

Chapter Counselor (CC) Visit Summary Guidelines

Adopted 9/27/09

The following guidelines are meant to ensure that the CC, Division Manager, and VP-CSLT are keep abreast of the health, activities, and needs of our chapters. The summary is not meant to be a report card/form. Both positive items and areas of concern should be included. The CC is the first and closest resource available to provide advice and to assist in resolving concerns. If resolution is beyond the CC's capabilities, he should seek advice or assistance from other District officials or persons with expertise in the area in question.

The bottom line is that visit summaries provide a means to ensure chapters and chapter members receive the attention and support they deserve, and that division and District officials are alerted when outside support is needed.

The summary is not formatted and is not intended to be a check-off list. It should provide a narrative summary of the CC's visit in his own words and style. Items that might be covered could include:

Date of event:

Reason for visit: (e.g. chapter or board meeting, performance)

Current chapter membership:

Number of members present:

Number of guests (if a chapter meeting):

Overview of activity:

Chapter comments/requests/concerns, etc.:

CC observations/comments:

Items for follow-up or other resources required:

Note: An expense report must be filed after every visit, whether reimbursement is requested or not. This is not an arbitrary requirement. Together, the reports will provide a sound basis for making budget decisions regarding chapter support line items in the annual District budget.

September 2009