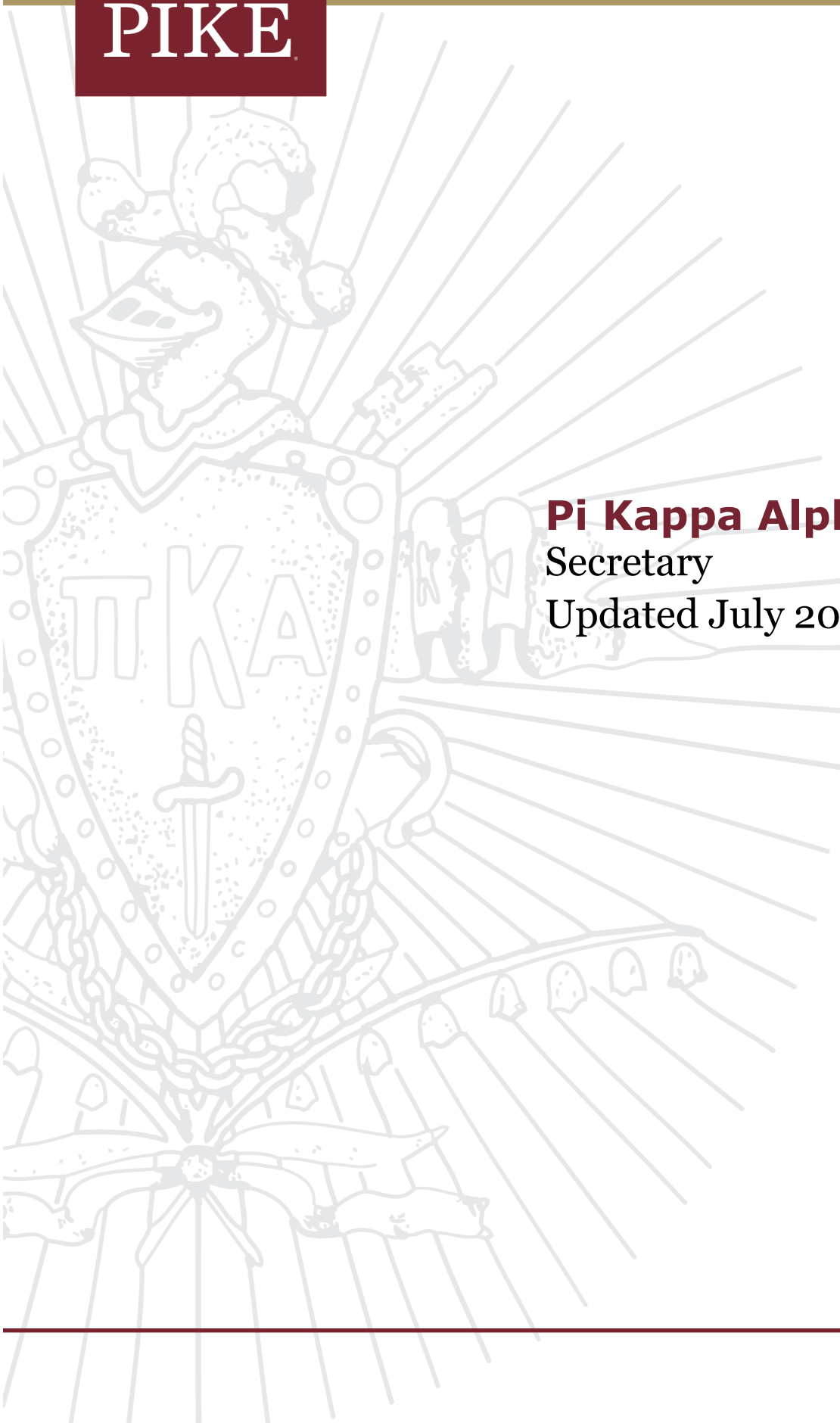


PIKE

Pi Kappa Alpha

Secretary

Updated July 2019



Foreword

The contents of this handbook are the result of a compilation of information from various chapters and various brothers affiliated with the Pi Kappa Alpha International Fraternity for the use by any chapter or volunteer which are interested in establishing or improving their programming.

It should be understood that each chapter is self-governing and solely responsible for its day-to-day, week-to-week and month-to-month operation and nothing herein is intended as or should be deemed as supervision, direction, monitoring, oversight or as an effort to control the local chapter by the Pi Kappa Alpha International Fraternity, which is a fraternal affiliation of over 220 chapters, over 15,000 active undergraduate members and over 300,000 alumni and several nonprofit corporations, including, but not limited to Oak Service Corporation, a Tennessee nonprofit corporation which serves as a clearinghouse and an administrator for purposes of organizing meetings and conventions, publishing fraternal publications and performing other functions for the entire International Fraternity.

This handbook is an educational guideline which only contains suggestions and recommendations developed by various chapters and alumni which were able to develop successful programs. It is published and available to any chapter through the International Fraternity in Memphis as a form of brotherly advice for whatever use one wants to make of it.

All ideas herein are optional, and nothing is mandatory. Participation is by the voluntary choice of each chapter and each member with the understanding that one generally gets out of something what one is willing to put into it. Thus, any language contained herein which could possibly be construed as “mandatory” such as “do this” or “do that” is only in the form of a recommendation that if one wishes to get the most benefit out of using the suggestions in the communication model, then the suggestions can be utilized with the understanding that any handbook or guide is, at most, a guide and that the users should substitute their own experience and judgment to use, adapt or modify the suggestions and recommendations contained herein. In other words, the communication model is a guide from which the users can use to establish, improve or build their own programs, using their own knowledge, common sense, ideas and experience and to assist the users from time to time as a reference for ideas and suggestions. In turn, each chapter is encouraged to share good ideas with other chapters by advising the administrative clearinghouse for possible inclusion in future publications.

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Overview of Handbook

It is important to follow a few recommendations when reading through this handbook. The first recommendation is to think of this handbook as a guide while you are secretary. This handbook is laid out in a fashion so that as you progress through the year, you will then advance to the next segment of the handbook. However, you do not have to read this handbook sequentially just because of that. If you only want a certain aspect of the handbook for reference, simply skip ahead to that part of the book. Also, you do not have to do everything exactly as this handbook states, but this handbook outlines some of the best practices being used today. Again, this handbook is simply a reference tool, so use it as such. If anything in this handbook does not sound familiar to you, some reevaluation and changing of processes may be in order, which leads to the next recommendation.

Do not let unfamiliarity or tradition keep you from implementing the ideas in this handbook. It is very easy to go through and simply read this handbook for general knowledge and understanding of the position. Unfortunately, things will not change or get better in your chapter unless you take action. In order to get the most out of this handbook and to make the greatest impact on your chapter, it is recommended to take the ideas in this handbook and put them into action. By taking action, you will get the most out of your position, which leads to the final recommendation.

Enjoy your position! No matter what reason you had for taking this position, make sure you fulfill your duties to the best of your ability. Much like the undergraduate fraternal experience, your tenure in this position will be very brief so do your best to make a positive impact and better the overall chapter. If you work your hardest to ensure this happens, you will truly have a rewarding undergraduate fraternal experience. Good luck!

Understand Your Position

Purpose of Secretary

The purpose of secretary is to ensure records are maintained and communicated for the chapter regarding operations and membership.

Job Description

As the secretary, you are the primary liaison between the university and the International Fraternity regarding membership reporting and responsible for appropriate documentation of chapter operations.

***** The following lists are examples and are not intended to be exhaustive or exclude other responsibilities as determined by the chapter. *****

Goals

- ◆ Ensure proper documentation and reporting of chapter operations and membership

Weekly Tasks

- ◆ Attend executive council and chapter meetings
- ◆ Attend and giving a report at weekly committee chair and chapter meetings
- ◆ Work to fulfill goals related to secretary
- ◆ Manage the secretary budget
- ◆ Take minutes at all executive council and chapter meetings
- ◆ Take roll at all chapter meetings and sponsored events

Semester/Quarter Tasks

- ◆ Set goals for the secretary position
- ◆ Set the secretary budget
- ◆ Work with the executive council to organize a chapter goal-setting retreat, officer retreat, and transition retreat
- ◆ Report all initiations to the International Fraternity five days prior to the day of initiation
- ◆ Report all transfer students wishing to affiliate, to the International Fraternity and the university within five days of the chapter's vote to accept him as a member
- ◆ Report all members who enter alumni status, to the International Fraternity and the university, within five days of graduation
- ◆ Forward all correspondence or forms needed for resignations, expulsions and reinstatements to the Memorial Headquarters and the University
- ◆ Report the election of all new officers to the International Fraternity and the university
- ◆ Order all needed supplies from the International Fraternity (e.g., rush brochures, new regalia, etc.)
- ◆ Update the chapter by-laws by including all new amendments passed each semester
- ◆ Update the fraternity roster with the university for accurate reports on scholarship
- ◆ Create and maintain a uniform secretary handbook including guidelines, ideas, and suggestions for future secretary
- ◆ Assist in the completion and submission of a Year End Summary

Completion of Position

Review position with the new secretary and provide written notes to successor and any other materials that were developed during your tenure as secretary including a uniform secretary handbook with guidelines, ideas, and suggestions for future secretaries.

Create the Plan for Your Position

Set the Goals for your Position

As secretary, your overall goal is to ensure that proper documentation and reporting of chapter operations and membership takes place. In order to properly achieve this goal, you must always be in attendance for chapter and executive meetings as well as be aware of any changes in membership. Therefore, to fulfill your duties as secretary, your goals should look something like this:

- ◆ Attend and properly document all business during chapter and executive council meetings
- ◆ Document and report any membership changes to International Fraternity and to the university in a timely manner

If you can accomplish these directives, you will successfully fulfill your duties as secretary. These goals may not seem difficult, but they it is crucial to the development of your chapter that you successfully accomplish these goals.

Set the Budget for Your Position

When setting the budget for secretary, you must take into consideration all the possible expenses that may be incurred during the program and then work with the treasurer to allocate the correct amount of the budget to secretary. You can first begin to think of all the expenses that will be incurred during the program.

After reviewing the expenses of secretary, you can determine that most of the expenses will be incurred primarily with pinning's and initiations (if not in the new member education budget) and prior to graduation (if not in the alumni relations budget). The list of expenses can then look something like this:

- ◆ Room reservations for chapter meetings (if necessary)
- ◆ *Garnet & Gold* manuals (unless ordered by the new member education chairman)
- ◆ New member pins (unless ordered by the new member education chairman)
- ◆ Initiate badges (unless ordered by the new member education chairman)
- ◆ Initiation materials (unless ordered by the sergeant-at-arms)
- ◆ New alumni packets (unless ordered by the alumni relations chairman)

Once you have determined what the expenses will be, you can then begin to work with the treasurer to ensure the correct amount is allocated to the secretary budget. The best way to go about working with the treasurer is to submit this information with the approximate corresponding amounts into the treasurer on the committee budget request form. This form can be found online at www.pikes.org in the financial documents of the officer resources. It would be beneficial to practice working with this document to make sure you fully understand how it works before developing your secretary budget with the document. After entering this information, the document you submit to the treasurer should look something like the table listed below:

Create the Plan for Your Position

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ΩΩ Chapter of The Pi Kappa Alpha International Fraternity

Secretary Budget Request Form

| Event/Activity (see detail pages for more) | Amount | |
|---|---------------|--------------|
| Meetings | \$ | 200 |
| New Member Supplies | \$ | 200 |
| Initiation Supplies | \$ | 500 |
| Alumnus Packets | \$ | 200 |
| Total Budget Request | \$ | 1,100 |

Once you have submitted this document, after approximately a week the treasurer should have a fully developed budget and the amount you requested should be fulfilled. If there are any discrepancies, make sure to work with the treasurer to resolve any issues. The budget is now set to enable you to accomplish the goals set for secretary. You are now able to move on to planning the tentative schedule for the year.

Sample Committee Request Form

<Chapter Name> Chapter of The Pi Kappa Alpha International Fraternity

<Insert Committee Name>

Line Item Details with Monthly Breakdown

| Event/Activity | Line Item Details | Total Cost | Jan | Feb | Mar | Apr | May | Jun |
|------------------------------|-------------------|------------|-----|-----|-----|-----|-----|-----|
| <Activity 1> | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| Event/Activity Totals | | \$ - | | | | | | |
| <Activity 2> | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| Event/Activity Totals | | \$ - | | | | | | |
| <Activity 3> | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| Event/Activity Totals | | \$ - | | | | | | |
| <Activity 4> | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| Event/Activity Totals | | \$ - | | | | | | |
| <Activity 5> | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| Event/Activity Totals | | \$ - | | | | | | |
| <Activity 6> | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| Event/Activity Totals | | \$ - | | | | | | |
| <Activity 7> | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| Event/Activity Totals | | \$ - | | | | | | |
| <Activity 8> | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| | | \$ - | | | | | | |
| Event/Activity Totals | | \$ - | | | | | | |

The above is intended to provide the chapter with general information and suggestions for improvement. It is not a directive and is not intended to direct the chapter in any manner. A chapter is not required to use or implement this information or suggestions. The decision on whether or how to use this information is solely that of the chapter.

Plan the Event Schedule for the Year

Contrary to many other positions in the chapter, the secretary position does not involve organizing or putting on events throughout the year. However, it is the duty of the secretary to document all chapter events that are taking place by organizing and communicating the chapter calendar. The calendar that is maintained and updated by the secretary should contain every chapter event and any other dates that are relevant to the chapter, campus and community.

The secretary will solicit the chapter for events over email, Facebook, and even during chapter meetings. Whenever you receive information about events, make sure that this information is documented in the calendar you are keeping. Additionally, make sure you share this calendar with members of the chapter either through email, Google Calendar, Microsoft Outlook, or any other means that will successfully inform members of the chapter of upcoming events. It may be helpful to share the calendar you are keeping electronically while also sending out weekly email reminders and reading the calendar in chapter since it is also a part of a general chapter meeting agenda. This will help constantly remind members of the different events that they have available to them.

It may not be your primary job to setup and organize all the events that the chapter will be putting on. It is extremely important, however, that you fulfill this part of your duties as secretary since your duties will directly impact the overall outcome of all chapter events. If you can remain organized and clearly communicate all chapter happenings to the membership, the chapter will see greater results from their events and ultimately realize a better chapter fraternal experience.

Execute the Plan for Your Position

Ordering Supplies

Supplies can be ordered through the www.pikes.org website. Once you access the website, click on the chapter resources tab and go to officer resources. Under the officer resources tab, you then click on order supplies. You will then click on the order supplies hyperlink which will go the online order form. After the online order form comes up, you can then pick which supplies the chapter needs and pay via credit card.

Taking Effective Meeting Minutes

Taking accurate minutes during chapter and executive meetings is a major responsibility of the secretary. This is important because in most cases this is the only way chapters document their history. If done correctly and in detail, chapter minutes may provide an accurate record of chapter activities. It is important to remember to submit copies of the chapter minutes to the regional president and the chapter advisor on the 15th of each month, during the academic school year. The chapter advisor must know what is going on within the chapter on a weekly basis. By informing him on a regular basis, he will be much more capable to advise the chapter in various areas. The regional president requires this information because it assists him in identifying problem areas where he may be of help. It is best if the minutes are taken electronically so that they can easily be stored and sent out to various groups. The secretary should also email the minutes to each member in the chapter once the chapter meeting is done. The chapter agenda should be sent to members prior to the chapter meeting.

Reporting Members and Officers

All new members, new initiates, and officers must be updated through the OmegaFi Chapter Desktop. New initiates need to be reported as initiated five days prior to the initiation date. Transfers should be reported within five days of transferring. Alumni should be reported within five days of becoming alumni. Resignations, expulsions, and reinstatements should be reported within five days of these situations occurring. New officers should be reported within five days of installations or elections. All these items can be done through the chapter desktop on OmegaFi. It is also recommended that a list of newly initiated brothers be sent to the chapter consultant. The best practice is to always confirm all changes made with new members, new initiates, and new officers with Memorial Headquarters.

Taking Roll

Roll shall be taken at every chapter meeting and executive council meeting. This can be done electronically using an excel spreadsheet with a comprehensive list of all members. The purpose of taking roll is to ensure the attendance policies established by the chapter's by-laws are being followed. Roll should be taken at the beginning of each meeting and excused absences need to be reported to the secretary two days prior to each meeting.

During the Executive Council Meeting

Every week there will be an executive council meeting. All members of the executive council should be in attendance for this meeting to discuss the business of the chapter. The purpose of the meeting is to ensure that all members of the executive council, essentially those who are running the chapter, clearly understand everything that is taking place that has to do with the chapter. It is important to have this meeting because the leaders of the chapter should always clearly understand what takes place within their organization. This also allows the leaders of the chapter to communicate a clear message to the

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rest of the chapter. By having all major decisions related to the fraternity worked out within the executive council, chapter meetings and overall chapter operations will run much smoother.

This meeting should take place at a time and day that will allow most members of the executive council to be in attendance. Determine this time and day at the first executive council meeting of the term. Typically, these meetings are held on either Sundays or Mondays before the chapter meetings by most chapters.

During this meeting, the secretary or president should have put together an agenda to follow in the meeting. Every executive council member will give their report during the meeting and each person should have a pad of paper to document any actions or items that arise from the meeting. Additionally, the secretary should take meeting minutes during this meeting to properly document what transpired. Dates of upcoming events should be documented and added to the chapter calendar. Once the meeting adjourns, the secretary should send the minutes of the meeting to all executive council members. Each officer should send their talking points to the secretary two days prior to the executive council meeting, to allow him to create an agenda for the meeting. It is also recommended that the alumni advisory board be in attendance and that minutes be sent to the alumni advisory board and the chapter advisor.

During the Executive Council Retreat

Once a semester/quarter, there will be an executive council retreat. All members of the executive council and members of the alumni advisory board should be in attendance for this retreat. The purpose of this retreat is to review the performance of the chapter during the previous semester/quarter, develop the long-term strategic plan of the chapter including goals for the upcoming semester/quarter, build camaraderie with the executive council and alumni advisory board, and address any other issues that the chapter may currently be facing. It is important to have this retreat because this will allow the chapter to maintain proper development over time while also ensuring that there is a good relationship between all members of the executive council and between the executive council and alumni advisory board.

This retreat will be approximately one to two days of time from each person involved so it is best to schedule this retreat for a weekend. The executive council and alumni advisory board will both be involved with this retreat, so it is best to plan for a time when most members of both groups are available. It is also beneficial to hold this retreat away from the chapter house and the membership so that the executive council can focus on the tasks at hand while not being distracted. Determine the date for this retreat when setting the calendar for the chapter. Typically, these retreats are held on a weekend near the end of the semester/quarter in order to properly prepare for the upcoming semester/quarter.

During this retreat, the secretary or president or alumni advisory board chairman should have put together an agenda to follow in the retreat. Every executive council member, new and old, will give their report during the meeting and each person should have a pad of paper to document any actions or items that arise from the meeting. Additionally, the secretary should take minutes during this retreat to properly document what transpired and the goals that were set. Dates of upcoming events should be documented and added to the chapter calendar. Once the retreat adjourns, the secretary should send the minutes of the meeting to all executive council members and alumni advisory board members. Each officer should send their reports/goals to the secretary at least one week in advance of the executive council retreat, to allow him to create an agenda for the meeting and to ensure everyone has the proper paperwork prior to the retreat. It may be beneficial to bring the last year end summary report and consultant visitation analysis to assist with goal setting.

During the Transition Retreat

Once a semester/quarter, there will be a transition retreat. All members of the executive council and each chairman, new and old, should be in attendance for this retreat. The purpose of this retreat is to review the performance of the chapter during the previous semester/quarter, assist the new executive council and chairmen in setting upcoming goals, and allow the old chairmen to transition materials and knowledge to the new chairmen. It is important to have this retreat because this will allow the chapter to maintain proper operations over time.

This retreat will be roughly a few hours of time from each person involved so it is best to schedule this retreat for a weekend. The executive council and all transitioning chairmen will both be involved with this retreat, so it is best to plan for a time when most members of both groups are available. It is also beneficial to hold this retreat away from the chapter house and the membership so that the executive council and chairmen can focus on the tasks at hand while not being distracted. Determine the date for this retreat when setting the calendar for the chapter. Typically, these retreats are held on a weekend near the end of the semester/quarter before the executive council retreat in order to properly prepare for the upcoming semester/quarter.

During this retreat, every executive council member and chairmen, new and old, will discuss operations and go over in-depth details about each position, so each person should have a pad of paper to document any actions or items that arise from the meeting. Dates of upcoming events and any recommendations should be documented and added to the chapter calendar. It is important to ensure all reporting of new officers and paperwork with the university and the International Fraternity has been updated. Once the retreat adjourns, the new executive members and chairmen should have their file and documentation for the position as well as the knowledge from the previous executive member and chairman.

During the Chapter Goal Setting Retreat

After the transition and executive council retreats, the goals of the chapter should be roughly developed. It is important to communicate these goals to the chapter in order to gain feedback and buy-in from the membership. The best way to do this is by holding a chapter goal setting retreat.

Once a semester/quarter, there will be a goal setting retreat. All members of the chapter should be in attendance for this retreat. The purpose of this retreat is to communicate the goals set by the men who hold positions for the upcoming semester/quarter to the rest of the chapter. It is important to have this retreat because the chapter will clearly understand and be unified toward achieving the goals for the next semester/quarter.

This retreat will be roughly a few hours of time so it is best to schedule this retreat for a time that is consistent with events where most of the chapter can attend, such as chapter meetings. It is beneficial to hold this retreat away from the chapter house or other noisy areas so that the chapter can focus on the goals while not being distracted. Determine the date for this retreat when setting the calendar for the chapter. Typically, these retreats are held on an evening/day near the beginning of the semester/quarter after the transition retreat and the executive council retreat have taken place near the end of the previous semester/quarter in order to be more relevant to the timing of chapter events.

During this retreat, the secretary or president should have put together an agenda to follow in the retreat. Every new executive council member will report their goals during the retreat and each person should have a pad of paper or be given a list of the goals to understand all the goals that the chapter has. Additionally, the secretary should take minutes during this retreat to properly document what

transpired and the goals that were set. Dates of upcoming events should be documented and added to the chapter calendar. Once the retreat adjourns, the secretary should send the minutes of the retreat to all chapter members. Each officer should send their reports/goals to the secretary at least one week in advance of the chapter goal setting retreat, to allow him to create an agenda for the meeting and to ensure everyone has the proper paperwork prior to the retreat.

During the Chapter Consultant Visit

Each chapter will receive a chapter consultant visit once each academic year. During this visit, the designated chapter consultant, a member of Memorial Headquarters staff, for your region will visit your chapter. The chapter consultant will stay with you and your chapter for, typically, a three to five day period. The consultant will meet with numerous members of the chapter including the entire executive council, each person who holds a position in the chapter, alumni of the chapter, university officials and the entire chapter. The consultant uses these meetings to find out more about the chapter to ultimately evaluate and provide recommendations to the chapter for better operations. This visit is by no means meant to be invasive or a method to cause issues for the chapter. It is simply a way for the international fraternity to help each chapter better itself through third party analysis and recommendations.

When the chapter consultant does come to visit your chapter, he will provide you with a preparation packet to help you properly prepare for his visit. It is important to be as helpful as possible when coordinating the visit with the chapter consultant since you should provide him with numerous items including chapter statistics, meeting times and locations for his meetings with chapter members, contact information for members in the chapter, meals for his visit, proper sleeping arrangements, and many other items. Make sure meetings are arranged with the chapter consultant to meet with all positions within the chapter. Again, it is important to complete the consultant preparation packet at least three days prior to the arrival of the chapter consultant. Ensure that the chapter consultant is able to conduct his business in a proper manner and that he is provided with plenty of other amenities to help the chapter as much as possible. The less hospitable and helpful you are toward the chapter consultant, the less likely he is to provide his best possible work and recommendations to the chapter.

Once the chapter consultant visit is finished, the consultant will then provide the chapter with a report that summarizes his visit known as the consultant visitation analysis. This document is meant to provide a snapshot of the current chapter operations while also communicating recommendations to improve chapter operations. This document is by no means used to score the chapter for awards, but it is simply a service that the chapter is provided in order to achieve a better overall fraternal experience.

Organize and Submit a Year End Summary

Once an academic year, usually between March and June, an application is made available that is known as the Chapter Year End Summary and International Awards Application. This application is completed by chapters in order to qualify for international awards and to also provide a document that the chapter can use to evaluate and better current chapter operations.

The application is very long and includes four areas (membership, operations, brotherhood, and leadership) with each area containing four sub-sections. Each of these sub-categories contains five questions. Each question in the application asks for supporting documentation to prove that the actual task was fulfilled. Most of the work related to completing this application is due to the compilation of all the documentation and it will take many weeks to complete this process.

Therefore, in order to properly complete the year end summary, it is recommended that all members of the executive council be involved as well as any other member in the chapter who chooses to be involved. It will help to get more members involved with completing the year end summary since there is so much information to compile. It will be helpful to start on the application immediately when it becomes available and delegate each area as well as corresponding sub-categories to individuals involved with the process. Make sure that all final documents submitted are aesthetically pleasing and would be of a quality you or even your professors on campus would be proud of. The more you can delegate responsibilities and get more members involved with the process, the greater chance you have for submitting a better year end summary and qualifying for more international awards.

The Chapter Year End Summary and International Awards Application can be found and completed through www.pikes.org.

Enhance the Plan for Your Position

Ensure a Successful Transition for Your Successor

It is vital to the performance of your chapter that there is some transfer of knowledge to the next secretary when your tenure is complete. This knowledge should be communicated in person and in writing through physical documentation.

The purpose of the physical documentation is to ensure that information is available for the new secretary to easily reference during his tenure in the position. Documentation to include would be anything that could help your successor including but not limited to the chapter roster, meeting minutes, templates for agendas, templates for minutes, documentation of previous secretary issues, slideshows, e-mail correspondence, notes to successor, etc. A sample event summary can be found on page 15 of this handbook. A sample contact list can be found on page 16 of this handbook. A sample notes to successor can be found on page 17 of this handbook. Again, the physical documentation pertains to anything that would help your successor transition more easily into his new position, so please ensure the physical documentation is organized.

Once the physical documentation is compiled, then you will be able to sit down with your successor to have a transition meeting. During this meeting, you want to make sure to describe the overall position and detail the physical documentation. Communicate anything to your successor that will be helpful and may be difficult to understand in the physical documentation. It is beneficial to review the goals that you set as secretary, to help the new secretary set goals, and to discuss any points that may be of difficulty during his tenure or that affected you while holding the position. Taking notes during this meeting will ensure that everyone is aware of what was discussed on the development of the secretary position.

You will ensure a successful transition for your successor if you are able to transfer physical documentation and conduct an in-person transition meeting. By ensuring proper transfer of knowledge takes place, the chapter will be able to continually accomplish the duties of secretary.

Event Summary

Date _____

Event _____

Committee and Chairman _____

Date and Time of Event _____

Description _____

Steps in Planning _____

Needed Supplies, Cost, Attendance, etc., _____

Persons to Contact, Addresses, Phone Numbers _____

Suggestions for Improvement _____ -

Your Name _____

The above is intended to provide the chapter with general information and suggestions for improvement. It is not a directive and is not intended to direct the chapter in any manner. A chapter is not required to use or implement this information or suggestions. The decision on whether or how to use this information is solely that of the chapter.

Contacts

Phone _____

Name _____

Organization _____

Address _____

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Frequently Asked Questions

How do I take effective notes?

Be sure notes are taken electronically to ensure that they will not be lost in transition of officers. Document each chair and executive member's report, being sure to highlight days for upcoming events. Always review all notes before sending them out to alumni and chapter members.

What is the best way to take attendance at meetings?

Verbally call roll to ensure that all members are present. Keep roll in an electronic spreadsheet which makes it easier to count members absences.

When should I compile information for the year end summary?

The information for the year end summary should be compiled throughout the entire year. Documenting all achievements, the chapter accomplishes. By compiling the information for the year end summary throughout the year, it will ensure the chapter will have a more organized submission.

Why should I report initiations five days prior to the initiation date?

To avoid the chapter being assessed a fine that is outlined in the *Constitution* and *Chapter Codes*.

When should I submit an order for supplies?

A supply order should be done at the beginning of the school year. Compile a list of all supplies that the chapter will need for the entire year. Please allow for a three-week assembly and shipping period.

How should I send out meeting minutes?

Chapter and executive council minutes should be sent out via email to the chapter advisor, alumni advisory board, and the chapter consultant. The chapter meeting notes should also be sent to all members of the chapter.