

Consul – Qualification Worksheet



Overview

Complete the below tasks within 45 days of taking office. Once complete, contact Gregg Hoss (gregghoss@yahoo.com; 408-515-5121) to set up a Zoom meeting to go over the information. Upon completion of the meeting, you will receive your Consul certification. Most likely, adjustments to the recommended agenda outline will be necessary to meet the needs of your chapter.

- 1) **PERFORM** a transition meeting with the outgoing Consul using the Officer Transition Meeting Agenda as a guide
 - a. Take control of any Consul property including the ritual books.
 - b. Update contact info for social media, Greek Life, Portal.sigmachi.org, etc.
 - c. Go over access to any other needed systems
 - d. Lessons learned
 - e. Pending tasks
 - f. Sign over checking account info to new Consul and Quaestor
 - g. Take possession of charter

- 2) **DEVELOP** a contact list by speaking to the people in the following positions to identify their role and how they can help you complete your Consul duties
 - a. Grand Praetor - name, email, phone, preferred method of contact, how they can support
 - b. Chapter Advisor - name, email, phone, preferred method of contact, how they can support, and complete tasks 4 and 10

- c. Regional Chapter Support Coordinator - name, email, phone, preferred method of contact, how they can support. Can help with tasks 3 and 4
- d. House Corp (if applicable) - name, email, phone, preferred method of contact, how they can support
- e. Fraternity/Sorority Life Office - name, email, phone, preferred method of contact, how they can support, complete tasks 5 and 6
- f. Ritual Peer - name, email, phone, preferred method of contact, how they can support and complete task 10
- g. Foundational Leadership Mentor -name, email, phone, preferred method of contact, how they can support
- h. University Faculty Advisor (if applicable)-name, email, phone, preferred method of contact, how they can support

3) REVIEW/UPDATE/CREATE the following documents with the appropriate officer. NOTE: These documents are due in the Chapter System by Sept 15. If creating from scratch, RCSC has templates.

REVIEW appropriate chapter committee tabs here:)

- a. Strategic Plan (Pro Consul) send to Regional Chapter Support Coordinator, copy Grand Praetor and Chapter Advisor
- b. Risk Management Plan (Risk Chair) NOTE: If completed in August, Chapter saves on insurance costs
- c. Chapter Budget (Quaestor)
- d. Chapter By-laws (Exec Committee)

4) REVIEW the last annual report (Peterson Award submission) summary with the Chapter Advisor and IDENTIFY areas for improvement

- a. Get the summary and last year's answers from RCSC
- b. Plan for any chapter training in areas for improvement (Mission 365, Ritual For Life, Drinking Smart, etc.). Discuss options with Chapter Advisor

5) DETERMINE specific requirements with your college/university Greek Life Office

- a. Examples (standards of excellence, deadlines, registering chapter events, insurance) What do outgoing officers know now that they wished they had known when they took office?

6) OVERSEE the development of the chapter's operational calendar by working with the appropriate officers

- a. [FERGLE Form/Annual Checklist](#) (department and officer checklist)
- b. Philanthropy schedule
- c. Exec Schedule
- d. Greek Life Schedule

7) COMPREHEND how HQ billing works for pledges by reviewing this reference

- a. [Member Fees Explained](#)

8) UNDERSTAND how to manage your chapter as an organization using this [reference](#)

9) VALIDATE the chapter roster in Portal.sigmachi.org to ensure accurate billing (will get email with due date around June).

- a. Remove graduated members

- b. Remove members no longer in school

10) PREPARE for the ritual by contacting your Ritual Peer with your Chapter Advisor and Kustos

- a. Ensure chapter has all needed items for the ritual. Work with Kustos to order more if necessary.
- b. Reserve location (if necessary)
- c. Contact alumni to fill ritual roles
- d. Go over Ritual Committee tab in this [document](#) for overall planning