

Theta Chi Fraternity

Chapter Operations Manual



Secretary



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YOUR ROLE AS CHAPTER SECRETARY

The elections are over and your chapter has elected you to the office of secretary. To date, your training has consisted of an hour-long conversation with the previous secretary. He gave you a box of letters (in no particular order), a Minute Book written in crayon, a Roster Book that shows your last initiation was in 1989, and a bunch of forms, which seem destined to make your life miserable. You instantly regret ever accepting the office and wonder if it is still too late to run for another office or committee.

Does this sound like your chapter? While transitions are not always this nightmarish, many of the problems listed above are present after every election. This manual will attempt to remedy them for you, the new Secretary.

Who is the Secretary? He is the brother given responsibility for all correspondence and record keeping in the chapter. He must be thorough in all of his work and pay close attention to detail. The Secretary has many different responsibilities, including, but not limited to:

1. Serving as an Executive Officer of the chapter and setting a high example of leadership and brotherhood for the chapter.
2. Maintaining and transmitting all correspondence of the chapter to the International Headquarters, the campus, other chapters, the community, and other Greek organizations.
3. Custody and responsibility for the chapter's Minute Book, 15 Ritual Books, Roster Book, and other files of the chapter. The Secretary also works with the Chaplain and Ritual Committee to care for the Ritual materials.
4. With the Treasurer, collecting all new member fees and initiation fees, depositing them into a separate account and sending them to the International Headquarters at the proper time.
5. Maintaining an accurate written record of all Chapter meetings, and keeping a comprehensive attendance roster for the members.
6. Seeing that all forms and information are sent to the International Headquarters on time, complete, and accurate.
7. Receive and distribute all incoming mail to the proper individual in a timely fashion. The International Headquarters sends most mail to that attention of the Secretary. It is their job to make sure that the appropriate people get the mailings.
8. Conducting proper officer training and developing an Officer's Notebook for the next Secretary.

SERVING AS AN EXECUTIVE OFFICER

The Secretary is the third highest-ranking officer in a chapter of Theta Chi. More importantly, he is a vital member of the Executive Board of the chapter. As a chapter leader, the Secretary must be a responsible brother who will carry out the duties of the office with great care. In the Executive Board meeting, the Secretary should assist in compiling the weekly agenda and take part in all discussions. If appropriate, the Secretary should make copies of the agenda for the brothers before chapter meetings. He should strive to improve communication at all levels of the chapter. This includes communication between members, parents, alumni, campus officials, and the Headquarters.

The Secretary can do great many things to spread the word about his chapter and improve the image of Theta Chi. It would be wise for the chapter to invest in some note cards and/or appropriate stationery for the Secretary to use in official correspondence. He should work with the Historian and Librarian to document the history of the chapter.

FORMS FOR THE INTERNATIONAL HEADQUARTERS

The following is a list of the different forms and deadlines the Secretary must understand and be aware of. All forms listed can be found on the website at www.thetachi.org/resources/membership

MEMBER'S PERSONAL RECORD FORM: This form should be filed out by the new member, returned to the chapter secretary, and mailed to the International Headquarters with the per man New Member registration fee within 10 days of the official recruitment.

NEW MEMBER INITIATION REQUEST FORM (PIRF-1): This form is to be completed and sent to the International Headquarters with the per man Initiation Fees three weeks prior to the scheduled initiation date. Please send only one chapter check to cover the total fee. Once the fees are received, the Headquarters will approve the initiation and send the appropriate number of badges so that you may present each new member his badge during initiation.

REPORT OF INITIATION FORM: This form should be completed and submitted within 24 hours of the initiation of the New Members to report the roster numbers and the date of initiation.

ALUMNUS INITIATE: Your chapter may wish to initiate a person as an Alumnus Initiate of Theta Chi Fraternity. The Secretary should complete the Nomination Form for Alumnus Initiate and submit this form, along with the proper fees, to the International Headquarters prior to initiation. The Executive Director will review the nomination. Your chapter cannot initiate an Alumnus Initiate until after they have received approval from the Executive Director. The Secretary should then enter the name of the Alumnus Initiate in the roster book and assign him a roster number. After initiation, a Member's Personal Record form should be completed and returned to the Headquarters for proper documentation.

TRANSFER OF MEMBERSHIP CERTIFICATE (Form T-1): This blue form is to be used when a member of another chapter requests the transfer of his membership to your chapter. First, send this form to his original chapter. They will complete the top half and return it to you. You complete the remainder of the form and forward it to the Headquarters. Remember that your chapter is not obligated to accept transfer brothers if they so choose. They should be granted membership in your chapter only after careful consideration, as with any member.

MEMBERSHIP SUMMARY: Every March you will receive a two part copy of your chapter's Active Membership Summary. You will be requested to review, revise, and return this report to the International Headquarters no later than April 10th. This report is used to assess the following year's Insurance and Rechartering fees. It is imperative that you submit this report in a timely manner so the proper membership count can be used for the Insurance and Rechartering fees.

CHAPTER OFFICERS (Form E-5): This white form is to be sent immediately to Headquarters after a change in one or more officers. The Headquarters keeps detailed records on each chapter and should always be informed as to your chapter's officers and correct contact information. Changes and updates can also be reported using the on-line form at www.thetachi.org/resources/officer_resources

SUMMER OFFICERS (Form E-5a): This form should be sent prior to the close of school for the summer. When planning for Chapter Leadership Conferences, Conventions and recruitment visits, the Headquarters will need to contact officers over the summer. Always be sure you leave addresses, email addresses, and phone numbers with the Headquarters so that communication can continue throughout the summer months. An on-line form is available at www.thetachi.org/resources/officer_resources

CHAPTER COMMUNICATION

In addition to the Headquarters forms, there are many other ways the Secretary can improve communication within the chapter and the campus community.

CHAPTER COMMUNICATION: In most chapters, the Secretary is responsible for sorting the daily mail and posting letters to individual mailboxes. The Secretary should read and route all Fraternity mail unless it is addressed to a specific officer. The Secretary should take time during his report to the chapter to read the minutes of the previous meeting, and also make any necessary announcements that may be appropriate.

It is recommended that chapters maintain a weekly or monthly calendar of events so that members will always be informed of activities. The Secretary should maintain a master calendar, which should be posted in a conspicuous place. The Secretary should take note of significant events in the chapter and record them on the calendar. Copies should be distributed to all members, along with a chapter phone/address list. These items should be updated each semester/quarter.

ALUMNI: The Secretary should work with the Alumni Corporation Secretary to maintain an accurate list of all alumni. Every effort should be made to secure good addresses from alumni. The Headquarters can supply mailing labels and a recent address list for a small fee. The Secretary may assist the Newsletter Chairman in mailing any chapter publication.

UNIVERSITY FACULTY/ADMINISTRATION: Invite members of the faculty and university administration to the house for dinner or a short discussion before chapter meetings. As Secretary, initiate further relations between your chapter and its faculty advisor. Send thank you notes to university staff members who help your chapter.

LETTERS TO PARENTS: Send letters to parents explaining the fraternity when members pledge. This could be followed up by a letter from the Parents' Club, and invitations to formal events. It is also a good idea to include a cost-breakdown from the Treasurer when explaining the Fraternity to parents. In developing such letters, you should work with the Marshal, Parents' Club Chair, and other members of the chapter.

PRESS RELEASES: After successful service projects and/or community service events, the Secretary should submit a summary to the local newspaper. Many papers will print positive articles about fraternities. The proper method to get newspaper coverage is to submit a press release before and after an event has occurred.

CAMPUS PAPER: Use the campus paper for ads or lines in Greek Notes or personal section of the classified advertisements. This can be used to congratulate Theta Chi brothers or other Greek organizations.

LETTERS/NOTES TO OTHER GREEKS: The Secretary can really get the name of Theta Chi out among other fraternities and sororities by sending thank you/congratulatory cards to them. Special occasions include: Good Luck in Rush, Happy Founders Day, Congratulations on winning Greek Week, etc... the list is endless! Be creative, brief, and polite in your correspondence.

*A list of founding dates and flowers for women's fraternities and sororities is included in this manual.

SUMMER MAILINGS: Compiling everyone's summer addresses and phone number is very important. As Secretary, you should send out a monthly letter reminding the chapter of work weekends, summer events, fall house bills and the Convention/CLC.

CHAPTER ARCHIVES

The Secretary is responsible for the Minute Book and the Roster Book, as well as many other chapter forms and records. Organization and attention to detail is imperative in this position. An efficient and detailed Secretary can help a chapter to run smoothly and effectively. A disorganized and messy Secretary can cause chapter communication to break down and fail.

THE ROSTER BOOK

This volume holds the names and signatures of all members initiated into a particular chapter. When a chapter is chartered by the Grand Chapter, all members present at the installation are recorded in the Roster Book. All subsequent members are added to this roll. Some chapters refer to the Roster Number as a "Pin Number" however, the correct term is Roster Number.

A couple of days before the Ritual, the Secretary should enter all information into the Roster Book for each new brother. Remember, enter only the names of the brothers who will be initiated. The Secretary should never skip or hold a roster number. This information must be neatly written and spaced properly in the Roster Book. He should then bring the Roster Book to the Ritual ceremony and have it ready for each new member to sign. An example is shown below.

At least two lines should be given for each member; three lines are also acceptable. Immediately following the Ritual, members should sign the Roster Book on the line below their printed name.

DECEASED DATE	ROSTER NUMBER	NAME IN FULL	PLACE OF BIRTH	DATE OF BIRTH	HOME ADDRESS	INITIATION DATE
	1	John Adams Doe	Fishers, IN	1-30-70	1357 Grant Avenue	10-2-89
		<i>John Adams Doe</i>			Fishers, Indiana 46200	
	2	James Henry Smith	Boston, MA	10-16-70	12 Freeman Street	10-2-89
		<i>James Henry Smith</i>			Boston, MA 02100	

Please review the inside cover of the Roster Book regarding the addition of the names of Honorary Members and transfer brothers within the Roster Book.

You will need to show the Leadership and Education Consultant (LEC) the Roster Book each time they visit. Please make sure that it is up to date and ready for the LEC to examine.

THE MINUTE BOOK

The Minute Book is the living history of your chapter. It should be the goal of every chapter Secretary to leave a complete and neat Minute Book, which chronicles the events of the chapter during his tenure as Secretary.

There are several ways to keep minutes. Some chapters hand write minutes in the traditional Minute Book. If this is the case, be sure to RECOPY the minutes into the Minute Book soon after each meeting. DO NOT record directly into the book. It is best to take notes in outline form on a legal pad or regular notebook paper, and then recopy the minutes into the book. You should never write in the minute book during a chapter meeting.

If you prefer to type minutes into a computer, be sure to print a hard copy of each meeting's minutes and bind them by year. Whatever method you choose, be sure that you leave an accurate record of events for your chapter. The minutes should record what was done during the meeting, not what was said word for word. Your minutes should look like a detailed outline, which follows the normal chapter agenda.

I. THE USE OF MINUTES

- A. An official record of the business of the organization.
- B. Give continuity to procedures, traditional activities, etc.
- C. Inform members not in attendance.
- D. Assists in follow up assignments and decisions.
- E. Assists in forming the agenda for the next meeting.
- F. Valuable review of recent years in forming an annual program of activities.

II. WHAT SHOULD BE IN THE MINUTES

- A. Name of the organization, committee, etc. Identify the group.
- B. Type of meeting. (regular, special, etc.)
- C. Date and time of meeting. (Year as well as month and day.)
- D. Place of meeting.
- E. Name of presiding officer and secretary (the latter at the end of the minutes, with signature above typed or printed name).
- F. Notation with reading of previous minutes and how they were approved. ("Approved as read" or "approved as corrected.")
- G. All of the major motions (except those withdrawn) and points of order or appeals, whether sustained or lost and all other major decisions. Include name of person making the motion.
- H. Names of committee members and statement of committee assignment, authority and date report is due.
- I. Names of members present in official policy groups. In most organizations member attendance is kept in a separate section of the record book.
- J. Adjournment. Mention date-time-place of the next meeting.

III. SOME IDEAS ON HOW TO WRITE MINUTES

- A. Use full names, not nicknames.
- B. Ask presiding officer to restate motion if you are not sure of exact phraseology.

- C. Ask the name of the person making the motion if you are not sure.
- D. State whether or not a motion was carried. The number of votes cast is not necessary unless it is required in your bylaws or a special situation arises.
- E. Make all corrections immediately. Minor changes can be made by writing the corrections above the original. Major changes can be attached at the end of the minutes, initial and date all corrections.
- F. Identify major items of business by marginal indentation and underlining.
- G. Number pages consecutively throughout the year.
- H. Include committee reports. Verbal reports may be summarized within the minutes. Written reports may be attached.
- I. Record what is done, not what is said. Summarize important discussions if knowing why a decision was reached is necessary to understand the decision.

You will need to show the Leadership and Education Consultant (LEC) the Minute Book each time they visit. Please make sure that it is up to date and ready for the LEC to examine.

THE RITUAL BOOKS

It is the Secretary's responsibility to keep each chapter's Ritual Books in a safe place, and see that they receive proper care. The Secretary should bring the Ritual Books to Formal Chapter Meetings and to Ritual ceremonies. At the close of each meeting, the First Guard shall also collect the Ritual Books and return them to your custody. He should also work with the Chaplain and Ritual Committee to care for the Chapter Robes and other Ritual properties. Many chapters have a special closet where they keep the Ritual properties and Robes locked up for safekeeping. The Secretary should see that the Ritual is a serious and proud part of the chapter.

You will need to show the Leadership and Education Consultant (LEC) all of the Ritual properties during each visit. Please make sure these items are ready for him to examine.

THE FEES ACCOUNT

As you know, the Secretary works with the Treasurer to collect New Member Fees and Initiation Fees. The chapter must have a separate account for New Member Fees and Initiation Fees. This set up prevents the mixing of funds with the chapter account. NEVER MIX THESE FEES WITH OTHER CHAPTER ACCOUNTS

All fees must be paid with either one check or one money order. Please do not send separate checks for each New Member.

It is the highest responsibility of the Secretary to see that the International Headquarters properly approves all initiates three weeks prior to the scheduled initiation date.

This approval includes payment of fees and a completed New Member Initiation Request Form for the initiate class. Having a separate fees account will enable proper payments to be made. This should be a two-signature account between the Treasurer and Secretary.

Under no circumstances may the Initiation Fees be used for anything else other than transmittal to the Headquarters for each member who is going to be initiated.

IMPROVING RELATIONS WITH WOMEN'S FRATERNITIES AND SORORITIES

Women's Fraternity and Sorority Founding Dates and Flowers

It has become tradition in many chapters of Theta Chi Fraternity to send flowers and a card to Women's Fraternities and Sororities on their Founder's Day.

NATIONAL PANHELLENIC CONFERENCE

Alpha Chi Omega	Scarlet Carnation	October 15, 1885
Alpha Delta Pi	Purple Violet	May 15, 1851
Alpha Epsilon Phi	Lily-of-the-Valley	October 24, 1909
Alpha Gamma Delta	Red and Buff Roses with Green Fern	May 30, 1904
Alpha Omicron Pi	Jacqueminot Rose	January 2, 1897
Alpha Phi	Forget-Me-Not & Lily-of-the-Valley	October 10, 1872
Alpha Sigma Alpha	Narcissus and Aster	November 15, 1901
Alpha Sigma Tau	Yellow Rose	November 4, 1899
Alpha Xi Delta	Pink Rose	April 17, 1893
Chi Omega	White Carnation	April 5, 1895
Delta Delta Delta	Pansy	Thanksgiving Eve, 1888
Delta Gamma	Cream Rose	December, 1873
Delta Phi Epsilon	Iris	March 17, 1917
Delta Zeta	Pink Rose	October 24, 1902
Gamma Phi Beta	Pink Carnation	November 11, 1874
Kappa Alpha Theta	Black and Gold Pansy	January 27, 1870
Kappa Delta	White Rose	October 23, 1897
Kappa Kappa Gamma	Fleur-de-Lis	October 13, 1870
Phi Mu	Rose Carnation	January 4, 1852
Phi Sigma Sigma	American Beauty Rose	November 26, 1913
Pi Beta Phi	Wine Carnation	April 28, 1867
Sigma Delta Tau	Tea Rose	March 25, 1917
Sigma Kappa	Violet	November 9, 1874
Sigma Sigma Sigma	Purple Violet	April 20, 1898
Theta Phi Alpha	White Rose	August 30, 1912
Zeta Tau Alpha	White Violet	October 15, 1898

NATIONAL PAN-HELLENIC COUNCIL

Alpha Kappa Alpha	Tea Rose	January 16, 1908
Delta Sigma Theta	Violet	January 13, 1913
Sigma Gamma Rho	Tea Rose	November 12, 1922
Zeta Phi Beta	White Rose	January 16, 1920

ADDITIONAL SUGGESTIONS

It is strongly suggested that chapters establish a separate account, controlled by the secretary and countersigned by the treasurer, for the sole purpose of collecting and submitting pledging and initiation fees. This not only prevents co-mingling of chapter funds with New Member/Initiation Fees, but also facilitates collection. The chapter secretary may simply collect New Member Fees as registration forms are collected, and later collect and hold Initiation Fees to avoid the possibility that this money will be spent. Establishing a separate savings account for fees is strongly recommended.

Here is a sample timetable to demonstrate how the collection system works.

September 12	Twelve fine young men wish to pledge Alpha Alpha Chapter at Midwestern State University. Member's Personal Record forms are completed and New Member fees collected by the chapter secretary immediately before the New Member Ceremony.
September 13	The morning after the New Member ceremony, the secretary deposits all checks and cash into the "Fees Account."
September 16	The chapter secretary sends in the Member's Personal Record forms and the \$720 (12 x \$60), by check or money order, to the headquarters. If any New Member wishes to pay by credit card they make sure that they call the headquarters with that information.
November 8	The chapter votes, in accordance with Theta Chi Bylaws, to approve twelve new members for initiation. Initiation Fees of \$3,000 (12 x \$250) are collected and deposited and the secretary fills out the Initiation Request Form.
November 11	Secretary sends the \$3,000 payment, along with the IRF form, to the headquarters.
November 24	Chapter receives approval to initiate their twelve New Members previously voted upon (response time may decrease, but allow two weeks). IF the headquarters has already received the fees, you may call for approval.
November 30	The chapter initiated approved men.
December 1	The chapter secretary mails the completed Report of Initiation form to the International Headquarters.