

# Guide for Secretary

## Theta Xi Fraternity



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## **GUIDE FOR SECRETARY**

(from *Guide for Officers*, Theta Xi Fraternity)

### **Job Summary:**

**Conducts the chapter's written (and electronic) communications with Fraternity Headquarters, alumni, campus administration and the campus community. Encourages Alumni involvement with each other and the chapter. Provides appropriate and timely correspondence to alumni, undergraduates, friends and other supporters of the chapter. Supports the goals and purposes of the chapter and Fraternity.**

### **Job Responsibilities:**

- Completes fall and spring membership reports, and other required documentation, and submits the information in a timely manner consistent with HQ guidelines. Maintains biographical data records for initiated members.
- Provides guidance and direction to committee members in setting goals and objectives within the assigned office that will directly support the goals and objectives of the chapter.
- Assists with alumni mail-outs and other forms of communication. Develops and processes mass mailings to alumni, which may include newsletters, timely notifications of upcoming events, holiday greeting cards, etc.
- Works with the alumni association, as requested, to direct all planning and development programs involved in fund-raising for the chapter. Establishes development goals with the chapter president and/or vice president. Meets with members of the alumni association to solicit alumni development ideas, interests, and trends.
- Assists in coordinating, communicating and conducting alumni programs and events. Secures funding for alumni operations/programs through the administration of various alumni giving programs and chapter allocations.
- Assists alumni association by ensuring necessary facilities are available for meetings.
- Submits budget requests to the treasurer prior to the beginning of each term. Assists in the administration of an effective budget control program.
- Performs other responsibilities as assigned by the president and alumni association.

## ***DUTIES of the SECRETARY***

The following pages outline many of the specific responsibilities of the chapter secretary. This will hopefully serve as a resource for you as you carry out your duties and responsibilities in the various areas of chapter operations.

NOTE -- The following abbreviations are used throughout this guide:

Associate Member	AM
Interfraternity Council	IFC
Executive Board	EBoard
Headquarters	HQ
Grade point average	GPA

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## **MEMBERSHIP CORRESPONDENCE**

It is the duty of the secretary to answer all correspondence, to maintain adequate communication with the Fraternity HQ and Grand Lodge, and to maintain chapter correspondence files. Information maintained at the Fraternity HQ on each chapter is only as accurate as the information received from the chapter. If, for some reason, your chapter files are destroyed, the HQ would be able to provide you with replacement copies of all documents and correspondence to assist your chapter in any reorganization efforts. Therefore, it is essential to keep the HQ up-to-date on any changes or pertinent information at your chapter.

### **MEMBERSHIP REPORT**

Each fall and spring, the Fraternity HQ distributes to each chapter a Membership Report which should be completed and returned immediately. This report should account for all current members and AMs enrolled for the present term. The report is sent to the Fraternity Headquarters and a copy is available upon request for your chapter files.

When completing the report, always provide an individual's full name. If the individual prefers a nickname, put the nickname in parenthesis after his full name. When providing an individual's address, use his home (parent's) address, **NOT** his campus address. When the report requests the class year, it is referring to the anticipated year of graduation for the individual.

### **REPORTING ASSOCIATE MEMBERS**

Upon affiliating a new AM, the chapter should report the names and information about the AM online at the Fraternity website. Consider having the AMs complete the information online either just prior to or after the AM Ceremony. Otherwise, the secretary should enter the information online within 24 hours of the AM ceremony.

### **PERMISSION TO INITIATE**

**BEFORE** an AM can be initiated, the chapter must receive permission from Fraternity Headquarters. To receive permission, the chapter must (1) submit his initiation fee, (2) gain approval from HQ to initiate. The initiation fee should be submitted approximately **ten days prior** to your anticipated initiation date. Initiations conducted without permission from HQ are considered unauthorized initiations and the chapter will be billed a fine of \$50 per initiation. The secretary is urged to work closely with the membership educator and treasurer to be sure that each AM has paid his initiation fee well ahead of the time for submitting payment to HQ and ensure that HQ is contacted to gain permission to initiate. (Note: The initiation fee can be paid on line by credit card.)

**AFTER** initiations are conducted they are to be reported to HQ by completing and forwarding the “Form A” (the detachable one-third of the Biographical Data Book sheet) which is a duplicate of the information retained by the chapter in the permanently bound book.

**Remember: The Form A is to be mailed to HQ within 48 hours of initiation.**

Consider having your AMs complete the Form A and Biographical Data Book just prior to their initiation. In this way, the secretary can collect the Form A’s and be ready to mail them in immediately after. **Membership Certificates (shingles) and Membership Cards cannot be ordered until the Form A’s are received and processed by HQ.**

**Under no circumstances should a sheet in the Biographical Data Book be skipped or switched.**

All information provided on the “Form A” should be **clearly printed** to reduce confusion. If the initiate prefers that his nickname be printed on his membership shingle, it should be printed in parenthesis following his full name. The same is true for a middle initial rather than his full middle name.

The sheets in the Biographical Data Book are numbered consecutively in groups of 200. As a new book is required, it should be ordered from HQ and the last number in the previous book should be stated so the new book can be correctly numbered.

Once all fees and a completed “Form A” for an initiate are received at HQ, a shingle for the new initiate will be ordered. The completed shingles are mailed directly to the chapter approximately 4–6 weeks following the receipt of the necessary fees and forms.

## **REPORTING ELECTIONS**

After any election, the secretary should immediately provide Fraternity HQ with a list of new officers. (Be sure to include the title of office AND the name of the officer!) This report may be completed online or submitted via email or regular mail.

## **CORRESPONDENCE**

As secretary, you are the chapter’s immediate and primary contact with everyone outside the chapter. All correspondence, whether addressed to a local business, school official or Fraternity HQ, should be handled with great care and attention. The impression you give in your letter or email is the impression the person reading it will have of your chapter.

If sending a printed letter, use stationary with a letterhead to ensure a positive impression. If your chapter does not have this type stationary, you can download a photo-ready copy of our coat-of-arms in a variety of sizes on the Fraternity website.

Most business letters should be only one page long. However, if a letter is longer than one page, the letterhead is used on only the first page. For this reason, when ordering or printing letterhead stationary, it is wise to order it in white paper. This approach allows you to use regular typing paper for additional sheets on longer letters.

When responding to correspondence, you should refer to the original letter by date (for example: "in response to your letter of June 1,"). Also, be concise when referring to the business at hand. All correspondence should be handled in a business-like manner. Therefore, it should be typed and a business letter format should be used. An example of a block formatted letter can be found in Appendix A.

## **FILING SYSTEM**

Copies of all correspondence, letters received and any replies, should be placed in a secure filing cabinet. Chapter files can generally be divided into three categories, secret, document and correspondence; each should have its own space in a filing cabinet or safe:

### **Secret Files (MUST BE KEPT UNDER LOCK AND KEY)**

- The Ritual of Theta Xi
- The Chapter Minutes Book
- The Register of Initiates
- Chapter Roll Book
- Regalia and paraphernalia

It is also appropriate to keep ***The Constitution*** and ***Bylaws of Theta Xi Fraternity*** in your safe, or other secure place, along with a copy of your local **chapter By-Laws**.

These two documents are public documents and, as such, should be used in AM education as well as full member education, but **it is imperative that they are not be misplaced.**

**Document Files** -Informational/resource files (length of time document should be retained is noted in parenthesis).

- Chapter By-Laws and house policies (as necessary)
- Alumni Association By-Laws (as necessary)

- Chapter scholarship records (4 years)
- Chapter financial statements
  - End-of-year (permanently with copies to HQ in the Annual Report and to Alumni Association)
  - Monthly Audits (permanently with copies to HQ and Alumni Association)
- Chapter budgets (3 years with copies to HQ and Alumni Association)
- Chapter Alumni newsletter (bind, permanently) or email newsletters (printed out)
- Chapter scrapbook (permanently)
- Biographical Data Book (permanently)
- Theta Xi Guides (permanently or until revised editions are provided)
 

<ul style="list-style-type: none"> <li><i>Alpha Nine (with AM Core Education Program)</i></li> <li><i>More Good Men Guides for Officers Blueprints</i></li> <li><i>Values into Action</i></li> </ul>	<ul style="list-style-type: none"> <li><i>Brother to Brother Fraternity Statements of Position</i></li> <li><i>The Quest for Theta Xi Fraternity</i></li> </ul>
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**Correspondence Files**

- Business (vendors, suppliers, receipts, purchase confirmations, etc)
- General
  - Fraternity HQ
  - Regional Director
  - School administration
  - Alumni (see more complete information below)
  - Other chapters (including their newsletters, for new ideas)
  - IFC
- Legal (or of more-than-usual significance)
  - Fraternity HQ and/or Grand Lodge
  - Alumni Association/Housing Corporation
  - School administration
  - IFC
  - Legal counsel

**ALUMNI RECORDS**

Each chapter should maintain up-to-date contact information for its alumni. If this information is kept in spreadsheet or database format, as most chapters prefer to do, a hard copy of the information should be readily available for the use of officers and members, as needed. Be sure to include the following information about alumni in your records:

(You may want to consider keeping your list by alphabet or by roll number, or both. Also, it is very useful to identify alumni who live in the area of your chapter, for use in invitations, mailings, etc.)

- Name and Roll Number
- Mailing Address
- Occupation
- Phone Numbers
- Email Address

## ***SPECIAL ORDERS and NOTICES***

### ***CHAPTER ROSTERS and MAILING LABELS***

Each chapter may request an electronic version of its chapter roster for all members at any time. This roster will include information such as current membership status and most recent contact information including phone numbers, mailing addresses and email addresses.

Additionally, each chapter may order mailing labels through the Fraternity HQ (alumni, for example). When ordering labels, please provide (1) your chapter name, (2) sequence (alphabetical within chapter, chapter roll number, or zip code), (3) selection criteria (mail able, lost, deceased), and (4) selectivity range (chapter, state, zip codes/ranges). Remember, electronic versions of your roster are **free**; labels cost \$0.04 per label plus shipping and handling.

### ***QUESTS AND ASSOCIATE MEMBER SHIELDS (AM PINS)***

Each fall and spring the National Headquarters mails an inventory to each chapter to account for all AM shields (otherwise known as AM Pins) in stock. One shield and one copy of *The Quest* is provided for each AM upon affiliating. Each fall, the chapter/colony should order pins and *Quests* well in advance of recruitment activities.

The cost of shields and *Quests* ordered in excess of the number of AM's reported, along with the cost of replacing lost shields or *Quests*, will be the obligation of the chapter.

### ***MERCHANDISE and JEWELRY ORDERS***

A variety of Theta Xi merchandise including jewelry is available through vendors such as Greek 101, Spirit and Burr Patterson. These may be accessed through the Fraternity website or directly via the internet.

**IMPORTANT NOTICE:** After an order for Theta Xi jewelry is received, approval for its production is required from HQ, per jeweler's request. Headquarters will **only** approve

jewelry orders when all records for that member are in order. This means that the member's "Form A" must be on file at HQ and the appropriate fees paid. If the chapter secretary has not mailed the records to HQ, there is no proof that the individual named on the jewelry order is an initiated Theta Xi. The requested approval will, therefore, be denied and the order returned to the jewelry company.

## **SPECIAL NOTICES**

From time to time there are circumstances that arise which require the secretary to make a special notice to Fraternity HQ. These include:

- **DISAFFILIATION** - Whenever an AM is disaffiliated, the secretary should immediately inform HQ and give the date of and reason for disaffiliation.
- **RE-AFFILIATION** - The By-Laws provide that a chapter must have permission of the National President in order to re-affiliate a disaffiliated member. See By-Law 30.2.4 for the protocol for making this request.)
- **CHANGE OF STATUS** - The secretary should notify HQ after any member's status has been changed from that which appears on the last Membership Report.
- **CHANGE OF ADDRESS** - Changes of address for any undergraduate or alumnus should be sent promptly to HQ.
- **AFFILIATING A MEMBER FROM ANOTHER CHAPTER** - The By-Laws provide that a member of one Theta Xi Chapter transferring to another school where there is also a chapter may affiliate with the second chapter, provided certain conditions are met. This affiliation must be approved by the second chapter and by the Grand Lodge. (See *Constitution*, 4.3.) A form to request a transfer is included on the Fraternity Headquarters website.
- **DEATH NOTICES** - Upon the death of any member, undergraduate or alumnus, the secretary should immediately inform Fraternity HQ, providing: name, roll number, date and cause of death, survivors, and occupation at the time of death. The same information should be recorded in the chapter's Biographical Data Book on that member's page. If he was not an initiate of your chapter, the secretary should inform the home chapter of the death.

## **ALUMNI RELATIONS**

Unless assigned to a different chapter officer, the secretary serves as the liaison/coordinator of relations with the chapter's alumni. These duties include:

- Maintaining accurate alumni contact information
- Attending regular Alumni Association officer meetings
- Coordinating the mailing of at least two newsletters to alumni during each school year. The newsletter may be in either hard copy or electronic format.

- Working with alumni to plan and publicize a yearly Founder's Day event, along with any other events that involve significant alumni participation (homecoming, Blue Iris, etc.)

## **A TIP FOR SUCCESS**

While much of the reporting work of the secretary can now be done online at the Fraternity website, there is still a need for some hard-copy mailing of submissions from time to time. A secretary is wise to **get organized ahead of time** for this portion of his job, helping to greatly reduce stress at the time of submission due dates and make his work very efficient.

The smart and efficient secretary will **consider preparing a packet/folder of supplies** at the beginning of the school year. These will make it possible for him to do his work quickly and with a minimum of stress. In the packet/folder, include

- 9x12 envelopes (6-8 of them)
- Business size envelopes (a dozen)
- A book or roll of stamps
- Mailing labels addressed to Fraternity HQ (a sheet of them, can be easily prepared using MS Word and an inexpensive box of labels)
- Return address mailing labels
- Pens

While this may seem overly tedious, it will allow you to respond quickly, such as mailing in Form A's immediately after initiations, etc. Having everything you need in one place will greatly reduce your work and help ensure that you accomplish the task efficiently.

**APPENDIX A**  
**Sample Letter Format**

November 30, 2015

Dr. John Doe, Dean of Students  
My University  
123 Any Street  
City, ST, ZIP

Dear Dr. Doe:

On behalf of the Brothers of the Omega Omega Chapter of Theta Xi Fraternity, I want to express my sincerest appreciation for your attendance and presentation at our Fall Scholars' Banquet.

After speaking with many of the members and guests in attendance, all indicated they were encouraged by your words of wisdom. The members, especially, are dedicated to repeating as number one in academics for the fall academic term as well as becoming more involved in campus affairs during the 2016 calendar year.

I trust you will call on the members of Omega Omega Chapter of Theta Xi Fraternity whenever our efforts can assist you. Again, my thanks to you and best wishes for a great school year!

Sincerely (or Interfraternally),

Jim Smith, Secretary  
Omega Omega Chapter of Theta Xi