



## HOW TO PREPARE FOR A CFR VISIT IN TEN 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 to fill out the Other Officer Form. You can print off copies of the forms or direct the officers to <http://www.kkpsi.org/CFRPacket.html>. Forms can be written on or typed up and printed – versions for each are available on the site.
- 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 housing for the CFR.** This does not have to be a hotel; the CFR is happy to stay on a full couch or to borrow a room at a brother's apartment. See the Frequently Asked Questions document for more information on housing a CFR.
- 7. Secure parking for the CFR.** Make sure that the CFR can either park near the site you will use for meetings or that a ride is available to the meeting site.
- 8. Complete the Chapter Self-Evaluation Sheet.** This is designed to be completed by the whole chapter together at a meeting. Give the completed form to the CFR when he/she arrives.

### **In the week leading up to the visit...**

- 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.
- 10. Touch base with the CFR.** Make sure he or she knows about the schedule, where to go, and who to contact upon arrival. Consult the Preparation Checklist in this document and make sure everything is ready. *Throughout this planning, feel free to call or email questions!*



## 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 the chapter's Membership Education Program and all MEP documents
- Provide copy of the Chapter Constitution
- Provide copy of the Joint Chapter Constitution (if used)
- 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\* (*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\*
- Set-up Housing / Reserve Hotel

*\* Included in this packet and should be given to the CFR upon arrival. In addition to providing a hard copy to the CFR upon arrival, please email a copy of the schedule to the CFR prior to the visit.*

*' Officer titles are unique to each chapter. Please use your best judgment when having officers/committee chairs fill out forms and attend meetings.*



# OFFICER MEMOS

## CHAPTER FIELD REPRESENTATIVE VISIT



### **PRESIDENT**

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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)**

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We will take this time to review your chapters' 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.

### **VICE PRESIDENT OF SERVICE / SERVICE COORDINATOR**

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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**

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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**

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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**

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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**

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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**

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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.*