Positive partnerships between fraternity/sorority headquarters staff and campus professionals are critical in advancing the fraternal movement and essential in ensuring chapter success. The following checklist has been developed intentionally to allow for positive partnerships to be formed between those who are part of campus visits between fraternity and sorority professionals. While all organizations and every campus are different, these are simply best practices and not every campus and organization will be able to establish these outcomes.

The resource is designed around the spirit of the visit and the partnership, not about specificity.

A Checklist for Campus-Based Fraternity/Sorority Professionals

Pre-Visit

- If possible, communicate to inter/national organizations in May/June and let them know who in your office will be their contact person for the coming year. Why? It is always expected that they will reach out to you; if you reach out first, you are showing an initial commitment to the partnership.
- Have any incident reports available in case someone is going to ask for this information. Why? Being transparent with chapter issues is a key to attacking cultural issues within a chapter.
- Be open and honest about the timing of visits; don’t be afraid to say timing is not good for a visit. (e.g., Greek Week, athletic events, etc.).
- Prepare a folder with standard information: grade report, university recognition documents/policies, community involvement, and service reports.
- Synthesize notes from meetings held with chapter leaders/members to share goals, action items, issues, etc. with inter/national organization staff members. Why? You will not get confused between chapters and will be fully knowledgeable of the chapter prior to the meeting.
- Consider various types of hospitality you might be able to provide to the visitor: parking pass, gym pass, campus map, place to stay, information about campus events. Let him/her know if other consultants will be in town at the same time. Why? We are all colleagues, and our campuses can be confusing; help a brother/sister navigate your community.
- Think about any needs you may have for programming support. If applicable, reach out and utilize a consultant for programming while he/she is on campus.

During Visit

Questions to Ask:

- What is your current alumni/advisor support structure? Who is most involved from your perspective? Why? Make sure you are dealing with the same alumni volunteers and not spinning your wheels trying to work with alumni who are no longer involved.
- What initiatives are going on within your organization and how can our campus help? Why? Many times we are doing similar work; the more we can work together, the stronger our profession will be.
- What are your visit objectives, and how can I help?
- Have there been any trends in discussion items among chapter leaders that we can work through right now, allowing you to follow up with the chapter before you leave? Why? It is important for the chapter to see the partnership in action.

Post-Visit

- Review the report with chapter leadership.
- Provide an opportunity for the campus visitor to give you feedback.
- Follow up on action items in a timely manner.
- Send a thank you note and any feedback to the inter/national headquarters thanking them for their time and providing feedback to the consultant/visitor.
A Checklist for Inter/National Headquarters Staff

Pre-Visit
- Identify the fraternity and sorority professional and contact them (Refer to the NIC, AFA member directory, or campus online directory) by e-mail. Let him/her know you will be working with a chapter on campus during the year.
- Two weeks out from the visit send a detailed e-mail about your visit including the purpose. Why? It is important for campus partners to know the purpose of your visit so they can plan accordingly for the conversation.
- Within two weeks of the visit, schedule a pre-visit phone call to discuss the purpose of the visit with the fraternity/sorority professional. Is the visit: standard/annual visit, recruitment, grades, risk management (when it can be shared), chapter/alumni requested visit, transition, involvement, campus related issue, reactive vs. proactive? Inform the campus professional of who will be attending the visit (other staff members, alumni, volunteers). During that call ask the question: What are the top three objectives you would like me to work on while I’m on campus? Reinforce the importance of your partnership.
- Discuss if there is a need to meet with headquarters staff and an involved student leader (i.e., president) from the chapter. (This may be necessary if there is no relationship developed.)
- Ask for statistics: What do you need from the campus professional? (Standards of Excellence Packet? Grades? Service hours? Retention rates?) Why? The more detailed your request, the better information the campus will be able to provide to you.
- Schedule a face-to-face meeting for when you are on campus. Be sure to provide the fraternity/sorority professional with your cell phone number should he/she need to contact you to reschedule or if he/she is running late.
- Discuss various other logistics, including the following: What does parking look like? Where is your office/where should we meet? Feel free to ask any other personal questions: What should I see while I’m in town? Can you e-mail me a campus map or tell me how to find your office?

Visit Prep
- Make sure you know chapter officer contact information and have it available to share with the campus professional if necessary.
- Come dressed professionally.
- Research past visit reports from prior consultants/visitors. Why? To identify areas of strength, growth, opportunities, and challenges.
- Tour campus beforehand so you know where to park.
- Be on time; have a student escort you if you need directions.
- Bring any documents you think the campus needs to have.
- Be prepared with an agenda of items that will be discussed. (This may not always be needed but at least you will be prepared to facilitate the meeting if necessary.)

During Visit
- Address objectives of the meeting that you set prior to your arrival.
- Questions to ask: What are some of the campus trends? How is our chapter contributing positively/negatively to your campus? What are the model fraternities/sororities doing on your campus right now that our group could learn from? Are there areas that the inter/national organization/area volunteers can support/develop with the chapter?
- If applicable: What are some follow-up items on leadership development and goal setting (e.g., national leadership development programming goals or campus retreat goals set by chapter leaders)?
- What can I do to support you as a fraternity/sorority professional and your initiatives on your campus? How can our organization help?
- Communicate the intended follow-up plan (e.g., e-mail report/follow up call/see you at the AFA Annual Meeting/etc.)
- Communicate any upcoming events; leadership institutes, scholarship application deadlines, or changes occurring on the regional or inter/national level.
Post-Visit

- Send a handwritten thank you note
- Send a report within two weeks and copy the chapter leadership.
- Inform the campus professional about when the chapter will have another visit and who to contact in the meantime.
- Send any additional information that was requested during the meeting.
- Follow up on action items from report (ongoing).