Theta Delta Chi International Fraternity

Understanding your Report of Visitation (ROV)

THINKING ABOUT THE REPORT OF VISITATION (ROV)

Theta Delta Chi is a small, intimate, diverse Brotherhood, focused on scholarship, leadership and a responsible social life.

The word IMPROVEMENT appears in the Preamble of our Constitution at the beginning and again at the end. Our Founders understood that without improvement we would never grow as men. They explicitly identified our need to improve intellectually, morally and socially and also identified that improvement was a way to overcome our faults. This was summarized in a phrase about our friendship supporting the belief in "pardoning the faults of each, endeavors to improve and reform."

The ROV is designed as a reflective tool to assist in the identification of areas of growth, through a gap analysis of perception and self-reported data. This data is then intended to be used to develop SMART Goals for the improvement of the Charge. Rather than focusing on problems (deficit model or mindset), the focus of the ROV is on the future (growth mindset). That is to say, how and where can we improve.

The purpose if the ROV is to point a direction for the Charge to grow and improve based on the foundational principles of the brotherhood. The ROV is also a tool to assist the Charge in making data-driven decisions. Additionally, the ROV is a way to allow the Grand Lodge to identify where Charges are in the data, this assists with the development of programing, to determine the type of resources needed, and how to deploy them to assist Charges in their goals.

ORGANIZATION OF THE ROV

The ROV (see Appendix A) is organized into three sections. The first section is a summary page which contains general information about the Charge and the host institution. This page also serves as the official documentation of the visit. The Charge Consultant or CFO staff member who makes the official visit verifies four key elements of the process and the Charge President signs this to certify the accuracy of the information. The cover page then contains the scores from the ROV Rubric and is signed by the Charge Consultant or CFO staff member.

The second section of the ROV is the actual rubric which is completed by the Charge Consultant in consultation with the Charge Leadership. It contains the

objective criteria by which your charge will be evaluated. A detailed explanation of the Rubric follows.

The third section of the ROV contains detailed data used for the improvement of the Charge and the development of SMART Goals. This section primarily comprises perception data gathered from Alumni, the host institution and from Charge Leadership. This perception data, is comprised of a 360-evaluation using the ROV rubric along with narrative data collected from interviews the Charge Consultant conducts with a representative of the Alumni Association, usually the Charge/Alumni Advisor or president of the alumni association or house corporation, and a representative of the host institution, usually the Greek Advisor. Charge Leadership also provides information in the form of their perception of the Charge identified as Charge strengths/success and challenges or areas for improvement. Finally, the Charge sets three goals and the Charge Consultant follows with a conclusion paragraph with his impressions and personal thoughts about the Charge.

THE ROV RUBRIC

The ROV Rubric (see Appendix A) forms the centerpiece of the entire ROV process and is focused on assisting every Charge in self-improvement, with a target of becoming Victory Cup Worthy. The Rubric is divided into four major categories with sub-categories in each.

1. Scholarship
   1.1. Academic
   1.2. New Member Education
2. Leadership
   2.1. Charge Operations
   2.2. Finances
   2.3. Recruitment
3. Responsible Social Life
   3.1. Risk Management
   3.2. Philanthropy and Service
   3.3. Communication and Verification
4. Brotherhood
   4.1. Ritual
   4.2. Alumni

These four major categories align with our International Brand which is a paraphrase and summary of our Preamble. Each subcategory is divided into four scoring ranges with specific descriptors in each subcategory. An example of one of these scoring areas would be:

Scholastic: Academic

4 – Victory Cup Worthy	3 – Meets Expectations	2 – Needs Improvement	1 – Improvement Plan Required
• The Charge maintains an Avg. GPA that is in top 25% of all fraternities on campus • The Charge's Avg. GPA is above the all-campus average • The Academic Chair's role, responsibilities, and a "Charge Academic Improvement Plan/Policy" is submitted to and on file with the CFO and Host Institution twice a year	• The Charge meets the 2.7 GPA standard and all brothers meet the 2.5 GPA individual member standard, or members below a 2.5 are put on individual academic improvement plans • Charge has a functional Academic Chair, with clearly defined roles and responsibilities in the Constitution	• The Charge does not meet the 2.7 GPA standard **OR** Some brothers do not meet the 2.5 GPA standard and do not have an individual academic improvement plan •Academic Chair position exists but does not have clearly defined roles and responsibilities and/or does not function well	• The Charge does not meet the 2.7 GPA standard **AND** Some brothers do not meet the 2.5 individual GPA standard

THE EXECUTIVE SUMMARY

The Executive Summary is an area of the ROV that contains an introductory paragraph, a comparative summary of a 360-degree assessment, three (3) Charge Successes or Strengths, three (3) areas for Charge Improvement, 3 agreed upon SMART Goals, a summary of a meeting with the host institution, a summary of a meeting with alumni and finally a conclusion statement authored by the Charge Consultant.

The introductory paragraph states when the Charge visit occurred and the process leading up to the actual visit.

The 360-degree assessment is a perceptual survey provided to the Charge President, a representative of the host institution (usually the Greek Advisor), and the alumni advisor or alumni association/house corporation President. This survey is completed electronically before the ROV visit occurs. The survey provided is the ROV Rubric and the resulting data provides data for Charge Leadership to conduct a gap analysis with the Charge Consultant. When this data is discussed with Charge Leadership, the primary questions used in the analysis are:

1. What story does this data tell?
2. What gaps do you see in the data?
3. Why do you think those gaps exist?

Another possible set of questions to ask are:

1. What are the positives you see in the data?
2. What are the areas of improvement you see in the data?
3. What is interesting in the data and poses further questions?

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The Charge leadership has an opportunity to provide information about how they see the successes or strengths of the Charge and the direction it is going. This is valuable information as it provides further insights as to how the Charge and leadership view themselves. This perception data may or may not align with the 360-degree data provided by the Charge President.

The three (3) areas for Charge improvement are a result of the leadership and/or the Charge doing a gap analysis of all the data presented; the 360-degree perception data, the interview data of the alumni along with the interview data from the host institution (Greek Advisor). This analysis, focused on the ROV Rubric and the narrative information from the interviews, provides data to move the Charge forward.

DEVELOPMENT OF SMART GOALS

Once the gap analysis has been concluded, Charge Leadership uses the data and the resulting analysis to set three broad goals. The Charge Consultant then assists Charge Leadership in the development of SMART Goals.

SMART is an acronym that stands for **Specific**, **Measurable**, **Achievable, Reasonable** and **Time-Oriented.** Each element of the SMART framework works together to create a goal that is carefully planned, clear and trackable.

S = Specific

Be as clear and specific as possible with what is to be achieve. The narrower the goal, the more the steps necessary to achieve it will become.

> **Example for a Charge of 30 members:** *"We want to recruit 15 new members."*

M = Measurable

What evidence will prove progress is being made toward the goal? For example, if the goal is to recruit 15 new members, consider measuring progress by the number of names and contacts you collect. Setting milestones along the way will provide the opportunity to re-evaluate and course-correct as needed. When the milestones are achieved, remember to reward yourself in small but meaningful ways.

> **Example for a Charge of 30 members:** *"We will collect 60 names and contact information in order to recruit 15 new members."*

A = Achievable

Is the goal achievable? Setting goals that are reasonably accomplished within a certain timeframe will help keep everyone motivated and focused. Using the above example of recruiting 15 new members, determine who will be working on making these contacts.

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> **Example for a Charge of 30 members:** *"Each brother in the Charge will provide contact information for at least two potential new members to reach 60 names in order to recruit 15 new members"*

R = Realistic

When setting goals with the Charge, consider whether or not they are possible. Each of the goals need to be challenging, yet attainable. By setting a goal that is way out of reach, a group will be disincentivized to working towards it. On the flipside, if it's too easy, the members may celebrate and develop a sense that the little effort they are putting forth is enough.

> **Example for a Charge of 30 members:** *"In order for the Charge to continue to fill the house and maintain adequate membership, each brother will provide contact information for at least two potential new members to reach 60 names in order to recruit 15 new member candidates."*

T = Time-based

What is the time-frame for the goal? An end-date can help provide motivation and help you prioritize.

> **Example for a Charge of 30 members:** *"By the start of fall recruitment, September 15th, each brother will provide contact information for at least two potential new members to reach 60 names in order to recruit 15 new members in order for the Charge to continue to fill the house and maintain adequate membership."*

Once the SMART goals have been established, the Charge, Leadership or Committee Chair needs to develop a set of actionable steps to help guide the implementation of the goal. These action steps need to include the **What**, **By When**, **Person Responsible** and **Resources Need** to make each step happen. While this might seem to be a tedious process, once a goal has been established and an action plan developed, execution becomes manageable and efficient.

(Adapted from: Indeed Career Guide: https://www.indeed.com/career-advice/career-development/smart-goals)

YOUR ACTION PLAN

The Action Planning step usually happens after the ROV has been completed. After the three goals have been set, the Charge sets about determining how it will proceed in implementing the goals. The process of Action Planning can then begin.

An action plan is a document that lays out the tasks you need to complete to accomplish your goal. It also breaks up the process into actionable assignments

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based on a timeline. A good action plan will outline all the necessary steps to achieve your goal and help you reach your target by efficiently assigning a timeframe to every step in the process.

This planning should be done by the person or committee who will be implementing the goal. The steps in creating your action plan are:

1. Create a list of actions
2. Set a timeline for these actions (deadline for each step in the plan)
3. Determine who will do the actions (point person to make this step happen)
4. Determine resources needed (people, material and money)
5. Monitor the progress of these actions

(Adapted from: Indeed Career Guide: https://www.indeed.com/career-advice/career-development/how-to-write-an-action-plan)

A sample action plan can be found in Appendix B

CFO / CHARGE ADVISOR / HOST INSTITUTION ASSISTANCE

CFO staff, Charge Advisor, or Greek Advisor can become partners in the implementation process. Approximately a month after the ROV has been concluded, CFO staff will contact Charge leadership to discuss the progress on the goals and will become mentors and monitors in the progress of the action plans. They will assist in making suggestions about how other Charges have implemented similar goals, locate resources, and create materials or provide training if needed.

The purpose of outside assistance is to provide the input, feedback and resources necessary for every Charge to become "Victory Cup Worthy," and to assure the success and sustainability of every Charge.

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Appendix A: ROV Template with Rubric

Charge:
Host Institution:
House Address:
Insurance Status (Housed or Unhoused):
Charge President:
Host Institution Contact (Title):
Number of Active Members:
Number of New Members:
Charge GPA/All Student Campus Average GPA:
Dates of Visitation:
Date of last ReCharge and/or ChargeUp Workshop:

☐   Charge Consultant has reviewed all of Theta Delta Chi's policies with the Charge President and Executive Board.

☐   Charge Consultant has met with executive committee and identified areas for improvement in order to be deemed 'Victory Cup worthy'.

☐   Charge Consultant has met with Host Institution contact.

☐   Charge Consultant has met/spoken with a representative from the Charge's Alumni Association (where applicable).

I hereby certify that I have read and understand all official policies of Theta Delta Chi and understand the repercussions that could come if my Charge or individual members violate them.

_____   _____
       Charge President   Date

Scholarship		Leadership			Responsible Social Life			Brotherhood		
Academics	NME	Charge Operations	Finances	Recruitment	Risk Management	Philanthropy & Service	Communication & Verification	Ritual	Alumni	*TOTAL SCORE*

Submitted by: _____ Signature:

_____

This page should be submitted in PDF format with Executive Summary, Host Institution Meeting, and Alumni Meeting text included.

All ROV scores should be entered into the ROV POINT SUMMARY sheet.

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Report of Visitation Scoring Rubric

Note: All Areas that a Charge is meeting will be highlighted to note their status. A Charge will get scores for sections they are meeting and partial points above or below that section. Ex: A Charge that meets all bullet points for a "3," in Academics and one bullet in the "4" section will result in a 3.33 score. Meeting the first bullet point in the "2" category and the second bullet in the "3" will result in a 2.5 score (see below).

		4 - Victory Cup Worthy	3 - Meets expectations	2 - Needs improvement (Improvement plan recommended)	1 - Improvement Plan Required
Scholarship	**Academics**	• The Charge maintains an Avg. GPA that is in top 25% of all fraternities on campus • The Charge's Avg. GPA is above the all-campus average • The Academic Chair's role, responsibilities, and a "Charge Academic Improvement Plan/Policy" is submitted to and on file with the CFO and Host Institution twice a year	• The Charge meets the 2.7 GPA standard and all brothers meet the 2.5 GPA individual member standard, or members below a 2.5 are put on individual academic improvement plans • Charge has a functional Academic Chair, with clearly defined roles and responsibilities in the Constitution	• The Charge does not meet the 2.7 GPA standard **OR** Some brothers do not meet the 2.5 GPA standard and do not have an individual academic improvement plan • Academic Chair position exists but does not have clearly defined roles and responsibilities and/or does not function well	• The Charge does not meet the 2.7 GPA standard **AND** Some brothers do not meet the 2.5 individual GPA standard
	New Member Education	• The NME plan and calendar are reviewed and updated twice a year • The NME plan and calendar are **approved by** and on file with the CFO and the Host Institution twice a year	• A written NME plan and calendar are created using the CFO NME format and implemented • All NME activities are aligned with and follow TDX and Host Institution policies • Charge has a functional New Member Educator, with clearly defined roles and responsibilities in the Constitution	• A loose-written NME plan exists • Charge has trouble retaining new members • Possible policy violations exist • New Member Educator position exists but does not have clearly defined roles and responsibilities and/or does not function well	• The Charge lacks a written NME Plan, or has no NME plan • Violates NME policies • Evidence of hazing is reported to the CFO, Host Institution, GL, and/or Alumni
Leadership	**Charge Operations**	• Written officer transition manuals with clearly defined roles, responsibilities, and processes are used. • Clear and defined standards document is signed by all members and adhered to • Clear and defined member management process (e.g. J-board, standards board, incentive system, Charge rules) exists in the Bylaws and is adhered to • The aforementioned, as well as the Constitution and Bylaws, are submitted to and on file with the CFO and Host Institution twice a year	• The roles and responsibilities for all members and officers are defined in a Charge specific Constitution/Bylaws Charge can provide evidence officers fulfill roles • Weekly Charge and Executive Board meetings are held • All Charge and Executive board meetings are held in an efficient and orderly manner and follow Roberts Rules of Order and Parliamentary Procedure	• Infrequent Charge meetings are held to conduct business • Infrequent executive board meetings are held • Meetings are disorganized • Officer positions exist, but do not have clearly defined roles and responsibilities and/or do not function well	• Leadership is ill defined and not functional • Meetings are rarely held • Executive board rarely meets • Meetings are not structured and ineffective at getting business done
	Finances	• Finances are transparent and are reported to the Charge at weekly meetings • Dues are collected in a timely manner, as set forth by the Charge Standards Document and/or Constitution/Bylaws • The Charge budget is submitted to the CFO and Host Institution twice a year	• The Exec Board collaborates to create a working budget that is balanced and responsible • The Charge verifies and votes to approve the budget at the beginning of every term • All financial obligations to the Grand Lodge and Insurance Company are met in a timely manner • All local financial obligations are met in a timely manner • Charge has a functional Treasurer, with clearly defined roles and responsibilities in the Constitution	• An unclear or non-working budget exists • Most financial obligations are met; however, they are often late • Treasurer position exists but does not have clearly defined roles and responsibilities and/or does not function well	• No budget exists • Financial obligations are rarely met in a timely manner • The Charge is in debt to either the Grand Lodge or outside entities

Recruitment			
• Charge sets goals that would meet the Charge's growth needs for the future • Charge recruits exemplary new members (defined as having higher GPAs than the Charge average GPA and is involved in another student organization) • More than 50% of the Charge is involved in another student org outside of TDX • The recruitment plan, goals, Charge "brand," and calendar are submitted to the CFO and Host Institution twice a year	• Charge has a written recruitment plan, which includes goals for numbers & the type of individuals they want, the Charge's "brand," and a calendar of events • Charge is meeting its set goals • Recruitment adheres to TDX and Host Institution policies • Charge has a functional Recruitment Chair, with clearly defined roles and responsibilities in the Constitution	• Charge has a loose recruitment process • Charge goals are not being met • The Charge has trouble recruiting new members • Recruitment Chair position exists but does not have clearly defined roles and responsibilities and/or does not function well	• Theta Delta Chi's and Host Institution's policies are disregarded during recruitment

		4 - Victory Cup Worthy	3 - Meets expectations	2 - Needs improvement (Improvement plan recommended)	1 - Improvement Plan Required
Responsible Social Life	**Risk Management**	• The Risk Management plans and procedures are **approved by** and on file with the CFO and Host Institution twice a year • More than 50% of the Charge is trained in risk management training (i.e. CPR, ASTP, TIPS, RAMP) • The Charge uses the Holmes Murphy Event Planning App or PDF to plan out its events (PDF print out proof required)	• Charge has written Risk Management plans and procedures that are successfully used and followed, which are reviewed with the Charge and all new members once per term • Follows and adheres to all Theta Delta Chi and Host Institution policies • The Charge has a functional Risk Management Chair, with clearly defined roles and responsibilities in the Constitution • No recent policy violations or issues	• Unclear risk management procedures • Inconsistent review of Theta Delta Chi and Host Institution policies • Risk Management Chair position exists but does not have clearly defined roles and responsibilities and/or does not function well • Has recent policy violations or issues	• No risk management procedures in place • Does not follow TDX and Host Institution policies • Evidence of serious risk management violations are reported to the CFO, Greek Life Office, GL and/or Alumni
	Philanthropy & Service	• Each Brother & New Member participates in 10 or more hours of either philanthropy or service per term • Philanthropy/Service Chair tracks hours and activities and reports them to Host Institution and CFO twice a year • Charge has a functioning Bros UniteD program	• Charge plans and implements at least two philanthropy events per year • Charge plans and implements at least one service project, e.g. Bros UniteD, per year. • Charge and Brothers regularly participate in philanthropy projects throughout the community • The Charge has a functional Philanthropy/Service Chair, with clearly defined roles and responsibilities in the Constitution	• Charge hosts only one philanthropy or one service project once per year • Philanthropy/Service Chair position exists but does not have clearly defined roles and responsibilities and/or does not function well	• Charge does not host any philanthropy or service project of its own
	Communication & Verification:	• Charge has regularly scheduled meetings with the Host Institution and/or Greek/faculty advisors • Charge regularly and proactively reaches out to CFO and Host Institution for help, assistance, and support • Charge has at least one active member apply for a TDX Educational Foundation scholarship, Convention award, or grant • Charge has members attend CFO webinars • Host Institution verifies that the Charge and its members are following all Host Institution policies and standards	• Charge registers all Preamble and Convention delegates on time • Charge submits all active Brother and New Member rosters to the CFO on time • Charge responds to CFO and Host Institution communication in a timely manner • Internal Charge communication is clear and effective • Charge is meeting TDX Educational Programming requirements and submitting all verification forms to the CFO on time	• Communication issues persist throughout the Charge • Charge has poor response rates to the CFO and Host Institution to get things done or submitted • TDX Educational Programming is being completed in part or in full, but verification is not submitted	• Charge rarely responds or only communicates with CFO and Host Institution during in person meetings • Communication issues lead to breakdowns in basic Charge functions • TDX Educational Programming is not done by the Charge nor its members

Brotherhood	**Ritual:**	• Daily Charge operations and decisions are discussed in the context of Theta Delta Chi values and rituals • The Charge lives its values through its operations and actions, which can be articulated to and recognized by Host Institution officials, the CFO, and the general public (some examples of this could be through Brotherhood events/retreats, service projects, educational programming for the public, etc.)	• All Meetings, officer transitions, and Initiations conducted in accordance with the 'Book of Rituals' • Ritual and Preamble explained to new members before 'Second Degree of Initiation' • Ritual and values are regularly reviewed and discussed • Charge has a functional position dedicated to Ritual adherence, with clearly defined roles and responsibilities in the Constitution	• Charge conducts some meetings or initiations in accordance with 'Book of Rituals' • Position dedicated to Ritual exists but does not have clearly defined roles and responsibilities and/or does not function well	• Charge does not conduct any meetings or initiations in accordance with 'Book of Rituals'
	Alumni:	<u>Scored</u> • Have a distinct Alumni Advisory Board, in which the Charge gives updates on pertinent information, asks for guidance, advice, and best practices • The Charge is in contact with the Alumni Advisory Board at least once a month • Charge sends out an alumni newsletter at least annually (if no alumni association, then newsletter is sent to CFO and Host Institution) <u>Not Scored</u> • Charge has an Alumni Association that is Chartered with the Grand Lodge	<u>Scored</u> • In contact with alumni association and/or housing corporation 2+ times a year • Hold at least one alumni event per year • Charge has a functional Corresponding Secretary/Alumni Relations Chair with clearly defined roles and responsibilities in the Constitution <u>Not Scored</u> • The Charge's alumni are organized as a local Alumni Association and/or Housing Corporation	• Sporadic contact with alumni • Do not hold a regular alumni event • Corresponding Secretary/Alumni Relations Chair position exists but does not have clearly defined roles and responsibilities and/or does not function well	• Little or no contact with alumni

Executive Summary (Introductory Paragraph, 3 Charge successes, 3 areas for Charge improvement, 3 agreed upon goals with Charge and Charge Consultant for the future, Meeting with Host Institution, Meeting with Alumni, Conclusion):
Introduction:

3 Strengths/ Successes:

3 Challenges/Areas for Improvement:

3 Goals

Meeting with Host Institution:

Meeting with Alumni:

Conclusion:

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Appendix B: Sample Action Plan

SMART Goal:	*By the start of fall recruitment, September 15th, each brother will provide contact information for at least two potential new members to reach 60 names in order to recruit 15 new members in order for the Charge to continue to fill the house and maintain adequate membership.*

Action	Timeline	Brother Responsible	Resources	Date Accomplished
Schedule Recruitment Workshop	August 15	Recruitment Chair	Director of Charge Operations	
Develop recruitment plan	August 15	Recruitment Committee	Charge Consultant mytdx.org template	
Share plan with Charge	September 1	Recruitment Chair	Plan	
Register to use Chapter Builder	September 2	Recruitment Chair	Grand Lodge Grant	
Recruitment Workshop	September 10	Recruitment Chair	Julian Weller and video connection	
Train Charge to use Chapter Builder	September 10-14	Recruitment Chair	Chapter Builder app	
Implement plan and monitor Chapter Builder	September 15	Recruitment Committee	Chapter Builder app	
Follow-up with Charge	September 20 Charge Meeting	Recruitment Committee	Nothing	