

# PRESIDENT RESOURCE GUIDE



**PHI DELTA THETA**  
*Become the greatest version of yourself*

# TABLE OF CONTENTS

<b>INTRODUCTION.....</b>	<b>1</b>
<b>SECTION 1: THE OFFICE OF PRESIDENT .....</b>	<b>2</b>
Tips for the President.....	3
Management Techniques.....	3
Chapter Buy-In.....	4
<b>SECTION 2: CHAPTER OPERATION.....</b>	<b>5</b>
Delegation Guidelines.....	6
Effective Chapter Meetings.....	6
Other Meetings.....	7
Practical Tips for Meetings.....	8
Meeting Checklist .....	9
<b>SECTION 3: WORKING WITH GENERAL HEADQUARTERS .....</b>	<b>10</b>
The Structure of Phi Delta Theta .....	10
Fraternity Executives.....	11
The Leadership Consultant Visit .....	12
Chapter Greatness Checklist – Reports due to GHQ.....	12
President .....	13
<b>SECTION 4: UNIVERSITY RELATIONS .....</b>	<b>14</b>
Meeting with a Campus Official.....	14
Contributing to the Greek Community .....	15
<b>SECTION 5: OBLIGATIONS AND STANDARDS .....</b>	<b>16</b>
Chapter Discipline.....	16
Suggested Discipline Procedure .....	17
<b>PRESIDENTS RESOURCE GUIDE .....</b>	<b>19</b>
APPENDIX .....	19
<b>PUBLIC SPEAKING .....</b>	<b>20</b>
<b>ROBERT’S RULES OF ORDER &amp; PARLIAMENTARY PROCEDURE .....</b>	<b>21</b>
<b>ADDITIONAL RESOURCES .....</b>	<b>23</b>

**MORE RESOURCES AVAILABLE AT**  
<http://www.phideltatheta.org/members/resources>

# INTRODUCTION

Congratulations on your election to the position of President. It is indeed an honor to be selected as the President, but with this honor comes great responsibility. You will be the member looked to for leadership by the other Brothers. You will also be the one complemented for your chapter's successes and blamed for its problems. You will find that the challenges and responsibility of the presidency are unlimited.

The position of President ultimately guides the attitude and future of the chapter. The President is held responsible for every activity or event with the Phi Delta Theta name associated with it. Thus, it is very important that the President openly communicates a vision and works with chapter constituents (chapter members, other fraternities, sororities, university officials and the General Headquarters) to ensure that the chapter is on the road to success.

# SECTION 1: THE OFFICE OF PRESIDENT

The President of a chapter shall preside at all meetings thereof, and, within the chapter, shall enforce the laws and rules of the Fraternity. He shall be charged with the custody of *The Bond*, Constitution, General Statutes, Rituals, and bylaws and shall deliver them to his successor. A list of the duties can be found below.

1. Serve as chairman of all chapter meetings.
  2. Be proficient with Parliamentary Procedure as outlines in Robert's Rules of Order.
  3. Serve as *ex officio* member of all chapter committees.
  4. Work closely with the Vice President to be informed of the current performance of each elected and appointed officer within the chapter.
  5. Ensure that the chapter takes a productive role in the Greek community and seeks interaction with other Greek organizations.
  6. Coordinate the development of written Officer Reports and permanent officer files.
  7. Lead and encourage the participation in the proper and consistent performance of Ritual each week.
  8. Foster a positive relationship between the chapter and the host institution.
  9. Communicate frequently with the Chapter Advisory Board Chairman, House Corp. President, Alumni Club President and the Province President.
  10. Submit the Fall, Winter, Spring and Summer Report Packets promptly the General Headquarters.
  11. Ensure the selection of General Convention and Kleberg Emerging Leaders Institute delegates.
  12. Lead the chapter in goal setting and implementation.
  13. Serve as the liaison between the chapter and General Headquarters.
  14. Lead the chapter by setting a positive example through everyday interaction.
  15. Monitor the overall morale of the chapter and work with the appropriate officer to rectify any problems.
- If you need additional information on the duties and responsibilities of contact your Leadership Consultant.
  - The following pages are full of resources and tips that will help you succeed as president.

## Tips for the President

1. **Be true to your word.** If the President does not perform efficiently and makes excuses, others will inevitably follow suit. Be on time, bring the materials you said you would, and get the answers you promised to get.
2. **Delegate.** Give a big job to a worker, and then keep after him. See that he gets the credit for what he does. Let the whole group see how well or how poorly he does.
3. **Do not be a proud father or brainchild.** If you can get someone to adopt your ideas as his, then you can, by becoming modest, tell everyone how good it is.
4. **Be available and visible.** When needed, climb into the trenches and pitch in to help with the work.
5. Review goals and objectives established by the chapter with each member and Phikeia.
6. **On a weekly basis,** meet with the Vice President to review what is planned for the upcoming week and to ensure that all officers are completing their responsibilities.
7. **Thanks, gratitude and praise never make enemies.** Lack of it discourages anyone. Public praise is better than private thanks. If you want good work, be appreciative.
8. **Plan your agenda ahead of time.** List business on the agenda. Give the chairman or person making the report the honor of being on the agenda.
9. Foster a positive relationship between the chapter and the host institution.
10. **Assist in the planning and execution of an annual, all-member retreat** for the purpose of reviewing the chapter's performance from the previous year and the activities/goals for the upcoming year.
11. **Inform everyone** from the house corporation, chapter advisory board, faculty advisor, General Headquarters, and your host institutions.
12. **Be a good listener.** Set the wheels in motion to correct mistakes and solve problems.

## Management Techniques

1. **Plan Ahead** every moment spent in planning saves three or four in execution.
2. **Write it down.** It helps a great deal to make a plan on paper. Also you can make reminders to yourself and refer if needed.
3. **Don't get caught up in insignificant details.** If you do, you will never find time to tackle the real issues.
4. **Don't procrastinate.** Don't waste time dreading a pesky job. If it needs to be done, plow into it. Otherwise it will take you twice as long.
5. **Budget your time.** Allot yourself the amount of time you feel you need, with diligent application, to accomplish each task. Do the job carefully and do it well, but don't waste time. Your time habits will become automatic.
6. **Make habits work for you.** Establishing good habits will speed up your routine.
7. **Learn to say "no."** Popularity is a wonderful thing but don't let it lure you away from accomplishing important tasks. When you're busy, excessive social conversation can be a waste of time. Don't let socializing or others, responsibilities waste your time.
8. **Relax and let your mind create.** The well-organized person can expect more leisure time as his just reward. Leisure time is a precious commodity.

## **Chapter Buy-In**

1. Make members want things.
2. Know your brothers. Be a good listener
3. Criticize constructively.
4. Criticize in private.
5. Be considerate.
6. Delegate responsibility.
7. Give credit where credit is due.
8. Avoid domination or forcefulness.
9. Show interest in, and appreciation of others.
10. Let Brothers in on your plans and programs even when they're in the early stages.
11. Never forget that the leader sets the model for the followers. Lead by example.
12. Play-up the positive

## SECTION 2: CHAPTER OPERATION

As President, you will be expected to know everything that is going on within your chapter. In addition, you will be held responsible for the actions of the members of your chapter and for the group as a whole. It is impossible for one man to meet with university officials, build Interfraternity relations, run the internal workings of the chapter, go to school, and maintain sanity. A good president must work closely with the Vice President to ensure officers are doing their jobs. Together the President and Vice President need to establish both long and short-term goals for the chapter and meet one-on-one at least once per week. Open communication is the key to successful internal operations. As President, you cannot afford to be uninformed of what the chapters officers are doing, but as a college student you cannot viably be involved in every committee meeting, planning session, or decision. There are several programs to help with internal chapter management in this section.

## Delegation Guidelines

1. The best way to increase your authority is to delegate it.
2. Once you assign responsibility, be sure you delegate the necessary authority to go with it.
3. Always work through channels, meaning, utilize all of your available officers and resources.
4. Delegate only if you have confidence that the member is capable of intelligently handling the power he possesses.
5. Assigning responsibility does not lessen your responsibility; it merely gives you a capacity to handle greater responsibility.
6. Clearly define the responsibilities assigned to each subordinate and make this information known to others who work through him.
7. Once you have delegated, follow-up to make sure the job is being done. Be careful not to over-supervise or micromanage.
8. If possible, delegate in such a way that the person receives instruction only from one person and is held accountable to only one person.
9. Never assign duties to another solely because they are distasteful or unpleasant to you.
10. When you delegate authority over others to a subordinate, be sure to back him up when the authority is questioned.
11. Be quick to straighten out any complaints about a member overstepping his authority.
12. Let every subordinate know just what decisions he has the authority to make. Have decisions made on the lowest possible organizational level.

## Effective Chapter Meetings

As President, you are the primary vehicle of communicating with your officers is the executive committee meeting. Major decision affecting the chapter will be made at these meetings. Therefore, you need to ensure that your executive committee meetings are both efficient and interesting.

1. **Prepare the meeting's agenda beforehand.** Use your notes from the executive meeting as well as any officer reports that were submitted to you prior to the meeting. An agenda should be clear, concise and easy to read so that chapter members can take notes as needed during the meeting. Agendas should either be sent out in digital form to the chapter members or printed and handed out when the members arrive for the meeting. A meeting agenda should consist of: role call, adoption of the previous week's minutes, all officer reports, old business, new business, any guest speakers or Alumni who wish to report and the adjournment of the meeting (example in appendix). A clear agenda will serve as your road map for the meeting and will help the discussion flow clearly as well as cut down on useless discussion.
2. **Always schedule the meeting at same location and time.** Brothers who are aware of a regular meeting time can more easily work it into their schedules. Start your meeting on time as well. Similarly, encourage punctuality among your officers.
3. **Be familiar with The Code of the Fraternity, as well as your own chapters' bylaws.** Have a copy readily available during your executive committee meeting and chapter meeting for review. On occasion, you may need to refer to them when certain questions arise.

4. **Require each officer to complete a written officer's report.** This will require the officer to give thought to his report before the executive meeting. If he is prepared during his portion of the meeting, productivity will follow. Also, a written report will create additional resource material that can be added to his officer file.
5. **Preserve order.** Though all meetings need not be as formal as a chapter meeting, an unruly meeting is not productive. Try to keep the questions and discussion flowing
6. **As you conclude the meeting, review the notes you have taken.** Summarize for the group all points made and what actions will be taken and by whom. Recapping decision will help ensure that everyone knows the meeting's results.

## Other Meetings

1. **Come prepared.** Know what is to be discussed and what you want to achieve as a result of the meeting.
2. **Create an informal atmosphere.** If it is a committee meeting, use circular seating to maximize eye contact.
3. **Strive to promote free debate.** Do not force your own ideas upon the group. Help those in attendance reach their own conclusion.
4. **Restrict discussion to new opinions about the motion.** Promote relative debate only on the issue at hand.
5. **Do not let one or two people dominate the discussion.** Try to involve less aggressive members to the best of your ability.
6. **As soon as the point is adequately covered,** move to close debate, ask for conclusions, and summarize.
7. **Be diplomatic and considerate.** Listen and respect all points of view.
8. **Praise people. Congratulate members on a good point.** Let them know you appreciate their input. A pat on the back helps everyone work a little better.
9. **Avoid direct criticism or correction.** Chastising someone in public will only serve to build resentment.
10. **Keep the meeting moving with discussion.** Stick to your agenda. Try not to get sidetracked on trivial matters.
11. **To help a member who has difficulty expressing himself,** casually restate his answer.
12. **When ending the discussion,** summarize all points made to reiterate the results with the members.

## Practical Tips for Meetings

1. **Study** the constitution, bylaws, and Robert's Rules of Order. Have copies of all readily available if necessary.
2. **Guard the spirit of the democratic procedure.** Work to (1) promote free debate; (2) guarantee the rights of minorities; (3) procure the majority will; (4) establish equal rights of members; (5) avoid time wasting procedures; (6) keep tones of the meeting impersonal; (7) take definite action.
3. **Work out the agenda before the meeting.**
4. **Preserve order.** Use the gavel, know the raps and what each of them stands for (can be found in the front of the ritual books).
5. **If in doubt, ask for a vote or opinion of someone who knows.**
6. **Recognize speakers fairly.** In case of doubt give preference (1) to one who hasn't spoken; (2) to one who speaks infrequently; (3) to alternate sides.
7. **Remember that before any subject is open to debate,** it is necessary, (1) that a motion be made by a member who obtains the floor; (2) that it be seconded; (3) that it be stated by the chair.
8. **If a member ignorantly makes an improper motion,** do not rule it out of order, but courteously suggest the proper one. If his motion is not in order at all, tell him when it would be in order.
9. **Insist upon relevant debate on clearly phrased motions.** Keep the chapter clearly informed as to what is pending.
10. **Identify the motion to be voted upon.** Say "the vote is to close debate on the motion to those in favor of ending debate, say aye." Avoid such ambiguities as, "Those in favor of the previous question."
11. **When putting a question up to a vote,** be sure the members will understand what the outcome will mean.
12. **Avoid ambiguous instructions.** Say: "Those in favor say aye those opposed say nay."
13. **Always take a negative vote,** even if the affirmatives seem to have carried and be sure to always consider abstentions.
14. **State clearly whether the motion carried or lost.**
15. **After announcing the result of a vote,** explain what question, if any, is pending.
16. **In the meetings where the social side appears,** divide the meeting into business and social portions.
17. **Amending motions.** Often motions can be withdrawn by general consent, and presented in a different form, thus avoiding complications in the amendment process.
18. **Limit Debate.** Sometimes a small group of people will talk repeating the same idea, whereas limitation to one speech and for a fixed amount of time may in the end get a more democratic presentation.
19. **Close debate.** If most of the members want to vote, but a few insist on talking on, going over old issues, than a motion to close debate may save time.
20. **No motion is necessary to close debate if no one wishes to speak.**

# Meeting Checklist

## 1. Planning

- Initial Planning
  - Reserve a meeting place
  - Notify members
  - Plan Agenda
- Building the Agenda
  - Officer reports
  - Items from last meeting
  - New business
  - Announcements
- Final planning
  - Type agenda and distribute
  - Check necessary meeting aids
  - Review objectives for meeting

## 2. The Meeting

- Conducting the meeting
  - Be on time
  - End on time
  - Speak clearly
- Presiding over the meetings
  - Follow *Robert's Rules*
  - Stick to the agenda
  - Be firm but gracious
  - Involve the group
  - Allow for full discussion
  - Keep meeting "on track"
- Conclusion
  - Summarize information, decisions, and assignments

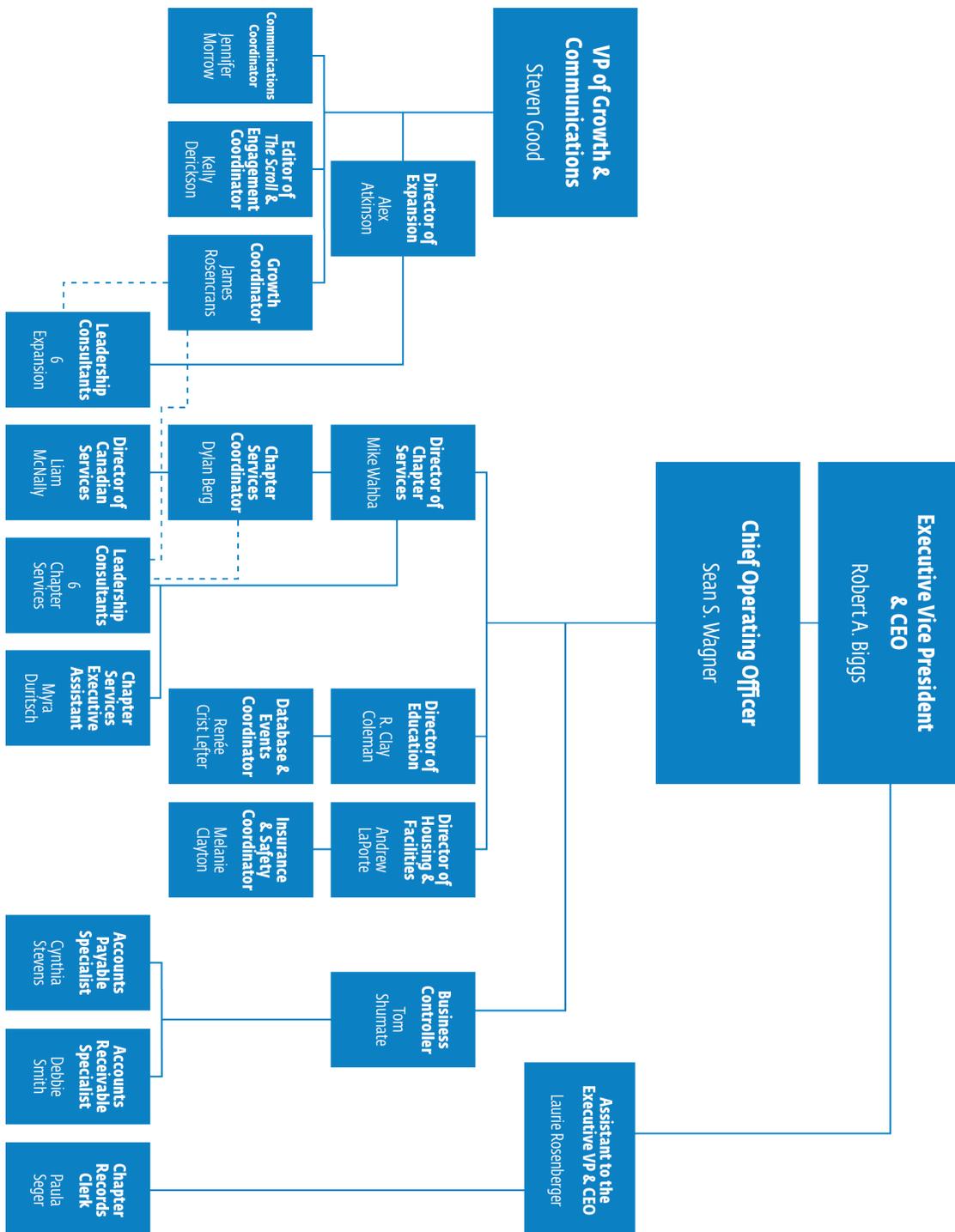
## 3. Follow-up of the meeting

- Immediately
  - Evaluate success of meeting
  - Develop plans for the future
  - Complete, distribute minutes
- Before next meeting
  - Define, assign, supervise "between meeting" tasks
  - Confer with another officer

# SECTION 3: WORKING WITH GENERAL HEADQUARTERS

One of the most frequently overlooked sources of help for a chapter is General Headquarters (GHQ). The resources and people at GHQ are here to help your chapter with anything that you may need. Never hesitate to call with any problems or questions. This section will outline the structure of the International Fraternity and give a detailed explanation of resources and people at headquarters.

## The Structure of Phi Delta Theta



## Fraternity Executives

The GHQ staff can assist your chapter with any problems or issues. Answers are only an E-mail ([ghq@phideltatheta.org](mailto:ghq@phideltatheta.org)) or a phone call away at 513.523.6345. Below is a description of each of the executive staff member's general responsibilities. To see information on all of Phi Delta Theta's executive staff, visit our [website](#).

1. **Executive Vice President & CEO** serves as the Chief Executive Officer and will direct the professional staff in conducting the business of the Fraternity.
2. **Chief Operating Officer** leads the daily operations of the Fraternity and Foundation, ensuring their alignment and fulfillment of Phi Delta Theta's strategic plan. Other primary responsibilities include board, litigation, and financial management, and alternative revenue activities.
3. **Vice President of Growth & Communication** oversees the growth and communications strategies, as well as the Iron Phi program. The paramount responsibility of this position is to promote and market the value of membership to current and potential members while engaging other stakeholders through traditional communication channels and new and innovative technologies.
4. **Director of Education** oversees all educational strategies and event services of the Fraternity. The paramount responsibilities of this position are to develop and manage a holistic educational effort through programs that utilize technology and promote our values to undergraduate and alumni members. This is accomplished through instructor-led and e-learning training in the following areas: in-person, values-based leadership development, undergraduate and alumni officer development, standardized Phikeia Education, sound learning, and career transition.
5. **Director of Chapter Services** executes the Fraternity's strategic plan with support strategies that build a strong chapter and alumni support structure to improve operations. This is accomplished through the management and coaching of leadership consultants, volunteers and other staff.
6. **Director of Expansion** leads the expansion program of the General Fraternity and coordinates activities and services involved directly with the development of new chapters of Phi Delta Theta. The overarching goal of the position is to help the Fraternity reach 200 total chapters by 2020. Duties are conducted in consultation with the General Council, Survey Commission, the Expansion Team and the Growth Team.
7. **Director of Housing & Facilities** oversees the housing related strategies of the Fraternity, as well as insurance and safety programs, to improve and preserve the Fraternity's historic and valuable housing stock through consultation and local fundraising to infuse capital resources that provide campus leading facilities and engaged, certified house corporations.

## The Leadership Consultant Visit

Your chapter will receive at least one visit during the academic year from a Leadership Consultant employed by the General Fraternity. His duty is to assist in the establishment and development of Phi Delta Theta's existing chapters. Many chapters make the mistake of thinking that the leadership consultant is at your chapter for the sole purpose of policy enforcement. The goal of the Leadership Consultant is to help the chapter improve upon its current situation, not to take the charter. This section contains advice for having a positive and productive visit with your Leadership Consultant.

1. **Have accommodations ready:** Your chapter is required to provide meals, as well as, either a bed with clean sheets or lodging in a nearby hotel. Remember that a consultant spends weeks at a time on the road and appreciates nothing more than comfortable and clean accommodations for his visit.
2. **Be prepared for his visit:** A typical consultant visit will be for three days; therefore, it is crucial for the chapter to be organized and to have prepared any requests for the Leadership Consultant. They should be on-time to all meetings with materials prepared and ready to take notes.
3. **Be honest:** It is foolish to think that you can hide things from the Leadership Consultant. He has been briefed on the status of your chapter and gains nothing from closing your chapter or getting the chapter in trouble. The Leadership Consultant can only help your chapter get better when the chapter is honest about the problems it is facing.
4. **Inform the chapter of his arrival:** Make sure that, as President, you inform the chapter of the Leadership Consultant's upcoming visit. Explain his purpose and encourage the membership to speak either formally or informally with him.
5. **Schedule chapter, Phikeia and executive committee meetings in advance:** It is important and required that the consultant attend a chapter meeting, meet with the Phikeia class and host an executive committee retreat during his visit. You may need to move regularly scheduled meetings so that they coincide with the consultant's visit.
6. **Arrange for a tour of the Chapter House and institution:** Please arrange to have the consultant given a tour of his surroundings, as this may be the first time that the consultant has been to your city, institution or chapter.
7. **Put yourself in his shoes:** Get him a pass to the gym, allow him to play intramurals, or take him to do something fun in the area. The consultants spend a majority of their time on staff touring a specific region of the country and anything to break up the busy days spent in meetings would be beneficial to his visit.

## Chapter Greatness Checklist – Reports due to GHQ

Throughout the academic year, there are several reports and fees that each chapter is required to forward to the General Headquarters. To assist chapters in the timely submission of these items, the [Chapter Greatness Checklist](#) was devised. The calendar itemizes what is to be completed and forwarded by the appropriate officer to the General Headquarters.

The Vice President should ensure that each officer is knowledgeable of the reports he is required to complete. It is highly recommended that each officer required to submit reports keep a copy of the Chapter Greatness Checklist in his officer files for quick reference. Attached to several reports is a point value that will be credited to a chapter for the submission of the report prior to the denoted deadline. Chapters that accumulate 100% of General Headquarters Points will be recognized with a General Headquarters Trophy. We also offer a [guide](#) to completing the chapter greatness checklist in our President's section of our officer resources manual on the Phi Delta Theta website. Listed below are all the reports/fees included on the Chapter Greatness Checklist Calendar, beginning with the reports for which the President is responsible.

## President

1. Fall Report = DUE DATE: October 15 of each year
  - The Fall Report takes care of the necessary reports which are the Risk Management Affidavit (to be mailed in) the Fall Chapter Officer List, New Member Reporting for Phikeia and Initiates (both completed on [myPhiDeltaTheta](#)) and a copy of your chapter's fall social calendar is to be emailed to Melanie Clayton ([melanie@phideltatheta.org](mailto:melanie@phideltatheta.org)). This single report provides valuable information on chapter practices and aids in quality communication with the chapter.
  
2. PLC Registration = DUE DATE: November 15 of each year
  - Registration is completed through [myPhiDeltaTheta](#)
  
3. Winter Report = DUE DATE: January 31 of each year
  - The Winter Report takes care of the necessary reports which are the Risk Management Affidavit (to be mailed in) the Fall Chapter Officer List, New Member Reporting for Phikeia and Initiates, Chapter Roster update for Member Dues (all completed on [myPhiDeltaTheta](#)) and a copy of your chapter's spring social calendar is to be emailed to Melanie Clayton ([melanie@phideltatheta.org](mailto:melanie@phideltatheta.org)). This single report provides valuable information on chapter practices and aids in quality communication with the chapter.
  
4. Spring Report = DUE DATE: April 1 of each year
  - The Spring Report is comprised of the Spring Chapter Roster Update for Insurance and New Member Reporting for Phikeia and Initiates (both completed on [myPhiDeltaTheta](#)).
  
5. Summer Report = DUE DATE: May 1 of each year
  - The Summer Report is the final report of the year; it should contain the Summer Chapter Officers List, General Convention Registration and/or Kleberg Emerging Leaders Institute Registration, Philanthropic Reporting (all completed on [myPhiDeltaTheta](#)) and the chapter's awards packet (mailed in to GHQ).
  
6. Other Important DUE DATES
  - Prep for Leadership Consultant Visit
    - Pre-visit Worksheet, Visit Schedule, Chapter Roster and Scholarship Report emailed to Leadership Consultant two (2) weeks prior to his visit.
  - Monthly Reports
    - A monthly report will be submitted to your Leadership Consultant to track the progress of the Chapter throughout the semester. Email consultant for template. They can also be submitted through our online form in your [myPhiDeltaTheta](#) desktop.

## SECTION 4: UNIVERSITY RELATIONS

One of the primary purposes of establishing a chapter of the Fraternity is to enhance the educational institution at which it resides. Many college campuses question the values of fraternities and Greek life because of a perceived lack of contribution to the college environment. You, as President, are Phi Delta Theta's primary spokesperson on your campus. You must ensure that your chapter is playing a positive part in your institution. One way to accomplish that goal is to meet with university officials on a regular basis.

1. **The Greek Advisor:** Understanding the Greek advisor is essential to maintaining positive relations with your institution. Their job is comprised of many tasks, and usually they are not given a large staff. The Greek advisor has to assist each chapter on your campus with recruitment, scholarship, risk management, event planning, and alumni relations. It is important to give the Greek advisor ample time to address your concerns. Never ask for things at the last minute. It would be appropriate to meet once every two weeks.
2. **Dean/Vice President of Residence Life/Student Housing:** Meeting with the residence life, or the office that is charged with housing is extremely important if your chapter house is owned by the university or is in a residence hall setting. Members must remember that without proper respect for their housing, it can easily be taken away. Building a rapport with this area of the university may lead to improvements of your living area or flexibility with housing agreements should the chapter fall upon hard times. Never wait until something bad happens to schedule a meeting.
3. **Dean/Vice President of Student Affairs:** The Dean/VP of Student Affairs sits above the Greek advisor and generally reports directly to the university President on the state of student life. Meeting with this administrator twice a term may improve communication with the institution. Be sure to talk about the positive things your chapter is doing, but do not be afraid to ask for advice with problems. The VP of Student Affairs may be a former Greek advisor and your visit will leave a lasting impression of Phi Delta Theta.
4. **President of the University:** A meeting with the President of the University should occur at least once per academic year. Remember that a college President does not usually have constant contact with students. Their information about fraternities and Phi Delta Theta will come to them from faculty and the VP of Student Affairs. It is important to explain what Phi Delta Theta, both locally and nationally, is contributing to their institution. It would be appropriate to ask what, from their viewpoint, fraternities can improve upon. Remember that their time is limited, so don't waste it and arrive prepared.

### Meeting with a Campus Official

1. **Dress Appropriately.** Use common sense. Your attire should be business casual at the minimum, and, of course, be clean.
2. **Be sure to introduce yourself,** your position, and your organization, if you have not previously met.
3. **Shake hands.** It is a common courtesy and is a sign of friendship and honesty.
4. **Have an agenda prepared before you go into the office.** This way you will not forget items of discussion. You may also want to send a copy of what you will be discussing a day or two in advance so the university official is able to prepare or find out more information prior to the meeting. At the very least you should state what you would like to discuss when you schedule the meeting.
5. **Bring your chapter's schedule of events** and be prepared to answer any questions about it.
6. **Bring paper and a pen.** Always have something on hand to write with, you never know when something that is said in this meeting may be helpful to the chapter.

7. **Maintain good eye contact and ask questions.** The university official will be more interested in your thoughts if you seem interested in her/him.
8. **If your financial situation allows, take the person to lunch.** They will appreciate a break from the Greek Life Office and it is a sincere gesture that the meeting is important.
9. **Let them know that your chapter is doing something positive for the university,** such as a recent community service event or large fundraiser for a local organization. Show that you are committed to giving back to the local community.
10. **Greek issues.** Show your human side; your entire conversation does not have to revolve around Greek issues. Ask the administrator about their weekend, family, or any common interests or hobbies. They are more likely to remember you and your organization if you show interest in who they are; but, remember that their time is valuable so don't run on or waste their time with pointless conversation.
11. **Keep in constant communication.** Send out letters and announcements when your chapter is involved in any positive activity, community service project, wins awards, or achieves high marks on scholarship. Let them know that your chapter is doing something positive for the University.
12. **Do not make a habit of asking for things or complaining about the institution.** This will leave a bad taste in the administrator with whom you met. You want to show results and proof of improvement rather than constantly asking for favors.
13. **Always send a thank you note following a meeting.** This will also leave a lasting impression that Phi Delta Theta is an organization of gentlemen and this will also help them remember you.

## Contributing to the Greek Community

One of the most common mistakes made by chapters is not contributing to their Greek community. The fact is that the Greek community has a very poor image on many campuses and unfriendly competition between chapters or complete apathy only helps reinforce that image. There are many people who would like to see Greek life become extinct and the only way to survive is to work together as a Greek community.

1. Developing a positive relationship with the Interfraternity Council (IFC)
  - Make it a priority to have at least one member on the IFC executive council.
  - Work with IFC to set academic achievement goals.
  - Attend every IFC meeting.
  - Always make sure your chapter is part of the solution, not the problem.
  - Meet with your Greek Advisor regularly.
  - Embrace expansion, expansion is good for a campus and often shows strong support from your university.
  - Lead by example, be the chapter that the other groups on campus want to be and look up to.

### 2. Ideas for strengthening Interfraternity relations

Plan and host a Presidents' retreat for the IFC; include Always send a thank you note following a meeting. This will also leave a lasting impression that Phi Delta Theta is an organization of gentlemen and this will also help them remember you.

- Plan and host a Presidents' retreat for the IFC; include sorority Presidents as well.
- Host a barbeque with/for a neighboring fraternity or sorority.
- Organize a Greek Tailgate party, following Phi Delta Theta's Risk Management policies.
- Invite a fraternity or sorority president to lunch with you.
- Send correspondence acknowledging campus chapter's local and national founding.

## SECTION 5: OBLIGATIONS AND STANDARDS

It is hoped that by becoming familiar with the *President's Manual*, you will be more aware of the tangible responsibilities you hold. The word responsibility, on a more sobering note, is synonymous with liability. Therefore, it is necessary that you are made aware of the responsibility you assume as the president.

In an issue of the *Fraternal Law*, a brief on officer responsibility read: "As far as who is responsible for what happens in the chapter house, the answer must always be the chapter, acting through its officers. In case of difficulty with law enforcement agencies, it is the officers to whom the university or police officials will look first." As the President, you are "in-command." You also oversee the activities of each officer within the chapter and, thus, fingers could conceivably be pointed at you.

The six areas outlined in the [Risk Management Policies](#) are generally recognized as the primary liability for fraternities. It is critical that you become very familiar with these policies so that you can ensure that they are adhered to in your chapter. In addition, see to it that the other officers of the chapter are aware of and strive to enforce these policies. In the end, you may greatly reduce your personal liability (see the full Risk Management Policies of Phi Delta Theta Fraternity and all materials provided for the [Risk Management Chairman](#)).

### Chapter Discipline

A very difficult issue for chapter leaders to labor over is that of chapter discipline. In any given year, the officers may encounter problematic members, financial delinquency, behavioral problems, nonparticipating members, etc. Encountering one or a combination of these during the academic year will require significant decision-making. It is for that reason that the following section on chapter discipline is included in the President's Manual.

A Standards Board is typically created for the purpose of developing a minimum set of rules and regulations by which the members of the chapter are expected to abide. This is a set of minimum rules and regulations may be included in the chapter by-laws or may exist on their own. The standards board may consist of three or more members within the chapter who possess objective viewpoints and are capable of making sometimes-unpopular decisions. There are certain facets of fraternity life for which a set of standards exist on their own. These include: participation in chapter activities; financial obligation; treatment of others; and personal behavior. These standards should be outlined in the chapter rules and regulations. Each member, and Phikeia, within the chapter should have a written copy of these standards. The standards board may use [The Code](#) as guidelines.

Outlined in Title XVI of [The Code](#) of Phi Delta Theta is the process whereby individuals committing infractions against chapter rules, regulations, or standards may be disciplined. It is imperative to remember that each member has a duty to maintain himself appropriately and uphold the objects of the Fraternity. It is equally important for individual members to assist one another in the monitoring and addressing of behavior exhibited by other members that violate the Fraternity's standards.

As incidents occur or complaints and disputes arise, any member may initiate the procedure for discipline by a chapter through a request made either verbally or in writing to the executive committee. The executive committee shall decide whether a matter should be brought before the chapter. Should the executive committee decide the matter is not to be brought before the chapter; it shall take all necessary action to do so. The executive committee may also choose to appoint a special committee to investigate the matter and report to a meeting of the chapter to decide upon any discipline. In either case, addressing the issue through the executive committee or a special committee, interpreting the rules and standards of the organization as

they relate to a particular incident, determining innocence or guilt, and levying one of the three possible disciplines outlined in *The Code* is the responsibility of the chapter.

According to Title XVI-Discipline and loss of membership, Section 155- Cause for Discipline found in [The Code](#). An active member may be disciplined by the chapter for any of one of the following causes:

- Financial Delinquency
- Violation of *The Bond*, Constitution or General Statutes of the Fraternity
- Conduct unworthy of a member of Phi Delta Theta

## **Suggested Discipline Procedure**

Below is a suggested procedure for dealing with internal discipline. In the event that problems arise, be sure to review Sections 153 through 164 of [The Code](#).

1. Problematic behavior is identified.
2. Follow section 156 of [The Code](#): Procedure for Discipline by the Chapter.
  - A chapter shall exercise its powers of discipline only after full investigation and for just cause. The active member sought to be disciplined shall be given notice in writing by the Warden of the alleged cause for his discipline and of the time and place at which a meeting of the chapter will be held to consider the matter. The notice in writing to the member sought to be disciplined shall be delivered no later than seven (7) days prior to the meeting of the chapter and shall be hand delivered by the Warden to the member sought to be disciplined, mailed to the member's last known address by certified mail, return receipt requested, or emailed to the member's last known email address. When said notice to the member sought to be disciplined is by certified mail, return receipt requested, delivery shall be deemed to have been made the date the notice is placed in the mail. When said notice to the member to be disciplined is by email, delivery shall be deemed to have been made the date the email is sent by the Warden. A copy of the email containing the date and time transmission shall be deemed sufficient to establish notice. The members of the chapter shall likewise be given notice by the Warden no later than seven (7) days prior to the meeting of the chapter by posting the notice in such a place where notices to members of the chapter are customarily posted. A meeting of the chapter shall then be held to decide upon such discipline and any vote to discipline the member shall only be effective if passed by a two-thirds (2/3) vote of members of the chapter who are present, provided that at least a majority of the active members who are entitled to vote are present. The President of the chapter shall promptly report any action of discipline in writing to General Headquarters.
  - Any member may initiate the procedure for discipline by a chapter by request made either verbally or in writing to the Executive Committee of that chapter.
  - The Executive Committee shall decide whether the matter should be brought before a meeting of the chapter. If the Executive Committee decides that the matter should not be brought before a meeting of the chapter, it shall report this decision and the reasons therefore to a meeting of the chapter. If the Executive Committee decides that the matter should be brought before a meeting of the chapter, it shall take all necessary action to do so and may, if it considers it advisable, appoint a special committee to investigate the matter and report to the meeting of the chapter held for the purpose of deciding upon any discipline.

3. If an appeal is requested, follow section 157 of The Code: Reconsideration and Appeals.
  - A chapter may, by two-thirds (2/3) vote of members who are present, reconsider any decision imposing discipline on an active member or former member and reach the same or a different decision, provided that at least a majority of the active members who are entitled to vote are present. Any such action resulting in a different decision shall be promptly reported in writing to General Headquarters and to the Province President by the President of the chapter.
  - An active member, or former member, who has been disciplined by a chapter may appeal such decision to the General Council or the next succeeding General Convention if the decision has been sustained by the General Council.

# PRESIDENTS RESOURCE GUIDE

## APPENDIX

# PUBLIC SPEAKING

During your term as the chief executive of your chapter, you will most likely be called upon to speak at numerous functions. It may be an introduction of guests at a recruitment dinner, presiding at a formal pledging or initiation, chairing a parent's weekends or Founders Day banquet, or giving a presentation to IFC. Whatever the occasion, you will be representing yourself, your chapter, Phi Delta Theta, and in many situations, the entire Greek community. Therefore, cultivating good speaking habits is a must. The following tips should be helpful.

1. After you are introduced, make sure you: (a) acknowledge the host's introduction, (b) recognize the individuals on the agenda or special people of the hosting organization, and (c) use the rest of the introductory remarks to gain favorable attention, promote goodwill, win respect, and lead into the heart of your speech.
2. Open your presentation with something you have in common with your audience.
3. Organize your presentation by placing the points of your speech in chronological sequence.
4. Use visual aids, but don't rely on them.
5. Humor. Even if you know a humorous story word for word, can you still tell it humorously? If not, don't try it. Will your humor make a point that is relevant to your speech? If not, forget it. Is the joke old? Better not use it. Is it off-color, crude, and vulgar? Drop it. Will it offend anyone? Remember whom you are representing.
6. Rehearse your presentation several times on your feet, if possible, in a room the size of the one in which you will deliver your presentation.
7. Rehearse in front of the mirror to study your body language.
8. Ask your brothers to critique you.
9. Be aware that nervousness is normal. Outward signs of nervousness can be concealed. If you find yourself nervous, concentrate on what you are saying rather than on yourself.
10. Look at your audience. Make sure you rest your eyes for a second or two on several individuals and that eventually you are equally distributing your eye contact to all sections of the audience. Most audience members feel offended if the speaker seldom looks their way.
11. Keep your voice alive. You can emphasize or dramatize parts of your speech using four techniques.
  - You can pause
  - You can prolong, or purposely slow down a phrase.
  - You can lower your voice or increase pitch.
  - You can speak softly or you can speak loudly.
12. Don't use physical motions or posture that detracts from the presentation.
13. When introducing another presenter
  - Don't steal his time.
  - Don't build the speaker up to heights he can't fulfill.
  - Don't yield to the temptation to speak on his subject unless he has asked you to briefly introduce them to it. Just introduce him.
  - Don't agree to introduce someone you have not met.
  - Don't detract from a speaker by your actions while he speaks.
14. Respect time limits

# ROBERT'S RULES OF ORDER & PARLIAMENTARY PROCEDURE

This is only an overview of Robert's Rules of Order, another description can be found in the officer resources under the President resource page on the Phi Delta Theta [website](#).

## 1. Addressing the chair

- All meeting should be conducted from the chair (usually the president). In Fraternity meetings, members addressing the chair should refer to the presiding officer as "Brother President."

## 2. 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 chair. The chair will recognize the members 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 chair. These cases are:
  - If the member who made a motion claims the floor and has not already spoken on the question, he is entitled to be recognized in preference of others.
  - 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.
  - The chair should attempt to alternate opposite opinions on a question if he is aware of members requesting the floor which may have opposing views.

## 3. Making a motion

- Have a copy readily available during your executive committee meetings.
- On occasion you may need to refer to them when certain questions arise.
- 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 meeting and not that he necessarily favors the motion. A member may second a motion because he would like to see the assembly go on record as rejecting the proposal, if he believes a vote on the motion will result in such a result.
- The chair then states the "question" on the motion. Neither the making nor seconding of a motion places it before the council; only the chair can do that by this step (stating the question). When the chair has stated the question, the motion is pending and is then open to debate (providing that it is a debatable motion). If the council decides to hear a motion's proposes, it adopts a motion or it is carried. If it decides against the motion, it is rejected or lost.

## 4. 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 germane; that is, it must be closely related to or have some bearing on the subject of the motion to be amended.
- A motion to amend is handled 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.

## 5. Amending the motion

- At the beginning of regularly scheduled meetings, copies of the minutes of the previous meeting will be distributed for study by the chapter members. The chair then asks "Are there any corrections to the minutes?" and pauses. Then the chair will ask "If there are no corrections the minutes stand approved."

## 6. Point of order

- When a member thinks that the rules of the meeting 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 meeting’s rules.
  - Is in order when another has the floor.
  - Does not require a second.
  - Is not debatable unless the chair, being in doubt, submits the point to a vote of the meeting; in which case, the rules of governing its debate are the same as an appeal

## 7. Previous Question

- The previous question is a 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 or amendable motions.
  - Is out of order when another has the floor.
  - Must be seconded.
  - Is not debatable.
  - Is not amendable.
  - Requires a 2/3 vote.

## 8. Postpone indefinitely

- A motion to postpone indefinitely is a motion that the assembly 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 not out of order when another has the floor.
  - Must be seconded.
  - Is not amended.
  - Requires a majority vote.

## 9. 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.
  - Is not amendable.
  - Requires a majority vote

# ADDITIONAL RESOURCES

1. **Meeting Agenda** – An organized and concise meeting agenda is key to the success of any chapter meeting. A template can be found on the Phi Delta Theta website [here](#).
2. **Chapter Retreats** – Chapters should participate in a retreat to bring the members together as well as work on plans for future semesters. A manual for retreats can be found on the Phi Delta Theta website here for chapter retreats; and, a presentation for on effective retreats can be found [here](#).
3. **Goals** – Long-term goal setting should be a main focus of Phi Delta Theta chapters to ensure success for future semesters. Examples of successful goal setting can be found on the Phi Delta Theta website here.
4. **MyPhiDeltaTheta** – The myPhiDeltaTheta desktop is a vital piece of the President’s responsibilities and instructions on how to use the desktop can be found on the Phi Delta Theta website [here](#).
5. **Officer Transitions** – Officer transitions between executive boards are an important piece to a successful chapter. Clean and smooth officer transitions will ensure success to future executive boards. Information on officer transition retreats can be found here; and a presentation on successful transition can be found [here](#).
6. **Minimum Standards** – Phi Delta Theta has a set of minimum standards that each chapter must follow in order to remain a recognized chapter of the organization. If your chapter falls below our minimum standards you may face probation, suspension or a review for separation. Information on our minimum standards can be found on the Phi Delta Theta website [here](#).
7. **Chapter Greatness Checklist** – As mentioned above, the Chapter Greatness Checklist is in place to ensure that our chapters remain on course to be successful. A copy of the checklist can be found here; and the guide to completing the checklist can be found [here](#).
8. **Monthly Reports** – As mentioned above, monthly reports are due to your consultant by the 1st of each month. You may submit your monthly reports through your myPhiDeltaTheta desktop or use the template given by your consultant.
9. **Affiliation Ceremony** – In the event that a Phi from another chapter transfers to your host institution, he may want to affiliate with your host chapter. Instructions on the affiliation process can be found on page 29 of [The Code](#) under Title XV: Affiliation. The form to begin the process of affiliation can be found on the Phi Delta Theta website [here](#).