

Kappa Psi Pharmaceutical Fraternity, Inc. Chapter Visitation Procedures

Effective Date: September 2018

Purpose

A Chapter visitation is a formal process in which an International Executive Committee (IEC) Officer or a Grand Regent's appointee from outside the Chapter helps the Chapter assess their current level of functioning, generate strategies for improving Chapter function, and (on occasion) formally investigate a risk management incident. It is important to note that a Chapter visitation should be viewed in a positive manner. It is a means to gain perspective and insight which will ultimately lead to Chapter function improvement. Additional information of the intent of a Chapter visitation can be found in the Kappa Psi Policy Manual, then "Chapter Visitation Policy." The goal of this procedural document is to assist the IEC Officer/Grand Regent's appointee and the Chapter Members in the preparation and planning of a Chapter visitation. It is important to note that there are two types of Chapter visitations. A "Scheduled Visitation" allows the Chapter ample amount of time to prepare and plan for the visitation. A "Risk Management Incident Investigation" will perhaps not give a Chapter ample time to prepare due to the nature of the visit.

SCHEDULED VISITATION

*Responsibilities of the Chapter and its Members for a **Scheduled Visitation***

- The Chapter Regent is responsible for communicating the upcoming Chapter visitation to the Chapter Members and all of the Grand Council Deputies (GCDs) and Faculty Advisors.
- The Chapter Regent shall be the primary contact person with the IEC Officer or the Grand Regent's appointee to set up the Chapter visitation.
- The Chapter Regent will include all Grand Council Deputies and Faculty Advisors on all communications with the IEC Officer or Grand Regent's appointee.
- The Chapter Regent and Faculty GCD/Faculty Advisor (with the guidance of the IEC Officer or Grand Regent's appointee) will create a Chapter visitation itinerary (Reference Appendix A for sample itinerary). Meetings must be set up with the following person(s):
 - Dean of the School/College of Pharmacy
 - Grand Council Deputy(ies) (and Faculty Advisor)
 - Chapter Officers/Executive Committee (as a group)
 - Any additional Kappa Psi Faculty Members, who are not GCDs/Faculty Advisors
 - Chapter Meeting (with use of Ritual)
 - Individual Meetings with: Regent, Treasurer, Secretary, Pledge Educator, Historian, Chaplain, and all other officers
 - Local Graduate Chapter (if possible)
 - Additional persons per request of IEC Officer or Grand Regent's appointee
- A Faculty GCD or Faculty Advisor must be present at all meetings listed on the itinerary.
- The completed Chapter visitation itinerary will be sent electronically to the IEC Officer or Grand Regent's appointee at least 7 days prior to the Chapter visitation.
- The Chapter Officers/Executive Committee will complete the "Chapter Self-Analysis Report" (and supporting documents specified) and electronically submit to the IEC Officer or Grand Regent's appointee at least 7 days prior to the Chapter visitation.
- The Chapter must have available for review all the documents specified in the "Chapter Self-Analysis Report" at the time of the Chapter visitation.
- Chapter Member(s) will arrange local transportation to/from the airport and to/from the school/college of pharmacy.
- Suggestions for hotel accommodations should be provided to the IEC Officer or Grand Regent's appointee.
- Chapter Members and GCD(s)/Faculty Advisor(s) are encouraged to ask questions and gain insight from the IEC Officer or Grand Regent's Appointee.

*Responsibilities of the International Executive Committee (IEC) Officer or Grand Regent's appointee for a **Scheduled Visitation***

- The IEC Officer or the Grand Regent's appointee shall work with the Chapter Regent and the Faculty GCD or Faculty Advisor to schedule a date for the Chapter visitation.
- A copy of the Chapter Visitation Policy, the Chapter Self-Analysis Report, and the Chapter Visitation Procedural Document must be sent 45 days in advance to the Chapter Regent and the Faculty GCD or Faculty Advisor. Guidance should be provided on how to navigate through the documents.
- The IEC Officer or the Grand Regent's appointee shall advise and assist the Chapter Regent and the Faculty GCD or Faculty Advisor in creating the Chapter visitation itinerary.
- The IEC Officer or the Grand Regent's appointee must forward their travel itinerary at least 14 days prior to the Chapter visitation in an effort for the Chapter to solidify the Chapter visitation itinerary.
- The IEC Officer or the Grand Regent's appointee must keep the Grand Regent and the Executive Director updated during the scheduling process by including them on all relevant emails.
- Advice and strategies to improve Chapter function will be provided verbally during the Chapter visitation.
- A formal Chapter visitation report must be completed and electronically submitted to the Grand Regent and the Executive Director within 14 days of the Chapter visitation.
- A Fraternity expense report must be completed and submitted to the Executive Director within 14 days of the Chapter visitation.

*Responsibilities of the Grand Regent for a **Scheduled Visitation***

- The Grand Regent shall notify the Chapter Regent and all Grand Council Deputies (GCDs)/Faculty Advisor(s) that a Chapter visitation needs to be scheduled. The purpose for the Chapter visitation should be stated in the communication.
- The Grand Regent shall communicate and share all necessary information and documents with the IEC Officer or Grand Regent's appointee prior to the Chapter Visitation.
- The Grand Regent shall inform the respective Province Satrap & Supervisors of the upcoming Chapter visitation. The Province may send a representative, at the discretion of the Grand Regent, to attend selected parts of the Chapter visitation including meetings with the Chapter officers, Chapter members and/or local Graduate Chapter only. Province representatives shall not be invited to attend meetings with the school/college administration or the GCDs/Faculty Advisors.
- A summary of the report will be provided to the Faculty GCD and/or Faculty Advisor, GCDs, and Province Satrap & Supervisors.

For additional information regarding Risk Management policy violations, reporting, sanctions, etc., please refer to the “Kappa Psi Pharmaceutical Fraternity, Inc. Risk Management Procedures” Document.

*Responsibilities of the Faculty GCD/Faculty Advisor, Chapter and its Members for a **Risk Management Incident Investigation***

- The Faculty GCD or the Faculty Advisor shall be the point contact person with the IEC Officer or the Grand Regent’s appointee to set up the on-site incident investigation.
- The Faculty GCD or the Faculty Advisor is responsible for communicating the upcoming Risk Management Incident Investigation to the Chapter Members, other Chapter GCDs, and the school/college administration.
- The Chapter Regent and Faculty GCD/Faculty Advisor (with the guidance of the IEC Officer or Grand Regent’s appointee) will create a Risk Management Incident Investigation itinerary (Reference Appendix B for sample itinerary). Meetings must be set up with the following person(s):
 - Dean of the School/College of Pharmacy
 - Grand Council Deputy(ies) (and Faculty Advisor)
 - Chapter Officers/Executive Committee (as a group)
 - Kappa Psi Faculty Members
 - Chapter Meeting (with includes a risk management seminar/presentation or discussion)
 - Individual Meetings with: Regent, Pledge Educator, and other officers (as appropriate)
 - Chapter Members directly or indirectly involved in the incident
 - Additional persons per request of the IEC Officer or the Grand Regent’s Appointee
- A Faculty GCD or Faculty Advisor must be present at all meetings listed on the itinerary.
- The completed itinerary will be sent electronically to the IEC Officer or Grand Regent’s appointee at least 2 days prior to the on-site incident investigation.
- The Faculty GCD or the Faculty Advisor will complete the “Kappa Psi Pharmaceutical Fraternity, Inc. Formal Violation Report” Form (and any supporting documents) and electronically submit to the IEC Officer or Grand Regent’s appointee at least 2 days prior to the on-site incident investigation. Documents should not be shared without the permission from the school/college of pharmacy.
- The Chapter must have available for review all the documents specified in the “Kappa Psi Pharmaceutical Fraternity, Inc. Formal Violation Report” Form at the time of the on-site incident investigation.
- Chapter Member(s) will arrange local transportation to/from the airport and to/from the school/college of pharmacy.
- Suggestions for hotel accommodations should be provided to the IEC Officer or Grand Regent’s Appointee.
- Chapter Members must provide all the facts and speak candidly during the on-site incident investigation.

*Responsibilities of the International Executive Committee (IEC) Officer or Grand Regent’s appointee for a **Risk Management Incident Investigation***

- The IEC Officer or the Grand Regent’s appointee shall work with the Faculty GCD or the Faculty Advisor to schedule a date for the on-site incident investigation.
- The IEC Officer or the Grand Regent’s appointee shall advise and assist the Faculty GCD or the Faculty Advisor in creating the on-site itinerary.
- The IEC Officer or the Grand Regent’s appointee must forward their travel itinerary once finalized prior to the on-site visitation in an effort for the Chapter to solidify the Chapter on-site itinerary.
- The IEC Officer or the Grand Regent’s appointee must keep the Grand Regent and the Executive Director updated during the scheduling process.
- Work with the Chapter Members, Faculty GCD or the Faculty Advisor, and Dean of the College/School to assess the incident.
- A formal Risk Management Incident Investigation report must be completed and electronically submitted to the Grand Regent and the Executive Director within 5 days of the on-site incident investigation.

- A Fraternity expense report must be completed and submitted to the Executive Director within 5 days of the on-site incident investigation

*Responsibilities of the Grand Regent for a **Risk Management Incident Investigation***

- The Grand Regent shall notify the Faculty GCD or the Faculty Advisor, GCDs (depending on the nature of the incident) of the Risk Management Incident Investigation. The purpose for the Chapter visitation should be stated in the communication. Due to the nature of the visit, the on-site incident investigation may occur without ample notice.
- A copy of the "Kappa Psi Pharmaceutical Fraternity, Inc. Formal Violation Report" Form and the "Kappa Psi Pharmaceutical Fraternity Risk Management" Policy will be sent in advance to the Faculty GCD or the Faculty Advisor. Guidance should be provided on how to navigate through the documents.
- The Grand Regent shall communicate and share all necessary information and documents with the IEC Officer or Grand Regent's appointee prior to the Risk Management Incident Investigation.
- The Grand Regent may inform (depending on the nature of the incident) the respective Province Satrap & Supervisors of the upcoming on-site incident investigation.
- A summary of the report will be provided to the Faculty GCD and/or Faculty Advisor, GCDs (depending on the nature of the incident), and Province Satrap & Supervisors (depending on the nature of the incident).



APPENDIX A

Itinerary for Lambda Rho Scheduled Chapter Visitation –Jane Pharmacist, PharmD

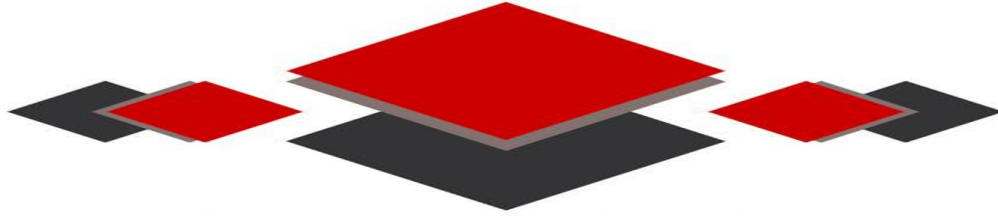
September 10, 2018

8:15 PM	Transportation from Airport to Green Lake Restaurant Flight AA2222 at 7:45 PM	Mary Doe, PharmD, BCPP Faculty GCD (555) 321-5431
8:30 PM to 10:00 PM	Dinner with Squire Graduate Chapter Brothers	Green Lake Restaurant 534 South Main Street Squire, XR 55555
10:00 PM	Transportation to Sheraton	Rich Doe Regent (555) 222-3344

September 11, 2018 – Dr. Doe to attend all meetings

7:30 AM	Transportation from Sheraton to Squire University, School of Pharmacy 333 South Gray Avenue Squire, XR 55555	Rich Colleague Regent
8:00 AM to 9:00 AM	Rich Colleague Regent	Room 32
9:00 AM to 10:00 AM	Chapter Officers	Room 32
10:00 AM to 10:15 AM	BREAK	
10:15 AM to 10:45 AM	Joe Student Pledge Educator	Room 32
10:45 AM to 11:15 AM	Rita Medicine Treasurer	Room 32
11:15AM to 11:45 AM	Sam Greek Secretary	Room 32
11:45AM to 12:15 PM	George Pill Historian	Room 32
12:15 PM to 12:45 PM	Donna Tablet Chaplain	Room 32
12:45 PM to 2:00 PM	LUNCH Chapter GCDs	The Sandwich Place
2:00 PM to 2:30 PM	Bill College, PhD, PharmD, BCPS, FASHP Dean, Squire University, School of Pharmacy	Office of the Dean Room 321
2:30 PM to 3:00 PM	Rita Ointment Regent -Elect	Room 32
3:00 PM to 4:00 PM	Lambda Rho Chapter Meeting	Room 105
4:00 PM to 5:00 PM	Wrap-up with Faculty GCD Transportation to Airport Flight AA3333	Mary Doe, PharmD, BCPP Faculty GCD (555) 321-5431

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APPENDIX B

Itinerary for Rho Mu Risk Management Incident Investigation –Jane Pharmacist, PharmD

Thursday, March 14, 2019

10:45 PM	Pick-up from airport and transported to Embassy Suites Flight AA1254 10:29 PM	Roger Doe Regent (555) 222-1357
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Friday, March 15, 2019 – Dr. Doctor to attend all meetings

8:00 AM	Pick up from Embassy Suites to University of Silly, School of Pharmacy 111 North Laugh Avenue Anywhere, CH 55551	Keith Doctor, PharmD, BCPS Faculty GCD (555) 322-5432
8:30 AM to 9:00 AM	Jessica Student, Immediate Past Regent Roger Doe, Regent	Room 152
9:00 AM to 9:30 AM	Jason Pill, Pledge Educator	Room 152
9:30 AM to 10:30 AM	Rho Mu Chapter Meeting Risk Management Presentation Jason Pill, Pledge Educator Rita Counter, Social Chairperson	Room 202
10:30 AM to 11:30 AM	George Lab, PhD Dean of the College of Pharmacy Rachel Faculty Assistant Dean for Student Affairs	Office of the Dean Room 111
11:30 AM to 12:00 PM	Chapter Officers	Room 152
12:00 PM to 1:30 PM	Lunch Keith Doctor, Faculty GCD Roger Doe, Regent Jason Pill, Pledge Educator Kappa Psi Faculty Members	Pizza Garden
1:30 PM to 3:00 PM	Wrap-up with Faculty GCD	Room 152
3:45 PM	Drop-off to Airport Transportation to Airport Flight AA3945 5:25 PM	Jason Pill, Pledge Educator (555) 111-3333

APPENDIX C: *SCHEDULED VISITATION CHECKLISTS*

CHAPTER

	Date
Set up meetings with:	
• Dean of the School/College of Pharmacy	
• GCD(s) and Faculty Advisor(s)	
• Chapter Executive Committee (as a group)	
• Kappa Psi Faculty Members	
• Entire Chapter (with use of the Ritual)	
• Individual Meetings with Chapter Officers	
• Individual meetings with involved Chapter Members	
• Local Graduate Chapter (if possible)	
• Other Members as requested by the visiting Officer	
A Faculty GCD/Advisor is available to be present at all meetings listed above	
Completed itinerary sent to the visiting Officer at least 7 days prior to visit	
"Chapter Self-Analysis Report" submitted to visiting Officer at least 7 days prior to visit	
Documents from Chapter Self-Analysis Report available for review:	
• Current Chapter roster	
• Minutes of the last Chapter business meeting	
• Copy of current local ordinances	
• Signed Risk Management Verification Forms	
• Risk Assessment Forms for rush/pledge activities	
• Most recent financial statements	
• Most recent signed GCD Verification Form(s)	
• Last submitted History Report Form	
Appropriate transportation arranged for visiting Officer	
Suggestions for hotel accommodations provided to visiting Officer	

IEC OFFICER/GRAND REGENT'S APOINTEE

	Date
Send to Chapter Regent and Faculty Advisor(s)/GCD(s) at least 45 days before visit:	
• Chapter Visitation Policy	
• Chapter Self-Analysis Report	
• Chapter Visitation Procedural	
At least 14 days before Visit	
• Forward travel itinerary to Chapter	
Within 14 days after visit	
• Submit formal Chapter visitation report to Grand Regent and Executive Director	
• Submit Fraternity expense report to the Executive Director	

APPENDIX D: *RISK MANAGEMENT INCIDENT INVESTIGATION CHECKLISTS*

CHAPTER

	Date
Set up meetings with:	
• Dean of the School/College of Pharmacy	
• GCD(s) and Faculty Advisor(s)	
• Chapter Executive Committee (as a group)	
• Kappa Psi Faculty Members	
• Entire Chapter	
• Individual Meetings with Regent and other appropriate Officers	
• Individual meetings with involved Chapter Members	
• Other Members as requested by the visiting Officer	
A Faculty GCD/Advisor is available to be present at all meetings listed above	
Completed itinerary sent to the visiting Officer at least 2 days prior to visit	
With permission from the school, Faculty GCD/Advisor submitted the "Formal Violation Report" to the visiting Officer at least 2 days prior to visit	
Appropriate transportation arranged for visiting Officer	
Suggestions for hotel accommodations provided to visiting Officer	

IEC OFFICER/GRAND REGENT'S APOINTEE

	Date
Schedule a date with Chapter for on-site investigation	
Advise/assist Faculty GCD/Advisor in creating on-site itinerary	
Forward travel itinerary to Chapter prior to on-site investigation	
Formal "Risk Management Incident Investigation" report submitted to the Grand Regent and Executive Director within 5 days of on-site investigation	
Fraternity expense report submitted to the Executive Director within 5 days of the on-site investigation	