

Kappa Kappa Psi

*Chapter Field Representative
Visitation Preparation Materials*



“To inquire, to analyze, to instruct, and to inspire.”

How to Prepare for a CFR Visit In Nine Easy Steps!

1. **If you haven't already done so, reply to the CFR's email and confirm the visit.** This helps the CFR to know that you will be ready and establishes contact.
2. **Notify your chapter, Director of Bands, and Sponsor about the visit.** It is important that everyone know as far in advance as possible. Ask the chapter members to work on making themselves available for any chapter-wide activities to be held in the evening and ask the officers to plan to schedule some time during the day to meet with the CFR. Make sure your Director and Sponsor know about the visit as well, and ask them if they would be willing to take 20 minutes on the day of the visit to meet with the CFR.
3. **Read through all of the materials pertaining to the visit.** In particular, review the Scheduling Instructions, the Frequently Asked Questions document, and the checklist on the next page.
4. **Make sure each of the officers receives his or her form and begins working on it.** Most officer positions have a specific form to be filled out. For ones that do not, ask them fill out the Other Officer Form. You can print off copies of the forms or direct the officers to <http://www.kkpsi.org/cfr-visit/>. Forms can be written on or typed up and printed.
5. **Create the schedule for the visit.** See the Scheduling Instructions for more information. Check with the CFR to find out the specific arrival time. Email the schedule to the CFR and provide a hard copy.
6. **Secure parking for the CFR.** Make sure that the CFR can park near the site you will use for meetings. Note that the CFR can cover parking fees, but that free day permits are always appreciated.
7. **Complete the Chapter Self-Evaluation Sheet.** This is designed to be completed by the whole chapter together at a meeting. Send the completed form to the CFR at least 48 hours before the day of the visit, and provide a hard copy when he/she arrives.

In the week leading up to the visit...

8. **Email your Chapter Self Evaluation Sheet, Membership Education Program, and Constitution to the CFR 48 hours before the visit day.** If at all possible, send copies of other officer forms ahead of time as well.
9. **Make sure the officers have completed their paperwork and know when to meet with the CFR.** Ideally, you will turn in the paperwork for all officers at the beginning of the visit. If not, make sure each officer brings his or her completed form to their meeting. If at all possible, email the paperwork to the CFR ahead of the meeting.

President's Preparation Checklist **Chapter Field Representative Visit**

The President must complete the following checklist to prepare fully for the Chapter Field Representative visit. The CFR will review or assist in the completion of the following items during their time with your chapter.

- Email CFR to confirm visit and discuss details of schedule
- Create appointment schedule* †
- Provide complete roster/phone list
- Provide copy of chapter's Membership Education Program and all MEP documents*
- Provide copy of the Chapter Constitution or Bylaws*
- Provide copy of any other governing documents (attendance policies, policies with other organizations, codes of conduct, et al.)
- Provide all chapter financial records, including budget if used
- Provide chapter scrapbook and historical documents (these will be returned)
- Provide copy of any recent chapter publications
- Secure all parking needs for the CFR's vehicle
- Ensure all report forms are completed and provide hard copies upon the CFR's arrival. (Chapter President must ensure each officer receives and completes the form(s) pertaining to his or her office) †
 - President's Form
 - Service Coordinator's Form (Make sure someone completes this!)
 - Vice President's Form
 - Membership Class Information Sheet
 - Treasurer's Form
 - Recording, Corresponding, and Alumni Secretaries' Forms
 - "Other Officer/Member" Forms for any other meetings
- Complete Officer Information Sheet*
- Complete Chapter Self-Evaluation Form as a chapter*

* If at all possible, please email these documents to the CFR at least 48 hours before the visit day. Provide hard copies to the CFR upon arrival as well.

† Officer titles are unique to each chapter. Please use your best judgment when having officers/committee chairs fill out forms and attend meetings. If you aren't sure, ask the CFR.

Officer Memos

Chapter Field Representative Visit

President

You are the point person for my entire visit. Please make sure that you stay on top of things and do your best to make the visit run as smoothly as possible. I have enclosed a questionnaire for you to fill out prior to my visit to help assess your needs. You will need the following things for our meeting: Officer Notebook, Chapter Constitution/Bylaws, Joint Constitution/Bylaws (if used), and any other documents with which you have questions. I look forward to working with you during my visit.

Vice President of Membership / Membership Educator (and Assistants)

We will take this time to review your chapter's Membership Education Program. If you do not have a documented program you need to begin working on one, and we will work on it further when I arrive. I have enclosed a questionnaire for you to fill out prior to my visit to help assess your needs. You will need the following items for your visit: Officer Notebook, Chapter Membership Education Program, Chapter Continuing Membership Education Program, current copy of anything carried by a Membership Candidate/Initiate, and any other documents you use for your office.

Programming / Service Coordinator

Included in this packet is a Service Coordinator Form. Please fill out this form prior to our meeting. Also, please bring anything to the meeting you would like to discuss. If you keep an officer notebook, please bring it with you.

Secretary – Recording, Corresponding and Alumni

You will need the following: Officer Notebook, Chapter Meeting Minutes, Copy of Phone List/Email List, and any other documents you would like to discuss. If your chapter has a Corresponding and Recording Secretary, I will meet with them separately. If your chapter has an Alumni Secretary, please have them bring recent alumni newsletters and alumni records to the meeting. There is a form for each secretarial office, please have the relevant officers fill these out and bring them to the meeting.

Treasurer / Fundraising Chair

You will need the following for our meeting: Officer Notebook, Chapter Budget, Ledger Book, Chapter Checkbook, and any other documents needed for your office. In this packet is a Treasurer's Form, please fill it out prior to our meeting.

Historian

Please bring anything you would like to discuss to our meeting. Examples include scrapbooks, written history, and any other documents that pertain to your office.

Membership Candidate Class

The CFR would simply like to get a chance to meet you and talk about your process and about Kappa Kappa Psi on the national level. Please bring any materials you use for membership education to our meeting.

Other Offices/Members

Please bring anything you would like to discuss, Officer Notebooks and any other physical documentation of what your office entails.

Please note that this does not limit the discussion we have. This merely gives a direction to begin our conversation. I am open to talk about anything about which you have concerns. Also, do not look at this just as a time to discuss issues your chapter is having – I would love to hear about projects that make your chapter proud. Remember, I am also available to meet with anyone from your chapter individually.

Frequently Asked Questions about CFR Visits and Preparation

About the CFRs and the CFR Program

Who is this CFR person, and what are they coming to do?

The Chapter Field Representatives are employed full time by the Fraternity to visit chapters and work with them on chapter operations, membership education, leadership, and many other things. The motto of the CFR Program is *"To inquire, to analyze, to instruct, and to inspire."* That's exactly what we're coming to do: to learn how you operate as a chapter and to give you some advice as to how your chapter can improve.

We're getting a CFR Visit! Are we in trouble?

Receiving a CFR Visit is certainly not a sign that anyone thinks ill of your chapter or that you are in trouble. Ideally, the CFRs want to be able to visit each chapter (200+) within a two year period. So don't worry yourself with reading things into the schedule – A CFR Visit isn't a sign you're in trouble!

Are you the National Police?

No, we're really not. A CFR Visit is not an investigation of any kind and we're not coming to take away your charter. We're seriously coming to see if we can help your chapter get better. Also, we learn from every chapter we visit, and we will take the good things your chapter is doing and use those things to help other chapters grow as well. We're not the police!

How do you two coordinate scheduling?

Kappa Kappa Psi has two CFR positions. We travel separately, so that we can reach as many chapters as possible, so you'll only see one at a time. CFR's each visit around 25-30 chapters a semester (so about 50-60 total), and work around district conventions in the spring. Chapters who haven't gotten a visit in a while get priority, as well as brand new chapters and colonies.

How does the whole driving thing work out?

We live in Stillwater, Oklahoma and work out of National Headquarters when not traveling. One common misconception is that we drive out to visit a chapter, return home, drive out again, return home, etc. In reality, we go on long trips – usually 4-6 weeks at a time – and visit dozens of chapters. Our cars, as well as the house we live in when not traveling, are provided by Kappa Kappa Psi. That's both a benefit and a necessity of the position – we do a whole lot of driving in a whole lot of places.

Preparing for a Visit

This is too much! How are we going to prepare for this?

First of all: relax. CFR Visits are important, and we take them seriously – but a visit isn't something to lose sleep over. Basically, you need to schedule some meetings, make sure the officers fill out their report forms, and do a short exercise with the chapter prior to the visit. Of course, you'll also need to let the CFR know that you received the packet and that the visit is being prepared. *(If you haven't already emailed him/her, stop reading this and do it right away!)*

Do we need to scout out hotels in the area?

Nope! The CFR takes care of his or her own housing plans—usually staying in a hotel or with a member of the National Leadership team, when possible. If there's a hotel your chapter would recommend the CFR staying in (convenient location, good reputation, etc.), it never hurts to let him or her know!

We have a major chapter function on the day of the visit! Can we reschedule?

Probably not. Plus, the CFRs are brothers! We can participate in your chapter function. In fact, that type of thing lets us see how the chapter interacts on a day-to-day basis. CFRs have washed cars, watched and participated in Ritual performances, cleaned instruments, attended formals – we can do these things! Don't cancel them on our account, and don't try to cancel the visit because of them either.

All of us are in band rehearsal during part of the visit! What do we do?

We'll be happy to watch the band rehearsal. However, if the rehearsal is going to be more than 1-1.5 hours, it might be wise to see if some meetings can be done during that time. Perhaps the officers can step out one by one – but make sure your band director fully approves of that! We do not expect or desire that you miss fulfilling your band obligations on our account – we're a band fraternity!

One of our officers can't be there to meet with the CFR! Are we in trouble?

Obviously, we like for everyone to be there if possible. However, we recognize that you have other commitments. Do the best you can to schedule the meeting (perhaps late in the day or early the next morning?), and if it still can't work, we will make do. Mention it to the CFR prior to the visit in an email and it'll be fine! We understand! Still have that officer fill out their paperwork from the packet and make sure to give that paperwork to the CFR when he/she arrives.

Our Sponsor/Director of Bands can't be there to meet with the CFR! Now are we in trouble?

Let the CFR know as soon as possible, and hopefully we can set up an email discussion or something with your director so that his or her input can be heard. We'll make it work – just send that email!

We're supposed to fill out a "Chapter Self-Analysis" sheet. How are we supposed to do this? What is it for?

Set aside 30 minutes in a chapter meeting prior to the visit and hold a discussion on the questions. Now, there might be some disagreement and it is perfectly fine to note such disagreement on the form. Do the best you can to capture the group's opinion(s) on the form, and send it to the CFR preferably 48 hours before the visit day. Also provide a hard copy upon arrival. This form will be used during the 45-minute meeting with the whole chapter. We'll go over the form, discuss some things from it, and see what we can do to help you build on those strengths and fix those weaknesses!

What kinds of paperwork do you want when you get here?

When we arrive, we like to be handed a packet containing the reports filled out by each officer, the schedule for the visit, a copy of the chapter's constitution and membership education program, the chapter self-analysis sheet, and anything else you might want to give us (even if you've already emailed these items). Also, if a parking pass is needed to park, please have that ready. Well-prepared visits make for a happy CFR.

How formal do we have to be dressed?

No need to be formal. If people want to look professional, that's certainly fine. But there is no need to wear Sunday dress or anything like that. The CFR will likely be dressed in business casual, and you don't even need to dress up that much for the visit.

How late should we keep you up? You can stay up all night, right?

Let's try not to schedule anything after 10:30pm if possible. Sometimes you might need to, and if you have to do that let us know. Just keep in mind: you are getting one visit this year, but the CFR will do 3-4 this week. He/she will likely have to get up early the next day, drive a few hours, and do this all over again – we need to get at least some sleep.

I have some other question that I need answered, and frankly I'm freaking out about this whole thing. What do I do?

Call or email us! That's all you need to do! We'll help you out!

I still haven't emailed you to confirm this visit yet. Will that be a problem?

Yes, it will! Preparation and communication are the two most important things you can do to make your CFR Visit a success! Make your CFRs happy by sending that email right away!

Some Special Cases

The CFR is scheduled for a two-day visit! How will that work?

If you are one of these chapters, email the CFR to discuss how your two-day visit will work – most likely, he/she will want some time in the morning of the second day to write reports and such while you go to class. After that, the visit can continue with more time for discussions and chapter activities.

We really don't think we can do it on this day. What do we do?

Nine times out of ten, we can still find a way to make it work on the scheduled day. Email us and we'll talk about it. Otherwise, we'll try to switch some things around, but with tight travel schedules that usually isn't possible. We really hate to cancel visits and are reluctant to do so. Let's discuss it and try to make it work.

Remember, we're a phone call or email away.
Ask any questions you might have!

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Keys to an Effective Chapter Visit

1. Arrival

Make sure that someone is available to meet with the CFR at the designated time. This is normally around 9 or 10am and will be specified in your introductory email from the CFR. At this time, the CFR should receive a copy of the meeting schedule.

2. Tours

Give the CFR a tour of your campus and town. This helps give the CFR a feel for your community and surroundings. Each campus is unique and often has many snippets of history to offer.

3. Be Organized and Prepared

Be prepared for the CFR's visit. Have all the officer report forms, schedule of appointments, and the chapter information sheet completed for the CFR when he/she arrives. This will be a big help in making his/her visit successful.

4. Meetings

Meetings should be scheduled with the sponsor, each of the officers, committee chairs, the Executive Council, the chapter, and any other Brothers or Prospective Member that would like to meet with the CFR

5. Be On Time

Make sure officers and committee chairs show up on time for scheduled appointments. The CFR's time is valuable as is the time of your officers.

6. Be Open and Candid

Be as open with the CFR as he/she is with the members of the chapter. The CFR is a brother there to help with any problems. It is much easier for him/her to give suggestions and solutions for your problems if you are open, candid, and honest with him/her.

7. Paperwork / Materials

Make sure that the chapter has all paperwork and materials ready for the CFR. Remember the CFR will need a copy of your chapter constitution and Membership Education Program to evaluate and file at the National Headquarters.

8. Respect

The CFR is a brother who is giving two years or more of his/her life to better our Fraternity. Please treat him/her, as you would want to be treated, with respect and consideration.

9. Listen and Follow Up

The CFR will give officers and members a number of ideas to improve the chapter. Listen to these suggestions and try to implement them into your chapter. The CFR has a wealth of knowledge and experience. Use his or her suggestions to improve your chapter.

Scheduling Information

Chapter Field Representative Visit

The planner below and the sample schedule that accompanies it are just an example of how you may choose to arrange my visit with your chapter. Please schedule meetings with the Director of Bands, Chapter Sponsor, and all Chapter Officers if possible. The other listed events would enhance the visit but are not mandatory. Feel free to add anything you feel would be beneficial to the needs of your chapter.

Meetings to Schedule	Average Length
Director of Bands	20 minutes*
Sponsor	20 minutes*
President	60 minutes
Membership Coordinator	60 minutes
Service Chair	45 minutes
Secretaries (each)	15 minutes
Treasurer	30 minutes
Historian	20 minutes
Alumni Chair	15 minutes
Sergeant at Arms/Parliamentarian	10 minutes
Membership Candidate Class	15 minutes**
Chapter Meeting / Discussion Time	45 minutes^
Wrap-up meeting with President	10 minutes
Meeting with any Active Member who requests one.	

Other Possible Events

- Executive Council Meeting
- Membership Education Meeting or Function
- Breakfast, lunch, or dinner with officers and/or members
- Social Event
- Service Project
- Ritual Rehearsal or Performance
- Music Rehearsal or Performance

** If your Director of Bands and Sponsor are the same person, please schedule 20 minutes for the meeting.*

*** Please contact the CFR prior to the visit if getting the entire candidate class together is logistically difficult. He or she may recommend a meeting with some of the candidates if all cannot attend.*

^The 45 minute requested time is the time needed by the CFR to hold a discussion with the chapter. If you plan to have a business meeting as well, please allow an extra 45 minutes in addition to the time you would allot for the business meeting. Please request that the entire chapter come to this meeting and be sure to fill out the "Chapter Self Evaluation" prior to the visit.

Sample CFR Chapter Visit Schedule

Keep in mind that this is only a sample visit schedule. Use it as a guide to set up your chapters visit, working around your members and band schedule. Feel free to adjust the schedule as needed. I will confirm an arrival time with you so you will know when to begin.

Please have a copy of your Chapter's Visit Schedule when I arrive.

Your schedule should begin at the time we specified in your visit notification!

10:00am	Arrive at campus
10: 15	Campus Tour
10:45	Director of Bands
11:10	Sponsor
11:35	Vice President
12:25	Membership Candidates
12:45	Lunch
1:30	Attend Band Rehearsal
2:30	President
3:30	Break
4:00	Service Coordinator
4:50	Treasurer
5:25	Secretary/Secretaries
5:45	Dinner with Chapter
7:30	Alumni Chair
7:50	Historian
8:15	Meeting with Chapter
9:00	Wrap-up meeting with President
9:15	Attend Chapter Activity

Please email the schedule to the CFR when it is completed and provide a hard copy upon arrival.

Chapter Contact Information

Date of Election: _____

President: _____

Email: _____

Phone Number: _____

Previous Offices: _____

Year in School: _____

Treasurer: _____

Email: _____

Phone Number: _____

Previous Offices: _____

Year in School: _____

Vice President: _____

Email: _____

Phone Number: _____

Previous Offices: _____

Year in School: _____

Service Chair: _____

Email: _____

Phone Number: _____

Previous Offices: _____

Year in School: _____

Recording Sec: _____

Email: _____

Phone Number: _____

Previous Offices: _____

Year in School: _____

Corresponding Sec: _____

Email: _____

Phone Number: _____

Previous Offices: _____

Year in School: _____

Historian: _____

Email: _____

Phone Number: _____

Previous Offices: _____

Year in School: _____

Fundraising Chair: _____

Email: _____

Phone Number: _____

Previous Offices: _____

Year in School: _____

Other Office: _____

Email: _____

Phone Number: _____

Previous Offices: _____

Year in School: _____

Other Office: _____

Email: _____

Phone Number: _____

Previous Offices: _____

Year in School: _____

Director of Bands: _____

Email: _____

Phone Number: _____

Sponsor: _____

Email: _____

Phone Number: _____

Profession: _____

