

CHAPTER OPERATIONS BLUEPRINT

THINGS TO DO

Currently Do It	Will Do It	Done...	Goal-Setting
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter establishes written goals and each goal is assigned to an individual committee.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Executive committee and committee members establish written objectives and action plans to meet chapter goals.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Committees schedule events on planning calendars.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	In addition to general chapter goals, executive committee members and committee chairmen set individual goals.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Written goals are posted in a prominent place.

Focus on the Details

Chapter goals should be general, but their components specific. An example of a GOOD chapter goal is: 20 new members by October 15. The two most important aspects of the goal are that it is quantified and qualified, which means it has a specific dimension (20 new members) and a deadline (October 15).

After goals are set, each goal should be assigned to a specific committee, which establishes written objectives to meet the goal. Objectives should also be general with specific components, and should be assigned a coordinator. An example of a good rush committee objective to meet the goal of 20 new members by October 15 is: (1) Casino Night rush party on September 5 – Silvio Dante, Rush Chairman.

Committee objectives should be broken down into individual written action plans and assigned to individual committee members, e.g.: (1) Black Jack Tables, Roulette Wheel rented by August 30 – Christopher Moltisanti; (2) Refreshments, food by September 4 – Paulie Walnuts.

The final step in the process is to place all planned events onto individual planning calendars and a master chapter calendar available to all members.

THINGS TO DO

Currently Do It	Will Do It	Done...	Communications
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Phone lists and email lists are distributed to every member.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Weekly chapter newsletters listing the week's events, meetings, and activities are posted on the chapter bulletin board and/or distributed to each member.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	A term calendar with the entire chapter's activities over the course of the semester is posted in a prominent place. Individual copies are distributed to each member.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Weekly announcements are posted in prominent locations in the chapter house.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Typed minutes of all chapter meetings are provided to each member.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	If the chapter has a meal program, a time is set-aside during dinner for special announcements.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	All committees are required to submit written reports and/or minutes of committee meetings to the executive committee as requested.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Executive committee members are required to submit written reports at each executive committee meeting.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Copies of executive committee reports, agendas, and committee reports are posted in a prominent place.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter secretary keeps copies of all of the above written materials on file.

Focus on the Details

How many times has an event or activity failed at the chapter because of a "lack of communication"? This excuse, along with a lack of prior planning, seems to be the most prevalent used when a chapter event does not go as planned. There are many ways to alleviate communication problems. Below is a list of communications enhancements that your chapter can use.

- Phone lists and email lists
- Weekly chapter newsletters listing the week's events, meetings and activities
- A term calendar listing the chapter's activities over the course of the semester
- Weekly announcements are posted in prominent locations throughout the house
- Typed minutes of all chapter meetings posted in a prominent place or emailed to members
- Time set-aside during dinner for special announcements
- Written weekly committee reports and/or minutes
- Written reports from executive committee members

Chapter secretary keeps copies of all of the above on file.

THINGS TO DO

Currently Do It	Will Do It	Done...	Delegation
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Committees are given authority as well as responsibility (committee-level details are not discussed during the chapter meeting).
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	All committee chairmen have written job descriptions.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The executive board trains all new committee chairmen on their duties and responsibilities.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Committee chairmen maintain notebooks, which contain goals, events, successes, any failures, and any printed resource materials relating to their duties.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Praise is given publicly, while criticism is given privately.

Focus on the Details

One of the most commonly aired complaints of chapter officers is that 20 percent of the members are doing 80 percent of the work. Although the executive committee usually attributes this problem to chapter "apathy," it is actually the result of poor administration.

In a well-run chapter, committees do 90 percent of the work because the president and the executive committee give them responsibility and authority. If a committee chairman feels he must ask the chapter to decide all the details before making arrangements for an activity, he has been given responsibility, but not authority. Authority permits details to be handled at the committee level. There should not, for instance, be a half-hour of debate during the chapter meeting regarding which T-shirt design to use for the next party. That is a committee-level detail, which should be handled outside of the chapter meeting. If chapter members would like a say in certain committee decisions, they may attend the committee meeting.

Authority gives a chairman the power to act, not just decide. In order that he might act, it is also essential that his job description is well-defined – i.e., WRITTEN. How can a chairman be expected to do a job if he doesn't know what his job is or how to do it? Thus, it is imperative that, before taking office, each committee chairman is educated regarding his duties and responsibilities, and is given a written job description. Further, it is his duty to educate his committee on individual responsibilities.

Praise for good work should be given publicly (during the chapter meeting), while criticism should be given privately (one-on-one).

THINGS TO DO

Currently Do It	Will Do It	Done...	Appointed Chairman & Committees
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has appointed necessary chairmen and committees to fulfill the goals of the chapter.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has developed written job descriptions for these chairmen and committees.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The chapter vice president oversees the committee structure and the performance of the appointed chairmen.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Committee chairmen coordinate all events and chapter activities through the vice president at regular meetings in order to avoid scheduling conflicts.

Focus on the Details

Aside from the election of the executive committee of the chapter, the chapter president has the authority to appoint other committee chairmen as needed in order to fulfill the objectives of the chapter. These positions may pertain to, but are not limited to: community service, social events, risk management, intramural athletics, and campus/public relations.

As with the Grand Lodge vice president, the chapter vice president should oversee the work of all appointed committee chairmen of the Fraternity. Regular meetings of these chairmen, with the vice president, provide an excellent time to share ideas, goals, and scheduled events for coordination with all other chairmen.

THINGS TO DO

Currently Do It	Will Do It	Done...	Committees
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Every member, including associate members is assigned to a committee.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Committee meetings are held regularly (at least bi-monthly).
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Committee chairmen hold planning meetings at the beginning of their terms, during which committee goals, planning calendars, and budgets are determined.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Committees keep minutes and submit written reports to the executive board as requested.

Focus on the Details

Every chapter member, including associate members, should be assigned to a committee. It is also suggested that, if possible, each member be assigned to only one committee. Committee meetings should be held at least monthly if possible. Therefore, committee meetings often may run concurrently, and if members are on more than one committee, time conflicts could occur. Attendance improves if each member has as few meetings to attend as possible.

Just as each committee chairman's duties should be clearly defined, member's role within a committee should be delegated. For example, it may be the responsibility of one member of the house manager's committee to go from room to room in the chapter house each week and check to see that each maintenance task has been completed. Clear definition of roles ensures the smooth operation of committees.

At the beginning of his term of office, each committee chairman should conduct a goal-setting session with his committee, during which all committee goals and programs for the term are determined. At this time a term calendar should be established, which includes dates of all committee meetings and events. (For example, the house management committee's calendar might include the dates on which all-house work parties are planned.) Also, a committee budget should be set at this time. All committees should submit complete budgets to the executive committee at the beginning of each term. All committee chairmen should maintain notebooks, which are similar to officer notebooks.

THINGS TO DO

Currently Do It	Will Do It	Done...	Meetings
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter meetings do not exceed 60 minutes (excluding Remarks).
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	All committee and officer reports and motions are submitted in writing to the executive board prior to the chapter meeting.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The president prepares a written agenda prior to each meeting.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The president is familiar with <i>Robert's Rules of Order</i> and a parliamentarian is appointed.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter includes parliamentary procedures in its meetings.

Focus on the Details

Chapter meetings should not exceed 60 minutes. There are three ways to ensure quick, efficient meetings:

1. Require all motions and committee and officer reports to be presented in writing at the executive committee meeting prior to the chapter meeting.
2. Develop a written agenda before each meeting.
3. Use parliamentary procedure.

Requiring all officers and committee chairmen to present written reports to the executive committee allows the president to prepare a written agenda for the chapter meeting. Time isn't wasted calling out names only to hear "no report" or, "Uhh, let's see....Uhh, everyone should attend study tables this week, Uhh...What else..." Any conflicts or redundancies in reports can be eliminated as well. Further, when a written agenda is set, the president should not deviate from it unless absolutely necessary.

Requiring motions to be presented in writing gives the executive committee time to clarify each motion and see that it does not conflict with, or duplicate, any chapter or Fraternity By-Laws. Further, it permits the executive committee to determine if adequate information is available for chapter members to make an informed decision and to make a recommendation if it so desires. If inadequate information is available, the executive committee should refer the motion or proposal to the appropriate officer or committee for further study. Thus, chapter meeting time isn't wasted clarifying and debating poorly-written or inappropriate motions. Unless there is an urgent need for an emergency motion, a motion not presented in writing prior to the chapter meeting should be tabled.

Every president should read and study *Robert's Rules of Order*. A shortened form of Robert's Rules is reproduced in the back of *The Quest for Theta Xi*. It is also suggested that the chapter president appoint a parliamentarian, who can clarify proper procedures when misunderstandings arise. Parliamentary procedure should be included in the chapter's membership education program, as well.

THINGS TO DO

Currently Do It	Will Do It	Done...	Minutes
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Minutes are maintained at executive board and committee meetings and retreats, as well as chapter meetings.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	A typed summary (non-ritual format) of executive board and committee meetings are prepared and copies kept on file.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Vulgarity, personal, and embarrassing references are kept out of minutes.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Minutes follow the order of exercises in the <i>Ritual</i> or the general order of business in <i>Robert's Rules of Order</i> .
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Summary of minutes of all non-Ritual meetings are posted in a prominent place or emailed.

Focus on the Details

Minutes should be taken at all chapter, executive committee and committee meetings and retreats. Committee chairmen should keep copies of committee minutes in their notebooks for future chairmen, as well. Summaries of minutes taken at all meetings should be posted in a prominent place. Of course, any information relating to the Ritual should be omitted from posted summaries.

Minutes should paraphrase what was said, rather than repeat it word-for-word -- except with regard to motions. The precise language of each motion should be recorded so that, if it is tabled and reconsidered at a later date, its original intent is clear. Vulgarity, personal references and other inappropriate items should be left out of the minutes.

Chapter minutes should be numbered successively year-after-year. In the minutes of each executive committee or committee meeting, the meeting date should be included, as well as the starting and ending time, and the date of the next regular meeting. Roll should be taken and recorded in executive committee and committee meeting minutes, as well as chapter minutes. The vice-president or recording secretary should sign his name at the end of the minutes.

Minutes of Ritual meetings must follow the order of exercises in the *Ritual*, and open meetings must follow the general order of business in *Robert's Rules of Order*.

THINGS TO DO

Currently Do It	Will Do It	Done...	Officer Notebooks & Files
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	All written goals, objectives, action plans, planning calendars, and written job descriptions area organized and maintained.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	All committee chairmen maintain similarly formatted binders.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Notebooks contain, among other things, the appropriate Theta Xi reference guides, goals, and suggestions, planning calendars and reference materials
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Each officer maintains a filing system for surplus materials.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The chapter secretary maintains complete and well-organized files of all printed materials produced, received by, or regarding the chapter.

Focus on the Details

In order to avoid each succeeding administration "reinventing the wheel," it is essential that officers and committee chairmen maintain notebooks and files for future officers' reference.

Notebooks should contain, but not be limited to, the following: the Theta Xi guide to the office, the officer or chairman's written job description, goals, calendars of events of previous terms, separate sections for each duty of his office, minutes, correspondence, event evaluations, suggestions for future officers, handouts and fliers, and reference materials.

Notebooks should be kept in 3-ring binders with dividers so that sections can be added or removed easily. When an officer's notebook becomes overloaded or materials become outdated, the surplus material should be kept on file for historical reference.

The chapter secretary should maintain files of all correspondence, publications, fliers, articles and newspaper ads written by or regarding the chapter, and records of chapter communications.

THINGS TO DO

Officer Selection

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The chapter has established a minimum GPA to run for office.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Members with overdue accounts receivable are not permitted to run for office.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The chapter has a written process to nominate members, which may be through a nominating committee.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	An officer understudy system has been established.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Officer duties and responsibilities are discussed and posted at least one month prior to elections.

Focus on the Details

Chapter officers should be chosen for their experience and ability, not personal popularity. Usually, only the seven major officers of the chapter are elected to their position. The rest are appointed by the president.

A minimum GPA requirement to run for chapter offices should be established. Further, no member should be able to run for executive committee positions if he has unresolved overdue accounts receivable with the chapter or if he has not recited the secrets.

It is suggested that the chapter appoint a nominating committee, which is responsible for reviewing the membership roster and identifying those who are qualified to run for executive committee positions according to the minimum standards established by your chapter. The committee might also encourage those who are reluctant to run to seek office. Often, qualified people need to be convinced of the need for their service.

The chapter should establish an officer understudy system to ensure the smooth transition of offices and to develop qualified leaders who are truly interested in the positions for which they are running. Also, the duties and responsibilities of each office should be posted in a prominent place or provided to all members in writing via email at least one month prior to chapter elections.

THINGS TO DO

Officer Transition & Retreats

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	After elections, a workshop/retreat is scheduled during which old officers train new officers on the duties of office, identify strengths and concerns, and brainstorm strategies.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Officer/committee chairman planning retreats are held each term.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	A key alumnus and/or the campus Greek Advisor is invited to officer/committee chairman planning retreat to act as an unbiased moderator.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Other retreats (e.g. rush, membership education) are scheduled throughout the year in such areas as rush and finance, as needed.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	A full day away from the chapter house and/or campus is set aside for the officer/committee planning retreat.

Focus on the Details

Soon after elections, a workshop/retreat should be scheduled during which old officers relay their knowledge and experience to the new officers and committee chairmen. The outgoing executive committee should brief each new officer and committee chairman on his duties and responsibilities. Also, the new executive committee should outline its expectations for the committees.

An officer/chairman planning retreat also should be scheduled shortly after the chapter planning retreat. During this retreat, the new officers and committee chairmen should set personal goals, and the executive committee should set overall administrative goals. Further, committee chairmen should establish goals and define specific responsibilities within his committee. The balance of the retreat (which should be the majority of time scheduled) permits participants to identify strengths, areas of concern and brainstorm strategies to improve operations. Like the general chapter planning retreat, the officer/chairman planning retreat should be conducted away from the chapter house, and full day should be set aside. A key alumnus and/or the campus Greek advisor should be encouraged to attend to act as an unbiased moderator.

It is also suggested that other, shorter and less intense retreats, in areas such as rush, finances and membership education, be held at different times throughout the year. A rush retreat, for example, might include watching the rush skills video, conducting role-playing sessions, and determining the chapter's selling points and rush strategies.

THINGS TO DO

Chapter Retreats

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The chapter holds planning retreats at least twice annually.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The executive board prepares a master calendar of events at the beginning of each term.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Associate members and key alumni attend chapter retreats.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Retreats are held away from the chapter house and at least one full day is set aside for each retreat.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Follow-up meetings/retreats and conducted.

Focus on the Details

WHEN: Planning retreats should be held either at the beginning of the academic term before classes begin, or at the end of the term for the following term (i.e., plan for the Spring term at the end of the Fall term).

WHO: Every member, including associate members (if you have them at the time of the retreat) and key alumni, should attend.

WHY: Members will put more time and effort into something, which they helped plan; they will feel more positive about the direction of the chapter if they have taken part in the planning process.

WHERE: Away from the chapter house. Distractions such as women, telephones, alcohol and non-contributing members should be left behind. A rural setting or campout is ideal, but hotel or university meeting facilities also work well.

HOW LONG: Plan for a full day, probably a Saturday or Sunday. Set aside 1-2 hours for general goal-setting, 2-3 hours for committee objective-setting and filling out calendars. Plan plenty of breaks, refreshments and recreation, and possibly a social event after all the work is completed.

The four step goal-setting process - setting general chapter goals; assigning each goal to a committee; developing specific objectives and action plans in committee; and developing committee planning calendars should be utilized during chapter retreats. After this process is completed, the executive committee can make a master calendar from the committee calendars, and post it in a prominent place.

It is recommended that the executive committee hold one or two follow-up retreats during the term to re-evaluate and update the chapter goals and committee objectives. Follow-up is essential to effective management.

THINGS TO DO

Behavior Expectations

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has established a judiciary board, which may be the executive committee.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The chapter advisor, or other key alumnus, is involved in the process.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Records of all judicial decisions are kept on file as precedents for future decisions.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has established an appeals process.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has a written document outlining the duties, powers, and composition of the judicial board (may be included in the by-laws).
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has established written behavioral expectations and rules of conduct for its membership.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has an established written process for members to confront fellow brothers who are not acting in the best interest of the Fraternity.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The chapter advisor is invited to attend all meetings that address the issues concerning individual chapter members' behavior.

Focus on the Details

Each chapter should establish a judicial board for three reasons:

- To mediate disputes between members.
- To hear charges against men violating chapter or Fraternity policies.
- To decide punishments and minor penalties for such violations.

It is suggested that the judicial board consist of either three or five members. The board should be chosen from the overall membership, but an officer may chair it. It is further suggested that the board represent a broad range of the membership (e.g. one member from each class year or from different initiation classes).

The chapter should develop a written document outlining the duties and powers of the judicial board, which may include: the composition and number of members on the board, eligibility requirements, selection system, decision appeals process, who is chairman, which cases may be brought before the board, maximum penalties the board may enforce, terms of office, procedures for removing board members from office, how cases are brought before the board, pre-hearing procedures, and guidelines, rules and procedures followed during hearings.

In order to enhance the overall experience for members in your chapter, rules and guidelines should be created, written down, and upheld. All members are expected to behave in an appropriate and acceptable manner at all times; we are always representing Theta Xi Fraternity. Chapter by-laws should outline this acceptable behavior, and include a process to confront those brothers who choose not to follow them.

THINGS TO DO

Supplies & Storage

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter maintains a special office or central storage space to which the leaders have access.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	All officer and committee chairman notebooks, files, and reference materials are stored in the office.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter stationary and correspondence supplies are stored in the office and inventory is maintained.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	An adequate budget is set aside to ensure that needed items are consistently in stock.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	A system is in place to ensure that all key documents and access to them are maintained through each transition of chapter leadership.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter maintains a library complete with all of the guides and manuals produced by the Fraternity.

Focus on the Details

It is suggested that the chapter maintain an office space, which could be a room set aside in the chapter house or, if the chapter is un-housed, at the university or in the chapter president's room. The chapter office is simply a room in which all officer notebooks, files, and manuals are kept. The secretary's files should be maintained in the office as well. Having all administrative materials in one place ensures that they will not be lost. Also, materials would be available to members even when officers are not present, although none of the materials should be permitted to leave the office. Of course, access to the secure location containing Ritual materials and the minutes should be limited to designated individuals.

Executive committee and committee meetings should be held in the office, if space permits. Therefore, desks, tables, bookshelves, computers, telephones and other items would be appropriate additions. All chapter stationary, letterhead, and other printed materials should be kept in the chapter office as well. Regular inventory of such items should be taken, and an adequate budget should be set aside to ensure that the items are consistently in stock.

Chapter scholarship files also could be stored in the office, unless the chapter has a library in which it would prefer to keep them.

THINGS TO DO

Membership Reporting

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter secretary submits the Associate Member Report Form to Fraternity Headquarters immediately following the affiliation of associate members through mail or the Theta Xi Fraternity website, www.thetaxi.org
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The chapter secretary fills out and submits Fall and Spring membership reports within 4 days of their receipt through mail or the Theta Xi Fraternity website.

Focus on the Details

Upon affiliating new associate members, the secretary must immediately submit the Associate Member Report Form, which includes space for each associate member's name, date associated, class year and home address.

Also, each fall and spring Fraternity Headquarters sends a membership report, which should be completed and returned immediately by the chapter secretary. The report should account for all members and associate members enrolled for the current term. A copy of the form should be kept for your chapter files.

THINGS TO DO

Initiation Deposits & Forms

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	All initiation fees are sent to Fraternity Headquarters at least two weeks prior to anticipated initiation date.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The chapter secretary ensures that the information in the Biographical Data Book (Form A) is thoroughly completed on the day of initiations.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	"Form A's" are sent to Fraternity Headquarters within 48 hours of initiations.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Initiations are not conducted until the chapter has received the "Permission to Initiate" form and/or verbal permission from Fraternity Headquarters.

Focus on the Details

Each chapter should submit the \$290 initiation fee deposit for each prospective initiate at least 14 days prior to the anticipated initiation date.

Once both the Initiation Fee Payment Form and the initiation payments are correctly submitted, Fraternity Headquarters will mail "Permission to Initiate Form" to the chapter president, which indicates that all is in order and that the chapter may proceed with the initiation. If a prospective member is not initiated, refunds on the initiation fee are available from Fraternity Headquarters upon request of the chapter president.

Immediately following the initiation of new members, the secretary must ensure that each new initiate has completed the "Record of Initiation" form from the chapter's Biographical Data Book. The form (known as the "Form A") must be mailed to Fraternity Headquarters within 48 hours of initiation. Life Membership Cards and Certificates (shingles), which take 6-8 weeks to produce, will not be ordered until Headquarters receives these forms.

THINGS TO DO

Unicorn & Update (HQ Newsletter)

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	News and photos of special chapter and alumni events are sent regularly to the Fraternity Headquarters for <i>The Unicorn and/or "Update."</i>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter promptly informs Fraternity Headquarters of any changes in addresses or phone numbers, if changes occur.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	One copy of the "Update" (Headquarters Newsletter) is posted on the chapter bulletin board and another is kept on file.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	All members are encouraged to read the "Update" (Headquarters Newsletter) and special announcements are made in the chapter meeting about chapter and Fraternity issues raised with the newsletter.

Focus on the Details

The UNICORN of Theta Xi Fraternity, the official Fraternity magazine, is published on a regular basis. *The UNICORN* contains news on individual chapters, special alumni, Fraternity and Interfraternity events, conferences and issues; and listings alumni contributions and Fraternity obituaries. Your chapter should send any news and photographs (digital photos must be at least 300 dpi resolution) of special chapter events, such as fundraisers, house dedications and special recognition, to Fraternity Headquarters. Also, the chapter should send any information it has regarding its alumni, such as job promotions, awards and other special recognition.

"Update" (Headquarters Newsletter), a publication sent 2-3 times each semester to all chapters, provides news about other chapters, upcoming events, hints and suggestions on improving chapter operations, reminders and due dates, announcements and Fraternity statistics. The newsletters are sent to each chapter via email and the chapter should run two copies: one for the chapter bulletin board, the other for chapter files. All chapter members, especially those on the executive committee, should read the newsletter. Many of the answers to the most commonly asked questions by chapters are provided within the newsletter, and much confusion and wasted time can be avoided, if chapter members simply read it.

THINGS TO DO

Fraternity Awards for Chapters

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter submitted Annual Report for the most recent awards competition.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter regularly submits copies of newsletters, newspaper articles, special recognition, financial reports, and other documentation required for the annual submission.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter maintains an awards file, which contains pertinent information required for the Annual Report.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	In the most recent competition, the chapter received an award of recognition in at least two of the many established award areas.

Focus on the Details

The Fraternity offers numerous awards each year to chapters who achieve standards of excellence; the foremost - and most coveted - being the Memorial Trophy, which is awarded to the most outstanding chapters. In order to receive the maximum number of points, it is necessary for your chapter to send documentation of its programming. In particular, the chapter should mail copies of all newsletters, scholarship awards, newspaper articles, recruitment publicity, financial reports and other pertinent materials to Fraternity Headquarters. It is suggested that the chapter maintain an award file to collect and file submission materials.

Several awards are given in conjunction with the Memorial Trophy competition. They are: the General Improvement Trophy, Outstanding Alumni Communications, Outstanding Region, Excellence and Scholarship Awards. The General Improvement Trophy is given to chapters whose present score improved over the previous year's score. Outstanding Alumni Communications awards are given to chapters that publish alumni newsletters. The Outstanding Region Award is given to all the chapters in the region that has the highest average score on Annual Reports and had the best attendance at regional and national conferences/conventions. Benchmark Awards are given to chapters scoring high in the annual award competition, and Scholarship Awards are given to chapters that maintain a GPA higher than the All Men's Average and chapters with the highest GPA of fraternities on their campus.

THINGS TO DO

Currently Do It	Will Do It	Done...	Social Programs
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter social program emphasizes non-alcoholic themes.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter social program includes non-alcoholic events.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Advertising of social events does not emphasize or make references to alcohol.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has established written rules of behavior for members when attending and hosting social events.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter plans all social events at least two months in advance, and develops its entire social planning calendar at the beginning of the academic term/year.

Focus on the Details

Today's chapter programming must demonstrate a commitment to social responsibility. Though we are social organizations, Fraternities must emphasize with prospective members the aspects of fraternity social life (serenading, Greek Week, intramurals, family-like atmosphere, etc.), which are often lost in "Animal House" imagery. A de-emphasis on alcohol in programming and advertising is no longer recommended, but required. If your chapter has not yet bought into this trend, its days are numbered. This does not mean you "can't have fun anymore." It just means you must have responsible fun. Instead of emphasizing alcohol at parties, the chapter must emphasize themes. Here are some possible themes:

- Fireside chats with special guests (e.g. university president, dean of students, Greek Life advisor, etc.)
- Casino Night
- Christmas in March
- Hayride and bonfire
- The Dating game with a sorority
- Cajun night (e.g., serve catfish, shrimp, crawfish, etc.)
- Golf outing (with alumni and other guests)
- Coffee house with a band
- Air band competition
- Canoe expedition
- Carnival
- Movie night
- Roaring twenties
- Sadie Hawkins dance (women ask men to event)
- Jeopardy, Murder Mystery (e.g. Clue), or Board games
- Famous Celebrity Couples party
- Family Dinners (Big/Little Brother families)
- Graffiti party (cover chapter house walls with paper and provide guests with magic markers)
- Brother combinations sit together.
- Grab-A-Date - surprise date dinner; members have 30 minutes to find dates.

Theme parties are more fun and, since all chapter events must be BYOB, considerably cheaper than the traditional "beer party." In order to host a successful theme party, however, the chapter must plan ahead, setting aside adequate time for set-up. Setting up is half the fun. Decorating the chapter house or a university/hotel ballroom to look like a tropical island, gambling casino or even a medieval castle, not only creates a fun atmosphere, but plenty of topics for conversation. Theme parties should be planned at least two months in advance. Ideally, the entire social calendar should be developed during the chapter planning retreat at the beginning of the semester.

THINGS TO DO

Risk Management

Currently Do It	Will Do It	Done...	
Chapter Policies:			
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has appointed a risk management chairman and committee in charge of implementing policies and procedures, creating programs, and educating members regarding risk management.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has its own written statements (may be included within chapter By-Laws) reinforcing the Fraternity's Risk Management Policy regarding hazing, sexual abuse, fire, health, and safety; and alcohol and drug use.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has developed and adopted written policies and procedures for hosting social events, which are signed by all members and associate members each year.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The policies and procedures statement for hosting social events includes all of the above-listed provisions.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Risk Management Policy provisions are discussed in a chapter presentation made at least annually.
Adherence and Violations:			
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has its own written procedure to deal with individual members who violate the National and local policies.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Each chapter member, active and associate, signs a copy of the Theta Xi Fraternity Risk Management Policy, agreeing to comply with all provisions.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has not been found in violation of the Theta Xi Fraternity Risk Management Policy nor any college or university risk management guidelines in the past year.

Focus on the Details

If risk management is not a regular part of your chapter's programming, then you had better get on the ball. Theta Xi adopted the Statement of Position on Risk Management and the FIPG Risk Management Policy in 1988. The topic of risk management has been covered during every regional conference and national convention and included in most Theta Xi publications produced since that time. Your chapter must develop its own written policy for hosting social events in accordance with our Risk Management Policy. The policy your chapter develops should include, but not be limited to, the following:

- Each party should have a theme (non-alcohol related).
- All events must have specific starting and ending times, which are enforced.
- All events are invitation-only (with sign-in lists) and must comply with the BYOB or Third Party Vendor Guidelines.
- Valid proof of age and valid college ID must be required.
- Designated drivers should be provided.
- Keys should be checked at the door and are refused to intoxicated guests.
- Bartenders (non-drinking at event) should place guests' beverages in a common cooler, record the type and quantity of beverage and the guest's name. Tickets should be issued for each beverage brought.
- The quantity of alcohol a guest may bring must be limited.
- Alternative beverages and non-salty food should be provided.
- Party monitors (non-drinking at event) should be appointed.
- Guests of legal age should be marked in a reliable and easily-recognizable fashion.
- Limit BYOB beverages to beer, wine, and/or malt beverages.

Your chapter should appoint a risk management chairman in charge of developing programs, implementing procedures and guidelines, and educating the membership regarding risk management provisions. The policy provisions encompass the areas of alcohol and drugs; hazing; sexual abuse; fire, health and safety; and education. It would be the risk management chairman's job, for example, to ensure that: the chapter house meets fire codes; social events follow chapter and Fraternity policies; the chapter is educated about rape and sexual abuse; anti-hazing policies are implemented and enforced; risk management presentations are made to the chapter at least annually.

THINGS TO DO

National Convention

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	An official voting delegate at the most recent National Convention represented the chapter.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	In addition to the voting delegate, one alternate delegate attended the most recent convention.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	In addition to the two delegates mentioned above, the chapter sent at least one additional member.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	An alumni representative from the chapter, which should be the advisor and/or an association officer, attended.

Focus on the Details

National Conventions are held biennially in odd numbered years. The National Convention is the supreme ruling body of the Fraternity. Undergraduate chapters command the majority of the voting power at the National Convention. Thus, it is important that every chapter send – at minimum – its President as its official delegate to vote at the convention.

National Conventions are also a tremendous educational opportunity for all additional chapter members who attend. Brothers can attend educational workshops, legislative sessions and have the opportunity to meet national officers, committee chairmen and Headquarters staff members, as well as representatives from Theta Xi chapters across the nation. Not to mention that conventions are a great deal of fun!

THINGS TO DO

District Leadership Academies

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Four delegates at the most recent District Leadership Academy represented the chapter.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	In addition to the four delegates, the chapter sent at least one more member.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	At least key alumnus (advisor or alumni board member) attend the most recent District Leadership Academy.

Focus on the Details

One chapter in each of Theta Xi Fraternity's eight district is chosen to host a District Leadership Academy(DLA). The conferences are general educational conferences, and chapters are encouraged to bring as many delegates as are able to attend. The topics covered at each conference vary as the issues facing the Fraternity vary. Conference agendas are meant to appeal to the general education of all members.

The main goal of each DLA is to promote Fraternity values, provide leadership training and create a greater national consciousness. Travel allowances are provided to each chapter. The chapter advisor and/or alumni board members should also attend to share in the educational process.

THINGS TO DO

Presidents Academy

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The chapter president attended the most recent President's Academy.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter holds elections at end of the Fall term to take advantage of the training provided new Presidents at the Presidents Academy.

Focus on the Details

Annually, the Fraternity expects each chapter President to attend the Presidents Academy in St. Louis, MO. This program, sponsored by the Theta Xi Foundation, offers the opportunity for presidents to hone their leadership skills in order to be a more effective president.

The vast majority of the cost to attend is covered by the Foundation. The Academy is held over the Dr. Martin Luther King, Jr. Weekend.

THINGS TO DO

Rising Stars Academy

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	One member initiated within the last year attended the most recent Rising Stars Academy.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	More than one member attended the most recent Rising Stars Academy

Focus on the Details

Held in conjunction with the Presidents Academy over Dr. Martin Luther King, Jr. Weekend, but with a very different program, is Rising Stars Academy.

Attendance is encouraged by all brothers initiated within the last year. All on-site costs are covered by the Theta Xi Foundation for the first representative from each chapter and additional representatives pay a very reasonable registration fee.

The program focuses on personal leadership development and broadening the new initiates perspective toward our national organization.

THINGS TO DO

Relations with Other $\Theta\Xi$ Chapters

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has a written policy on member conduct when visiting or receiving members from other chapters.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter gives other chapters plenty of advance notice before making visits.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter sends copies of its newsletter to other area chapters.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter takes special effort to make visitors from other chapters feel comfortable and welcome.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter has invited another nearby chapter(s) to participate in a joint recruitment, philanthropy, or social function or has sponsored a joint officer, chapter, or other retreat.

Focus on the Details

A great benefit of belonging to our national brotherhood is the opportunity to visit other chapters and meet fellow brothers in the bonds. When you visit, remember that you are a guest and should act in a manner, which would not embarrass your host. You would not appreciate it if men wearing your Fraternity letters came into your home and acted disorderly or destroyed chapter property, or acted in a similar manner outside of the chapter house in full view of university students or local residents. In short, show the same respect for another chapter's home that you would want shown to your own. Also, when you choose to visit another chapter, be sure to give plenty of advance notice, so that brothers have time to make proper accommodations.

When receiving guests from another chapter, special efforts on your part should be made to make them feel comfortable and welcome. If they are staying overnight, give them the opportunity to spend a few moments alone shortly after their arrival to freshen up. Make sure any luggage or personal belongings are moved to their room or another secure location shortly after you greet them.

Visiting other chapters also gives you the opportunity to share ideas and find fresh solutions to similar problems. You might consider hosting a joint officer, rush or chapter retreat. If you have one or more chapters in close proximity to yours, consider doing joint philanthropy or service projects. A joint rush or social function with another chapter can be fun, too. Send copies of your newsletter to other chapters in your area to keep them informed of your progress.

THINGS TO DO

Chapter Visitations

Currently Do It	Will Do It	Done...	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The president informs the chapter of the upcoming consultant's visit at least one week in advance, and reminders are given during the preceding chapter meetings.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Chapter officers complete the pre-visitation evaluation in order to brainstorm questions and concerns regarding their office and general chapter operations prior to the consultants visit.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Executive board sets aside time for a meeting with consultant, and board members set-aside time for individual meetings.
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	President informs chapter advisor and key alumni of upcoming visits and arranges meeting times.

Focus on the Details

One of the most important services the Fraternity provides is the individual visit to chapters by the Headquarters' traveling staff. The Chapter Consultant is the Fraternity's personal link to each of its chapters. He provides the experience derived from his own undergraduate years, from visits to campuses nation-wide, and from intensive training received at Fraternity Headquarters and Interfraternity conferences. The consultant is not a "spy from national," and he is not there to make life difficult for the chapter. Quite to the contrary, his purpose is to help the chapter improve its operations by advising the officers and giving presentations to the chapter on specific areas of operations such as recruitment and membership education. He is an educator, advisor and confidant. Only when absolutely necessary is he a disciplinarian.

The chapter members, and particularly the officers, should brainstorm and record questions to ask the consultant about particular areas of concern. More than anything else, the chapter should use the consultant as an educational resource.

The officers should plan to schedule time for individual meetings with the consultant, and the chapter should be prepared for special general meetings to be scheduled as well. The president should arrange a meeting with the campus Greek advisor, as well as meetings with the chapter's advisor and other key alumni. Also, the chapter should be prepared to provide comfortable lodging for the visitor, whether that is within the chapter house or by recommending reasonable hotels or motels in the area. The chapter officers should also plan to hold a ritual meeting during the consultant's visit.