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Introduction

The chapter secretary has the opportunity to be one of the most important officers in a chapter. The secretary is the oil that can keep the chapter organizational machinery working together smoothly. In many chapters, the role of secretary can be expanded to encompass the numerous organizational, managerial, and structural functions. One of the goals of this manual is to accurately portray the breadth and scope of the secretary’s duties and responsibilities, and show the importance of the secretary’s role within the chapter organizational structure.

The secretary should be doing more than taking minutes and producing a phone list. He is responsible for all internal chapter communications. He is the central location and organizer for all chapter resources. He is the authority for questions of procedure, policy, and protocol. He is a central figure in tracking progress towards chapter goals, and compiles the master chapter calendar. He also plays a crucial role in bringing together the *Chapter Excellence Report* for the chapter. The secretary should also be a central figure in communicating with the International Headquarters. There are numerous administrative requirements that every undergraduate chapter must submit to Headquarters and the secretary is instrumental in ensuring that they are completed.

The area of chapter administration is one in which a dedicated secretary can make huge strides to improve the internal functioning of the chapter. Competent execution of the secretary’s duties and responsibilities can have immeasurable effects on almost every other area of chapter operations. The secretary is the lubrication in the chapter organizational machine. When he is working well, it makes everything else easier to do. The better he is at his job, the less an outside observer notices him. When not held accountable for his responsibilities and duties, the chapter’s organizational machinery operates less efficiently. Parts begin to rust and scrape against each other and eventually the machine grinds to a halt.

This manual reviews the responsibilities of the secretary, and offers guidelines, advice, and examples for nearly everything that a secretary will have to deal with during his term. It addresses everything from managing sub-officers and properly dealing with minutes and agenda, to chairing the by-laws committee and centralizing chapter resources. The secretary is vital to the functioning of any chapter, and this manual will help him to fulfill that role.

Secretary Position Description

Reports to: Executive Council

Sub-officers: Historian, Librarian

Position Function:

The secretary serves on the executive council, takes minutes of all official meetings of the chapter, and distributes them to the undergraduates, alumni, and all other appropriate groups and individuals. He keeps all records of the chapter and maintains relations with the International Fraternity. He is the central resource for the chapter and is responsible for internal chapter communications.

Principle Responsibilities:

1. Serve as an executive council officer within the chapter. Attend executive council meetings and contribute input as to the advancement of the Fraternity.
2. Create, maintain, and update as necessary, a chapter member phone/e-mail list and roster.
3. Prepare outline agenda for chapter and executive council meetings detailing all agenda items.
4. Record minutes from chapter and executive council meetings.
5. Maintain attendance records for meetings and other required chapter events.
6. Responsible for all mailings to the International Fraternity Headquarters. This includes the Change of Officer Form, Leadership Institute Registration, and Summer Officer Address Form.
7. Produce a master chapter calendar for planning and coordinating events. Collect dates from every chapter officer at the beginning of each academic term, for inclusion in the master calendar. Distribute copies of this master calendar to every member and pledge.
8. Manage the activities of the historian and librarian. Assist these sub-officers with their duties, and hold them accountable for their duties and responsibilities.
9. Maintain the chapter's by-laws, and make all updates in a timely manner. Ensure that the chapter by-laws reflect the policies and procedures of the chapter. When needed, form and chair the by-laws committee, which is responsible for compiling all major bylaw revisions or changes.
10. Compile and maintain a central chapter resource file which includes copies of all chapter programs, chapter by-laws, Fraternity constitution and by-laws, officer notebooks, chapter and executive council meeting minutes, etc.
11. Develop and maintain a detailed account of secretarial activities and compile an officer notebook to educate future officers.
12. Compile all necessary support documentation for the Fraternity awards applications and the Chapter Excellence Report as outlined in the Chapter Administration section of the *Chapter Excellence Plan Guidebook*.
13. Develop position goals and budget. Utilize appropriate sections of the *Chapter Excellence Plan Guidebook* as a planning tool in the goal setting process.
14. Properly and adequately train all assistants and replacements.

Sample Secretary Goals

Just as a chapter must develop goals and objectives to maintain focus and improve operations, the chapter secretary must do the same. The secretary’s goals and objectives should be an extension of the secretary position description, and the administrative requirements of the chapter, striving to increase organization and efficiency. When developing these goals, be sure that they:

- Describe success
- Provide a challenge
- Create common tasks and processes
- Create an expectation level of yourself and others
- Give direction and purpose

The more clearly and explicitly goals are defined, the easier it is to accurately assess progress towards their attainment. They must be attainable within a designated period, and be measurable. With these guidelines in mind, the following are an example set of secretary goals.

1. Meet all administrative deadlines to International Headquarters.
2. Have all meeting agenda prepared and posted 24 hours before chapter meeting.
3. Have all minutes compiled and posted on e-mail within 36 hours of chapter meetings.
4. Form by-laws committee, and have the chapter by-laws updated and fully implemented by the end of the semester.
5. Fulfill all duties and responsibilities as outlined in my position description.
6. Have chapter phone/e-mail list completed and handed out by second meeting of each semester.

Sample Secretary Budget

The following budget is an example for a 35-man chapter. Depending upon the scope of the secretary’s duty, and the resources available from the university, the items and dollar amounts may vary. Other expenses could include costs associated with the maintenance of a web site, or the upkeep and repair of a chapter photo copier. The total amount will vary from chapter to chapter as well, but this basic outline should be a good start.

Copies	35 agenda x 12 chapter meetings x \$0.03 per page x 1 page	\$12.60
	10 minutes x 12 chapter meetings x \$0.03 per page x 2 pages	\$ 7.20
	35 phone lists x 2 times/semester x \$0.03 per page x 1 page	\$ 2.10
Postage	3 mailings to IHQ per semester (see p. 29) x \$0.33	\$ 1.00
Stationary	2 reams of paper x \$10/ream	\$20.00
	Box of envelopes	\$ 5.00
Computer Disks	5 Disks x \$1.00/disk	\$ 5.00
Toner Cartridge	For printer	\$20.00
Total	1 semester	\$72.90

Sub-Officers: The Historian and Librarian

One of the secretary’s responsibilities is managing the librarian and historian. This will involve knowing the responsibilities and duties of these positions, as well as using interpersonal skills to ensure the sub-officers are fulfilling those responsibilities. Although not executive council officers, these two positions are still of great importance to the chapter. As with all of the sub-officer positions, they are the training grounds for our future chapter leaders. Through performance of their duties, the historian and librarian will learn the organizational and leadership skills they will need to move on to positions of greater responsibility. As the executive officer managing the librarian and historian, it is the secretary’s responsibility to ensure they are learning new skills, accomplishing their duties, and fulfilling their responsibilities.

Historian Position Description

Reports to: Secretary

Position Function:

The historian serves as a sub-officer of the secretary. He is responsible for producing the annual yearbook. In addition, he oversees the growth and maintenance of the chapter's archives.

Principle Responsibilities:

1. Compile pictures, newspaper articles, and other documentation of chapter activities, in order to produce a chapter yearbook.
2. Working with the alumni and the alumni relations officer, gather and compile information and materials regarding the past activities of the chapter and its members.
3. Develop and maintain a detailed account of historian activities and compile an officer notebook to educate future officers.
4. Compile any necessary support documentation for Fraternity awards applications and the *Chapter Excellence Report* as outlined in the *Chapter Excellence Plan Guidebook*.
5. Develop position goals and budget. Use appropriate sections of the *Chapter Excellence Plan Guidebook* as a planning tool in the goal setting process.
6. Properly and adequately train all assistants and replacements.

Librarian Position Description

Reports to: Secretary

Position Function:

The librarian serves as a sub-officer of the secretary. He is responsible for maintaining the chapter's literary, cultural, and academic resources.

Principle Responsibilities:

1. Collect textbooks at the end of each semester to build the chapter's library.
2. Develop and maintain a detailed account of librarian activities and compile an officer notebook to educate future officers.
3. Develop a plan utilizing parents, alumni, the campus, and the community to expand the chapter's holdings.
4. Compile any necessary support documentation for Fraternity awards applications and the *Chapter Excellence Report* as outlined in the *Chapter Excellence Plan Guidebook*.
5. Develop position goals and budget. Use appropriate sections of the *Chapter Excellence Plan Guidebook* as a planning tool in the goal setting process.
6. Properly and adequately train all assistants and replacements.

Sample Sub-Officer Goals

It is also necessary for the historian and librarian to set officer goals for their area of operations. As described above, remember that goals must:

- Describe success
- Provide a challenge
- Create common tasks and processes
- Create an expectation level of yourself and others
- Give direction and purpose

The more clearly and explicitly goals are defined, the easier it is to accurately assess progress towards their attainment. They must be attainable within a designated time frame, and be measurable. With these guidelines in mind, the following are an example set of secretary goals.

Historian

1. Produce the chapter yearbook.
2. Work with the alumni relations officer to collect archive material from chapter alumni.
3. Meet, or exceed, all of the duties and responsibilities as outlined in my position description.
4. Compile any necessary support documentation for Fraternity awards applications and the *Chapter Excellence Report* as outlined in the *Chapter Excellence Plan Guidebook*.
5. Develop position goals and budget. Utilize appropriate sections of the *Chapter Excellence Plan Guidebook* as a planning tool in the goal setting process.
6. Properly and adequately train all assistants and replacements.

Librarian

1. Grow the chapter’s library collection by 10% by the end of my term.
2. Meet, or exceed, all of the duties and responsibilities as outlined in my position description.
3. Compile any necessary support documentation for Fraternity awards applications and the *Chapter Excellence Report* as outlined in the *Chapter Excellence Plan Guidebook*.
4. Develop position goals and budget. Utilize appropriate sections of the *Chapter Excellence Plan Guidebook* as a planning tool in the goal setting process.
5. Properly and adequately train all assistants and replacements.

Sample Sub-Officer Budgets

Although a sub-officer’s budget may not include many items, or account for a large percentage of the chapter’s total budget, it is still necessary to develop a budget for the historian and librarian. If the chapter accurately controls and accounts for expenses, it can more accurately set membership dues, and manage our money more professionally. The more accurate the chapter is, the more likely there will be a surplus at the end of the year, that has not been eaten away by unaccounted for expenses.

Historian

The following is a sample budget for the chapter historian. Many other items could be included such as expenses surrounding video-taped interviews of alumni, a campaign to solicit archive materials, maintenance of archives, etc. The expenses will vary from chapter to chapter, and semester depending upon the state of the chapter’s historical holdings and program. The following example should be a good outline to get the budgeting process in motion.

Film	5 rolls x \$5/roll	\$25.00
Film Developing	5 rolls x \$6/roll	\$30.00
Photo Albums and sheets/Scrap Book		\$20.00
Photocopies	100 copies x \$0.03/copy	\$ 3.00
Misc. Supplies	Paper, pens, etc.	\$10.00
Total	1 semester	\$88.00

Librarian

The following is a sample budget for the chapter librarian. Remember that this is only an example, and it could vary greatly between chapters, and between semesters. Other librarian budget items may include computer and web page maintenance, a campaign to increase the chapter’s holdings, etc. Use this as a start for the librarian’s budget.

Photocopies	100 copies x \$0.03	\$ 3.00
Misc. Supplies	Paper, pens, etc.	\$10.00
Total	1 semester	\$13.00

Internal Chapter Communication

The secretary is responsible for all internal chapter communications. In order to efficiently communicate information within the chapter there are a number of things that must be accomplished by the secretary. The first part is having accurate information to distribute. This is accomplished through proper maintenance of chapter resource files, minutes, and meeting agenda. The second part is having the proper contact information for the people to whom the information is distributed.

In order to collect information, the secretary has to be organized and involved in the day-to-day operations of the chapter. Part of this is organizing and distributing agenda and minutes. This also involves making sure members, pledges, and chapter officers understand that they must submit pertinent information to the secretary for distribution or recording. This holds true for executive officers submitting dates for the master calendar or committee reports, as well as members that need to be called when they miss a meeting or event. The secretary must be informed before he can accurately disseminate relevant chapter information.

Once the information is at the secretary’s disposal, the next step is to organize and present that information to the appropriate constituents in the most easily understood and useful format. The form of this information dissemination will vary and can include telephone calls, word of mouth, posters, phone and e-mail lists, and e-mail correspondence. It is up to each chapter and secretary to determine which form is most appropriate for which information. Regardless of the format chosen, it must be done. Part of this task is working with the chapter officers to help them distribute appropriate information as well.

Agenda and Minutes

One important function of the secretary is to manage meeting agenda and minutes. Agenda give members insight on meeting topics. Minutes allow for efficient information dissemination and provide a record of meeting proceedings and chapter business. The most important thing to remember about agenda and minutes is **to do them**. Furthermore, to be an effective organizational tool for the chapter, they need to be produced on a regular basis, and in a timely manner.

An agenda should be prepared for all executive council, committee, and chapter meetings. Executive council meeting agenda should be prepared by the President, which will be informal in most cases. Committee meeting agenda will be informal as well, being the responsibility of the committee chairman. The items discussed at executive council meetings should then be used to develop the chapter meeting agenda. This helps us prepare for chapter meetings, as well as maintain continuity in chapter operations. Agenda for executive council and committee meetings should be informally discussed with the appropriate individuals before the meetings, whereas chapter meeting agenda should be type-written and distributed to the chapter 24 hours in advance.

Minutes are an equally important part of the chapter’s organizational structure. The secretary should take minutes at both executive council meetings, and chapter meetings. Although much may be repetitious, many issues discussed at executive council meetings will never reach the chapter floor, therefore, executive council minutes will help future administrators review past executive council decisions for perspective and direction. Chapter meeting minutes should document the progress and actions of a chapter throughout the year. They are of the utmost importance, informing our members of meeting actions as well as upcoming dates and events. Minutes are also the means through which we learn from our predecessors, and educate future brothers. Once produced, type-written meeting minutes should maintained in a central resource file. Furthermore, the chapter meeting minutes should be posted and/or distributed within 48 hours of each chapter meeting.

The following is a summary of agenda and minutes culminating with weekly chapter meetings.

Committee Meetings

- Agendum informally set by committee chairmen
- Committee meeting minutes taken by committee secretaries

Executive Council Meetings

- Agendum informally set by the chapter president
- Officers discuss their areas of operations using committee minutes as a resource
- Executive council meeting minutes prepared by secretary
- Chapter meeting agendum formally set and posted 24 hours prior to the chapter meeting

Chapter Meeting

- Use agendum formally set by the executive council
- Secretary takes chapter meeting minutes
- Minutes posted within 48 hours of the chapter meeting

Sample Agendum

- I. **CALL TO ORDER:** [Designate day, time, and location]
- II. **FRATERNITY SONG:**
[All members and alumni rise to sing an appropriate Fraternity song, such as *Hail Delta Upsilon*]
- III. **ROLL CALL:** [All members answer roll to determine attendance and if a quorum exists]
- IV. **WELCOME:** [Introduction of any guests or alumni]
- V. **OFFICER REPORTS:** [in the following order]
 - A. PRESIDENT
 - B. TREASURER
 1. Assistant Treasurer
 2. Financial Review Board
 3. Fundraising Chairman
 - C. SECRETARY
 1. Historian
 2. Librarian
 - D. VICE PRESIDENT OF MEMBERSHIP EDUCATION
 1. Pledge Educator
 2. Big Brother Chairman
 3. Brotherhood Development Chairman
 4. Intramural Chairman
 5. Chaplain
 - E. VICE PRESIDENT OF MEMBERSHIP RECRUITMENT
 1. Assistant vice president of membership recruitment
 2. Membership Recruitment Committee
 3. Summer Recruitment Chairman
 - F. VICE PRESIDENT OF LOSS PREVENTION
 1. House Manager
 2. Social Chairman
 3. Kitchen Steward
 - G. VICE PRESIDENT OF SCHOLARSHIP
 1. Scholarship Review Board
 2. Judicial Review Board

H. VICE PRESIDENT OF PUBLIC RELATIONS

1. Alumni Relations Officer
2. Philanthropy and Community Service Officer
3. Parent Relations Officer
4. IFC Delegate
5. Special Events Chairman
6. Campus Relations Officer

VI. OLD BUSINESS: [any business tabled from the last meeting]

VII. NEW BUSINESS: [any new business introduced to the chapter]

VIII. ANNOUNCEMENTS:

IX. PIN CALL: [Secretary calls on all members, in turn, for any final comments]

X. RECAP: [President recaps important information]

XI. ADJOURNMENT [Time]

Sample Minutes

- I. **CALL TO ORDER:** 8:02 p.m. on Sunday, April 25, 1999, in UC room 402.
- II. **FRATERNITY SONG:** Chapter sang Hail Delta Upsilon
- III. **ROLL CALL:**
 - Excused Absences: Linus Pauling, Les Pearson
 - Unexcused Absences: none
- IV. **WELCOME:** Brother Candelino welcomed everyone with a leadership quote
- V. **OFFICER REPORTS:**
 - A. **PRESIDENT:**
 - a. Reviewed Chapter Excellence Plan and Chapter Goals
 - b. Executive Board meeting is open this week for those who would like to learn more
 - B. **TREASURER:**
 - a. Chapter bills are due on May 15, 1999.
 - b. Get T-shirt money in a.s.a.p.
 1. Assistant Treasurer
 - a. will be notifying all members who have overdue accounts this week
 2. Financial Review Board
 - a. hearing May 16, 1999 for all with overdue accounts
 3. Fundraising Chairman
 - a. Car wash on Saturday, May 1/99 at 11a.m. at Kroger
 - C. **SECRETARY:**
 - a. passed out copies of chapter by-laws
 - b. compiling summer address/phone list
 1. Historian
 - a. collecting member and alumni biographies
 2. Librarian
 - a. working on chapter web site, if you want to help let him know
 - D. **VICE PRESIDENT OF MEMBERSHIP EDUCATION:**
 - a. CPR course is on Saturday, Saturday, May 1 at 9 a.m. in UC 402
 1. Pledge Educator
 - a. pledge test next week
 - b. getting ready for initiation
 2. Big Brother Chairman
 - a. all Big Brothers are helping Little Brothers study for pledge exam

3. Brotherhood Development Chairman
 - a. setting up summer retreat (time and location TBA)
 4. Intramural Chairman
 - a. Finished third overall for entire year. AWESOME!
 5. Chaplain
 - a. bible study Sunday, May 2nd at 2 p.m. in chapter library
- E. VICE PRESIDENT OF MEMBERSHIP RECRUITMENT:
- a. updated potential member list (5 new names added)
 - b. collected member evaluations of recruitment workshop
1. Assistant vice president of membership recruitment
 - a. getting incoming freshman list from Greek Advisor
 2. Membership Recruitment Committee
 - a. meeting this week (Thurs., April 29th at 6 p.m. UC31)
 3. Summer Membership Recruitment Chairman
 - a. setting summer recruitment event dates
- F. VICE PRESIDENT OF LOSS PREVENTION:
- a. reviewed loss prevention policies for Delta Zeta mixer
1. House Manager
 - a. all house clean-up on Wed., April 28th right after dinner
 2. Kitchen Steward
 - a. remember that all plates, cups, etc. must stay in the kitchen
 - b. DO NOT TAKE THEM TO YOUR ROOMS!
 3. Social Chairman
 - a. Mixer Thurs., April 29th with Delta Zeta (meet at the chapter house at 8 p.m.)
- G. VICE PRESIDENT OF SCHOLARSHIP:
- a. submit professor evaluation forms next meeting
1. Academic Review Board
 - a. meeting Tues., April 27th at 7 p.m. in chapter house library
 - b. all members below the GPA requirement for good standing must attend
 2. Judicial Board
 - a. announced sanctions from last week's hearing (see attachment)
- H. VICE PRESIDENT OF PUBLIC RELATIONS:
- a. sent flowers to new Pi Beta Phi initiates
 - b. Serenade of Alpha Phi pledges is Mon., April 26th (meet at the chapter house at 8 p.m.)
1. Alumni Relations Officer
 - a. newsletter will be mailed on Wed, May 19th, needs volunteers to stuff envelopes
 2. Community Service/Philanthropy Officer
 - a. reminder of Blood Drive going on this week
 3. Parent Relations Officer
 - a. sent out Mother's Day cards to mom's last week
 4. IFC Delegate
 - a. 1st place in Greek Week--GOOD WORK!

5. Campus Relations Officer
 - a. Orientation leader applications due in Student Relations Office May 19th.
6. Special Events Chairman
 - a. Greek Week summary

VII. OLD BUSINESS:

- nothing

VIII. NEW BUSINESS:

- motion passed to make every Wednesday "Letter's Day" (moved by Steve Parks, Seconded by Peter Lucio)

IX. ANNOUNCEMENTS:

- congratulations to Brother Michael Garza who was engaged this weekend
- Career fair in Student Center on Tues., April 7th all day

X. PIN CALL:

- members were called on for any final comments or concerns

XI. RECAP:

- President Dave Wassenaar recapped the important dates, and wished the pledges good luck in studying for their pledge exam.

XII. ADJOURNMENT:

- Meeting was adjourned at 9:35 p.m.

Master Chapter Calendar

All chapters should develop a calendar for the semester or year to ensure proper scheduling of major events. Give recruitment, Initiation, and alumni events top priority on the schedule. The secretary plays a vital role in collecting event and program dates from each executive officer, as well as the compilations of those dates into the final product. Once created, the executive council should approve the calendar making sure to avoid conflicts or over-programming, and disseminate it to the rest of the chapter. A set calendar not only lets members know about important dates, but it can also be useful to alumni, IHQ staff, or the Greek advisor. The calendar can also serve as a reminder for completing administrative reports and activities.

Every calendar should include:

- Recruitment Events
- Alumni Events
- Pledging and Initiation Events
- Chapter Meetings
- Executive Council Meetings
- Alumni Chapter Meetings
- Officer Transition and Retreat
- Scholarship Dinner
- Philanthropy and Community Service Events
- Mom and Dad’s Weekends
- Homecoming
- Campus Events
- Social Functions
- Intramural Sporting Events
- Holiday Breaks
- Birthdays
- Exam Schedule
- Add-Drop Class Deadlines
- Chapter Retreat

Events and dates to include:

September

- Officer or chapter retreat should be held to prepare for the upcoming school year
- Review fall term goals at chapter retreat
- Chapter's fall budget should be finalized and copies sent to IHQ and key alumni
- Fall insurance assessment due to IHQ by September 15th
- Chapter programming for the semester should be planned and written in the chapter event calendar including:
 - ◆ At least one philanthropy or community service project
 - ◆ At least one alumni and/or parents event
 - ◆ Initiation
 - ◆ At least two programs dealing with loss prevention
 - ◆ At least two membership education programs
 - ◆ Scholarship programming
 - ◆ Chapter retreat
 - ◆ At least two guest speakers
 - ◆ Recruitment events
 - ◆ IHQ staff visit
 - ◆ Social functions
 - ◆ Intramural sporting events
 - ◆ Important university/college dates
 - ◆ Chapter Founding Day commemoration, if applicable
 - ◆ Send in all new member biographical cards and pledge fees immediately after pledging
 - ◆ Begin preparing a fall undergraduate newsletter
 - ◆ Chapter budget due to IHQ by October 1st
 - ◆ Send in initiation report, and initiation fees within 24 hours of the ceremony

October

- Return the fall membership roster to IHQ by October 15th
- Fall membership fees due October 15th
- Inform members about officer elections in November. Speak with members who would be an asset at a particular office.
- Schedule a fire drill

November

- *Presidents Academy* registration due to IHQ by December 1st
- Founders Day Commemoration on November 4th
- If applicable make preparations to close the chapter house during Thanksgiving break
- Prepare chapter goals for spring term
- Prepare spring term budget
- Schedule officer elections

December

- If applicable make preparations to close the chapter house during winter break

January

- Officer transition retreat should be held. Prior to transitions, instruct past officers to update officer binders or notebooks.
- Review chapter goals for spring term
- Chapter's spring budget should be finalized and copies sent to IHQ and key alumni
- Chapter programming should be planned and written in the chapter event calendar including:
 - ◆ At least one philanthropy or community service project
 - ◆ At least one alumni, faculty, and/or parents event
 - ◆ Initiation
 - ◆ At least two loss prevention programs
 - ◆ At least two member education programs
 - ◆ Scholarship programming
 - ◆ Chapter retreat
 - ◆ At least two guest speakers
 - ◆ Recruitment events
 - ◆ IHQ staff visit
 - ◆ Social functions
 - ◆ Intramural schedules
 - ◆ Important university/college dates
 - ◆ Chapter Founding Day commemoration, if applicable
- Begin preparing the International Fraternity Awards application(s)
- Begin preparing the Chapter Excellence Report
- Send in all new member biographical cards and pledge fees immediately after pledging
- Begin preparing a spring undergraduate newsletter
- Chapter President to attend *Presidents Academy*
- Complete all campus and/or Greek life administrative requirements

February

- Spring chapter officer list due to IHQ by February 15
- Final insurance assessment due to IHQ by February 15
- Send in initiation report within 30 days after the ceremony
- Send all pledge biographical cards and pledge fees to IHQ immediately after pledging
- Continue to prepare the International Fraternity Awards application(s)
- Continue to prepare the Chapter Excellence Report
- Begin planning the chapter's summer recruitment effort
- Begin planning spring term initiation
- Check progress of individual officers

March

- Spring membership roster due to IHQ by March 15
- If applicable, make preparations to close the chapter house during spring break
- Schedule a fire drill

April

- Finalize Fraternity Awards application(s)
- Finalize the Chapter Excellence Report
- Prepare and finalize next year's budget
- Begin planning fall programming and events
- Initiate spring pledges, and the initiation fees and report to IHQ within 24 days of ceremony
- Plan summer recruitment activities

May

- *Leadership Institute* registration due to IHQ by May 1
- Summer Officer Address form due to IHQ by May 1
- If applicable, make preparations to close the chapter house for the summer
- Make plans for a summer meeting, if necessary
- Make plans for a fall or late summer executive council or chapter retreat
- Finalize planning fall programming and events

June

- Update members on summer recruitment progress with mailings and phone calls
- Hold at least one summer executive council meeting
- Hold at least one summer recruitment event
- Prepare chapter goals for the fall term
- Prepare fall term budget
- Continue planning fall programming and events

July

- Update members on summer recruitment progress with mailings and phone calls
- Send at least two chapter delegates to the *Leadership Institute*
- Hold at least one summer executive council meeting
- Hold at least one summer recruitment event
- Continue planning fall programming and events
- If applicable, make plans to open the chapter house

August

- If applicable, hold a chapter work session to prepare the chapter house for the upcoming year
- Update members on summer recruitment progress with mailings and phone calls
- Hold at least one summer executive council meeting and recruitment event
- Arrange for composite and all-chapter pictures
- Continue planning fall programming and events

Sample Phone and E-mail List

Name	Phone	E-mail	Major	Position	Residence
Alpe, Adam	x101	alpead@du.edu	Mech. Eng.		406 Pine rm1
Armstrong, Justin	x105	armstr@du.edu	Food Sci.	Assist. Treas.	406 Pine rm5
Baird, Franklin	x102	bairdf@de.edu	Art History	Intramurals	406 Pine rm2
Connors, Matthew	x109	connor@du.edu	Civ. Eng.	Parent Rel.	406 Pine rm9
Chung, Victor	x108	chungv@du.edu	History	Fundraising	406 Pine rm8
Damico, John	765-3838	damico@du.edu	Business	Librarian	312 Santino
Dombroski, Nathan	x107	dombro@du.edu	Genetics	President	406 Pinerm7
Fredericks, Michael	x104	freder@du.edu	Biology	Campus Rel.	406 Pine rm4
Gunnell, Evan	765-1909	gunneldu.edu	Micro. Bio.	Greek Week	212 McMartin
Hahn, Vince	x103	hahnvi@du.edu	Philosophy	Pledge Ed.	406 Pine rm3
Hammer, Christian	x111	hammer@du.edu	Pharmacy	House Manager	406 Pine rm11
Hossain, Bhupinder	x109	hossai@du.edu	Fine Art	VP Loss Prev.	406 Pine rm9
Kehoe, Joseph	x102	kehoej@du.edu	Botany		406 Pine rm2
King, Elvis	x110	kinge@du.edu	Architect.	Philanthropy	406 Pine rm10
Lombardi, Louis	x106	lombar@du.edu	English	Secretary	406 Pine rm6
MacIntyre, Shamus	x108	macint@du.edu	Forestry	IFC Rep	406 Pine rm8
Misnerski, Guy	x105	misner@du.edu	Pre-Med	VP PR	406 Pine rm5
Mosca, Angelo	765-1834	moscaa@du.edu	Crop Sci.	Social	1132 Johnson
Newton, Jason	x101	newton@du.edu	Chem. Eng.	VP Scholarship	406 Pine rm1
O'Neil, Patrick	765-1834	oneilp@du.edu	Kinesiology		1132 Johnson
Parent, Stephan	x111	parent@du.edu	Chemistry	VP Mem. Ed.	406 Pine rm11
Reid, Jonathan	x103	reidjo@du.edu	Music		406 Pine rm3
Sanchez, Miguel	x107	sanche@du.edu	Psychology	Alumni Rel.	406 Pine rm7
Simons, Steve	x112	simons@du.edu	Aquatics	Kitchen Stew.	406 Pine rm12
Timlin, Robert	x112	timlin@du.edu	Poli. Sci.	Historian	406 Pine rm12
VanHorn, Jason	x110	vanhorn@du.edu	Economics	VP Recruitment	406 Pine rm10
Wilson, John	x108	wilson@du.edu	Accounting	Treasurer	406 Pine rm8

Pledges					
Faulds, Jamie	773-1232	faulds@du.edu	Accounting	Pledge VP	212 Stevens
Morin, Roger	773-1232	morinr@du.edu	undeclared		212 Stevens
Murray, Ryan	773-3364	murray@du.ede	Botany	Pledge Secret.	231 Tyler
Orsi, Chris	773-5738	orsich@du.edu	Mech. Eng.	Pledge Treas.	317 Stevens
Ryckman, Chris	773-5615	ryckma@du.edu	Kinesiology		418 Tyler
Tompkins, Shawn	773-0481	tompki@du.edu	Crop Sci.		108 Mercer
Wall, John	773-5757	walljo@du.edu	Math	Pledge Pres.	113 Mercer

The Membership Database

A membership database is an invaluable tool that every chapter should develop and maintain. As a member makes the transition from potential member, to pledge, to initiate, to alumnus, their vital information must be tracked by the chapter in an up-to-date and maintained data base. The database will change hands several times as a member proceeds through the ranks from potential member to alumnus. Therefore, it is important that all of the people responsible along the way understand the importance of the database, and how to manage and keep the database up to date.

The vice president of membership recruitment is the first link in the information chain. He needs to know names, telephone numbers, and other personal information about each of the chapter's potential members. Once a future brother becomes a pledge and then a member, the data must pass from the hands of the pledge educator to the chapter secretary. The secretary is then responsible for managing the database through the member's days as an undergraduate until that member graduates. Once a member graduates, the alumni relations officer takes over and manages the data for the chapter’s entire alumni group. The information that is relevant and important, changes slightly along the way from potential member to alumnus, but the need to manage the data properly does not. Accurate records are essential in every step of the process.

The secretary will have the data for a large portion of time. He is the vital link between the vice president of membership recruitment and the alumni relations officer. If the secretary does not properly transfer and maintain accurate information, many of our members can be “lost”. This will have many consequences including making it nearly impossible to track down those with outstanding accounts receivable, and those who we want to invite to events or send a newsletter.

The minimum information the chapter must document is:

- Name
- Graduation Year
- Pledging Date
- Initiation Date
- Major
- Local Address
- Date of Birth
- Permanent or Parent’s Address
- Local Phone
- Work Phone
- Work Address
- Cell Phone &/or Pager
- E-mail
- Spouse’s Name
- Giving Record

Parliamentary Procedure

Without order, a meeting can turn into total chaos in a matter of minutes. The purpose of parliamentary procedure is to conduct business in as efficient and orderly a manner as possible. The following is a condensed version of *Robert’s Rules of Order*, and is intended to provide a basic background in parliamentary procedure.

Addressing the President

The chapter president should conduct all meetings. Members addressing the president should refer to him as “Brother President.”

Obtaining the Floor

Before a member may make a motion or speak in debate, he must obtain the “floor.” To claim the floor, a member raises his hand and waits to be “recognized” by the chapter president. The president will recognize the member by announcing his name or title. This member then has the floor and can stand and speak until he yields the floor by resuming his seat. While a motion is open to debate, there are three important cases where the floor should be assigned to a person who may not have been the first to rise and address the president. These cases are:

1. If the member who made the motion claims the floor and has not already spoken on the question, he is entitled to be recognized in preference to other members.
2. No one is entitled to the floor a second time as long as any other member who has not yet spoken to the pending motion requests the floor.
3. The president should attempt to alternate opposite opinions on a question if he is aware of members requesting the floor which have opposing views.

Making A Motion

1. First, a member makes a motion. Though he makes a motion, he uses the word “move” to make the motion (for example: “I move to allocate...”).
2. Another member seconds the motion by saying, “I second it” or simply, “Second”. It should be noted that a second by a member merely implies that the motion should come before the chapter and not that he necessarily favors the motion. A member may second a motion because he would like to see the chapter go on record as rejecting the proposal, if he believes a vote on the motion would have such a result.
3. The president then states the “question” on the motion. Neither the making nor the seconding of a motion places it before the chapter; only the president can place a motion before the chapter by stating the question. When the president has stated the question, the motion is pending and open to debate (providing it is a debatable motion). If the chapter agrees with the motion, it adopts the motion or the motion is carried. If the chapter decides against the motion, it is rejected/lost.

Amending A Motion

The motion to amend is a motion to modify the wording (within certain limits) of a pending motion before it is acted upon. An amendment must be closely related to or have some bearing on the subject of the motion to be amended.

A motion to amend is handled in the same way as a main motion, and requires a second to be considered. An amendment is adopted by a majority vote even in cases where the motion to be amended requires a 2/3 vote for adoption.

Approval of the Minutes

At the beginning of regularly scheduled meetings, copies of minutes of the previous meeting will be distributed for study by chapter members. The president then asks, “Are there any corrections to the minutes?” and pauses. Then the president says, “If there are no corrections” (or “no further corrections”) the minutes will be approved.

Point of Order

When a member thinks that the meeting rules are being violated, he may make a “point of order”, thereby, calling upon the chair to make a ruling and enforce the regular rules. A point of order:

- can be applied to any breach of the chapter’s rules.
- is in order when another has the floor.
- does not require a second.
- is not debatable unless the president, being in doubt, submits the point to a vote of the chapter; in which case, the rules governing its debatability are the same as for an appeal.

Previous Question

The previous question is the motion used to bring the meeting to an immediate vote on one or more pending questions. The motion for the previous question:

- takes precedence over all debatable or amendable motions to which it is applied.
- can be applied to any immediately pending debatable or amendable motion.
- is out of order when another has the floor.
- must be seconded.
- is not debatable.
- is not amendable.
- requires a 2/3 vote.

Postpone Indefinitely

A motion to postpone indefinitely is a motion that the chapter declines to take a position on the main question. Its adoption kills the main motion, at least for the duration of the session, and avoids a direct vote on the question. It is useful in disposing of a badly chosen main motion that cannot be either adopted or expressly rejected without possibly undesirable consequences. The motion to postpone indefinitely:

- is out of order when another has the floor.
- must be seconded.
- is debatable.
- is not amended.
- requires a majority vote.

Adjourn

To adjourn means to close the meeting. The motion to adjourn is a motion to close the meeting immediately, made under conditions where some other provision for another meeting exists and where no time for adjourning the present meeting has already been set. The motion to adjourn:

- is not applied to any motion and no motion can be applied to it.
- is out of order when another has the floor.
- does not need to be seconded.
- is not amendable.
- requires a majority vote.

Steps for presenting a motion

1. Obtain the floor
 - Wait until the last speaker is finished. Rise and address the chair.
2. Make your motion
 - Speak clearly and concisely. State your motion affirmatively, "I move that..."
3. Wait for a second
 - Another member will say, "I second the motion," or the chair will call for a second. If there is no second, your motion will not be considered.
4. Chairman states your motion
 - The chairman must say, "It is moved and seconded that we..." After this happens, debate or voting can occur. Your motion is now "assembly property" and one cannot change it without consent of the members.
5. Putting the question
 - The chairman asks, "Are you ready for the question?" If there is no more discussion, a vote is taken.

Four Types of Motions

1. Main Motions

- Introduce subjects to the assembly for its consideration. They cannot be made when another motion is before the assembly. They yield to privileged, subsidiary, and incidental motions. For example, "I move that we purchase..."

2. Subsidiary Motions

- Change or affect how the main motion is handled (voted on before the main motion). For example, "I move the question before the assembly be amended by striking out..."

3. Privileged Motions

- Are most urgent about special or important matters not related to pending business. For example, "I move we adjourn."

4. Incidental Motions

- Are questions of procedure that arise out of other motions, must be considered for the other motion. For example, "I move to suspend the rules for the purpose of..."

Other Questions Related to Motions

1. Is it in order?

- Your motion must relate to the business at hand, and be presented at the right time.

2. May I interrupt the speaker?

- Some motions are so important that the speaker may be interrupted to make them. The original speaker regains the floor after the interruption has been attended to.

3. Do I need a second?

- Usually, yes. A second indicates that another member would like to consider your motion. It prevents spending time on a question which interests only one person.

4. Is it debatable?

- Parliamentary procedure guards the right to free and full debate on most motions. Some privileged and incidental motions are not debatable.

5. Can it be amended?

- Some motions may be altered by striking out, inserting, or both. Amendments must relate to subject as presented in the main motion.

6. What vote is needed?

- Most require only a majority vote, but motions concerning the rights of the assembly or its members need 2/3 vote to be adopted.

7. Can it be reconsidered?

- Some motions can be re-debated and re-voted to give members a chance to change their minds. The move to reconsider must come from the winning side.

Parliamentary Procedure Quick Reference Chart

Type Of Motion	Can be Interrupted	Mover Must Be Recognized	Requires A Second	Debatable	Vote Required	May Be Renewed
Main Motion	No	Yes	Yes	Yes	Majority	Not at Same Session
Lay On Table	No	Yes	Yes	No	Majority	After Progress
Amend	No	Yes	Yes	Yes	Majority	No
Reconsider	Yes	No	Yes	Yes	Majority	No
Rescind	No	Yes	Yes	Yes	Majority	Not at Same Session
Refer	No	Yes	Yes	Yes	Majority	After Progress
Suspend Rules	No	Yes	Yes	No	2/3 Motion	Unless Unanimous
Withdraw	No	Yes	No	No	Majority	After Progress
Question Of Privilege	Yes	No	No	No	Majority	After Progress
Point Of Order	Yes	No	No	No	None	No

Adapted from:

AcCent on Leadership (handout), Oklahoma State University, August 1, 1989. Jones, Garfield, O., Parliamentary Procedure at a Glance, Hawthorn/Dutton, New York, 1971. Parliamentary Procedure, Channing L. Bete Co., Inc., South Deerfield, MA, 1974.

Chapter Constitution, By-laws, Policies, and Procedures

The constitution and by-laws are the basis from which a chapter's operations originate. They provide guidance and clarity in situations where confusion and emotion can often cloud the proper decision making process.

The differences between a chapter constitution, chapter by-laws, and chapter policies and procedures are very important. The distinctions between them are both operational and philosophical, and although sometimes difficult to understand, can have a profound affect on the undergraduate members and the chapter. The chapter constitution is the document that outlines how the chapter is governed. This differs from the chapter by-laws, which summarize how the chapter is managed. Policies and procedures are the daily operating guidelines that describe how the chapter fulfills the governing principles of the constitution and the management principles of the by-laws.

The constitution is an institution. It rarely needs to be updated because the items it contains are the cornerstones of the organization's existence. Almost all of the information contained in the Chapter Constitution will be identical to that of the International Fraternity Constitution. Many chapters simply use the International Fraternity Constitution as their own.

By-laws are the management tools that provide the basis on top of which the policies and procedures function. They can change more frequently than the constitution, but not as often a policies and procedures. Chapter By-laws must always be within the bounds of the International Fraternity and Chapter Constitutions.

The operating guidelines of a chapter’s policies and procedures may change with each new administration. Incoming officers will have different approaches to issues, and the campus and chapter climate will dictate the necessity of updating the policies and procedures as well. Policies and procedures should only be changed when circumstances merit such updates. In addition, many policies and procedures will vary greatly from chapter to chapter. This is to be expected as every chapter has evolved under its’ own unique set of circumstances, and its equally unique set of chapter leaders.

With the help of chapter leaders, and the by-laws committee, the secretary is responsible for the proper development, utilization, and maintenance of the chapter’s constitution, by-laws, policies, and procedures.

The By-laws Committee

The by-laws committee is responsible for maintaining the chapter constitution, by-laws, policies, and procedures. These documents should be updated as often as necessary, not just once or twice per year. If procedural changes occur, make sure the chapter constitution, by-laws, policies, and procedures officially recognize and reflect those changes.

The committee should consist of the secretary, who is the committee chairman, and one non-executive member from each class/year for a total of five members. The committee should meet at least once per month to update documents, and discuss potential changes.

Principle Responsibilities:

1. Meet as often as necessary to maintain the chapter constitution, by-laws, policies, and procedures. During these meetings one person (not the chapter secretary) should be appointed as committee secretary to record minutes and keep other resources.
2. Once per academic term, update and revise the chapter by-laws, as allowed within the parameters of the International Fraternity Constitution and By-laws.
3. Compile all necessary support documentation needed for Fraternity awards applications and the *Chapter Excellence Report*.
4. Ensure the committee maintains a detailed account of committee activities, and compiles relevant information to educate future committee members.

The Chapter Excellence Report and Fraternity Awards

The Secretary plays a very important role in many administrative and organizational duties in the chapter. Compiling the information and documentation necessary for the Chapter Excellence Plan (CEP) Report and Fraternity Awards are such duties.

The process of producing the CEP report and awards application(s) should start as soon as school begins in the fall. The chapter must gather support documentation for chapter events and programs, and begin to shape this information into the final report. Waiting until the end of the year to scavenge items from the bottom of closets is definitely not the way to go about gathering the necessary information. Awards applications are due June 1st, and the Chapter Excellence Report is due July 1st of each year (due date is subject to change).

The secretary’s role in this process is to constantly gather the necessary data, and to remind officers that they need to submit the information and documentation on a regular basis. It is not the secretary’s job to do the documenting for each area of operations, but to gather the near final product from each officer and combine them into the final report or award application. This process will undoubtedly involve many chapter officers and members, and the secretary should be coordinating that effort.

International Headquarters Communications

Building positive relations with International Headquarters (IHQ) and its staff should be a priority of the chapter. A good working relationship allows for effective and efficient communications between the chapter and IHQ. To facilitate this, the secretary, and all other chapter leaders, should not hesitate to contact Headquarters with any questions, concerns, or requests. The better the chapter understands the resources that IHQ makes available, the more the chapter will get out of the relationship. Regular contact is the means through which to build this relationship. It is difficult for IHQ to help a chapter when unaware of the chapter’s problems and concerns. It is in everyone’s best interests to build a positive relationship, for there is much to gain and nothing to lose.

Within a chapter, the responsibility of communicating with International Headquarters falls upon more than one set of shoulders. The chapter secretary is one of those upon which this responsibility falls. There are several administrative requirements for which he is solely responsible. In addition, there are other administrative requirements, although technically the responsibility of other officers, that the secretary should play a key role in their timely submitting to IHQ. Be sure to keep all of the administrative requirements in mind when developing the master chapter calendar. Having them in the calendar is an effective means by which to meet the documentation and deadline requirements.

Administrative Requirements

To ensure the International Headquarters maintains accurate records on DU chapters and their members, nominal administrative requirements must be met by chapter leaders. The list below indicates the reports (and applicable fees) which must be completed and submitted to the International Headquarters, the officer responsible for their completion, and date they must be forwarded (postmarked). The IHQ staff will forward the appropriate report(s) to each chapter to complete well in advance of the respective due date(s).

As an incentive for chapters to complete and return the below listed chapter administrative reports, those chapters remitting each report by the prescribed due date will be eligible for the IHQ Efficiency Award at the end of the academic year.

REPORT	OFFICER RESPONSIBLE	DUE DATE
1. Fall Membership Roster and Fall Dues (\$40/member)	President	October 15
2. Spring Membership Roster and Spring Dues (\$35/member)	President	March 15
3. Biographical Data Card & Pledge Fee (\$60/pledge)	Pledge Educator	Immediately after pledging
4. Initiation Report & Initiation Fee (\$200/initiate)	Secretary	Immediately after Initiation
5. Fall Chapter Officers List	Secretary	October 15, and immediately after officer elections
6. Spring Chapter Officers List	Secretary	February 15, and immediately after officer elections
7. Presidents Academy Registration	President	December 1
8. Recruitment Symposium Registration	VP Membership Recruitment	December 1
9. Leadership Institute Registration	Secretary	May 1
10. Officer Summer Address Form	Secretary	May 1
11. Chapter Budget	Treasurer	October 1
12. Fraternity Awards Applications	President	June 1
13. Chapter Excellence Report	President	June 1

Centralizing Chapter Resources

Every chapter needs to have a central location for chapter resources. Having essential information in a designated location can save time and energy, and often avoid unnecessary frustration. This frustration normally occurs when returning to school after a summer or winter break, or following the election and transition of chapter officers. The resources retained in this central location can cover a wide range of areas but need to include some essential items. This could include, but is not limited to the following:

- International Fraternity constitution and by-laws
- Chapter constitution, by-laws, policies, and procedures
- Chapter meeting and executive council meeting minutes
- Written and/or electronic copies of all chapter programs including
 - Loss Prevention
 - Pledge Education
 - Membership Education
 - Year-round Recruitment Plan
 - Scholarship Program
 - Current and previous chapter and officer budgets
 - Public Relations Program
 - Alumni Relations Program
 - Philanthropy and Community Service Program
 - Alumni Database
 - Membership Database
 - Financial Management Program
- Officer notebooks
- Contact information for vendors, suppliers, municipal officials, important neighbors, etc.
- IHQ officer resource notebooks

The secretary is responsible for maintaining this central resource, while each officer is responsible for submitting copies of those resources. The resource files should be updated as often as needed, and at least once per semester.

Tracking Chapter Goals

The secretary has a very important role to play in tracking chapter progress towards its goals. Most chapters set goals and create some type of action plan outlining how they will accomplish those goals. Many times chapters falter because they do not check up on themselves as they execute the action plan. If the chapter does not consciously pursue their goals, they can easily slip to the back of the chapter’s collective mind as the day-to-day activities of classes, exams, and other pressures build. To avoid this, it is imperative that the chapter track its progress towards its goals in order to achieve success. While it is the entire chapter and executive council’s responsibility to monitor the chapter’s progress, the secretary needs to take a leading role in the process.

Obviously, the first step in this process is to set chapter and officer goals each semester. These goals need to be measurable, manageable, and realistic. After setting goals, the chapter must develop an action plan to accomplish these goals that includes a time line for accomplishing the necessary responsibilities and duties.

The key to effectively managing this process is weekly tracking of our progress towards chapter and officer goals. This means that the chapter needs to take time at the weekly executive officer meetings for the executive officers to review their progress. This process helps the officers discover minor problem areas and adjust their plan accordingly before challenges turn into major roadblocks to success. This process will also give helpful weekly reminders to the executive officers, enabling them to stay focused.

On the following page you will find a sample template for keeping track of officer goals and chapter goals. Reviewing these each week will improve the chapter’s chances of success, and increase the rate at which the chapter builds and improves. When tracking progress, remember to keep the “Big Picture” clearly in mind. Avoid becoming so focused on the process that you lose track of the goals that are driving the process in the first place. With a little planning and hard work, managing this process can be an important piece of the organizational structure that facilitates the chapter’s growth and development.

Weekly Goal Progress Report

Officer: _____

Date: _____

Last week’s goals/action items (accomplished? – Y/N):

1. _____

2. _____

3. _____

This week’s goals/action items:

1. _____

2. _____

3. _____

Chapter and officer goals for my area of operations:

1. _____

2. _____

3. _____

4. _____

Chapter History and Archives

Chapter history can be a great resource. One can learn from past successes and challenges, and move forward with confidence having a solid grasp of where one has been. Each chapter should maintain any and all historical records they can compile.

Under the guidance of the secretary, the chapter historian is charged with the responsibility of maintaining and building the chapter’s archives and historical holdings. These holdings can be everything from meeting minutes, to photographs, to invitations, or video and audiocassettes. The daunting task of gathering historical information can be greatly eased by soliciting help from our alumni. The historian should work with the alumni relations officer to make contact with alumni and gather historical information on the chapter.

All of the chapter officers can make the job of future historians easier by putting aside and accurately documenting appropriate information. Items that may not seem very important today may be extremely interesting to future brothers many years from now. Be sure to include anything that may be of relevance, as future historians can sift through the information down the road.

The following are ideas for gathering historical items and information for the chapter. There are numerous things that can be done to ensure that the history of our chapter and alumni is accurately documented. A detailed account of DU history is a wonderful gift to our future brothers. This is not an exhaustive list, but should be more than enough to get the chapter’s historical projects off the ground, or to invigorate an existing program.

I. Why care about history?

1. Learn from the experience of others
2. Inspire members to do better
3. Learn first-hand from living alumni (visits and personal interviews)
4. Good projects for pledges - see if they can carry through, write, etc.
5. Good projects for class credit
6. Spruce up the chapter house (photos of famous alumni)
7. Impress potential members
8. Impress women, parents, faculty, neighbors, townspeople, etc. (Public Relations)
9. Understand the true purpose of Fraternity
10. You may not care, but **ONLY YOU** are in position to preserve material for future DUs who may care (Once it's gone, it's gone)

II. What is important to save?

- Chapter charter and Roll Book
- Installation or major chapter anniversary programs
- Chapter minutes
- Chapter correspondence to and from alumni, and alumni newsletters
- Composites and photographs
- University yearbooks
- Bound copies of the *Quarterly*
- Chapter files, officer notebooks, scrapbooks, etc.
- Framed awards and certificates
- Annual financial reports
- Other chapter publications (Recruitment brochures, etc.)

III. Where should you save it?

(More than one location is best)

1. College/university archives (at the library)
2. State/Province or county historical society

These two sources are likely to have extremely secure storage and knowledgeable personnel who can assist in preserving delicate material. Contribution of material may have conditions, e.g. becomes part of the of that organization’s permanent collection; limited access hours; must be available to the public (but what does DU have to hide?). Some of these conditions are often negotiable.

3. Chapter library/archives
4. Other location (alumnus home/office)

IV. Special Historic Projects

Personal Interviews

Conduct personal interviews with alumni, starting with the oldest men in the convenient travel area. Confirm the interview date and time by letter before going; do a reminder call the day before; be on time and look sharp! Take two or three men to his home and conduct a 20-30 minute interview. Video or audio tape the interview if the alumnus agrees. Review with the alumnus any memorabilia he may have. See if you can photocopy items, or arrange a donation to one of the archives listed above.

Take photos for use in the chapter newsletter and elsewhere, if the alumnus agrees.

Reunion Reminiscences

At every chapter homecoming or reunion, set up an archives area with a display of old composites and photos, Roll Book, and chapter minutes from the reunion class (or classes), and a guest book.

Set up a video camera and do 5-minute interviews of alumni (and their wives) about their current activities and their memories of the chapter and its activities. Build a library of videos and index them so you know who is on which video.

Sample questions:

- What activities were you involved in as an undergraduate?
- What were the best concerts? Favorite musical entertainers?
- What was your tuition? Chapter bill? House bill?
- What were the chapter's favorite activities?
- What songs did you sing? Sing one....
- Who in the chapter (or in your class) was active on campus, in sports, etc.?
- What was the best thing about living here (or) being a DU?
- What did you learn in DU that has been of most value in your career?
- Who were your best mentors or role models?
- Which fraternities and sororities were strongest when you were on campus?

Chapter Hall of Fame

Work with your alumni to establish a Chapter Hall of Fame. This could be done in conjunction with a major chapter anniversary, or an annual Founders Day dinner on or near November 4, or your Chapter’s founding date.

Establish a selection committee to initially choose three living alumni (and three deceased alumni if your chapter is of sufficient age). For induction, set down some selection criteria, including successful - careers, involvement with the community, loyalty to Delta Upsilon, etc. Then call for written nominations to the Chapter Hall of Fame from alumni and undergraduates.

Once men are selected, work to get a suitable photograph for framing and inclusion in the chapter newsletter. Arrange for a standard frame and matting to include the photograph and a one-page explanation on of each man's achievements and the reason he was chosen for the honor. The framed material will be the permanent chapter record of his status; make a copy for his home or office.

At the Homecoming, anniversary, or dinner, introduce and induct the initial Chapter Hall of Fame members. Ideally the living inductees will be present or at least send taped or written remarks. Each year, do a new call for nominations, and add one more living and one deceased (if applicable) alumnus, as the Selection Committee chooses them.

Write a Memory

Choose an age range (oldest men first) and write to 50 alumni asking them to respond in writing. Tailor the letter to their college days to bring back memories. Sample text:

As part of the _____ Chapter's history and archives project, we're writing alumni from the classes of 1930 to 1945 to ask about life in Delta Upsilon as they recall it.

We know those years were difficult financially for many men, and then challenging as the war began in the Pacific and in Europe, but we also know that Delta Upsilon persevered at _____ (college).

We hope you will take some time to write some of your recollections of those days for inclusion in our history and archives project. Here are some questions, which may help you recall your time as a DU undergraduate:

(Questions)

Please mail your response to (address) or send by e-mail to (address). If you have photographs or other memorabilia from those days which you would like to loan or donate to chapter, please make a note of that and we will arrange safe transport for the items.

Thanks for helping preserve the history of Delta Upsilon!

As the chapter receives replies, write thank-you letters immediately. Answers received often generate more follow-up questions that can be included in the thank-you letter, or sent separately. Write a report on what is learned and share it with other alumni through the chapter newsletter and/or web page.

Famous Frame-ups

In addition to famous DUs from the chapter, identify (*see The Cornerstone*) DUs from all chapters and get signed photographs of them for display in the chapter house. If the alumnus is making an appearance near the chapter, try to arrange a time for him to sign the photo or perhaps pose with chapter members for a photograph. A written description of the reasons behind the DU's fame could accompany the photograph.

For living alumni, consult the chapter's copy of the DU alumni directory for addresses or contact the International Headquarters. Writing the office of a famous alumnus may result in a photograph or even a letter.

Sponsor a Noted Alumnus

If the local historical society or similar organization has displays (permanent or temporary) about key historic figures, consider helping develop or set up a display about one or more of the chapter’s famous alumni.

Work his DU membership into the display. Include photos from yearbooks or chapter group poses. Get information from him, or chapter minutes, showing his involvement.

Time Capsule

Compile items and information that accurately reflect the chapter’s current state of affairs. This may include a copy of the chapter newsletter, meeting minutes, or a composite. The possibilities are endless. Plan to bury, and then open, the time capsule during important alumni events and chapter anniversaries. This can add a touch of excitement to almost any chapter gathering.

The More, the Merrier

A variation on any of the above:

Team up with a sorority. Find an alumna who is in the same category as the chapter’s alumnus.

Do the research together, and explain the results (and present the final product, e.g. a framed photo and narrative) twice - once at the chapter, and once at the sorority.

The chapter not only learns about another important Greek from the campus, but also gets to spend time with women from the sorority.