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March 23, 2011

Dear Chapter Presidents, Treasurers, and CABs –

As you know, we have been working on a proposal to hopefully help solve some issues/concerns in the areas of recruitment, retention, fall billing processes, New member reporting (P109, M476 card, upload to BillHighway, Essential Sigma) and fees, and payments to NHQ. Ten webinar opportunities were provided between December 2010 and March 2011 to share the proposals with chapters and seek their input on proposed changes.

The March Sigma Standard included a final proposal of the plan as well as a poll to seek chapter input on whether or not to implement the plan. Additionally, the poll inquired about a suggested time frame to implement the proposal. This letter will outline the results and next steps,

**Key Points:**

- The response was an overwhelming YES to implement this plan as presented in the March 2011 Sigma Standard.
- The poll indicated a split opinion between WHEN to implement – Fall 2011 or Fall 2012. Therefore, NHQ staff implementing the plan weighed the pros and cons of both implementation timeframes.
- The final outcomes include:
  - Implementation of the proposed plan starting July 1, 2012
  - April 1, 2011 budget deadline is being pushed back to April 15 in case this decision has stalled your budget development process.
- There were 3 main considerations in this final outcome:
  - We want this plan to HELP chapters not hurt. While there were a number of chapters in a “good place” and would be able to implement this plan without stress or concern, there are also a number of chapters who could benefit from an additional year to get to a better place with both financial management and recruitment. By “good place”, I mean stable financial management, use Honor Council effectively to collect outstanding fees, use a budget to manage expenses, firm grasp on tools in BillHighway, membership/recruitment stable and at/above total, and advisor involvement to help with implementation.
  - This is a big change and will take much collaboration between chapters and the National Organization. We decided it was best to not rush through implementation and instead move slow and steady through this process. We will take the next 14 months to assist chapters with personal coaching – both financial and membership stability – to ensure there is preparation for this change and that members of the chapter are well informed. This will take patience and your participation.
  - Chris Smithhisler, Director of Programs, is working on some key tools which will be a tremendous resource for chapters. One includes a Recruitment Tool Kit to help chapters develop personalized recruitment plans and a comprehensive resource center. Another includes an enhanced educational programs section of Sigma Connect. Both will serve as resources to help chapters with recruitment and financial management.

friendship | *character* | conduct



### Things you can expect from the National Organization:

1. A full time line for the implementation beginning with action items for chapters in June 2011.
2. Appointing a personal coach and contact to your chapter for the implementation of this plan.
3. Developing enhanced educational tools for your chapter to include:
  - a. Member FAQs
  - b. 1 page Executive Summary of the plan/changes to be implemented Fall 2012 (with the first statement being distributed July 1, 2012.
  - c. Step-by-step analysis process for you chapter to review your current financial standing and any items which need to be addressed (ex. fee collection, Honor Council, roster, large graduating classes, use of BillHighway, recruitment skill training for members, skill training on BillHighway, recruiting a financial advisor, etc.)
4. Walking you through how this plan fits into your chapter...a personalized plan and responding to your needs with available resources/information.

### Things we expect from chapters:

1. Making this implementation a priority for the next 14 months by responding to emails and attending scheduled coaching sessions.
2. Being informed - reading updates, attending coaching sessions, and doing something with the information provided to the chapter leaders and advisors.
3. Informing your members of updates and what the officers/advisors are working on for implementation.
4. Participating in all implementation process steps because being informed and taking action is the right thing to do as a leader...not because you believe it to be "mandatory".

**What we'll need from each other....**trust, follow-through, patience, and understanding.

**I commit** that we will do our very best to help you put processes in place which can be used year after year. **I commit** to listening to your local chapter concerns and finding solutions with the available resources. **I commit** to working through any bumps which come with change. **I need** from each of you some understanding that with 110 chapters this will not be a perfect plan for everyone BUT if you help us understand your concerns (trusting that we'll listen) you enable us to make this the best plan it can be for your chapter. I look forward to hopefully partnering with your chapter leaders and advisors for a successful implementation. More information to follow in May and throughout the summer.

In our bonds,



Lorin Phillips  
Director of Chapter Services