

PROVINCE PRESIDENT WORKBOOK



PHI DELTA THETA

Become the greatest version of yourself

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FOREWARD

Dear New Province President:

This is a manual of suggested procedures for guidance when working with your chapters and alumni within your province. It is a compilation of the input from many Province Presidents and needs this forward to make one fact clear – these are *suggested* procedures.

A Province President would not accept this assignment if he did not have a love of Phi Delta Theta and had not already proven his devotion to our hallowed principles. You are living our open motto, “We enjoy life by the help and society of others,” because you find the association with both the undergraduates and alumni a stimulating and rewarding experience. This experience may seem thankless at times, but keep in mind you are making a difference in many undergraduate lives today and for years to come.

There are many rewards that accompany this position. From the passing on of beliefs and traditions of this Fraternity in hopes that someone, someday will take hold of an idea and create a solid foundation in which to build upon to watching young men mature and develop into good citizens. There is true knowledge in the words “Brother in the Bond.”

In summation, we welcome you. May the enclosed ideas help you just as they have helped those who have come before you.

Yours in the Bond,

The Province Presidents

PROVINCE PRESIDENT POSITION DESCRIPTION

REPORTS TO: General Council

The president of each province shall serve as the representative of the fraternity and provide oversight in their respective area. Through a collaborative effort with the general headquarters staff, it is his duty to help provide a strategic course for all chapters, advisory boards, house corporations, and alumni clubs within the province boundaries and to promptly notify the General Headquarters of any matters which may require immediate attention. The Province President shall strive to fulfill the following objectives:

OBJECTIVES

1. Serve as ambassador for Phi Delta Theta by promoting, supporting and communicating initiatives, programs, and policies of the General Fraternity through in-person meetings and remote contact.
2. Aid in the recruitment of volunteers within the province and monitor their educational progress as they work towards certification.
3. Provide strategic guidance to chapters, chapter advisory boards, house corporations, and alumni clubs within the province.
4. Address disciplinary issues in a prompt manner, notifying General Headquarters of all disciplinary action.
5. Assist the General Headquarters Staff in benchmarking and follow up with the chapters in his province that are enrolled in the Recruitment Coaching Program.
6. Assist the Director of Expansion by prospecting campuses and cultivating relationships with the campuses located within his province.
7. Attend required Fraternity functions and participate in educational opportunities as a Fraternity volunteer.
8. Help identify potential donors for the Phi Delta Theta Foundation.
9. Recognizing the importance of Fraternity volunteers financially supporting the Phi Delta Theta Foundation, each General Officer is expected to contribute within his appropriate level of capacity.

PERFORMANCE GOALS

1. Meet and cultivate relationships with all of the Chapter Advisory Boards, Alumni Clubs, and House Corporations in his province through visitations at least once an academic year.
2. Host a conference call or virtual meeting for all volunteers in province at least twice a year.
3. Work in conjunction with the regional leadership consultant to ensure that each chapter has an active Chapter Advisory Board of no less than five members who regularly attend chapter and executive committee meetings. The Chapter Advisory Board will assist the chapter in the areas of finances, Phikeia education, recruitment, scholarship, and risk management.
4. Confer with the chapter advisory board chairman on a regular basis to:
 - a. Review chapter progress in key operational areas
 - b. Review strategic
 - c. Monitor the CABs regular attendance at chapter and executive committee meetings
 - d. Ensure online training certification is up-to-date
5. Visit each chapter at least once a year, preferably twice a year, meeting with various undergraduate, alumni, and university leaders while on site and to promptly submit a report within 30 days to the General Headquarters for each visit.
6. Visit and cooperate with alumni clubs and ensure each club is engaged with a local undergraduate chapter when possible.
7. Attend the General Officers Conference and General Convention.
8. Stay up-to-date with Fraternity matters through electronic communication and education, i.e., Palladian Window, General Officers Bulletin, Scroll Extra, Facebook, etc.
9. Perform self-assessment and review with General Council Liaison.
10. Address such other things as called for by *The Code*, or that the General Council may request.
11. The Province President is to work with the General Headquarters Staff to ensure that the chapters in his province meet the Minimum Standards and Expectations Policy, or to provide a plan to meet those standards.

PROVINCE PRESIDENT PERFORMANCE EVALUATIONS

The following items will be used to measure each Province President on an annual basis and will be reviewed by the General Council at the fall retreat meeting.

1. Province President self-assessment which evaluates:
 - a. Active collaboration with the regional leadership consultant
 - b. Interaction with chapter and constituents
 - c. Interaction with alumni clubs
 - d. Disciplinary Situations
 - e. Understanding and Awareness of Fraternity programming and messaging
2. Number of reports and vouchers submitted representing in-person visits
3. Number of tracked conference calls or virtual meetings
4. Attendance at Fraternity conferences
5. Number of chapter advisory board members
6. Completed online education for CAB members in province
7. Number of Chapter Awards received in province
8. Chapter and General Headquarters feedback
9. Other specialized training programs, conferences, specialized communication, programs developed for the province
10. Evaluations from Chapter Advisory Boards, undergraduate officers and House Corporations.

PROVINCE ACTION PLAN

INSTRUCTIONS:

“If you don’t know where you’re going, any road will take you there” is a famous quote from Alice in Wonderland.

In order to properly pave our road to success, the General Council is asking you, as Province President, to take the critical steps of developing a plan of action for your province. The General Council and GHQ staff will assist you in developing and executing your action plan. Remember to use the new Province President job description to review your performance goals when creating your plan. The Fraternity will provide written measured feedback on your performance as a Province President.

The action plan should encompass broad goals for your province that must be converted to SMART (Specific, Measurable, Actionable, Realistic, Timely) goals. A thorough plan will detail six elements:

- ✓ **Goal:** Statement of the SMART goal.
- ✓ **Strategy:** A broad brush paragraph or two outlining your game plan.
- ✓ **Tactics:** A list of the specific action steps you must take to achieve the goal.
- ✓ **Timetable:** Define when the steps will start and be completed.
- ✓ **Responsibility:** Define who will be accountable for each step.
- ✓ **Budget:** Define how much time and money will be allocated for each of the steps.

Once your written action plan is created, assign the actions and timetables to the appropriate constituent and follow-up with them to ensure the actions are taken. Lay the foundation for success in your province now and lead the charge to ensure Phi Delta Theta is well-represented by both the undergraduates and alumni in your area.

SAMPLE

S.M.A.R.T. Goal:	To ensure each of my chapters applies for a 2009 Foundation scholarship.	
Strategy:	Many chapters fail to take advantage of the scholarship opportunities afforded by the Phi Delta Theta Foundation. I will educate the alumni volunteers and undergraduate chapter leadership about this benefit and ensure each of my chapters nominates an eligible brother by the deadline.	
Tactics:	<ol style="list-style-type: none"> 1. Send an e-mail to alumni volunteers and the executive council of each chapter to make them aware of the scholarship offerings and the application process. 2. Confirm with the president that he received the application materials during PLC. 3. Ask the CABC to see that the chapter nominates a qualified brother for the scholarship at the first chapter meeting after break. 4. Ask the CABC to follow-up with the nominated brother to ensure his application is given the proper attention and is submitted by the deadline. 5. Ask the CABC if the nominee sent his application to GHQ. 	
Timetable:	<ol style="list-style-type: none"> 1. Tuesday, November 1, 2008 2. Monday, January 10, 2008 3. Monday, January 10, 2008 4. Friday, January 29, 2008 5. March 28, 2008 	Responsibility: Me Me, chapter president Me, CABC Me, CABC Me, CABC
Budget:	All items can be done via telephone and e-mail communication.	

PROVINCE ACTION PLAN FORM

PROVINCE: _____ YEAR: _____

PROVINCE PRESIDENT: _____ GC LIAISON: _____

E-MAIL ADDRESS: _____ CONSULTANT: _____

S.M.A.R.T. GOAL STATEMENT #1:

STRATEGY:

TACTICS:

1. _____
2. _____
3. _____
4. _____
5. _____

TIMETABLE & RESPONSIBLE PARTY:

1. _____
2. _____
3. _____
4. _____
5. _____

BUDGET REQUIREMENTS:

NOTES FOR GHQ:

PROVINCE PRESIDENT VISITATION REPORT

Province: _____	Date of Visit: _____
Province President: _____	Date of Report: _____
Chapter: _____	Institution: _____
Chapter President: _____	CAB Chairman: _____

NOTES FOR GHQ ASSISTANCE

1. _____	3. _____
2. _____	4. _____

VISIT SUMMARY AND GENERAL OBSERVATIONS

(Briefly outline your accomplishments during the visit detailing chapter strengths and weaknesses; campus/Greek issues or concerns; individual members that stood out or are emerging leaders.)

ALUMNI INVOLVEMENT AND RELATIONS:

Chapter Advisory Board:	Yes	No	Discussion Points:		
Did you meet with CAB Chairman?	Yes	No	ρ Overall Alumni Programming		
Level of involvement:.....	Good	Fair	Poor	ρ Life Safety Program	
Avg. monthly chapter meeting attendance:	1	2	3	4	ρ Facility Maintenance Program
House Corporation:	Yes	No	ρ Lease Agreements / Membership Contracts		
Did you meet/speak with HC rep.?	Yes	No			

(Discuss the effectiveness of the CAB and their relationship with the chapter and note house corporation issues.)

THE INSTITUTION & CAMPUS INVOLVEMENT:

Did you meet with Greek Advisor?	Yes	No	Discussion Points:
Greek Advisor name:.....	_____		
ρ Chapter Involvement in Campus Events			
ρ Chapter Involvement in Student Organizations			

ρ Regular meetings by the chapter with Greek Advisor

(Note any concerns from the Greek Advisor and briefly outline the chapter's involvement on campus and in activities.)

GENERAL FRATERNITY NOMINATIONS:

Gold Star Award: _____ Silver Star Award: _____ Improvement Citation: _____ Biggers Ritual Trophy: _____

Leadership Consultant Candidates:

Peer Mentor Candidates:

The Code and The Province President

In addition to the most important general demands placed on the office of the Province President, there are many details that are described within the Constitution and General Statutes. For example, the Province President must make all chapter adviser appointments. He is entitled to a copy of the monthly financial statement which must be forwarded by the chapter treasurer. He has certain responsibilities in connection with the collection of delinquent chapter accounts. To help in these responsibilities and obligations, the following is a list of Code sections dealing specifically with the Province President.

It is important to remember that while the Province President has the ability to be authoritative at times, he is still an adviser to the undergraduates. There must be a mutual respect if there is to be success.

CONSTITUTION

Article III - General Council

- 6. Officers

Title I - General Convention

- 27. How Composed

Title II - General Council

- 40. Nominations for General Council

Title IV - Provinces

- 52. Division and Names
- 53. Appointment and Qualifications of Province Presidents
- 54. Duties of President
- 55. Province Meetings

Title V - Establishment, Installation, and Withdrawal of Province Presidents

- 56. Appointment of Survey Commission
- 57. Granting of Charters
- 58. Vote in Convention
- 59. Vote Between Conventions
- 60. Establishment of a Colony

Title IX - Chapter Houses

- 99. House Occupancy
- 101. Removal of Alumni or Pledged Men

Title X - Officers of Chapters

- 120. Treasurer
- 130. Vacancies Declared by Chapter or General Council
- 131. Chapter Adviser

Title XVI - Loss of Membership

- 154. Discipline by Chapter
- 156. Procedure for Discipline
- 158. Discipline of an Alumnus
- 159.1. Discipline by Province President

Significant Sections of the Constitution and General Statutes

CONSTITUTION

Article VII - Membership

- 12. Qualifications
- 13. Voting

Article IX - Insignia

- 21. Secret Work

Article XI - Amendments

- 23. Amendment of Constitution and Ritual
- 24. Amendment of General Statutes

GENERAL STATUTES

Title I - General Convention

- 30. Election of Delegates

Title VII - Chapter Meetings and Operation

- 78. Regular Meetings
- 79. Special Meetings
- 80. Meetings Secret
- 81. Quorum
- 82. Order of Proceedings
- 85. Chapter Fees, Dues and Assessments

Title VIII - Chapter Equipment

- 88. Restrictions Concerning Bond
- 91-92. Custody of Books
- 93. Chapter Paraphernalia
- 94. Approved Suppliers

Title IX - Chapter Houses

- 95. Chapter House Corporations
- 96. House Corporation Records
- 97. Chapter House
- 98. House Rules
- 99. House Occupancy
- 100. Pledged Men in Houses
- 101. Removal of Alumni and Pledged Men

Title X - Finance

- 103. General Fraternity Initiation Fee
- 104. Allocation of Payment
- 107. Delegates Expenses to Convention
- 108. Delegates Expenses to Leadership Conferences

Title XI - Officers of Chapters

- 113.1 Eligibility for Office
- 114. Terms of Office

- 114.1 Election Procedures
- 115. Installation
- 122. Historian
- 126. Chapter Officer Reports
- 127. Executive Committee
- 128. Finance Committee
- 129. Scholarship Committee
- 131. Chapter Adviser

Title XII - Eligible for Pledging

- 133. Proposals for Pledging
- 135. Pledge Training

Title XIII - Eligible for Membership

- 138. Time of Initiation
- 138.1 Depledging
- 139. Fraternity Examination
- 139.1 Completion of Pledgeship
- 140. When Initiated
- 141. Graduate and Professional Students
- 143. Membership in Other Societies
- 144. Double Fraternity Membership Prohibited
- 145. Membership in Local Societies

Title XIV - Rights and Obligations of Membership

- 147. Chapter Members
- 148. Rights and Obligations
- 149. Scholarship
- 159.1 Discipline by Province President

Title XV - Affiliation

- 151. Affiliation in Another Chapter
- 152. Where Affiliation Certificate is Refused

Title XVIII - Insignia

- 175. Use of Badge Design
- 176. Badge - How Worn
- 177. Undue Display Prohibited

The Expense Account

Not to be overlooked is the matter of reimbursement for expenses. The General Statutes state that “all expenses incurred by the Province President in chapter visitation, arranging for the attendance at province conferences, attendance at General Conventions, attendance at regional conferences, and all other expenses incurred in the regular administration of his office, shall be paid from the treasury of the General Fraternity.” A better explanation of the above quotation is explained in the next paragraph.

A Province President is entitled to reimbursement for his travel expenses at the rate of **\$0.45 per mile** if he is driving within the province, or by actual cost if traveling by public conveyance. Alternate methods of reimbursement may be adopted by the General Council for travel outside the province (e.g. conventions, conferences, etc.). In addition, his out of pocket expenses for room and board while traveling, as well as postage, telephone, and similar miscellaneous expenses throughout the year, are reimbursable.

The General Fraternity shall provide for the financial reimbursement for organizational meetings of both alumni clubs and chapter advisory boards within a province. However, chapter and university venues should be utilized whenever possible to keep costs down.

Policy Guidelines on Expenses for the General Officers of Phi Delta Theta

The General Principles Behind the Policy Guidelines:

1. Those who perform the greatest services for Phi Delta Theta are unpaid volunteer workers. Any expense policy should in no way discourage or inhibit this volunteer service.
2. Our volunteers come from different economic levels and have individual tastes and preferences which are reflected in their modes of travel, dining, entertainment, etc.
3. Those who represent Phi Delta Theta should do so proudly and should not appear to represent anything less than a first class organization.
4. The money we expend on the activities of our general officers is spent in a considered manner - for the benefit of the Fraternity.
5. The money we expend is trust money - it come from the undergraduates and the alumni as dues or volunteer contributions - it must be wisely preserved and prudently spent.

The Policy Guidelines:

1. All expenses should be reported in detail to General Headquarters and supported by voucher where possible. This is not meant to be a burdensome process. Keep it simple, but try to explain if something is out of the ordinary.
2. Travel - you are the best judge of which travel option best suits your individual requirements. Time is indeed money. It is also time available for family, friends, community, etc. But planning ahead can often decrease costs and increase effectiveness. If you have to fly, then you must do so. But please try to examine the most cost effective alternatives. As a general guideline, the Fraternity will reimburse you for the lesser cost of flying or driving when making chapter visits or attending Fraternity sponsored conferences.
 - Particularly for general officers' meetings, try to take advantage of the fare saving plans offered by major airlines such as:
 - Purchase ticket at least 21 days in advance
 - Include your stay over a Saturday night
 - Utilize the General Fraternity's travel agent
 - Taxis are extremely expensive. Try to arrange for an undergraduate or alumnus to take you to and from the airport.
 - Rental cars are extremely expensive. Try to work out an alternative.
3. Lodging - Obviously, it should be convenient and presentable. Look at the alternatives. There is an obvious savings by choosing a lower priced accommodation.
4. Meals - The best rule is to treat the money you are spending as if it were your own or as if you were operating as a trustee of a charitable organization. Is the expenditure reasonable and prudent? Let your conscience be your guide.
5. Entertainment - The treating of undergraduates and alumni by general officers is not encouraged. If it is necessary to meet with a chapter adviser over lunch, each person should pay his own way. At the end of the day, if there is a period of relaxation with the brothers, then generally it should be paid for personally, just like you would do on other social occasions. There will be legitimate times when entertainment expense is necessary.
6. Telephone - Try to keep long distance calls to a minimum. Although writing is slower, it is also more precise and lasting. Keep in mind that e-mail communication continues to be a logical choice.
7. Spouse Expenses - Generally speaking, you are on your own for the costs of fraternity activities where you choose to involve your wife. Her participation is welcome and desirable, but it is difficult to justify her expenses to the undergraduates and the unmarried.

Conclusion:

1. With respect to expenses, you are on the honor system. Nobody wants to look over your shoulder or second guess your judgment. We prefer not to move to rigid per diem kinds of expense rules.
2. We ask you to ask yourself - is it businesslike, is it reasonable, is it prudent, is it common sense?
3. If you find that an unusual expense is anticipated and you are not sure about it, telephone the Executive Vice President and discuss it. He may be able to suggest a way to avoid it and, at the very least, will not be surprised when your expense account is received.
4. In the event of problems, the Treasurer of the General Council will have the authority to approve or disapprove unusual expenses. He may, at his discretion, submit such matters to the General Council for guidance on a decision.

Brothers, we are a fraternal brotherhood. We believe in the Bond, friendship, sound learning and rectitude. These guidelines do not infringe on our beliefs. They are meant to make us better, wiser and more prudent. Please accept them in that spirit.

Phi Delta Theta Fraternity General Officer Expense Voucher

Name:	Period:	Internal Reference #:
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All Expenses Incurred (1)

Date	Location	Meals including Tips (2):			Lodging	Tolls, Taxi, Subway	Auto Rental or Parking	Auto (3) Mileage	Other Tips	Phone	Other (4) Expenses	Total Cash
		Breakfast	Lunch	Dinner								
COLUMN TOTALS		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	xxx

(1) Evidence Required to Substantiate:

- **Car Rental** - Copy of Invoice
- **Lodging** - Hotel or motel receipt
- **Cash expenditures of \$25 or more**

(2) List names of guest(s) and nature of expense in space provided

(3) Mileage to be figured at 45 cents per mile

(4) Give detailed explanation in space provided

TOTAL EXPENSES:	\$ -
- Personal expense	\$ -
- Tax deductible gift to Foundation Annual Fund	\$ -
- Non-tax deduct. gift to Loyalty Fund	\$ -
= AMOUNT TO BE REIMBURSED:	\$ -

Explanations:

Date:	Reference Item: <small>(meal, lodging, other, etc.)</small>	Explanation: <small>(i.e. - what the item is, who you were with, etc.)</small>

THE CHAPTER ADVISORY BOARD

Locating and Appointing a Chapter Advisory Board (CAB) Chairman

Almost inevitably, the need for a CAB chairman to step down will arise in one of your chapters. These dedicated brothers often are faced with multiple time constraints such as work, family or other interests. Sometimes, the task of attending meetings or working closely with the collegian brothers becomes quite burdensome. A CAB chairman may resign in frustration. As a result, the turnover of CAB chairmen is sometimes high.

As the Province President, it is your responsibility to name a suitable successor. Most often, this is an easy task if you are familiar with your chapter and its situation. However, this can be a large obstacle if there is no easily identifiable replacement. Listed below are some avenues to pursue in your search for a new CAB chairman.

- Consult with the retiring adviser. Perhaps he knows someone in the area who is interested in helping or who he has “groomed” as his replacement.
- Ask the chapter membership. There may be an alumnus who frequently visits the chapter who they know and would like to have as the chairman.
- Consult with the house corporation. Perhaps one of its members is able to take the responsibility, or may know of someone to ask.
- Contact General Headquarters. The staff may be aware of someone in the area who would be suitable.
- If there is an alumni club or association in the area, approach them for their help or assistance in finding one of their members to fill the role.
- The General Headquarters can do a general search letter over your signature to all Phiis residing in an area around the chapter or to all of the chapter’s alumni. A response card is usually included.
- *The Scroll* and/or the website can publish listings of chairman openings. Often, alumni will respond to this plea for help.

Once you locate interested brothers, meet with them to determine how qualified they are. Review the chapter’s CAB chairman’s position description with them. Discuss your expectations and the chapter’s expectations of a chairman. Encourage the chairman candidate and the chapter to meet each other and

seek feedback from the undergraduates. Try to make the best match for you, the chapter, and the chairman.

After you have selected a replacement, notify General Headquarters, preferably in writing, of your decision. It will then be possible to switch all CAB chairman's mail to the new brother.

Additional Support for the CAB Chairman

The Importance of Training a Successor

First and foremost, the CAB Chairman's workbook should be reviewed with the new chairman. This will provide him with the basic essentials to begin working with his chapter. A clear understanding of the CAB Chairman's job description, understanding the relationship between the chairman and the province president, and the relationship between the chairman and General Headquarters pertaining to correspondence and resources are three areas of great importance in order to have the new chairman feel more comfortable with his recent appointment.

There are many areas that are going to be unique to his situation and the CAB Chairman's workbook will not be able to cover those issues. These experiences can only be shared by the current chairman with the newly appointed chairman. Also, everyone knows, a good education comes through experience. The new chairman may not have many questions at the outset, but many may follow. Your guidance to him can be as much assistance as his training from the previous chairman prior to taking on the new responsibility. Sharing your own personal experiences, as well as offering your guidance, will be two excellent assets for the new CAB Chairman.

Basic expectations need to be shared as well. Your feelings on weekly chapter meetings, executive committee meetings, and chapter retreats are a few areas where clear expectations are required. Where does he fit in the chapter's social affairs? Sharing the information, as well as covering liability insurance with the new chairman and board will help a great deal. Reviewing the financial area of the chapter is another issue for expectations. The bare minimum is his signing of the Treasurer's Monthly Reports to GHQ, but on top of that, you will be able to share experiences with your other chairmen and pass on these experiences.

An Assistant CAB Chairman

Is one of your chairmen having trouble making the weekly chapter meetings and/or executive committee meetings? Is he unable to pay close enough attention to the chapter's financial situation? Is he not around as often as brothers may desire?

An assistant may be the answer. Recruiting one more dedicated alumnus, like yourself, to assist in the duties as the CAB chairman may be the solution to some current dilemmas. An assistant CAB chairman can take on certain responsibilities, i.e. finances and/or Phikeia programming and/or university and community relations. He can also be available to fill in when the primary adviser is not able to attend chapter functions. Either way, it is perhaps a breath of fresh air for your CAB chairman and the chapter.

An assistant does not necessarily need to be on the General Headquarters' mailing list, nor does he need to be on the roster of CAB chairmen at GHQ. He can be used at your discretion. When a leadership consultant is planning a visit to your chapter, a meeting between all three individuals would be ideal. This

way, the relationship between the CAB chairman and the assistant can be better understood and perhaps the consultant can give some input. A copy of GHQ correspondence and/or a leadership consultant report can be shared with the assistant by the CAB chairman to keep him totally informed.

This is an area in which the Province President can also play a role. Periodic meetings between you, the assistant, and your CAB chairman can help clarify the situation at your chapter. Also, the Province President can build a relationship with both advisers and can use both of them as resources at any chapter.

The Chapter Advisory Board

The Chapter Advisory Board relates to an assistant adviser but it takes it one step further. This board can consist of as many dedicated alumni as the situation at your chapter demands. The role of this board is to disperse the responsibilities often placed on one person's shoulders to a number of dependable Phis. Each individual can focus on one area of the chapter's operations and work with the chapter members involved.

If your chapter needs attention in Phikeia education, financial management, membership recruitment, and scholarship programming, then you may have the ideal situation for a Chapter Advisory Board. These four areas of concern in this example are major facets of a chapter's operations and may be too much of a burden to be handled by one person. The Chapter Adviser would become the chairman of this committee and would then consist of Phikeia Education Adviser, a Financial Adviser, a Membership Recruitment Adviser, and a Scholarship Adviser. The duties of the adviser would then be altered somewhat but he would have a wealth of assistance. An example of a Chapter Advisory Board follows this section.

For the CAB chairman, his role can now focus on the chapter's overall operations. How effective is the current officer corps? How can he assist in planning retreats and brotherhood events? How can he keep the chapter's focus on its goals? By managing the Chapter Advisory Board, ensuring that regular meetings are held between the individual board member and the chapter members in each area, and having the board members attend chapter meetings, his job as the CAB chairman can take on a whole new meaning.

The Province President will play a large role in this process as well. Each situation is unique, which means the Province President will have different requirements for the CAB. The board should be created by both the Chapter Advisory Board chairman and the Province President in order to insure capable men are appointed to the committee. Regular meetings between the board and the Province President may be deemed necessary and/or regular reports from the CAB chairman to the Province President may also be required.

Suggestions for the Province President

- 1) Get to know and maintain close communication with each of your CAB chairmen. Explain your expectations to them. Also, listen to their thoughts and advice. The CAB chairman's insight can be invaluable. Former Province President Cary Buxton always said "I have four strong chapters in my province because I have four excellent chapter advisers."
- 2) Visit each chapter at least once a year, or as often as is necessary to oversee any concerns or problem areas. Proper notice should be given to each chapter prior to visits. Visitation reports to the General Headquarters should be filed promptly.
- 3) Communication with the chapter president should be maintained throughout the year, either written, or via email or telephone. This will build a better working relationship between you and the chapter. This type of communication will ensure that all reports and fees due to the General Fraternity are submitted on time by your chapters.
- 4) During at least one of your visits each year, you should attempt to meet with other individuals such as a Greek advisor of the institution or a representative of the chapter house corporation. Knowledge of what's happening in those realms can often be helpful. Familiarity with those key players can be an advantage later during a sticky situation
- 5) Maintain good contact with the General Council member who oversees your area. Let him know what problems you or your chapters may be experiencing, what's on your mind, or how the General Council or General Fraternity can be of better service to you.
- 6) Value the judgment or recommendations of the leadership consultants when they visit your chapters. These young Phis are trained and dedicated to the cause of strengthening the Fraternity. Follow-up on their reports and suggestions with your chapter officers. Don't play the consultant or Headquarters off as the "bad guy," but work together with these men for the common good.
- 7) Be on the lookout for expansion opportunities at colleges or universities within your geographical area. Consult with the Director of Expansion and the Survey Commission on these institutions.

Chapter Advisory Board Job Descriptions

The following pages provide job descriptions of the various positions for a Chapter Advisory Board.

Phi Delta Theta Fraternity

Position Description

POSITION: Chapter Advisory Board Chairman

REPORTS TO: Province President

BASIC FUNCTION:

Serves as the Chairman of the Chapter Advisory Board (CAB). Supervises the activities of the other board members and keeps all parties informed of progress and new development. Works with chapter president and executive committee to oversee chapter operations and to create chapter programming. Works with the university to maintain relations between the chapter, the General Fraternity, and the Greek Official/Dean of Students.

RESPONSIBILITY TO POSITION:

- Convene monthly meetings of the Chapter Advisory Board.
- Recruit and appoint other members to the CAB.
- Work with the chapter president and other officers at the weekly executive meetings in the implementation of the *Chapter Operations Assessment*.
- Meet with the campus Greek Official once per semester to monitor progress of the chapter and discuss campus issues.
- Work with the chapter community service chairman, social chairman, and house manager to develop a positive public relations program.
- Work with the chapter vice president to ensure prompt submission of all reports to the General Headquarters.
- Work with the chapter awards chairman in the preparation of the appropriate awards reports, both for the campus and the General Fraternity.
- Conduct at least two retreats for the chapter each year.
- Report periodically to the Province President on the progress of the chapter.
- Conduct along with the executive committee a recruitment workshop prior to each semester/recruitment period.
- Works with the executive committee to establish chapter goals for the academic year.

Phi Delta Theta Fraternity

Position Description

POSITION: Board Member: Alumni Club Representative

REPORTS TO: Chapter Advisory Board

BASIC FUNCTION:

Serves as the alumni chairman for the Chapter Advisory Board (CAB). This person will serve as the liaison between the chapter and the alumni club and coordinate efforts to enhance the relationship between undergraduate chapters and their respective alumni club.

RESPONSIBILITY TO POSITION:

- To inform the chapter of any upcoming events sponsored by the alumni club
- Assists in the coordination of Founder's Day
- Assists in the planning for chapter and campus anniversaries
- Informs the undergraduate chapter of alumni achievements
- Assists in the organization of co-sponsored activities between the chapter and the alumni
- Assists the chapter in developing strong alumni relations

Phi Delta Theta Fraternity Position Description

POSITION: Alumni Club Representative

REPORTS TO: Chapter Advisory Board

RESPONSIBILITY TO POSITION:

- Attend all alumni club meetings and regularly scheduled meetings.
- If an alumni club does not exist, create one to be utilized to its fullest.
- Work closely with the chapter and alumni club to keep them continuously updated on issues within the chapter and general fraternity.
- Help the chapter initiate the following events: Founders Day, Homecoming, Alumni Newsletter, and a joint schedule of events.
- Work with the alumni to have the volunteers work closely with the undergraduates to conduct and execute programming for the following events: social, alumni, membership recruitment, career planning, and internships.

Phi Delta Theta Fraternity

Position Description

POSITION: Financial Adviser

REPORTS TO: Chapter Advisory Board Chairman

BASIC FUNCTION:

Serves as the financial chairman for the Chapter Advisory Board (CAB). This responsibility focuses upon advising the treasurer in the development and maintenance of a sound financial base for the chapter. Responsibilities for this position are listed below. Additional resources can be found in the Treasurer's Manual.

RESPONSIBILITY TO POSITION:

- Attends: Chapter Advisory Board meetings, officer retreats, Leadership Consultant meetings, Province President meetings, and meetings with the treasurer (at least monthly).
- Assists in the development of membership and/or housing contracts, promissory notes, and a budget.
- Serves as an ex-officio member of the financial, budget, delinquencies, and any other committees that have to do with chapter finances.
- Approves chapter budget, contracts, financial bylaws, and any payment plans or promissory notes.
- Help to educate the members on the financial obligations of Phi Delta Theta and their importance to the chapter.

RESPONSIBILITY TO TREASURER:

- The adviser must make sure that the officer is keeping up on all items of paperwork that are necessary for General Headquarters points. These include, but are not limited to: GHQ bills, monthly treasurer reports, the annual audit, and the yearly budget. The adviser must make sure that these reports are being filled out appropriately. General Headquarters asks for this information to ensure that no improprieties are going on within the chapter.
- Help the treasurer in the enforcement of Sections 148 and 155(a) of the *Code of Phi Delta Theta*. To paraphrase section 148, it states that every member of Phi Delta Theta is responsible for any monetary obligations asked of him by the chapter. Section 155(a) gives the right to discipline a member for being delinquent in one's accounts.
- Ensures that all tax forms are turned in on time and are accurate to the best of the chapter's knowledge.

RESPONSIBILITY TO CHAPTER:

- Develop ways to help promote fundraising ideas amongst the chapter members.
- Promote smooth transition between the incoming and outgoing treasurer.
- Develops a good rapport with the chapter so members will respect and follow suggestions.
- Have an annual meeting to explain the financial state of the chapter and to answer any questions about the budget or the billing procedures.

Phi Delta Theta Fraternity

Position Description

POSITION: Chapter Advisory Board Plant Manager

REPORTS TO: Chapter Advisory Board Chairman

BASIC FUNCTION:

Works with the chapter House Manager to ensure that the physical plant remains in good order. The Plant Manager also works with the chapter in the area of fundraising. The Plant Manager can be a parent of a member or any other interested adult in the community.

RESPONSIBILITY TO POSITION:

- Supervise the regular maintenance of the chapter house, including all scheduled maintenance and any emergency repairs.
- Supervise and administer to any employee of the chapter and/or house corporation (cook, janitor, housemother, etc.)
- Assist the House Manager in the creation and implementation of a chapter maintenance and cleanliness program.
- Arrange for the chapter an annual Fire/Safety inspection and program.
- Work with the chapter Fundraising Chairman to develop a program to fund facility improvements.
- Work with the house corporation/local alumni club to develop a strategic long-term fundraising campaign targeted towards the chapter's alumni.
- Assist the chapter in the creation and maintenance of a Sinking Fund.

Phi Delta Theta Fraternity

Position Description

POSITION: Risk Management Advisor

REPORTS TO: Chapter Advisory Board Chairman

BASIC FUNCTION:

Serves as the risk management chairman for the Chapter Advisory Board (CAB). Supervises and advises the activities of the undergraduate chapter's risk manager and the chapter's social chairman. Works with the chapter to ensure their social program follows the Phi Delta Theta Risk Management Policies and the local college or university's social guidelines. Works with the Phikeia Educator to ensure the new Phikeia class is educated on the principles of risk management and the above mentioned policies.

RESPONSIBILITY TO POSITION:

- Attend the monthly meetings of the Chapter Advisory Board.
- Attend at least one chapter meeting per month.
- Supervise the activities of the chapter's risk manager, and meet with him at least twice a month during the academic year, and at least once during the summer break and Christmas break to help oversee the planning of the social calendar for the upcoming semester.
- Utilizing the General Headquarters and outside resources, help facilitate and plan risk management workshops for the chapter and Phikeia class which include, but are not limited to, the following topics:
 - Basic risk management * Phi Delta Theta's Risk Management Policies * chapter liability insurance * hazing * fire prevention planning * crisis management * chapter house maintenance and kitchen safety * alcohol awareness * chapter event planning * etc.
- Conduct above workshops with the support from the local alumni and the General Headquarters.
- Know, understand, and, if necessary, enforce Phi Delta Theta's Risk Management Policies, the local university or college's social guidelines, and Phi Delta Theta's Crisis Management plan.
- Help maintain a filing system consisting of minutes from risk management committee meetings and file copies of Event Planning Forms.
- Along with the CAB Chairman coordinate accident investigations and claim reports to the General Headquarters.
- Have a thorough understanding of the *Event Planning Program* offered by General Headquarters and help supervise the event planning process for each chapter event.
- Meet with the University/College official responsible for risk management at least once per term/semester.

- Perform along with the risk manager and house manager (if applicable) a semesterly fire and life safety inspection of the chapter living facility. If improvements need to be made, contact the appropriate representative on the chapter's house corporation.
- Meet with the chapter's house manager (if applicable) at least once per term/semester to ensure a comprehensive fire safety program is in place including, but not limited to the following guidelines:
 - Weekly inspections of all fire safety systems * unannounced quarterly fire drills * regular chapter house inspections * evacuation routes and emergency phone numbers posted * compliance with local fire, safety and health codes.
- Perform any and all other incidental duties at the direction of the CAB Chairman, Province President, or the Director of Housing & Insurance at General Headquarters.

Phi Delta Theta Fraternity

Position Description

POSITION: Membership Recruitment and Education Chairman

REPORTS TO: Chapter Advisory Board Chairman

BASIC FUNCTION:

Serves as the membership recruitment and membership education chairman for the Chapter Advisory Board (CAB). Supervises, and advises the activities of the undergraduate chapter's membership recruitment and membership education programs. Works with the chapter recruitment chairman and recruitment committee to coordinate the recruitment program of the chapter. Also serves as a liaison between the local alumni and the local chapter to organize events and support. Works with the Phikeia Educator and the Pallas committee to oversee the proper education of the Phikeias. Creates and develops programming, with the undergraduate members, for the Phikeia program.

RESPONSIBILITY TO POSITION:

- Attend the monthly meetings of the Chapter Advisory Board.
- Attend at least one chapter meeting per month.
- Supervise the activities of the recruitment chairman, and meet with him at least once a week during the academic year, and several times during the summer break.
- Assists in planning and organization of the chapter's recruitment program for both the summer and academic year.
- Help facilitate pre/post recruitment workshops for the chapter.
- Conduct these workshops with the support from local alumni and the General Headquarters.
- Help the recruitment chairman and the chapter set realistic recruitment goals.
- Coordinate with the local alumni club, or area alumni, to receive recruitment recommendations and to participate in chapter's recruitment program.
- Approve and coordinate location for recruitment events. (During summer, or if chapter does not have chapter house)
- Meet with the Phikeia Educator to help plan and organize a positive and constructive Phikeia program for the chapter.
- Meet weekly with the Phikeia Educator, Phikeia education committee, and Pallas committee.
- Serves as an ex-officio member of the Phikeia education committee and Pallas Committee.
- Attend all Phikeia class meetings during the pledge period.
- Know and understand *The Phikeia Program*. Encourage the use of the program with the undergraduate chapter.
- Discuss and establish the goals and objectives of the Phikeia Educator and Phikeia program.

- Remind the chapter and Phikeia Educator of the goals throughout the Phikeia program, when necessary.
- Sees that all Phikeia and initiation documents and fees are paid to the General Headquarters on time and in full.
- Ensure that all recruitment and Phikeia programs are conducted in accordance with *The Risk Management Policies of the Phi Delta Theta Fraternity*.
- Perform any and all other incidental duties at the direction of the CAB Chairman, Province President, or the General Headquarters.

Phi Delta Theta Fraternity

Position Description

POSITION: Board Member who works with chapter scholarship and career development.

Possible position titles:

- Chapter Academic Advisor
- Alumnus Academic Advisor
- Alumnus Scholarship Coordinator
- Alumnus Scholarship Advisor

REPORTS TO: Chapter Advisory Board

BASIC FUNCTION:

The responsibility of the CAB Member is to primarily oversee the chapter and its operations in fulfilling our quest to live up to, and exceed in the second principle of our fraternity; Sound Learning. He will assist the chapter in setting and achieving goals and to help set academic standards for individuals as well as the chapter.

RESPONSIBILITY TO POSITION:

- Assist the chapter in setting and achieving realistic chapter goals pertaining to scholarship.
- Approves the chapter's scholarship program, the scholarship section of the bylaws and rules and programs for members below the chapter's requirements for good standing.
- Knows campus procedure for release of brothers' and Phikeias' grades.
- Understands and transmits the Fraternity's philosophy and goal of encouraging each member and Phikeia to achieve his academic potential.
- Reviews the Scholarship Chairman's manual with each scholarship chairman upon election to his office.
- Enforce Fraternity, chapter, campus and IFC scholarship requirements.
- Encourages the scholarship chairman to use his committee effectively and to use creative and innovative ideas in scholarship programming.
- Reviews and explains the scholarship expectations set forth in *The Chapter Operations Assessment*.
- Meets with officer and committee prior to each semester to review the current scholarship program and look for ways to update and improve the program.
- Works with area alumni to assist in securing local prominent Phi Deltas to discuss the business world and the key to success.
- Works with scholarship chairman and committee to see that an awards and incentives program is implemented and utilized on a semesterly basis.

- Explains the workings and benefits of the Phi Delta Theta Foundation and assists the chapter's nominee with his application process.
- Ensures that the chapter is aware of, and applies for the General Fraternity scholarship awards.
- Introduces himself and meets with the Phikeias during a Phikeia class meeting to discuss the scholarship requirements of the chapter, campus and IFC.
- Sees that the scholarship chairman notifies the president about members whose scholastic average falls below the chapter good standing requirement
- Encourages the chapter to maintain an environment conducive to good study habits.
- Encourages members to take advantage of professional assistance with academic problems.
- Encourages members to make scholarship a priority during the membership selection process.

IN ORDER TO ASSIST THE ADVISER IN FULFILLING HIS OBLIGATIONS, THE FOLLOWING MATERIAL WILL BE PROVIDED:

The Code of Phi Delta Theta
 The Scholarship Chairman's manual
 The *Chapter Operations Assessment*
 The chapter's bylaws
 Example scholarship programs
 The Awards Chairman's Manual
 Current mailings from the Education Commissioner

Phi Delta Theta Fraternity

Position Description

POSITION: Board Member, University Representative

Possible position titles:

- Chapter Faculty Advisor
- Alumnus Faculty Advisor (Dependent on if the faculty member is a Phi Delta Theta alumnus)
- Chapter Faculty representative
- Campus Faculty Advisor

REPORTS TO: Chapter Advisory Board

BASIC FUNCTION:

The responsibility of the CAB Member is to primarily oversee the chapter and its operations in utilizing the campus and administrative resources to the best of their ability. This person will serve as a liaison between the chapter and the institution and coordinate efforts to educate the members and enhance the relationship between the institution and chapter on a continual basis.

RESPONSIBILITY TO POSITION

- Assist the chapter in setting up educational public relations programming
- Assists in the organization of several public relation events for Greeks, non-Greeks and the campus.
- Ensure a campus representative conducts a workshop covering the importance of Greek relations.
- Encourage that each brother be involved in at least one other campus organization other than the Fraternity.
- Assist in the creation of a public relations chairman and committee.
- Assist in the organization of a workshop for upperclassmen concerning graduate schools and other secondary education issues such as taking the GRE, LSAT, MCAT etc.
- Help uphold Fraternity, chapter, campus and IFC regulations.
- Encourages the public relations chairman to use his committee effectively and to use creative and innovative ideas in public relations programming.
- Reviews and explains the institutional expectations set forth in *The Chapter Operations Assessment*.
- Meets with officer and committee prior to each semester to review the current public relations program and look for ways to update and improve the program.
- Works with area alumni to assist in securing local prominent Phi Delta Theta alumni to discuss public relations and the importance of networking.
- Ensures that the chapter is aware of, and applies for the General Fraternity awards.

- Introduces himself and meets with the Phikeias during a Phikeia class meeting to discuss the importance of living up to the expectations of the chapter, campus and IFC.
- Encourages the chapter to maintain an environment conducive to a high standard of morality.

IN ORDER TO ASSIST THE ADVISER IN FULFILLING HIS OBLIGATIONS, THE FOLLOWING MATERIALS WILL BE PROVIDED:

The Code of Phi Delta Theta
The Faculty Adviser's Program
The *Chapter Operations Assessment*
The chapter's bylaws
Example campus/ public relations programs
The Awards Chairman's Manual
Copies of Fraternal Law

The Chapter

The Chapter Committee Structure

One of the cornerstones of a successful fraternal operation is total member participation. It is virtually impossible; however, for every member to take an active part in making all decisions of the chapter. For this reason, the chapter can delegate responsibility to committees comprised of several members from the chapter. An effective committee system is characterized by three distinct features:

1. Specialization - each committee member performs a specialized duty;
2. Authority - each member, by virtue of his appointment to the committee, possesses the necessary authority to execute his function in the same manner as an officer;
3. Direction - each committee has a clear and distinct set of goals

COMMITTEE ANALYSIS

Provided below is a step-by-step analysis of the ideal development and function of a committee.

1. The appointment of the committee. Individuals appointed to a committee are expected to perform work for the chapter. Such appointments involve choosing an individual(s) who is capable of performing a particular task. The distribution of responsibilities must not, however, overload any particular member/set of members. Rather, the committee workload should be distributed equally among the active members who compose the membership of the various committees within the chapter.
2. The organization of the committee. Following the appointment of the committee, the first duty of the chairman is to arrange an organizational meeting of the committee. The purpose of this first meeting is to discuss, in detail, the function of the committee. The next step is to divide and apportion the work to the members whose abilities best match the particular task. The committee is then prepared to function.
3. The function of the committee. The second meeting of the committee allows for the management of the particular task assigned to the committee. The period between the first and second meeting is an opportunity for the committee members to perform and complete their assigned tasks. It is suggested that the committee members:
 - Gather the necessary information or perform the designated task before the chairman conducts the second meeting;

- Use all possible resources;
 - Prove and record results rather than guessing at conclusions
 - Think intelligently and constructively
4. The Report. When making a formal report during the chapter meeting, the effectiveness of the committee is determined by the presentation. A professional approach, detailed, but to the point, information and constructive suggestions are a must when presenting information to the chapter.
- The formal report should be typed and printed for filing.
 - List all sources from which information was obtained.
 - The report should conclude with a set of specific recommendations or options for the chapter to consider.
5. The Evaluation. Following the completion of the assigned function, the committee should meet to evaluate its work. By outlining both the positive and negative points of the committee's function, the problems encountered during the work of the committee can be alleviated in the future.

A CHECKLIST FOR THE DEVELOPMENT/ ORGANIZATION/FUNCTION OF A COMMITTEE

DEVELOPMENTAL MODE

1. A plan of action. Before the project or task is to be executed by the committee members, the chairman must conduct primary research. This involves knowledge of the objective to be accomplished with regard to the manpower available, time required to complete this task, organizational structure of the committee, and financing of the work. The following outline should serve as a model for developing a plan of action:
- Determine the purpose and general method for accomplishing the assigned task;
 - Determine the manpower required;
 - Establish a suggested timetable for completion of the task;
 - Propose a budget.
2. Endorsement by the chapter. Gaining approval for your plan of action is all a matter of selling. Before the formal presentation on the proposed project is made to the chapter, discuss the plan with the executive committee. This will provide the chairman with some immediate feedback. Next, conduct a formal presentation before the chapter members. Explain exactly what task is to be completed and generally how it is to be completed. Be enthusiastic, realistic, thorough, and to the point.

ORGANIZATIONAL MODE

1. Identifying Committee Members. Though the committee project may be presented in a professional manner, members may not flock to your assistance. The members must be interested in your project before they will join your committee. Similar to gaining the endorsement of the chapter, the best means to secure a member's aid is to spark the member's interest in the project.

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- Present the general project to the potential committee member.
 - Show how the prospective member can help the project, while also showing how he can benefit.
 - Encourage committee membership by giving emotional reasons to join, i.e., special talents, friendships, etc.
 - Use enthusiasm to motivate the committee members.
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2. The organizational meeting. With the committee chairman and members in place, the organizational meeting, which serves as a kickoff to the project, can now occur and ideas for completion of the task can be gathered.
 3. The committee meeting.
 - ◆ **Agenda.** Prior to the commencement of the organizational meeting, the chairman should prepare a written agenda for the committee members. All business items should be presented in a logical sequence as determined by the agenda.
 - ◆ **Appointment of a secretary.** To ensure that accurate records of the committee work are maintained, appoint a secretary. In addition to keeping minutes of the meeting(s), the secretary should collect records, news clippings, and photographs for the historical records of the chapter.
 - ◆ **Delegation of responsibility.** A project is a series of small inter-related jobs fitted together. Breaking down the project into separate jobs which can be delegated to committee members is a test of the chairman's leadership ability. Choosing the right man for the job is paramount. After assigning specific responsibilities to each committee member, be sure he knows:
 - ⇒ Exactly what task he is expected to complete;
 - ⇒ To whom he is to report;
 - ⇒ What degree of authority he has.
 4. The time table. The toughest decision of committee work is determining a "D-Day," or deadline. Establishing a timetable for action to commence and for the project to be completed is critical to the success of the committee.

THE FUNCTIONAL MODE

1. Performing the task. The committee, after being selected and having established a specific plan of action, is now prepared to perform its assigned task. The completion of the project is a matter of following through the organizational process. The chairman must continually consult with the committee members to ensure all tasks are executed. In addition, throughout the functional phase of committee work, general committee meetings serve as a "rally" to maintain enthusiasm. Should the work bog down, the vice-president should be prepared as committee chairman, or an acting committee chairman, to jump in any time to assist. Finally, arrangements should be made to give interim reports the chapter members on the progress of the committee and a final report at the conclusion of the chapter members.
2. Follow-up. It is equally important for the committee chairman to perform the appropriate follow-up tasks:
 - ☞ Recognize and praise each of the committee members;
 - ☞ Make sure the minutes and notes of the committee's activities are in proper order;

- Forward “thank you” letters to all who participated, contributed support, or provide assistance to the effort.

TYPES OF COMMITTEES

There are several committee possibilities within the chapter. The specific personnel make-up, committee function, and responsibility will be dictated by the needs of the chapter and campus environment. The three primary types of committees include: the executive committee, standing committees, and special committees.

THE EXECUTIVE COMMITTEE

The Code of Phi Delta Theta states that the executive committee is responsible for preparing “an agenda for chapter meetings prior to such meetings and generally to direct the activities of the chapter.” This is a broad job description for the overall driving force within the chapter. In fact, the importance of an effective and influential executive committee to the overall welfare of chapter cannot be emphasized enough. The executive committee advises and directs chapter operations by establishing goals, priority matters, programs, and agendas for the chapter meeting. The executive committee essentially sets the tone and pace for all chapter activity. The success of the chapter lies with the executive committee’s ability to organize and motivate the chapter membership. The chapter’s likelihood of functioning smoothly or erratically is dependent upon the executive committee.

Being the role model: The key component of dynamic leadership is to set a positive example. Leaders have the responsibility and duty to serve as role models for others to emulate. To do so, the executive committee members must pay their bills promptly, maintain an acceptable level of academic performance, actively participate in chapter activities, place the best interest of the chapter first, and exhibit pride, spirit, enthusiasm. In essence, do not expect from others what you cannot deliver yourself.

Membership: Though the configuration of the executive committee varies from chapter to chapter, there are several officers that, by virtue of their importance in the operation of the chapter, should sit on the executive committee. As a rule of thumb, the vice-president chairs the executive committee while the inclusion of the president and treasurer are likewise mandated by the Code of Phi Delta Theta. In addition to these three, it is recommended that the executive committee represent both the internal and external facts of the chapter operations. The following officers should also comprise the executive committee: secretary, Phikeia Educator, recruitment chairman, alumni secretary, house manager, social chairman, and scholarship chairman. Including these offices reflects the issues/items typically discussed by the executive committee: membership education, membership recruitment, alumni affairs, housing, social activities, academic achievement, chapter finances, Interfraternity Council, chapter, and officer goals and objectives.

Items/Issues: Executive committee meetings provide the forum for reviewing and discussing all chapter related activities. It is also the forum for creating key programs that contribute to the betterment of the chapter. Furthermore, the committee also serves as a forum for all topics to be discussed by executive committee. This will help avoid subjecting the chapter members to the sometimes trivial items that arise.

Officer Reports: To ensure the effectiveness and influence of the executive committee, each member officer must be explicitly prepared for the chapter meeting. A specific agenda including the minimum

information expected from each officer should be declared. Motions presented during the chapter meeting should be developed. Motions presented during the chapter meeting should first be reviewed by the executive committee - whether presented by an executive committee officer or a non-officer.

Unity: It is inevitable that disagreement on chapter measures will occur during the executive committee. In fact, debate and compromise are healthy. During chapter meetings; however, the executive committee must present a unified image to the members.

Specific Responsibilities of the Executive Committee

- Guide all activities of chapter operation. Develop policies with regard to chapter activities.
- Coordinate all officer programs. Oversee committee activity to ensure agreement with chapter policies.
- Hold weekly meetings prior to the chapter meeting to review all proposals/motions so as to provide specific recommendations to the chapter.
- Establish and pursue overall chapter goals.
- Review the performance of each executive officer and non-executive committee officer.
- Make recommendations to the president for creating other committees charged with specific functions.

STANDING COMMITTEES

Standing committees are created for the purpose of developing and/or maintaining specific programs of an on-going nature within the chapter (recruitment, alumni relations, Phikeia education, scholarship, finances, etc.). Activities may include: goal setting, program development, program implementation, event preparation, etc. When identifying and establishing these committees, follow the aforementioned "Checklist" listed earlier in this section. Generally, the officer responsible for the respective area of chapter operation serves as the committee's chairman. Several examples of such committees are outlined below.

1. **Scholarship Committee:** The scholarship committee is charged with the duty of designing and implementing a Scholarship program and to cultivate and encourage academic excellence within the chapter. This committee may also retain authority in cases of scholarship deficiencies by reviewing the academic performance of the members of the chapter.
2. **Alumni Relations Committee:** The alumni relations committee coordinates all alumni activities sponsored by the chapter. Its role is to develop a program to strengthen interpersonal and written communication with the chapter's alumni through alumni newsletters, alumni functions, Founders Day activities, etc.
3. **Finance Committee:** The chief responsibility of the finance committee is to design and implement a sound fiscal policy for the chapter. This would include the development of a budget,

collection of accounts receivable, work with the house corporation, and creation of fundraising ventures.

4. Phikeia Education Committee: The Phikeia education committee is commissioned with the duty of developing and instituting a positive Phikeia Education program. Its goal is to execute the written education program and to ensure hazing of Phikeias does not occur. This committee can also review the performance of the Phikeias and/or act as a disciplinarian for cases involving the Phikeias.

Chapter Bylaws

Of all the leadership tools available to the chapter adviser, the one most immediately useful is the establishment and maintenance of self-government, i.e., chapter bylaws. In other words: “use ’em if you got ’em - write ’em down if you don’t.”

WHY ARE BYLAWS IMPORTANT?

Like *The Bond* itself, chapter bylaws are basic ground rules written by those directly concerned, of what is deemed fair treatment, procedure, and the expectations of their peers. Over time, if implemented impartially without favoritism, the bylaws will lead to good internal leadership and control.

CONSIDERATIONS

Obviously, nothing in the bylaws should contradict *The Bond*, the Constitution or General Statue of Phi Delta Theta. Nor should it contradict itself. The bylaws will become increasingly useful to the members the more often they are a part of discussions, especially as they realize they are living by the rules they themselves think important to maintaining a strong chapter. Your job will be to remind them from time to time that these are their rules and to help them become stronger as the inevitable “loopholes” occur.

TIPS

- 1) Don’t have rules for the sake of rules. Be sure they are serving a purpose and are useful.
- 2) It is not a simple chore to create a set of bylaws or to revise the current document it takes thought and planning. Form a committee (include yourself) that considers all the important factors and faction within your chapter.
- 3) Start with a broad, rough outline of what the bylaws should address. For example:

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- **Procedure**, how will this document be ratified, accepted, or changed in the future;
 - **Membership**, what are the minimum standards, requirements, and expectations the chapter should hold for itself;
 - **Officers**, same as above, what minimum grades, etc. should be expected for a member to hold office;
 - **Regulations**, what procedures does your chapter need to ensure the house is repaired, the dorm is full, debts are collected, etc.;
 - You might also consider a section on **Finances**.
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- 4) Debate, include, or reject controversial sections after the easy ones are agreed to.
- 5) If a section is rejected, wait awhile, then see if the objections to it can be overcome
- 6) Never, ever break a bylaw to favor a popular member or Phikeia. Hedge, bend, or do a *Quid Pro Quo* if you must, but the only power your bylaws will have will be in their credibility. It is like breaking your word.
- 7) Distribute copies to all brothers and **especially** to Phikeias. Test the Phikeias on it before they are initiated on it so they can't say: "I didn't know."
- 8) Make it "a process" to change your bylaws, so the chapter is not run from within. Each spring is a good time to form a committee and update the bylaws.
- 9) You and the top officers should know the bylaws backwards and forwards, because you will be tested by chapter members.
- 10) Ask General Headquarters to provide you with examples of successful bylaws in use at other chapters.

Predication

In 1898 at the semi-centennial Convention in Columbus, Ohio, Founder Robert Morrison implored the brothers, "You must guard against elation... do not look at the past as a thing that is satisfying; look at it only as something in general that was well done. Thank God for it, but go and do something better."

His words referred to the Fraternity's need to constantly reach new and higher levels, to seek improvement, and to make Phi Delta Theta the absolute best. This concept continues to have relevance today, both to the officers of the General Fraternity and to the collegiate brothers in each chapter. Our mutual goal, across all levels of the Fraternity, should be to elevate Phi Delta Theta above the commonplace, to make it the BEST fraternity on each campus. At the chapter level, there should be an

understanding by all of the brothers that the chapter is making a commitment to excellence. Each chapter officer, committee chairman, and member realizing the shared goal and working together toward its attainment demonstrates this commitment and provides the chapter with a unified sense of purpose.

Imagine the potential your chapter has if all the brothers are working toward the same goal! If the goal is overall excellence, think of the rewards:

- | | |
|--|---------------------------------------|
| ★ strong campus reputation | ★ prowess on the intramural field |
| ★ strong academic achievement | ★ safe, yet fun, social events |
| ★ consistently successful recruitment | ★ financial stability |
| ★ notable and worthy community service | ★ genuine brotherhood and camaraderie |

Indeed, the very notion is exemplified in a pledge we have all taken, as the last line of our Phikeia oath reads, “I will strive in all ways to transmit the Fraternity to those who may follow after, not only not less, but greater than it was transmitted to me.”

An excellent vehicle to reach this overall excellence is the *The Chapter Operations Assessment*. The program attempts to illustrate a noble starting point for each chapter. If a chapter, *your* chapter, can equal that starting point, then the job is halfway complete. You are already functioning in the realm of excellence. The second part of the job is to not merely continue your excellence but to challenge it, redefine it, and reach new heights. By reviewing past accomplishments and evaluating new objectives, the chapter can continue to determine new and loftier goals and succeed in its unending quest to be the best. The banner of Phi Delta Theta will fly ever higher and higher.

At the same time, the potential for individual development will be increased significantly. Members can learn various skills in the chapter and more so in an excellent chapter:

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- ★ leadership training
 - ★ strategic planning
 - ★ financial management
 - ★ organizational responsibility
 - ★ scholastic aptitude
 - ★ community involvement
 - ★ interpersonal communication skills
-

The Fraternity hopes you and your chapter will realize your potential with the help of *The Chapter Operations Assessment*. The program should be seen for what it is — an opportunity for your chapter and our Fraternity to position ourselves better on your campus. With the program, the General Fraternity is only giving you some guidelines, our expectations of what we would like to see from your chapter and every chapter. It is up to you and your brothers to help us realize our dream to make Phi Delta Theta the standard for brotherhood on every campus!

Chapter Operations Assessment

Within many of the chapters of our great Fraternity there is a tendency to “reinvent the wheel” each year. With each new corps of chapter officers comes new enthusiasm, new ideas, and new levels of commitment. However, there is often a lack of understanding concerning the fundamental elements of good chapter management. As a result, much time is spent learning what others have already learned.

Additionally, increased attention to such concerns as risk management, membership recruitment, and multicultural issues may have distracted focus from chapter fundamentals. Today’s fraternity leaders must deal with more factors than ever before. This, too, could be affecting some chapters’ lack of attentiveness to details.

Thus, the design and intent of *The Chapter Operations Assessment*. This program can help chapters in their search for excellence by outlining the fundamental expectations of chapter programming and management. These Basic Expectations should be viewed as the minimum levels of operation which should be achieved each year. If so visualized, each chapter can raise its level of efficiency by striving to attain, building upon, and exceeding these Basic Expectations.

The Phi Delta Theta *Statement on Standards of Responsibility* was created in 1986 in an effort to articulate how the principles of *The Bond* can be applied to everyday life in the chapter. The document outlined 14 aspects of fraternity life on which chapters should concentrate. In 2006 the Chapter Operations Assessment became an online version of this program to further expand on these areas while providing chapters resources to improve.

The Basic Expectations serve as guideposts to aid chapters in their quest for excellence. The program helps a chapter build accountability in specific areas and foster commitment to achieve chapter goals. At the same time, a sense of unity and cooperation, *brotherhood*, is fostered when chapter members work together, realizing their fullest potential.

In using *The Chapter Operations Assessment*, each chapter gains a clear idea of its strengths and weaknesses through a self-evaluation. It is then able to establish goals to propel the chapter in positive directions. Consequently, by developing an action plan on how to achieve these goals, members know *what* is to be done, *who* is responsible, and *when* it is to be completed. An attempt should be made to gain commitment from individual members by soliciting their input on goals and assistance on committees. Frequent reviews of progress will ensure proper follow-through. Communication among all the chapter members will be necessary throughout the entire process to improve the likelihood of success. The result should be a chapter with an enhanced sense of its responsibility to afford members a valuable experience which extends beyond their undergraduate years. An experience which is guided by the principles set forth in *The Bond*.

Outline of Expectations and Responsibilities of the Treasurer

Congratulations on your selection as a leader of your chapter. You are looked upon as one of the most important and dependable men in your chapter. Upon your shoulders rests not only the financial well-being of your chapter for the current year, but also the financial future of your organization for years to come. You will play an integral part in the decisions made concerning your chapter's fiscal policy, and will be expected to show sound judgment at all times.

The job in front of you is filled with challenge and responsibility. All financial matters will become your concern, either directly or indirectly. There will be times when your leadership will appear to threaten your relationships with some of your brothers.

To become and remain effective as treasurer, you must not allow your personal likes or friendships to affect the efficiency of your responsibilities. You must study in-depth the problems or situations and then make decisions.

Among the treasurer's many responsibilities are the billing and collection of all accounts in the chapter, the preparation of an annual budget, and a continuous set of bookkeeping records. A treasurer does not have to be an accountant or a business major, but rather a brother who will be dedicated, conscientious and willing to keep the chapter finances in control. If you ever find yourself "backed in a corner" or have a question regarding a bookkeeping procedure, look for an alumnus or professor, a CPA, a professional accountant or a qualified businessman - these men can and will help if you ask.

In addition to the above, the treasurer is responsible for financial obligations and reports due General Headquarters.

On the following page there is a Treasurer's Organization Chart, showing the different relationships, and people with whom the treasurer is in contact.

Proper use of the finance committee, chapter advisory board, house corporation and province president can be of great assistance to the treasurer. They may help to establish a better understanding of chapter needs and financial priorities, to institute a solid collection policy, and to provide the necessary "back-up" on important decisions. An assistant treasurer, whether elected or selected during the present treasurer's term of office, can also be a useful aide. In addition to easing the work load, an apprentice helps to safeguard future financial stability and continuity. Your reading and comprehension of Section 103, 107, 108, 120, 128 and 155 of *The Code of Phi Delta Theta* will give you a greater knowledge of your job. Also, refer to the Suggestions and Reminders, available from General Headquarters, for additional insight into your responsibilities.

What now? Your enthusiasm to tackle the treasurer's job, your desire to improve your chapter and prepare its future, and your dedication to Phi Delta Theta are needed.

The Phikeia Program

Introduction - Welcome to the Phikeia Program

This program was developed by members of the General Headquarters staff, alumni volunteers, and undergraduate members to provide chapters of Phi Delta Theta with a comprehensive and consistent program of Phikeia education. It was compiled with nearly every detail in mind and piloted in more than 25 chapters during the 1993–94 academic year.

Phi Delta Theta strongly believes in a period of education before initiation to familiarize new members with the Fraternity. This period is one of positive and encouraging preparation for the responsibilities of membership and reaffirms the principles of Phi Delta Theta. The Phikeia Program has been designed around an eight week model, a time period which the Fraternity believes is ideal for the introduction of new men into the chapter.

The Fraternity recognizes the need for a chapter to tailor a Phikeia education program to suit its specific needs. Therefore, The Phikeia Program has a certain amount of flexibility built into it so that chapters may rearrange, add, or delete material which reinforces the purpose and objectives of the program.

In order to prepare for the challenge of educating the chapter's future leaders, the Phikeia Educator should carefully read through each section of this program well in advance of formal pledging. The program has been developed in detail, but it does need planning and execution by a prepared and committed Phikeia Educator.

A comprehensive scholarship program has been provided within the eight week time frame, and it emphasizes scholarship performance during the entire undergraduate membership not just the few weeks prior to initiation. The program places emphasis on proper attitudes regarding scholarship, and provides incentives and education to enhance Phikeia scholarship performance. A sample bylaw is included with the scholarship program which addresses sub-standard scholarship performance of all initiated members. The chapter should use this as a cornerstone to developing ways to handle scholarship deficiency for the entire chapter, including new members. The scholarship chairman may wish to incorporate some of the ideas in this program into the chapter scholarship program as well.

The program also includes a workshop on membership recruitment, an academic orientation workshop, and risk management seminar. In addition, the Phikeia Educator is encouraged to plan workshops not provided in this program. The Phikeias will learn about the Fraternity's history and principles, chapter organization and leadership, and develop friendship and brotherhood with the members of their Phikeia class and the entire chapter membership.

The ultimate goals of this program are to successfully prepare all of the Phikeias for initiation, enhance their scholarship performance, and to provide a challenging educational experience which will cultivate commitment and excitement in these new members of Phi Delta Theta.

THE PURPOSE OF THE PROGRAM

To plan an effective program, the Phikeia Educator must first examine the purpose of Phikeia education. The purpose of any good Phikeia education program is to develop qualified, participating members of your chapter, not to make good Phikeias or to build class unity. The mission of this program is no exception.

The Phikeia Program hopes to teach the fundamentals of being an effective member of Phi Delta Theta, so that the chapter might enjoy the future leadership of these young men. In this process, this program will give the Phikeias the skills, put them into practice, and temper their use with the wisdom of the Fraternity's principles.

The Phikeia Educator should read the section on purpose & objectives to better understand the framework of this program. Although the Phikeia Educator will have much freedom to develop a program that is distinctively your chapter's, the Phikeia Educator should be sure not to undermine the basic objectives of this program.

RESPONSIBILITIES & RESOURCES

The responsibility of the Phikeia Educator is to implement this program. This is a time-consuming task and it requires dedication, good planning, and preparation. Do not think, however, that the Phikeia Educator must execute this program alone. Being a good leader requires a keen understanding of delegating tasks. The Big Brothers, the Phikeia Education Committee, the chapter officers, and even the Phikeias can assist in preparing all aspects of the program. Here are the Phikeia Educator's basic responsibilities:

- Plan and prepare this program
- Chair the Phikeia Committee
- Sit on the Pallas Committee (disciplinary committee)
- Monitor each Phikeia's progress
- Report to the chapter regarding the Phikeias' progress
- Assist in the planning and execution of initiation

Remember, there are many people who can assist in the planning and execution of this program. The Phikeias should do as much of the planning and execution of their own program as possible. It will help them learn more about leadership and organization.

In order to accomplish the goals of this program, the Phikeia Educator must learn to delegate tasks, manage time effectively, trust others' abilities, and motivate people to work together. He must also be able to assess available resources and capitalize on them. Some of the assets available are listed here.

The Phikeia Committee is the planning board. The committee should have five members, including the Phikeia Educator as chairman. Other suggested members are the warden, the historian, the scholarship chairman, and other members-at-large.

The committee is responsible for:

- Organizing the Phikeia Induction Ceremony
- Sending a letter to all parents of Phikeias
- Administrating and evaluating the Big Brother program
- Organizing the Phikeia Retreat
- Grading tests over the Phikeia manual
- Preparing for the initiation ceremony

The Pallas Committee follows the progress of the Phikeias and recommends them to the chapter for initiation. Although the Fraternity does not condone hazing or any other forms of physically or mentally abusive behavior, the committee also deals with disciplinary situations as they arise. There may be times when a Phikeia's conduct or his lack of performance calls for some type of confrontation. The Pallas Committee was designed to deal with these situations in a positive and constructive manner. The committee will help take the burden of disciplinary responsibility of the Phikeia Educator and the Big Brothers.

Every Phikeia Educator should have an assistant to help execute the program, but to also ensure an adequately trained and experienced brother will succeed him. The assistant is responsible for planning and preparing for Phikeia activities and monitoring the Phikeias' progress. He is an aide and a protégé.

The staff at General Headquarters can assist in executing the program in several ways. The Headquarters' video loan program provides many videos and resources useful in the program. Ideas for creative activities, planning, Phikeia discipline, scholarship, and a variety of other topics regarding The Phikeia Program can be obtained through the staff.

The Big Brothers can be the biggest resource or the biggest management disaster for a Phikeia Educator. The Phikeia Education Committee should place only the most reliable and committed members as Big Brothers. Doing so will make the Phikeia Educator's job much easier and the Phikeias' experience more worthwhile. Big Brothers can assist in many Phikeia activities, as well as provide the Phikeias with wisdom, support, counseling, and encouragement. Although the Phikeia Educator may be the first person the Phikeias come to know and trust, their Big Brother will become a closer friend and confidant. This important relationship will be useful when dealing with the Phikeias.

The institution more than likely has a Greek Advisor or administrator in charge of student activities. This person will have countless resources available to the chapter. Besides advice, ideas, and suggestions, this administrator will probably have several educational tools available for the chapter's use. These resources will include videos, printed materials, and programs on a variety of campus topics from date rape to alcohol education to scholarship.

The province president is a volunteer officer of the General Fraternity, and he will make periodic visits to the chapter. Be sure to schedule time with the Phikeias when he arrives. He will have knowledge of the General Fraternity organization.

The chapter adviser is often the alumnus who is closest with the chapter. He can provide valuable insight and advice to the chapter and the Phikeias. He may be knowledgeable about the chapter and university history, and he can give an alumnus' perspective. He can be useful as a speaker or help the Phikeia Education Committee schedule other speakers. He may also serve on the Pallas Committee.

The Phikeias themselves are an eager group of men at the disposal of the Phikeia Educator. The Phikeia Educator should have the Phikeia class officers schedule events, speakers, photocopy materials, and do other tasks during the program. It will teach the Phikeias responsibility and give them a sense of ownership in their own program.

GETTING ORGANIZED

The Phikeia Educator should buy a daily planner as soon as possible. Using it will help coordinate the many events, activities, and meetings the chapter and Phikeia class will have during the program and beyond. Pencil in the days and times each event will occur and be sure to check it before scheduling other things. The first events that should be scheduled are the dates of The Phikeia Induction Ceremony and initiation.

A weekly planner is provided in this workbook. The Phikeia Education Committee plans the dates of all the Phikeia events and activities during the eight-week program. Once this is done, the Phikeia Educator lists these important dates in the Program Planner. The completed planner should be photocopied for every new member.

The Phikeia Educator should keep a manila file on each Phikeia, containing a copy of his bio card, scholarship evaluations, attendance record, Big Brother reports, Pallas Committee evaluations, and tests. This will be used later by the Phikeia Committee and the Pallas Committee in assessing each Phikeia's performance in the program.

SCHEDULING SPEAKERS

The Phikeia Educator will schedule several speakers during the program, sometimes more than one per Phikeia meeting. It is essential that the Phikeia Educator be sensitive to the speakers' time constraints. Schedule each speaker at least two weeks in advance and schedule them at a time when the regular business of the meeting is concluded. If the meeting is still going on, interrupt it for your guest, then resume business after the presentation. Each item in every meeting agenda is assigned an approximate time period to assist in scheduling.

Be sure to review the schedule with the chapter as early as possible. List events that are mandatory attendance for members and those that are strictly for Phikeias. Community service events should be finalized with the appropriate service organization well in advance.

PLANNING WORKSHOPS

Three workshops are included in the body of this manual (academic orientation, risk management, and membership recruitment). They are easy to plan and implement, and the Phikeia Educator may wish to schedule more workshops on other subjects for the remaining weeks of the program.

To create a workshop, a facilitator should determine the following:

- Subject of the workshop
- Date and location
- Time needed
- Materials needed
- Who should attend
- Program outline

There are many topics which are important to stress to new members, including: alcohol education, study skills, leadership, time management, and etiquette. The Phikeia Education Committee should choose material that is important and interesting to the Phikeias.

THE PHIKEIA RETREAT

The Phikeia Education Committee must meet as soon as possible before the beginning of The Phikeia Program to plan the Phikeia Retreat. The retreat will start to build friendships between the Phikeias and their Big Brothers and will assist the Phikeia Educator in developing a sense of brotherhood among the new members.

MEETINGS

The Phikeia Educator establishes a regular time and place for weekly meetings of the Phikeia class at the first meeting. The Big Brothers must also be in attendance at each weekly meeting after they have been selected. The meetings should not last longer than two hours, so the Phikeia Educator or Phikeia president must keep things moving at a steady pace. The weekly agendas have time allotments which give an estimate of the time necessary for each item.

A list of materials the Phikeia Educator will need at each meeting is also given in the agendas. The Phikeia Educator and Phikeia president review the items, speakers and materials needed before the meetings. They should also think of additional items needed which are not included in the agendas.

After the first meeting, the Phikeia officers should be allowed to run the meeting themselves, following the outline in the Manual of Phi Delta Theta and using parliamentary procedure. A typical meeting outline is:

1. Opening song
2. Roll call
3. Minutes of last meeting
4. Officer reports
5. Committee reports
6. Scholarship review
7. Old business
8. New business
9. Announcements
10. Tests over the Manual
11. Speaker
12. Pass the gavel/candle

See the enclosed weekly agendas for more details.

The Phikeia Program Outline

Week One

PHIKEIA INDUCTION CEREMONY

PHIKEIA MEETING #1

- Officer Nominations
- Recruitment evaluation
- Chapter officer descriptions
- Big Brother Preferences
- Chapter committee assignments
- Speaker: Chapter president
- Assign Manual chapters 1 – 2

ACADEMIC ORIENTATION WORKSHOP

OTHER ACTIVITY

Week Two

BIG BROTHER ORIENTATION

PHIKEIA MEETING #2

- Election of Phikeia officers
- Speaker: student leader
- Assign Manual chapter 7

TOUR OF CAMPUS ACADEMIC RESOURCES

PHIKEIA RETREAT

- Brotherhood building activities
- Big Brother ceremony

OTHER ACTIVITY

Week Three

PHIKEIA MEETING #3

- Phikeias join campus activity/organization
- Speaker: chapter adviser
- Assign Manual chapters 3, 4 & 10

STUDY SKILLS WORKSHOP

OTHER ACTIVITY

Week Four

BIG BROTHER ACTIVITY

PHIKEIA MEETING #4

- Choose community service project
- Assign Manual chapters 5 – 6

FUND-RAISING EVENT

RISK MANAGEMENT WORKSHOP

OTHER ACTIVITY

Week Five

PALLAS COMMITTEE REVIEW

PHIKEIA MEETING #5

- Speaker: faculty advisor/professor
- Assign Manual chapters 8 – 9

COMMUNITY SERVICE EVENT WITH BIG BROTHERS

ETIQUETTE SEMINAR

OTHER ACTIVITY

Week Six

PHIKEIA MEETING #6

- Speaker: province president or alumnus
- Assign Manual chapters 11 – 12

ALL-CAMPUS LECTURE HOSTED BY PHIKEIAS

MEMBERSHIP RECRUITMENT SEMINAR

OTHER ACTIVITY

Week Seven

BIG BROTHER/LITTLE BROTHER ACTIVITY

PHIKEIA MEETING #7

- Speaker: Greek advisor/dean of students
- Assign final Manual review and two essays

ALCOHOL-FREE SOCIAL EVENT/PHIKEIA FORMAL

OTHER ACTIVITY

Week Eight

PALLAS COMMITTEE RECOMMENDATION

BIG BROTHER ACTIVITY

PHIKEIA MEETING #8

- Final Exam
- Speaker: local prominent alumnus

INITIATION

POST-INITIATION RETREAT

Program Objectives - Preparing Phikeias for chapter membership

The purpose of The Phikeia Program is to develop good members who will contribute positively to the chapter. The program must acclimate the Phikeias to the college environment, and successfully introduce them to the complexities of Greek life. The program will teach the principles and history of the Fraternity, foster friendship and brotherhood, introduce chapter operations, teach leadership skills, and cultivate good habits regarding scholarship. The program will also educate the Phikeias on a variety of issues facing the modern campus.

By far the most important objective of the program, however, is to successfully prepare new members for initiation and assimilate them into the participating chapter membership.

SCHOLARSHIP

The scholarship program's purpose is to encourage and develop proper habits and attitudes regarding class work. The program encourages class attendance and active participation in the educational process. It also teaches good study habits and scholarship skills. The program includes:

- Big Brothers meeting with Phikeias' professors
- An evaluation of attendance, attitude, and participation in classes
- Submission of all papers, tests, and exams to the scholarship chairman
- Awards for academic achievement
- Discussion of classes at weekly meetings
- Study skills workshops
- A study hall of 10 hours per week

BROTHERHOOD

The program develops group cohesiveness by encouraging the new members to participate in chapter activities. Many Phikeia activities include the entire chapter to promote this essential objective of The Phikeia Program. Other brotherhood-building activities include:

- Big Brother program
- Chapter participation in Phikeia activities
- A Phikeia Retreat with Big Brothers
- Chapter-Phikeia social functions

LEADERSHIP DEVELOPMENT

To develop the future leaders of the chapter, the program will focus on teaching leadership through experience. The program:

- Assigns Phikeias to chapter committees
- Encourages Phikeias to participate in campus activities.
- Elects Phikeia officers
- Teaches parliamentary procedure
- Has Phikeias organize a social function and a service project
- Hosts speakers on leadership

PERSONAL DEVELOPMENT

To be a positive contributor to the chapter, the Phikeia must learn the fundamental basis of good character, personal responsibility, and rectitude. The program emphasizes discussion of personal values and social responsibility and teaches the Fraternity's principles and their application within the chapter. Other activities in this area include:

- Workshops on risk management, alcohol education and etiquette
- Discussion of the principles of the Fraternity
- Participation in community service projects
- Case studies on a variety of ethical issues

APPRECIATION OF FRATERNITY

The program fosters a sense of loyalty to the chapter and the Fraternity as an international organization. It cultivates an understanding of the Fraternity's history, its rituals and principles, and its place in the Greek community. Toward this end, the program includes:

- Weekly review of the Manual
- The chapter history and bylaws
- Presentations by an IFC officer, chapter alumnus, chapter adviser, province president, and Greek advisor
- Learning the songs of Phi Delta Theta
- Participation in chapter activities

APPRECIATION OF THE INSTITUTION

Greeks are often accused of offering nothing to its host institution except a social life. This program seeks to instill respect and loyalty to the college or university by teaching its history, its customs, and encouraging participation in campus organizations. The program includes:

- Phikeias hosting an all-campus lecture by a professor
- Attending varsity sports events
- Learning the institution's history
- Participating in a campus organization
- Presentations by Greek advisor or other University and student officials

INITIATION OF PHIKEIAS

The end purpose of any new member education program is to prepare the new member for initiation. It is unfortunate to have any new member drop out of the program or fail to qualify for initiation. Therefore, the program is geared to prepare and retain every Phikeia for initiation. Toward that end, the program includes:

- A Pallas Committee to monitor each Phikeia's progress
- Clearly defined requirements and expectations of each Phikeia to fulfill before initiation
- Initiating the Phikeia class at the end of eight weeks
- A post-initiation brotherhood retreat

Since the program's objectives include integrating the Phikeias into the chapter, new members will be asked to participate in all non-ritualistic chapter activities. The Phikeias are not regarded as second-class citizens, but are readily accepted by the Brothers as the men who will carry on the tradition and success of the chapter. The Brothers, on several occasions, will be asked to participate in Phikeia activities. The men should recognize their role as mentors and pass on their knowledge and experience to the Phikeias and be reminded that their role carries a burden of responsibility.

ADDING NEW ACTIVITIES

This program allows a certain amount of latitude to the Phikeia Educator and the Phikeia Education Committee in its planning, organization, and execution. The committee can be creative in thinking of positive new ways to accomplish the goals outlined in this program. The Phikeia Educator must be careful to avoid undermining the integrity and purpose of the program by adding unconstructive or superfluous activities. Here are some ideas which might be considered:

- Outward Bound expedition
- Ropes course (if one is in your local area)
- Sunday morning worship at a local church
- Additional community service activities
- Create a Phikeia class photo album/history
- Phikeia class house project

These are just some ideas that may be added to the current program. Additional activities should fall under one of the objectives listed above.

A WORD ON HAZING

Phi Delta Theta is completely opposed to any form of hazing or other unconstructive pre-initiation activities. Hazing can be defined as any undignified treatment of the members or Phikeias or any activity which causes mental or physical abuse (please read the FEA Statement of Position on Hazing and Pre-Initiation Activities). Rather than listing endless examples to illustrate what hazing is, a Phikeia Educator must ask himself, "Would I show these activities to the school administration or to our parents? Are these activities I would be proud to show the general public? Are they conducive to a positive educational experience?"

If the answer is 'no' to any of these questions, the activities should be removed from the new member education program agenda immediately.

This program was developed to provide chapters with a specific program of positive education which develops new members into productive participants in chapter life. By encouraging the new members, teaching them the value of fraternity, and instilling in them a sense of leadership and self-worth, the program benefits the chapter. The Phikeia Educator and the Phikeia Education Committee must remember that the purpose of their education program is developing the chapter leaders of the future.

The Fraternity and Scholarship

Many brothers maintain that sound learning is an “individual matter” and that a fraternity can do little or nothing to affect the performance of an individual member or Phikeia.

To be sure, the scholarship performance of each member and Phikeia is definitely an individual responsibility but such responsibility can be supported and stimulated by group actions. Case histories throughout the nation attest to the influence of group action on the scholastic performance of fraternity members.

Obviously some chapters have had success in gaining sound learning without any formal program but these chapters are few in number. The presence of a dynamic program of sound learning heightens the opportunity for making scholarship success the rule and failure the exception.

As members of Phi Delta Theta, we must recognize that we have a responsibility when we ask a man to join our organization to insure that every member is not only afforded full opportunity to demonstrate his true ability, but is also actively encouraged toward that end. This is no easy task. However, a strong scholarship program will provide a means toward that end. Such a program must receive the support and approval of the entire membership.

For clarity and better identification, a sound learning program might best be geared toward:

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1. A better look at potential Phikeias
 2. The development of attitude
 3. The maintenance of an academic atmosphere
 4. Institutionalized importance of scholarship in the chapter
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Potential Phikeias. The scholarship accomplishment of any chapter is usually the result of the type of man the chapter seeks to pledge - a type that has already proven himself academically and is sufficiently mature to accept the academic challenges offered by his college environment.

Most of the colleges and universities operate on the basic principle that every man admitted to the institution has the potential to complete successfully one of its curricula. Each of our chapters has the same obligation, to know that each man pledged is one that will be initiated. Any Phikeia who lacks ability and motivation will not make it scholastically and will certainly not become an initiated member.

Attitude. It goes without saying that the basis of a good sound learning program within any chapter is attitude. No matter how strong the program is, total failure will result if the members and Phikeias do not have a positive attitude toward the goals and the objectives of the program.

Consider the various factors which often contribute to, and accordingly affect, the individual's attitude toward academic achievement:

1. Personal pride in achievement
 2. Hope for future employment and advancement
 3. Desire for respect and approval
 4. Group recognition and approval
 5. Sense of duty or obligation
 6. Expectation of reward
 7. Fear of failure and its consequences
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Once the motivating factors can be identified, a scholarship chairman can take steps to focus attention and action accordingly. For example, a primary goal of many members to get a good job after graduation; inviting a university official from the career and placement office to speak after dinner may provide an insight into what will be expected of future graduates. Subtle programs such as this reinforce the benefits of good scholarship, and help meeting the evolving needs of our members as well.

Atmosphere. One of the most important ingredients of a sound learning program involves maintaining an atmosphere that provides the opportunity to study. Constantly loud music, noise and partying do not create this environment. It is unrealistic to expect members to confront the rest of the chapter just so they can study. A poll of seniors who have moved off campus will probably show that noise and the inability to study was one of their primary motivator for moving out. Creating an atmosphere conducive to studying could benefit the chapter in a variety of areas.

Quiet hours can solve problems . . . when they are enforced! The best way for them to be enforced and successful is for the chapter to agree as a whole on their need, and to understand the reasons for their implementation. Competent and respected enforcers help as well.

REMEMBER, IF YOUR CHAPTER MEETS ITS RESPONSIBILITY ... to ensure that every man is not only afforded full opportunity to demonstrate his true ability but is also actively encouraged toward that end ... IT REQUIRES THE COOPERATION OF EVERY MEMBER!!

FROM THE RECRUITMENT CHAIRMAN'S MANUAL...

To be successful at recruitment

For many years, Phi Delta Theta enjoyed great prosperity in all areas of chapter operations, including membership recruitment. However, our studies have indicated that this is no longer the norm. Though Phi Delta Theta is still a leader in the area of recruitment, we find that we are not marketing our Fraternity as effectively as we have in the past.

Many accept the Greek system's declining numbers, stating that the problem is the result of a "recruitment recession." However, it is probable that these numbers indicate the need for fraternities in general, and Phi Delta Theta in particular, to recognize two very simple facts about membership

recruitment today: our market is changing, and our marketing must change accordingly.

For Phi Delta Theta to once again enjoy greater prosperity in membership recruitment, we must identify and address the issues facing us. We must identify our market and present our product to that market so that it will be desired.

IDENTIFYING OUR FUTURE MEMBERS

In the past, we have considered a rather narrow market for our recruitment efforts. Recruitment focused on those who signed up for rush. However, the number of students who register for rush is generally declining. At the same time, most campus populations are growing. This means that we are working with a shrinking pool of students, when our real market is actually increasing in size. We can understand this by looking at the three types of people that compose our markets:

The “Always Joiner”

This group is who we traditionally work the most on. These are students who come to school knowing that they want to be Greek. These men are often legacies, relatives or friends of brothers, acquaintances of alumni, or others with a positive image of fraternity. Although this group is currently our main focus in recruitment, this pool has been shrinking for several years. Though we should not neglect this market in our recruitment efforts, we need not focus all of our efforts on these men who are going to join anyway.

The “Never Joiner”

This group is basically a lost cause. These are men who will not join a fraternity, whether the reason is one of interest, personality, or philosophy. Once these men are identified, efforts should be directed elsewhere. Beware, however, some “maybe joiners” can appear to be “never joiners.” Careful identification is very critical in assessing the individuals.

The “Maybe Joiner”

This is the largest group in our market, and it is growing every year. It is also a generally untapped resource. The “maybe joiner” is often a first-generation student, a sophomore, a transfer student, a student of color, or an otherwise “non-traditional” student (i.e. married, 22+ years old, etc.). These are men who either know very little about fraternities, haven’t really considered the option, or both.

The “maybe joiner” generally has a limited conception of what fraternities are about. Usually, all they have heard about Greek life is through the media, whether it is a movie like “Animal House” or “Revenge of the Nerds,” a television show like “Beverly Hills, 90210,” or a newspaper article. Generally speaking, these sources present the “maybe joiner” with an unbalanced view of what fraternities are all about, and the attitude in this group can reflect that view. The best way to educate these men is to interact with them on a personal, direct level; however, most of these men are never reached, as they usually don’t get involved in recruitment, and they typically don’t approach chapters for information. This lack of involvement is obviously important to us when we look at a breakdown of the typical campus, and understand what we’re dealing with in terms of markets:

Obviously, the “maybe joiners” are the largest pool of people on the typical college campus. They are often some of the best people on our campuses, and would be fine additions to Phi Delta Theta. Unfortunately, many of these students never consider Phi Delta Theta as an option, as we focus our efforts primarily upon the “always joiners.” Thus, we find that

as our chapters gradually shrink, our rushes are less successful, our chapter finances are suffering, and our morale gets low. All because of a perceived “recruitment recession”—one which quite possibly doesn’t exist.

So now we understand our market. The next step is to present Phi Delta Theta effectively.

PRESENTING OUR BROTHERHOOD (ADAPTED FROM THE NIC)

The rest of this manual will deal chiefly with how to sell Phi Delta Theta on your campus. It can be a detailed process (and, hopefully, this book will help you to deal with most of these details), but it breaks down quite simply into a five-step process. The five steps to taking an individual and making him a Phi Delt are:

1. **Meeting Him.** This doesn’t mean waiting for him to come over to the house so you can introduce yourself. This means going out, finding good men on campus, and becoming acquainted.
2. **Making Him Your Friend.** Once you meet a guy, don’t start cramming fraternity down his throat. Learn about him, and tell him a little bit about yourself. Ask questions, express interest, and maintain contact. Most importantly, be sincere.
3. **Introducing Him to Your Brothers.** The more brothers a person meets, the more involved, included, and attached he will feel. Make a guy feel like part of your group. He will go where his friends are.
4. **Introducing Him to Phi Delta Theta.** Once the guy is part of your group, let him in on the foundation of your group. Tell him about your fraternity, why you are a Phi Delt, and what being a Phi Delt means to you.
5. **Asking Him to Join.** You’ve taken a man you didn’t know, made him your friend, and introduced him to your brothers and fraternity. Now, invite him to join Phi Delta Theta. Many young men are interested in Greek life, but don’t join for a very simple reason—they are never asked. Don’t miss this simple, yet crucial, step.

When recruiting members, most chapters forget steps one through three altogether. They talk about the intangible benefits of Fraternity with people who they don’t know—people who have no reason to trust or believe them. The five-step process is so effective because it establishes a foundation for action. It is the best way to find and recruit quality people for your chapter of Phi Delta Theta.

Minimum Chapter Expectations and Standards

In September 2000, the General Council established a foundation for minimum chapter standards. The minimum chapter standards and expectations address three areas:

A. Ritual. There are four parts:

1. Each chapter must have, or have on order, a complete set of ritual equipment.
2. Each chapter must perform the ritual on a weekly basis at chapter meetings while college is in session. (For sufficient reasons, the chapter president may postpone any regular meeting to a time not exceeding two weeks from the last regular meeting.)
3. Each chapter must read *The Bond* at a chapter meeting at least once per month while college is in session.
4. Each chapter must utilize and perform the initiation ceremony for all initiations.

B. Chapter Representation at International Fraternity Conventions and Conferences.

Each chapter must have a representative at every General Convention, Kleberg Emerging Leaders Institute, and Presidents Leadership Conference.

C. Minimum Chapter Size.

The minimum size of each chapter (members and Phikeias) as of May 1 of each year must be 35 or greater, or must be of a size at least equal to the average fraternity chapter size of all fraternities on the campus at which the chapter is located.

Implementation: If a chapter falls short of a standard, the chapter's charter will be placed in escrow for a period not to exceed one year. Escrow means that the charter will be physically removed from the chapter. The chapter will then have up to one year to bring its operations into compliance with the stated standards. If the chapter has not done so by the end of that period, the charter will be automatically suspended.

The Phi Delta Theta Awards Program

I. INTRODUCTION

The Phi Delta Theta Awards Program is designed to recognize and promote various levels of achievement and contribution to the Fraternity on an individual and chapter level. This manual reviews the awards available, the requirements, selection, and application process of each.

Please refer to the Award Chairman's Manual on the website at www.phideltatheta.org for the actual applications for the year, as well as any questions regarding eligibility.

The primary responsibility for the administration of the program rests with the Awards Committee. This body is composed of three alumni volunteer workers and one General Headquarters staff member who assist in the gathering of applications and information. In addition to this committee, several of the awards are judged by special alumni groups. The judging body for each award is noted within the manual.

Each chapter should appoint an Awards Chairman with the overall responsibility of coordinating chapter participation in the program. This is an appropriate way to gain international recognition for the chapter's accomplishments and efforts over the school year. The website will carry a full report on each year's results.

Best of luck in the competition!

NOTE: RISK MANAGEMENT VIOLATIONS & ELIGIBILITY

All chapters are highly encouraged to submit award applications with the understanding the award's committee will take into consideration all risk management violations in their deliberations.

II. GOLD STAR, SILVER STAR, AND IMPROVEMENT CITATIONS

The Gold Star Award is the top award a chapter can be nominated for and is presented for overall excellence. Guideline areas used in determining eligibility include scholarship, chapter management, alumni relations, fraternity life, and information available from the province president, General Headquarters staff representatives, and university administrators.

The Silver Star Award is an honorable mention excellence award with slightly less demanding criteria than that of the Gold Star Award. Qualification for this award still requires excellence in overall operations with slightly lower requirements needed in scholarship, chapter management, alumni relations and community service. Chapters nominated for the Gold Star Award which fail to meet the criteria are automatically placed in contention for the Silver Star Award.

The Improvement Citation is awarded to chapters that have demonstrated outstanding improvement in three of seven possible areas over their previous performance. Areas include scholarship, finances,

recruitment, Phikeia education, alumni relations, community service, and fraternity life. Information available from the province president, General Headquarters staff representatives, and university reports is also utilized. *NOTE:* A chapter is not eligible to win an improvement citation two years in a row.

ELIGIBILITY AND APPLICATION:

- ❶ All chapters are eligible for these awards.
- ❷ The application must be submitted to GHQ and postmarked no later than May 1.
- ❸ **NEW!!! No nominations are needed.**
- ❹ Each report **must be** co-signed by the province president and chapter advisory board chairman.
- ❺ Each application must include a letter of support from the Dean of Students, Greek advisor (except for those Canadian chapters located at schools without a Greek advisor), or university official responsible for advising Greek organizations.

PHI DELTA THETA FOUNDATION

The Phi Delta Theta Foundation annually awards scholarships to undergraduate members and graduate fellowships to Phis who are enrolled in graduate or professional schools. The information that follows concerning the criteria for the grants applies to typical scholarships and fellowships. Certain restricted scholarships and fellowships may have additional or different criteria. That additional information is distributed to applicable chapters each year.

CRITERIA FOR UNDERGRADUATE SCHOLARSHIP GRANTS

1. All of the scholarships are restricted to undergraduate students. A candidate for an undergraduate scholarship must be a member of Phi Delta Theta, currently enrolled in college, who in June will have completed two or more years of study.
2. The scholarship recipient must return to the College or University where his chapter is located for at least one additional academic year as a full-time undergraduate student, during which time he must be an active participant in chapter affairs.
3. The candidate should be the brother who, in the eyes of his fellow chapter members, best exemplifies the teachings of the Bond of Phi Delta Theta. His accomplishments in the following areas should be considered: scholarship, chapter service, campus activities and honors, and community involvement. Rectitude, leadership, and character should also play an important role in the selection process.
4. The candidate must be in good financial standing with the chapter. He must not be in arrears to the chapter for any financial obligation including -- but not limited to -- dues, fees, room, or board.
5. Reaching as many deserving students as possible is one of the goals of the Foundation scholarship program. Thus, any student who has previously received an undergraduate scholarship from the Foundation is ineligible to receive another award.

The Scholarship Committee will make recommendations to the Foundation Trustees. The Trustees will select all scholarship recipients from the nominations submitted. The decisions of the Trustees will be final.

NOMINATION REQUIREMENTS

Unless otherwise instructed, a chapter may nominate only one member. The chapter should provide the name of the undergraduate scholarship nominee by January 31. The chapter nominee must provide typewritten or computer-generated material, and send the nomination packet no later than April 1. High school activities are not relevant and should not be mentioned.

A candidate's credentials will be considered by the judges only after all of the materials listed below have been received by the Foundation office.

1. Award Nomination form
2. * Letter of Nomination signed by two principal chapter officers. Stating that a man is the chapter's nominee -- unsupported by the reasons he was selected -- is not adequate.
3. Statement of Financial Good Standing signed by the chapter treasurer.
4. Latest official transcript of grades from the Registrar's Office. Transcript must bear the seal of the College or University and must arrive in a sealed envelope. The candidate's cumulative grade point average must be clearly stated.
5. A photograph of the candidate in a coat and tie.
6. * Letter of recommendation from a College or University official. This may be a professor, a dean, a faculty adviser, etc. The individual selected should be well acquainted with the candidate so that he/she can give a meaningful personal recommendation. This letter of recommendation must arrive in a sealed envelope.
7. * Letter of recommendation from the chapter adviser or province president. This letter must arrive in a sealed envelope.

Information on additional chapter or campus awards, offices and honors received by the candidate after April 1 should be sent to the Foundation office as supplements to the nomination. It is important for all chapters (especially those on campuses that elect officers or present honors and awards after April 1) to take advantage of the opportunity to submit additional information.

* Letters should cite specific accomplishments and achievements of the nominee. Factors such as moral rectitude, leadership, and character should also be addressed in letters of recommendation.

Fellowships for Graduate Students

Each year the Foundation offers a number of graduate fellowships to graduate or professional students. The grants are for graduate students in any chosen field.

QUALIFICATIONS

1. An applicant must be a member in good standing of the Fraternity.
2. He must currently be a graduate student or he must have completed his undergraduate work by June 30 and begin graduate school in the fall.
3. Selection is based upon academic excellence, campus and community activities, and Phi Delta Theta involvement.

Men who have received an undergraduate scholarship from the Phi Delta Theta Foundation are eligible to receive a graduate fellowship and are encouraged to apply. However, once a student has received one graduate fellowship, he is not eligible to receive a second one.

APPLICATION PROCEDURES

Completed application forms, all supporting materials, and the required letters of recommendation should be mailed to the Foundation by May 1.

A candidate's credentials will be considered by the judges only after all of the materials listed below have been received by the Foundation office.

1. Fellowship Application Form.
2. Official transcript(s). Current graduate students submit their final undergraduate transcript and their latest graduate school transcript. Current undergraduates submit their latest undergraduate transcript. All transcripts must bear the official seal of the college/university and must arrive in sealed envelopes.
3. A copy of the official statement of graduate school acceptance.
4. Three letters of recommendation. Two of the letters must be from members of Phi Delta Theta. Letters should cite specific accomplishments and achievements of the applicant. Each letter should arrive in a sealed envelope.
5. Photograph of the applicant in a coat and tie.

Francis D. Lyon Scholarship

The Trustees of the Phi Delta Theta Foundation annually award **Francis D. Lyon Scholarships** to students of film. Mr. Lyon had a distinguished motion picture and television career as a film editor, director and producer. In 1948, he received an Oscar from the Academy of Motion Picture Arts and Sciences for best film editor for the movie, *Body and Soul*. A member of Phi Delta Theta Fraternity at UCLA, Lyon established this scholarship in 1996 to assist students who shared his passion for making films.

The fund is an unrestricted fund which means individuals who are not members of Phi Delta Theta Fraternity are eligible to receive the scholarship and are encouraged to apply.

The first Francis D. Lyon Scholarship was presented in 1997-1998 academic year. The award was a grant of **\$3,000**. In recent years two \$3,000 Lyon Scholarships have been provided annually.

Students of Film Making will be given first priority for the award. Should a qualified student of Film Making not apply, the scholarship will be awarded to a student in another field of study. **Priority will be given to students in fields similar to or related to Film Making such as Speech, Theater/Drama, Communications, Photography, Entertainment, and especially Writing.**

The successful student need not be majoring in Film Making or in one of the above similar/related fields to apply for the award. He/she must, however, express a passion for and demonstrate talent in the named discipline. A mere interest is not sufficient for consideration.

The student should have a demonstrable need for financial assistance.

To receive the award, the student must have completed two full years of college by June. He/she must be enrolled in college for the full academic year.

Both undergraduate and graduate students are invited to apply.

The first criteria for selecting the recipient will be evidence of **Talent**. The second consideration will be **Academic Excellence**. The applicant's entire academic record will be evaluated although emphasis will be placed on his/her record in the named discipline. The third area will be **Financial Need**. Other areas that will be considered are: **Activities/Achievements Outside the Classroom in the area of Film Making or in the Named Discipline, Other Campus Activities and Honors, Leadership, Character, Community Service.**

A member of Phi Delta Theta Fraternity who applies for the scholarship must be in good standing financially with his chapter in order to receive consideration.

The members of the Francis D. Lyon Scholarship Selection Committee will make their recommendations to the Trustees of the Phi Delta Theta Foundation. The Trustees will select the recipients of the scholarship from the applications submitted. The decisions of the Trustees will be final.

PHI DELTA THETA FRATERNITY

Fall Report Packet

Dear Brother President:

This Fall Report Packet is designed to take care of various administrative tasks early in the school year. New items for this report are the submission of initiation records and Phikeia biographical data cards to ensure proper record-keeping. We included initiation record forms and several Phikeia biographical data cards in your chapter's fall supplies packet that should be referenced for this report. One sample biographical data card and another initiation record have been inserted in this document for your convenience.

Also keep in mind this report is worth 18 General Headquarters points which will be applied to the Gold Star Award, the GHQ Trophy, and several other award criteria, so timely submission is crucial.

As the president, you will be required to complete and postmark this packet by **October 15th**. In this packet you will find instructions, the return address to send it to, as well as the actual report.

The other reports include the Risk Management Affidavit and the Chapter Officers List. Both of these documents are crucial in the proper administration of your chapter. Simply complete all of the information on the page (front & back) and return it to the General Headquarters as soon as possible.

Please review the instructions carefully on the blue initiation form. Remember to submit this form even if your chapter is currently up-to-date with General Headquarters.

Good luck with the fall term!!! We are confident the upcoming academic year holds much promise and prosperity for you, your chapter and indeed, the Phi Delta Theta International Fraternity. If I can be of assistance, please do not hesitate to contact me at the General Headquarters.

Yours in the Bond,

Director of Chapter Services

THIS REPORT IS WORTH A GRAND TOTAL OF 18 GHQ POINTS

INSTRUCTIONS FOR THE FALL REPORT PACKET

Risk Management Affidavit

- PURPOSE

The purpose of this affidavit is to ensure the chapter officers have a thorough understanding of the risk management policies of Phi Delta Theta. It is expected that each member of the chapter have a thorough knowledge and understanding of the risk management policies.

- INSTRUCTIONS

Simply read the requirements on the report and plan to accomplish each of these tasks. Once you have completed a certain section, check it off so you know it has been completed. Once all of the requirements have been checked off, have each officer sign on the space provided at the bottom of the page. In addition, the chapter advisory board chairman's signature and the date the report was finished will be required for the document to be complete.

Chapter Officers List

- PURPOSE

To ensure quality communication with your chapter and chapter advisory board chairman, we require the Chapter Officers List. With the Chapter Officers List, we can keep you up-to-date on the happenings of the Fraternity. Also, at certain times, mailing of various parcel items and such is required; therefore correct addresses are crucial to our operations. This is the simple, yet imperative reason for the Chapter Officers List.

- INSTRUCTIONS

Visit <http://myservices.phideltatheta.org> and enter in the same login information as PDT Daily. If you've never visited, create a new account. Select your chapter and scroll down to the Chapter Contacts. Select the link: 'Click here to update the Chapter Officer Roster.' Select a new officer from the drop down menu and, when you are finished making all changes, click the save changes button at the bottom of the screen. Be aware that the changes may take up to two hours to reflect on the page.

Initiation Record & Phikeia Biographical Data Cards

- PURPOSE

To ensure General Headquarters has accurate and up-to-date membership records for your chapter. This ensures your new brothers receive their membership card and membership certificate in a timely fashion. This also helps to ensure your membership roster is correct for insurance and membership dues billing.

- INSTRUCTIONS

Initiation Record – Return to the section where you entered the Phikeia Biographical Data Cards. The roster you submitted originally has been approved. Assign each person a Bond number (remember never to skip a Bond number), and enter the date of initiation. Your chapter will be sent the badge(s) and billed at the normal rate of \$25/badge. If one of your Phikeias failed to be initiated, please clear that that persons name from your chapter roster and give a brief description of why he was not initiated.

Phikeia Biographical Data Cards – Visit <http://pdttdaily.phideltatheta.org>. Enter the site and scroll down to the Phi Business heading. Click the New Member Roster Link. You will be asked to sign in again to verify your position in the Fraternity. Select the link 'Click here to create a new blank New Member Roster. Select the link 'add new member.' Fill out all necessary information and click the 'add to roster' button. After you've added all of the new members, click the submit roster button once and then click the submit roster button that appears. The roster will be sent to GHQ for approval – approval is granted within 48 hours of submission.

PHI DELTA THETA FRATERNITY

Risk Management Affidavit

As a member of Phi Delta Theta, I acknowledge by my signature below that I have read and agree to abide by the Fraternity's policy on hazing and the FEA Statement on Hazing. I further understand that, according to the risk management policies of Phi Delta Theta, our chapter facilities and property are to be alcohol-free. I also agree to review and explain these policies to any new member or Phikeia.

I am committed to upholding these policies as part of my obligation as a member of Phi Delta Theta. I also understand that alleged or suspected violations of the risk management policies will lead to an immediate investigation to be conducted by the General Fraternity. If it is determined a violation of policy did occur, I understand that the General Council may take, but is not limited to, the following actions: suspension of the Chapter's charter, suspension or expulsion of members and/or the removal of officers from office.

Phi Delta Theta Risk Management Policy on Hazing

No chapter or member of Phi Delta Theta shall indulge in any physical abuse or undignified treatment (hazing). Hazing is defined as: "any action taken or situation created, intentionally or unintentionally, whether on or off fraternity premises, and whether with or without the consent of the persons subjected to the action, which produces mental or physical discomfort, embarrassment, harassment, or ridicule." Such activities and situations include: paddling in any form, creation of excessive fatigue, physical and psychological shocks, quests, treasure hunts, scavenger hunts, road trips, or any other such activities carried on outside the confines of the chapter facility, wearing apparel in public which is conspicuous and not normally in good taste, engaging in any public stunts and buffoonery, morally degrading or humiliating games and activities, late work sessions which interfere with scholastic activity, and any other activities which are not consistent with fraternal law, ritual, or policy with the regulations and policies of the educational institution.

Fraternity Executive's Association (FEA) Statement on Hazing

The association defines hazing as any action taken or situation created, intentionally, whether on or off fraternity premises, to produce mental or physical discomfort, embarrassment, harassment, or ridicule. Such activities and situations include paddling in any form; creation of excessive fatigue; physical and psychological shock; quests, treasure hunts, scavenger hunts, road trips, or any other such activities carried on outside the confines of the house; publicly wearing apparel that is conspicuous and not normally in good taste; engaging in public stunts and buffoonery; morally degrading or humiliating games and activities; late work sessions that interfere with scholastic activities; and any other activities that are not consistent with fraternal law, ritual, or policy or the regulations and policies of the educational institution.

Further, the chapter officers agree to ensure each of the following is completed:

- The Chapter President shall read the Risk Management Policies, Section 135 of *The Code*, and the "Message From the President of the General Council" in their entirety during a chapter meeting and a Phikeia meeting at the beginning of each academic term.
- A copy of the Risk Management Policies, Section 135 of *The Code*, "The Message From the President of the General Council" and *The Statement on Standards of Responsibility* shall be posted at the beginning of each academic term on the chapter bulletin board or other appropriate place within the chapter facility for a period of not less than two weeks.
- All social functions sponsored by the chapter will adhere to the risk management policies of Phi Delta Theta Fraternity and the host institution. Also, all social events will adhere to all applicable federal, state and local laws and ordinances.
- The chapter shall develop a written Phikeia education program before the beginning of the Phikeia education period. This program shall show in detail the activities planned and the responsibilities of the Phikeia and initiated members, from formal pledging to initiation.
- The Chapter President shall review the crisis management plan with the members of the Executive Committee at the beginning of each academic term.
- The undersigned officers recognize their duties to

uphold the laws, rules, regulations and policies of the Phi Delta Theta Fraternity.

President

Vice President

Treasurer

Risk Management Chairman

Recruitment Chairman

Phikeia Educator

Social Chairman

Chapter Advisory
Board Chairman

House Manager
(if applicable)

Chapter Designation (i.e. Ohio Alpha)

Date Completed

	Bond #	Signature	Date
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____
8.	_____	_____	_____
9.	_____	_____	_____
10.	_____	_____	_____
11.	_____	_____	_____
12.	_____	_____	_____
13.	_____	_____	_____
14.	_____	_____	_____
15.	_____	_____	_____
16.	_____	_____	_____
17.	_____	_____	_____
18.	_____	_____	_____
19.	_____	_____	_____
20.	_____	_____	_____
21.	_____	_____	_____
22.	_____	_____	_____

	Bond #	Signature	Date
23.	_____	_____	_____
24.	_____	_____	_____
25.	_____	_____	_____
26.	_____	_____	_____
27.	_____	_____	_____
28.	_____	_____	_____
29.	_____	_____	_____
30.	_____	_____	_____
31.	_____	_____	_____
32.	_____	_____	_____
33.	_____	_____	_____
34.	_____	_____	_____
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36.	_____	_____	_____
37.	_____	_____	_____
38.	_____	_____	_____
39.	_____	_____	_____
40.	_____	_____	_____
41.	_____	_____	_____
42.	_____	_____	_____
43.	_____	_____	_____
44.	_____	_____	_____

Failure to submit this report by December 1 and March 1 will result in up to a 10% debit for your chapter on next year's liability insurance bill.

Problem Chapters and Crisis Situations

CHAPTER DEVELOPMENT STANDARDS AND GUIDELINES

This will serve as a guide for General Council action regarding chapter development by providing standards and guidelines for methods and techniques available to the General Council for use regarding undergraduate problem situations. The intent is to approach these problem situations in a constructive and educational manner. With all other actions of recourse exhausted; however, *The Code* of Phi Delta Theta grants the General Council authority to discipline chapters.

Section 7. Duties. The General Council shall be the legal representative of the Fraternity and custodian of the property of the Fraternity. The General Council shall interpret and administer all laws of the Fraternity and make such policies and appointments as may be necessary to promote general welfare of the Fraternity.

Section 64. Chapter Suspension. The General Council, after full investigation and for just cause, shall have power to withdraw from a chapter the right to exercise all or any of its functions, except representation in the next General Convention. Representation of the suspended chapter at the General Convention shall include the right of members of the suspended chapter to be admitted to the General Convention and to speak, but no representative of the suspended chapter may vote or offer motions.

The following pages will provide some assistance in handling crisis situations. A sample terms of escrow is an idea of the stipulations a chapter must accomplish before returning to good standing.

Chapter Crisis Management Plan

This crisis management plan has been developed to aid chapters in case of an emergency. A fraternity emergency situation may be prompted by any of the following occurrences:

- An accident resulting in severe or fatal injuries, or a member attempting or committing suicide.
- A fire or explosion in the fraternity chapter facility.
- Substantial damage to the chapter facility caused by a storm, flood, tornado, or earthquake.
- Deliberate damage to the chapter facility from malicious mischief, sabotage, or a riot.
- Chapter member, members, or the entire chapter being accused of violating local, state, federal, or university/college laws, rules, or regulations.

There may be other types of emergencies not identified above. In all cases, these guidelines should be followed.

GUIDELINES:

- 1) **The chapter president is in charge** during all emergency or crisis situations until he is relieved by the chapter advisory board chairman, house corporation officer, or General Fraternity representative. In the absence of the president, the next highest-ranking chapter officer should assume these duties.
- 2) **Contact the proper authorities** (i.e. police, fire, ambulance, etc.) immediately. These emergency telephone numbers should be posted by each chapter house telephone.
- 3) **The building should be closed and secured immediately** if the emergency has occurred in or around the chapter facility. Only members, appropriate supervisory personnel, and the proper authorities should be allowed admittance.
- 4) **The president should contact the Crisis Management Help-Line at 1-(877) 563-1848.**
- 5) **The president should notify each of the following individuals or offices within one hour of the emergency.**

CRISIS MANAGEMENT HELP-LINE: 1-877-563-1848
--

	Name:	Business Phone:	Home Phone:
ΦΔΘ General Headquarters:	Director of Chapter Services	(513) 523-6345 ext.256	1-877-563-1848
Chapter Advisory Board Chairman:	_____	_____	_____
House Corporation President:	_____	_____	_____
Province President:	_____	_____	_____
Phi Delta Theta's Insurance Agent:	James R. Favor & Co.	(800) 344-7335	
Greek Advisor/University Official:	_____	_____	_____

- 6) **The president should call a meeting of all members to inform them of the emergency** and to review this crisis management plan.
- 7) **All members should be instructed to make no statements, comments, suggestions, or remarks to the media.** The president is the only spokesman for the chapter until he is relieved of those duties as described in guideline #1 above. Refer to "How to Work with the Media in a Crisis" for assistance.
- 8) **Sample Media Statement which can be used:** "This is an unfortunate and regrettable event. The Fraternity is cooperating fully with all interested parties. Further information will be given promptly when we have fully completed our investigation."

Sample Conditions of General Council Probation

PHI DELTA THETA FRATERNITY CONDITIONS OF PROBATION FOR THE OHIO DELTA CHAPTER
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The terms of Probation are based on the *Statement on Standards of Responsibility* issued by the General Council of Phi Delta Theta on May 3, 1986. The statement outlined 14 areas that chapters and members of our organization should strive to attain.

The Ohio Delta charter shall be placed on Probation until such time as the General Council determines significant progress and advancement has been made in the chapter's operations. The following conditions shall be followed unconditionally with no deviation from them. Any deviation from the following conditions will be a violation of the terms of the Probation and the charter of Ohio Delta will then be suspended.

1. ***Intellectual Development***

- A. A chapter wide scholarship program will be implemented and submitted to General Headquarters for review.
- B. The program will include time management skills, guest speakers on scholarship, recognition for scholastic achievement, and an organized tutor system.
- C. Phikeias must meet a 2.5 or higher GPA during their pledgeship period in order to be initiated.
- D. All members must maintain a 2.5 cumulative GPA or they will lose their voting privileges the following semester.
- E. All officers will have a 2.5 cumulative GPA in order to hold an office.
- F. The chapter shall seek the aid of all campus resources in order to develop and execute these scholastic conditions.

2. ***Membership Recruitment***

- A. The recruitment program shall be approved by the chapter advisory board chairman.
- B. The program will be in compliance with current IFC standards which includes a non-alcoholic recruitment program.
- C. A recruitment committee will be formed and will outline qualitative as well as quantitative goals for membership recruitment.
- D. A recruitment workshop will be conducted at least once a semester with 100% chapter/Phikeia attendance.

3. ***Membership Education***

- A. The chapter will adhere to the *Phikeia Program* as the sole mean of Phikeia education at Ohio Delta. Not later than the following Wednesday of each week of the eight week program, the Phikeia educator, co-signed by the president of the chapter, shall by written report to the chapter advisory board chairman and the province president, report on the specific Phikeia education at Ohio Delta.

- B. Any Phikeia group activities outside the chapter house shall be submitted to the chapter advisory board chairman in writing for approval at least ten (10) days prior to the activity.
- C. Initiation will be coordinated through the chapter advisory board chairman and province president.
- D. The chapter will organize and sponsor a campus-wide alcohol education program, approved by the province president and the university administration, and organized with the Interfraternity Council. All chapter members, including Phikeias, will be expected to attend this program.
- E. All chapter members will sign an alcohol-free housing affidavit, developed by the General Headquarters, signifying the understanding of and commitment to this policy.
- F. Each member will endorse a membership contract which outlines minimum requirements for active membership, particularly relating to academic performance, financial obligations, Phikeia education, risk management policy compliance, and campus conduct. This contract will be created by the Executive Committee and approved by the chapter advisory board chairman, the province president, and General Headquarters PRIOR to implementation.

Further, this membership contract will include compliance checks or “spot checks” to ensure the risk management policies of the Fraternity are being adhered to. Alumni members of the Fraternity including the province president, chapter adviser, and General Headquarters staff will conduct these unannounced checks.

4. *Financial Management*

- A. The treasurer and finance committee will submit a budget for consideration by the membership each semester.
- B. The treasurer will report weekly on the financial status of the chapter to the chapter advisory board chairman.
- C. All monies owed to GHQ must be remitted immediately. All new balances must be paid within 30 days.
- D. All bills by members must be paid promptly. No delinquencies will be permitted in accordance with the chapter’s bylaws. Financial delinquency will result in suspension and eventual expulsion from Phi Delta Theta if not remedied.

5. *Alumni Relations*

- A. At least one alumni newsletter per semester will be published.
- B. A Founders Day banquet will be conducted at least once a year.
- C. All recruitment recommendations from alumni must be acknowledged in writing.
- D. The chapter must host one alumni event during the fall semester. This function will follow the social rules stipulated in the terms of escrow.
- E. The chapter, along with support from the province president, will recruit enough alumni to form a new chapter advisory board consisting of a minimum of five members. Those Ohio Delta members on the board previously during the time of the incident resulting in this document are not allowed to remain on the board unless approved by the General Headquarters.

6. *Social Program*

- A. All Risk Management Policies of Phi Delta Theta will be strictly followed and enforced.
- B. The chapter will not be permitted to host any social functions with alcohol during the fall 2004 semester. The chapter will be allowed to host two social activities (non-alcohol) during the fall 2004 semester.
- C. The chapter will comply with the event planning program. This will be mandatory participation. Failure to participate will be a violation of the conditions of escrow.
- D. IFC guidelines and the policies of College of Wooster regarding social programming shall be implemented when social privileges are restored.
- E. No illegal drugs will be allowed at any chapter function, and no member of Ohio Delta will be permitted to use illegal drugs or banned substances. Doing so will result in immediate discipline and possible expulsion.

7. *Property Management*

- A. Cleaning schedules and the overall cleanliness of the chapter facility will be enforced at all times.
- B. Updating the bylaws may be necessary to reflect cleaning schedules and enforcement.
- C. Both members & Phikeias will have equal responsibilities in the house maintenance program.

8. *Obligation to Human Service*

- A. The chapter shall each semester of the probation period document a minimum of five hundred (500) hours of community service for local organizations with a minimum requirement of ten (10) hours per member, for a total of two thousand (2,000) hours for the charter escrow period. Any hours documented beyond the ten (10) hour minimum per member may be credited forward. The organization(s) shall be approved in advance by the province president or the chapter advisory board chairman for such purpose.
- B. All active members and Phikeias will participate in at least two (2) community service projects per semester. One will be planned for April, Phi Delta Theta's community service month.
- C. The chapter will embrace a large scale philanthropic event to support a worthwhile charity. Suggested is the ALS Society of American (Lou Gehrig's Disease).

9. *Ritual*

- A. A complete set of ritual equipment will be obtained if any items are missing.
- B. Ritual will be used at each weekly meeting, as per *The Code*.
- C. *The Bond* will be read once a month while school is in session, as per *The Code*.
- D. The warden will conduct a ritual review twice a semester. Also, a post-initiation ritual review will be executed for new brothers.
- E. All additional ritual ceremonies will be utilized when appropriate.

10. *Discipline*

- A. All members and Phikeias who deviate from the standards of Phi Delta Theta which include *The Bond*, ritual, *The Code*, and the chapter bylaws will be disciplined.

- B. The chapter shall form a judicial board which will handle all internal disciplinary problems. This board will be led by the warden of the chapter and shall meet when appropriate.
- C. This judicial board will be formed using the guidelines outlined in the officer manuals provided by General Headquarters. A copy of the board's duties, responsibilities, and procedures for discipline will be integrated into the chapter bylaws and submitted to the chapter advisory board chairman and province president for review.

11. *Organizational Responsibility*

- A. The chapter officers shall facilitate a retreat at the beginning of each semester for the purpose of developing goals and objectives by utilizing *The Chapter Operations Assessment*. The minutes of the retreat shall be forwarded to the province president.
- B. A copy of the chapter minutes will be sent to the chapter advisory board chairman and the province president.
- C. The executive committee will meet weekly and establish a written agenda for each chapter meeting.
- D. A committee system will be established and expanded where needed.
- E. The bylaws of the chapter shall be revised to reflect the academic and financial requirements for membership, campus conduct, expectations, anti-hazing provisions, risk management requirements, and other necessary operational duties as outlined in the new reality of Ohio Delta. These bylaws shall be distributed to each member and Phikeia and their contents strictly enforced.

12. *Membership Involvement*

- A. Attendance will be recorded at chapter meetings and Phikeia activities.
- B. Any member pledged failing in his commitment will be addressed and action taken to improve participation or consideration given toward separation. The Phikeias will be disciplined only through the Pallas Committee as outlined in the *Phikeia Program*.
- C. Each member of Ohio Delta will be involved in at least one (1) other campus organization.

13. *The General Fraternity*

- A. A written monthly report detailing progress on the conditions of Escrow will be submitted to the province president, chapter advisory board chairman, and the General Headquarters by the chapter president.
- B. Through province president and leadership consultant visits, follow-up supervision will be provided to ensure implementation of goals and activities.
- C. The chapter shall send at least one (1) officer delegate to all General Fraternity meetings.
- D. The chapter shall accumulate all possible General Headquarters points for the proper submission of all remaining reports on time. There will be no exceptions to the timely submission of reports.

14. ***The Institution***

- A. The president will schedule monthly meetings with the Greek Advisor at College of Wooster.
- B. The chapter will be a positive contributor to the overall community of College of Wooster.

Over the period of charter escrow volunteers, alumni, university and fraternity officials will carefully monitor the efforts of the chapter. After two years have passed and it has been determined that the chapter has responded in an acceptable manner, the charter will be removed from Escrow by the General Council and a probationary period will exist whereby continued progress and advancement is expected.

Sample Letter to Disciplined Individuals

Date _____

Mr. _____

Dear Mr. LAST NAME:

It is my duty to inform you that as a result of the membership interviews conducted by the Alumni Interview Team, consisting of various Ohio Delta alumni, Fraternity volunteers and a General Headquarters representative, that you have been suspended from the Phi Delta Theta International Fraternity for (twelve or six) months effective _____. Due to the chapter's deteriorating state of operational efficiency, and disregard for the policies and standards of Phi Delta Theta, this action was deemed necessary. It is essential to the future existence of Ohio Delta that the chapter be comprised of individuals who will embrace the changes needed to be made within the chapter and who recognize the true challenges that are currently choking this historic chapter's development and growth.

The effect of suspension, taken from *The Code of Phi Delta Theta* is as follows:

A person suspended from membership in Phi Delta Theta shall lose all rights, privileges, and immunities of membership in Phi Delta Theta during the period of his suspension. He may not hold office, vote, or attend chapter meetings. He may not reside in the chapter house without written permission of the province president and the chapter adviser.

In addition, as a result of the recent destruction which occurred in the chapter house facility, the General Fraternity and the College of Wooster are both conducting investigations into the matter. Individuals who are responsible will be disciplined further.

Should you have any questions concerning this disciplinary action, please contact me here at the General Headquarters.

Yours in the Bond,

Director of Chapter Services

c: Chapter President
Advisor to Fraternities

Chapter Advisory Board Chairman
House Corporation

Province President
General Council

The Province President and Expansion

General Procedures to Establish a Colony

When Phi Delta Theta is approached by an interested party regarding expansion, the following procedure is generally followed.

1. All inquiries about expansion are directed to the General Headquarters. They are acknowledged and sent to the Survey Commission within whose geographical area of responsibility the inquiry originated for investigation.
2. The Survey Commission may approve an institution after investigation determines that it meets Phi Delta Theta requirements.
3. The province president is advised of the inquiry. He, or a GHQ staff member, may be requested by the Survey Commission to make a Probe visit.
4. Alumni are requested to hold a meeting to consider their attitude toward the expansion prospect and, if favorable, to appoint a colony committee and one alumnus to act as the colony coordinator/adviser.
5. An aggressive recruitment effort is implemented by the Fraternity. The goal is to form an interest group of 30-40 men who desire to form a chapter of Phi Delta Theta.
6. The Survey Commission may recommend to the General Council the organization of a colony when all local conditions seem favorable and when the prerequisites for colony recognition have been met by the interest group.
7. The General Council may recognize the group as a colony which may then be developed and inducted through the help of alumni, the colony coordinator/adviser, GHQ staff, officers of the institution, the Province President, and the Survey Commission within whose area of geographical responsibility the colony is located.
8. Initiation and installation is accomplished when the colony is declared ready by fulfilling each chartering prerequisite, and by the votes of the chapters in its province, the province president, and the General Council. This process generally takes 12-18 months, although some groups develop more quickly.

Prerequisites for Receiving Colony Recognition

Colony status will be considered for a petitioning interest group when the following prerequisites have been address and sent in the form of a prepared petition to the General Headquarters.

1. A roster of membership of the interest group including:
 - A. Full name
 - B. Home and school addresses
 - C. Major field of study
 - D. Expected year of graduation
 - E. Previous term GPA & cumulative GPA
2. A copy of the interest group's bylaws
3. A list of officers
4. A mission statement which includes the interest group's goals and objectives
5. A letter from the Dean of Students, or appropriate administrative official, pledging support for the interest group and a colony of Phi Delta Theta
6. A membership of at least 25 men is preferable, but in some circumstances a smaller group may be considered
7. A chapter advisory board of 3-5 members is in place.
8. A report indicating the ability of the interest group to collect \$100 in colony dues from each member at the time of the group's induction. These dues shall be paid to the General Headquarters and will be prorated as follows:

A. GHQ resource materials/pledging dues/colony badge/Phikiea Manual	\$ 75
B. Chapter paraphernalia (total cost of about \$2500)	<u>\$ 25</u>
	\$100
9. A report indicating the ability of the group to pay \$75/man for liability insurance.
10. Signed copy of the Risk Management Affidavit.

Upon receipt of the above items, the Province President and Survey Commission will consider the eligibility of the interest group. With the unanimous approval of the General Council, colony status will be granted.

Alumni Procedures to Organize a Colony

Alumni living near a collegiate institution where a chapter of Phi Delta Theta is not in existence will find the following procedures helpful in the establishment of a colony.

1. All activities and correspondence must be coordinated with GHQ and the province president.
2. It is suggested alumni have an organizational meeting to select colony establishment leaders. This group may be composed of interested alumni or a previously organized alumni club. The General Headquarters can supply a list and/or self-adhesive labels of all members of Phi Delta Theta living in the geographical area.
3. The primary leader for the organization of a colony is the colony coordinator. Additional leaders might be selected to: (1) recruit college men to become members of the colony; and (2) coordinate activities of the colony after it is established.
4. The recruitment coordinator may solicit recommendations for membership in the colony from all members of Phi Delta Theta living in the area. He may also solicit recommendations of non-fraternity undergraduates for membership in the colony from the IFC and Panhellenic officers, the dean of students office, and any student groups which might enroll desirable men (colony membership is comprised of full-time male students of the college or university).
5. The alumni and/or GHQ staff member will choose the men who are founders of the colony. After the colony is established, the members should choose the new men.
6. After the colony is fully established, biographical data cards, colony dues (\$100), and an insurance payment (\$75) for each member should be sent promptly to GHQ.
7. A representative of the GHQ staff is available to assist alumni with the establishment of the colony and, after installation of the colony, will begin regular visits for the purpose of preparing men for initiation and installation of the colony at some future date.
8. The representative from GHQ will consult with the chapter advisory board and elected Phikeia Educator to formulate a colony Phikeia program and an action plan for the academic year. The action plan should outline goals, priorities, responsibilities, and deadlines for all the colony members to monitor.

Prerequisites for Receiving a Charter

A colony will be awarded a Phi Delta Theta charter upon the receipt of a formal petition which addresses the following prerequisites. The petition must include accurate documentation which lends evidence that the noted prerequisite has been fulfilled. Once the petition is completed, a copy should be forwarded to the province president and the General Headquarters.

1. It is preferred that the colony have a membership that, at a minimum, equals the campus fraternity average (colony member and colony Phikeia). However, a colony membership of at least 35 is recommended, and 40-50 is strongly encouraged. A membership roster must be included in the petition and shall identify the following:
 - A. Full name
 - B. Home and school addresses
 - C. Major field of study
 - D. Expected year of graduation
 - E. Previous term GPA and cumulative GPA
2. The colony must provide information about housing accommodations, meeting facilities, sites for social functions, and locations of interaction.
3. The colony must achieve an overall academic standard which meets college/university requirements for all fraternities and is acceptable to the Phi Delta Theta principle of sound learning. Include academic statistics on the campus and the fraternity system.
4. The colony must submit all Fraternity reports (following the date of colony induction) required of colony officers. Refer to the Red Letter Days Calendar for specific report information.
5. The colony officers must submit the monthly progress reports to the General Headquarters. Include copies of each report in the petition.
6. The colony must develop, implement, and submit copies of written programs in at least the following areas:
 - A. Membership recruitment
 - B. Scholarship
 - C. Alumni relations
 - D. Risk management
7. The colony must implement The Phikeia Program for its colony Phikeias.
8. The colony must develop and utilize resource files for each officer. These resource files shall contain a written job description, chapter and individual goals and objectives, colony bylaws, officer report forms, manuals and resources provided by the General Headquarters, and any other pertinent information. A sample resource file for at least one colony officer shall be included in the petition.

9. Each colony member must have passed an examination testing his knowledge of all aspects of the Fraternity and the colony. Include a copy of the examination and documentation that each colony member has passed the said exam.
10. The colony must operate under a set of bylaws which are consistent with *The Code of Phi Delta Theta*. A copy of these bylaws must be included in the petition.
11. The colony must utilize *The Chapter Operations Assessment*. Copies of the program's Summary Analysis must be included in the petition for each academic term of the colonization.
12. The colony must have sufficient funds to underwrite all expenses associated with the initiation and installation ceremonies. An itemized accounting of the colony's financial condition must be included in the petition.
13. The colony must receive a favorable vote from the chapters in the province, the province president, the Survey Commission, and the General Council.

General Instructions Covering Installations

Important notice: This outline is designed to be of assistance in planning for the installation of a chapter. A representative of the Fraternity will help coordinate all arrangements and assist with the miscellaneous details.

1. The ceremonies in connection with the initiation and installation should take first priority in arrangements and the social functions should be made secondary.
 - A. Three days will be required for the installation, the second day of which will be given entirely to the initiation ceremonies. It is suggested that arrangements be made promptly for all who wish to be initiated when the chapter is installed. All colony alumni who cannot be initiated at that time should be initiated as soon as possible thereafter by the chapter. The General Council allows a period of one (1) year for such initiations, after which time the chapter must petition the General Council for special dispensation to initiate alumni members of the local fraternity or colony.
 - B. The place where the initiation ceremony is to be held should be reserved two months in advance of the ceremonies. It must be a place where absolute privacy is assured. The room must be large enough to accommodate the entire group and it should have an anteroom where the candidates may be prepared for initiation. A waiting room away from the initiation hall is also necessary. Four to five (4-5) hours will be required for the ceremony.
 - C. The installation of the chapter will take place on the morning or afternoon of the third day. One and a half (1 ½) hours will be required for the exercises which should take place in attractive surroundings such as a church, lodge hall, or college auditorium. Friends of Phi Delta Theta, including college/university representatives, student leaders, faculty, and families of members, may be invited to these exercises.

- D. Music, including an organ, organist, and chapter chorus, is desirable to help create the proper atmosphere at the installation exercises.
 - E. An installation banquet or luncheon on the third day serves as a perfect forum to celebrate the event.
 - F. An evening social function is typically held after the banquet to culminate the installation weekend.
2. The chapter must have a complete outfit of paraphernalia which has already been ordered through the General Headquarters. The paraphernalia should not be unpacked except by a member of Phi Delta Theta.
 3. All bona fide alumni of the colony shall be eligible for initiation. A list of such alumni, together with the complete list of undergraduate candidates, must be submitted to the General Headquarters of Phi Delta Theta at least two (2) weeks before the installation weekend. Every candidate for initiation, both undergraduate and alumnus, must have signed the prescribed biographical data card before the time of initiation.
 4. The local and nearby alumni of Phi Delta Theta should be ready to assist the chapter in all arrangements in connection with the installation, both in regard to the ceremonies and the social functions. Nearby chapters should be prepared to assist the installing group in connection with the initiation. The local alumni should be shown a copy of these installation instructions.
 5. The installing group will consist of several General Officers whose names will be made known to you well in advance of the installation date.
 6. Before the initiation of any member, he must pay to the colony treasurer a colony dues (\$100), an insurance payment of (\$75), and an initiation dues (\$225) which must be transmitted to the General Headquarters. A biographical data card must be on file at GHQ for each prospective initiate.
 7. Arrangements should be made to have photographs taken of various individuals and groups for publication, with the installation story, in *The Scroll*. Articles covering various phases of the installation should also be prepared for local papers.
 8. Any information desired that is not herein covered may be obtained in writing:

Probe Visitation Guide

Before you travel to the prospective institution, it will be necessary to do a little pre-planning. The following suggestions are to assist in your preparations and to help you get the most out of the Probe Visitation.

- _____ (6 weeks) Contact the General Headquarters to obtain a listing of all Phi Delta Theta alumni living in the immediate area of the institution.
- _____ (3 weeks) Make telephone calls to some of the alumni to determine any interest in assisting and to set up appointments with them during your visit.
- _____ (3 weeks) Establish an appointment time to meet with the institution's Greek Advisor, IFC officers, etc.
- _____ (3 weeks) Obtain any materials from General Headquarters which you may need to have during your visit and meetings (i.e. *Guide to Colony Organization*, marketing materials, Risk Management Policies, etc.).
- _____ (2 weeks) Establish an appointment with interested students on campus (if appropriate).
- _____ (1 week) Confirm meetings with Greek Advisor, IFC officers, students, alumni, etc.

THE REPORT

The Probe Visitation fact sheet should be completed in its entirety and should be accompanied by a thorough written report. In the written report you should attempt to discuss in some detail each of the following areas. Feel free to add your own opinions and comments.

1. General information about the university/college
2. General campus Greek situation
3. Summary of meeting with Greek Advisor
4. Level of alumni interest or commitment
5. Possible housing opportunities
6. Your summary and recommendations to the Survey Commission

To further assist in providing information, it would be helpful if you would include copies of the following items with your report:

1. Latest school or IFC recruitment publication
2. School or IFC risk management or alcohol policy
3. Latest scholarship rankings of fraternities
4. IFC constitution
5. General brochure about the institution
6. IFC expansion policies
7. Probe Visitation data sheet

**PHI DELTA THETA
PROBE VISITATION DATA SHEET**

INSTITUTION: _____ **CITY:** _____

VISITOR: _____ **DATE OF VISIT:** _____

COLLEGE/UNIVERSITY OFFICIAL'S NAME & TITLE: _____

GENERAL CAMPUS INFORMATION

Total undergraduate enrollment _____ Male undergraduate enrollment _____

Percentage of Greek students _____ Percentage of minority students _____

Number of fraternities _____ Average size _____ Number of sororities _____

List all fraternities who have expanded in the last 5 years:

- | | | |
|----------|----------|----------|
| 1. _____ | 4. _____ | 7. _____ |
| 2. _____ | 5. _____ | 8. _____ |
| 3. _____ | 6. _____ | 9. _____ |

Is Fraternity housing available? ____ Yes ____ No Number of fraternities with houses _____

Housing is owned by: ____ Fraternities ____ Institution

Recruitment occurs in: ____ Fall ____ Spring ____ Both

Number of men on campus who went through last recruitment _____ Number of men pledged _____

Average pledge/associate class size _____

Does school/IFC provide a recruitment brochure to incoming freshman? ____ Yes ____ No

All Men's Scholarship Average _____ All Fraternity Scholarship Average _____

Is school/IFC receptive to expansion? ____ Yes ____ No How long? _____

Is there a waiting list? ____ Yes ____ No How long? _____

Are there established expansion policies and guidelines? ____ Yes ____ No

If so, please include a copy.

ADDITIONAL INFORMATION TO CONSIDER:

1. Is the Greek system recognized by the campus administration? To what extent?

2. What is the attitude of the administration toward expansion of the Greek system?

3. Is the Greek Advisor a faculty member or graduate student? _____

4. What percentage of time does the Greek Advisor devote to Greeks? _____

5. What current problems are facing the Greek system (e.g. risk management, hazing, etc.)?

6. Does the institution or IFC/Panhellenic have a risk management or alcohol policy?
_____ Yes _____ No If so, please include a copy.

Please ensure this data sheet is forwarded to the General Headquarters with your written Probe Visitation report.

Mail to: Director of Expansion
Phi Delta Theta Fraternity
2 South Campus Avenue
Oxford, OH 45056

Components of the General Fraternity

The General Convention

The General Convention is held every two years in various cities throughout North America and serves our Fraternity as the supreme legislative and judicial body. It affects its own organization and elects the General Council to interpret and execute all of the laws of the Fraternity for the two-year period between conventions. Voting delegates include one delegate from each chapter, a delegate from each alumni club and the General Officers of the Fraternity. Many other fraternity members attend the convention and participate in its discussions and activities.

A special Chapter Advisory Board Chairmen's session is held at each convention. This session also provides an excellent opportunity for developing relationships among the participating advisers.

Since the General Council desires the participation of the Chapter Advisory Board Chairmen at the General Convention, the Fraternity covers the registration fees, hotel and banquet expenses. Travel expenses are the only fees not absorbed by the General Fraternity. Many of the past participating Chapter Advisory Board Chairmen have obtained additional funds from their chapter, the house corporation and local alumni clubs to cover travel and incidental expenses. Several of the participating Chapter Advisory Board Chairmen have had their local alumni club name them their delegate and, thus, become a voting delegate to the convention.

The General Officers Conference

During a three-day weekend in January or February, the general officers of the Fraternity hold their annual General Officers Conference to review the past General Council's decisions and to discuss the current problems being encountered by the Fraternity and by the chapters. The conference provides the province president with an excellent overall view of what is happening within Phi Delta Theta and the fraternity world and training to react to that world. At the same time, the province president may be requested to present the progress of the individual chapters within his province.

A Chapter Advisory Board Chairman should be prepared to provide any requested information to the province president for his presentation. In turn, the province president will have information available for each of his chapters on current General Council decisions affecting their operations.

Kleberg Emerging Leaders Institute

This conference takes place in Oxford, Ohio each summer. Our Kleberg Emerging Leaders Institute brings anywhere from 600-900 Phi Deltas to Oxford for a four-day leadership conference. Important fraternity topics are discussed and these emerging leaders are taught how to improve their chapter's operations. The conference also provides the attendees with the courage to bring change to their chapter. Two delegates from each chapter are invited, while a travel reimbursement is not provided, room and board is standard once the delegates arrive in Oxford.

Presidents Leadership Conference

The Presidents Leadership Conference was started in 2000. It is held annually in St. Louis due to its centralized location. Each chapter is asked to send their newly elected president to this conference. Each chapter delegate's travel, room, and board expenses are subsidized by the General Fraternity. The conference format is similar to the Kleberg Emerging Leaders Institute with individual chapter meetings and general session speakers, but differs in that it is a more business-like atmosphere. The curriculum balances how to be an effective chapter president with discussing leadership styles and traits and how that relates to their position.

Correspondence between the Chapter and General Headquarters

Phi Delta Theta is a service organization operating in the information age. The chapters in the realm of the Fraternity need servicing and that is what the General Headquarters provides to the brothers across North America. Numerous requests are processed at GHQ daily and a response is supplied immediately. The response is either over the telephone or through the mail, or via email.

When correspondence is mailed from the General Headquarters, the standard operating procedure is to copy the Chapter Advisory Board Chairman, Province President and campus official (if necessary). Depending on the circumstances, if the correspondence is referring to a monetary loan, then the Palmer Foundation is copied as well. Quite often the General Council representative in your area is copied also. As you can see, wide arrays of brothers receive copies of the various mailings from GHQ.

Of importance in this manual is the Chapter Advisory Board Chairman. When a letter or email is sent from the General Headquarters to your chapter, you are automatically copied. This keeps you informed of what it is the chapter has requested from GHQ, it provides you with information on what is included with the letter or email and it provides you with the insight that was shared by the GHQ representative. If it is a reminder of an upcoming due date, then you know well in advance of the time. If it is an overdue reminder, then you know who to go to in order to follow up on the material missing. Basically, the copied correspondence is to assist you in understanding what is going on between the General Headquarters and your chapter.

Also worth noting is the Leadership Consultant report following a visit to your chapter. A copy of the report is sent to the Chapter President, the campus official, Province President, General Council representative in your area, and the Chapter Advisory Board Chairman. The chapter President is encouraged to read the report at the next chapter meeting following receipt of the document. The Chapter Advisory Board Chairman can play a large role in this area as well. Ensuring that the report is read at a chapter meeting and following up on the recommendations made by the Leadership Consultant are two crucial areas. The officers of the chapter are often given recommendations to better fulfill their duties of their office. The Vice President should be following up on these recommendations and ensuring that his officers are attempting the suggestions left by the consultant. The Chapter Advisory Board Chairman can assist by following up with the Vice President.

Other mailings are distributed by the General Headquarters and they include:

1. *The Palladium Window* - An e-newsletter which is sent to undergraduates, chapter advisory board members, Greek Advisers, and parents.
2. *The General Officers Bulletin* - A quarterly e-newsletter sent to all General Officers from the desk of the Executive Vice President.
3. *The Scroll Extra* – An e-newsletter sent to all members on a monthly basis that provides current news and highlights of Fraternity activities between issues of *The Scroll*.

These various newsletters are created with the intent of keeping the brothers well informed of the current trends in the fraternity world and within Phi Delta Theta. The Chapter Advisory Board Chairman is emailed a copy of e-newsletters distributed from GHQ with the exception of the *General Officers Bulletin*.

Resources on the Phi Delta Theta Website

General Headquarters staff members can be reached via the Phi Delta Theta website at www.phideltatheta.org. Chapter officer manuals, forms, the Chapter Greatness Checklist, workbooks, guides, and many other resources can be found in the Resources section within the pages of phideltatheta.org under the Member tab. For an online “snapshot” of the chapters within your province, visit: www.omegafi.com and login to myPDT. To use these features, you need to establish your account. myPDT also allows you to update your record, and register for conferences.