the provided spreadsheet for scheduling and to complete the Pre-Visit Packet. **These forms should be completed prior to the Field Secretary arriving.**

Here's What to Do:

- ____ 1. Notify the officers and the entire chapter of the Field Secretary visitation dates. Make sure the brothers meeting with the Field Secretary are prepared for their meetings. They should bring all existing goals, ideas and questions to discuss, and laptop or paper/pen to take notes.

Determine accommodations for the Field Secretary. You should provide the following:

- ____ 2. ____ single bed (not a couch) ____ clean linens and blanket
 ____ clean towel and wash cloth ____ desk space for work/typing
 ____ space to hang clothes

If you do not have a chapter house or a brother who can share an apartment, it is your chapter's responsibility to provide hotel accommodations.

For the Following Items, Mark Times & Location on the Provided Spreadsheet

- ____ 3. Determine a quiet, appropriate location for the Field Secretary to hold his meetings.
- ____ 4. Schedule a one-hour Cabinet meeting (all five officers) as his first meeting for the visit, on the day of his arrival if possible. This will allow you to get to know him and let him know what you would like assistance with. Be prepared to share your group goals for the semester/year with him.
- ____ 5. Plan individual (one on one) Cabinet officer meetings with the Field Secretary to discuss officer responsibilities and duties related to the officer's position.
- ____ 6. Schedule another one-hour Cabinet meeting for the Field Secretary on the day of his departure so he can relay the summary of his visit to you.
- Contact the following people and let them know the Field Secretary will be in town. Schedule one hour meetings with them for the Field Secretary:
- ____ 7. ◇ Purple Legionnaire
 ◇ Board of Chapter Advisors (BCA) President
 ◇ Fraternity and Sorority Life/ Greek Life Advisors



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Schedule half-hour meetings for the Field Secretary with the following:

- ◇ Pledge Class (as a group)
- ◇ Pledge Educator(s)
- ◇ Senior Class (as a group)
- ___ 8. ◇ Recruitment Committee
- ◇ Scholarship Chairman
- ◇ Philanthropy/Community Service Chairman
- ◇ Risk Manager or Risk Management Committee
- ◇ Graduate Relations Chairman

___ 9. Plan a formal (Ritual) chapter meeting during the Field Secretary's visit. This is not to grade or reprimand the Chapter's Ritual performance, but rather to help you all understand, appreciate, and efficiently perform Ritual. If the visit falls during a period outside of your regular meeting day and time, we appreciate your accommodation to move the meeting, so it fits into the visitation schedule.

___ 10. Set aside at least a two-hour time block for the Field Secretary to conduct any education programming. These requests must be communicated to the Field Secretary in advance. Descriptions of Phi Gamma Delta's educational programs are included in this packet.

___ 11. On the schedule, set a four-hour block of time for the Field Secretary to complete the report from his previous visit.

___ 12. If applicable, plan for the Field Secretary to dine with the brothers at regular chapter meals.

___ 13. Make sure the Pre-Visit Packet is completed.

Your Field Secretary can also handle special needs of your Chapter, if you let him know in advance.

You might ask for assistance with:

- ◆ Alcohol / Leadership Education
- ◆ Goal setting with the chapter or committees
- ◆ Officer Transition
- ◆ Completing forms/NetCommunity training for International Headquarters
- ◆ Ritual review and/or post initiation education
- ◆ Dynamic recruitment training
- ◆ IFC interaction