

## CHECKLIST OF RESPONSIBILITIES FOR THE SUPPORT ALUMNI

The following list, while fairly exhaustive, is not to be used as the definitive list of the only responsibilities of the support alumni. They do, however, give an excellent idea of the important issues that need to be addressed. Unless otherwise indicated, these apply to all support alumni.

- A. Read the *Chapter Operations Manual*. (All should read their relevant sections and others as possible)
- B. Assist officers in general operations and procedure. (Each in their relevant areas)
- C. Make sure each chapter/colony officer reads and understands their respective resource manuals.
- D. Function as the liaison between the undergraduates and the alumni. (“BB”)
- E. Develop an ongoing, beneficial relationship with the university administration (Greek Advisor/Dean of Students). (“BB”, Faculty Advisor and Public Relations Advisor)
- F. Help the chapter/colony prepare yearly/semesterly budgets prior to the end of the school year and perform monthly budget reviews with a report at the ABT meeting. (Financial Advisor)
- G. Make sure the rush chairman plans the rush program prior to leaving for vacation (winter/summer). (Rush Advisor)
- H. Meet with the associate member class to educate in matters such as the Fraternity’s policy regarding hazing and lifetime involvement in The Delta Chi Fraternity. (Membership Education Advisor)
- I. Serve as a resource person for area alumni. (Alumni Relations Advisor)
- J. Make sure chapter/colony “E” is publishing alumni newsletters. (Alumni Relations Advisor)
- K. Supervise transition of officers and hold officer training workshops (see *Chapter Retreat BRIEF*).
- L. Make semiannual reports to the International Headquarters (4/30 and 12/31). (“BB” and ABT Pres)
- M. Attend (at least two per month) executive council and general meetings. (“BB”. Others as possible)
- N. Review the chapter's/colony's financial status with the “D” (monthly). (Financial Advisor)
- O. Supervise initiation of new members. (ABT)
- P. Make sure Form 990 is filed with IRS. (Financial Advisor)
- Q. Maintain close contact with Regent. (“BB”, ABT Pres., and HC Pres.)
- R. Review the officer responsibility check-list with each officer to ensure he knows his duties.
- S. Attend regional leadership conference. (“BB” and Vice Regent)
- T. Suggested attendance at Henry M. Jackson Leadership College and convention (“BB” and Vice Regent)

It is the responsibility of both the alumni and the undergraduate group to design a semiannual written agreement stating what is expected of each party. This agreement between the chapter/colony and the alumni should include, but not be limited to, such areas as communication, problem solving, problem prevention and interaction.

## CHAPTER OFFICER RESPONSIBILITIES

The following lists, while fairly exhaustive, are not to be used as the definitive list of the only responsibilities that the respective officers have. They do, however, give an excellent idea of what each office entails. Only by reading the various manuals, **BRIEFS**, and general letters can an officer keep abreast of his full responsibilities.

### “A”

- A. Read the *Chapter Operations Manual*.
- B. Chair general meetings. Run efficient (1 hour) meetings using parliamentary procedure and a written agenda.
- C. Meet with the Greek Advisor regularly and attend IFC meetings.
- D. Remain fair, unbiased, and objective.
- E. Be the key representative of the chapter.
- F. Be a good listener and facilitator.
- G. Iron out small problems and conflicts before they become big ones (a good resource text is Dale Carnegie's *How to Win Friends and Influence People*).
- H. Coordinate officer and chapter retreats each term with the “BB”.
- I. Take care of all paperwork needed for recognition on campus and by the IFC.
- J. Get to know other fraternity and sorority presidents and try to maintain open communication with them.
- K. Meet regularly with support alumni.
- L. Communicate regularly with the International Headquarters.
- M. Be familiar with the responsibilities of other officers and chairmen. Pay specific attention to due dates (including your own).
- N. Communicate with neighbors.
- O. Communicate and meet regularly with the “BB”.
- P. Set specific personal goals for the office.
- Q. Attend all ABT meetings (the “A” is a voting member).
- R. Send in list of ABT and house corporation members to International Headquarters by December 1 of each year.
- S. Report “BB” election/re-election by November 1 in non-Convention years.
- T. Periodically check to make sure each officer is keeping his officer notebook up to date.

**The main responsibility of the “A”, outside of those specifically outlined above, is to keep tabs on everyone and assure that things are getting done. He should not be doing everything himself.**

**“B”**

- A. Read the *Chapter Operations Manual*.
- B. Schedule, plan and chair executive committee meetings.
- C. Oversee all committees.
- D. Make sure chairmen are working with tangible plans and goals, as well as keeping their committee notebooks up to date.
- E. Contact local bookstores and vendors to get them to stock Delta Chi decals, sportswear, etc.
- F. Keep a detailed calendar of events. Post and/or hand out monthly.
- G. Arrange meeting rooms when needed, try to get same room all the time.
- H. Act as the parliamentarian during general meetings.
- I. May chair the by-laws committee (if not, at least makes sure they are adopted ASAP and kept up to date).
- J. Set up ad hoc committees as needed.
- K. Summarize the weekly written officer / committee reports at Executive Committee meetings.
- L. Coordinate with the “C” and “E” special correspondence with other Greeks, the university and alumni (holiday and congratulatory messages, etc.).
- M. Insure all award applications (Delta Chi, IFC, university, etc.) are properly filled out and submitted on a timely basis.
- N. Promote alumni initiations (faculty, fathers, ABT members, and community leaders).

## “C”

- A. Read all materials pertaining to office (“C” *Manual*, reference sheet, general letters, chapter “C” notebook, *Public Relations BRIEF*, etc.).
- B. Complete and return Chapter Meeting Report (CMR) forms to the International Headquarters within 3 days of every chapter meeting.
- C. Post minutes from each meeting.
- D. Responsible for having Personnel Record (PR) forms filled out and sent to International Headquarters two weeks prior to initiation (should accompany initiation dues).
- E. Give a copy of election results to the Greek Advisor, IFC, ABT and the International Headquarters (in next CMR).
- F. Unless a separate chair is created, the “C” is in charge of communications among the members (phone list, newsletter, help “B” with calendar of events).
- G. Regularly update and distribute membership list (send copies to the International Headquarters and Greek Advisor).
- H. Review and return the computer-generated membership lists sent by the International Headquarters by the October 15 and February 15 deadlines.
- I. Complete and return the holdover and new Associate Member list by October 15.
- J. Unless a separate chair (historian) is created, the “C” is in charge of constructing a scrapbook of the chapter’s activities.
- K. Keep current on all correspondence. Organize a correspondence file and require all members to give you a copy of all official correspondence.
- L. Order and hold stationery, envelopes, thank-you notes, etc.
- M. Make written agendas for chapter meetings available to all the members.
- N. Keep and preserve all records, books, documents, and archives of the chapter.
- O. Report all disaffiliates to the International Headquarters (in CMR). Credits for disaffiliates can only be made if the man disaffiliates within two weeks after he affiliates and is reported immediately.
- P. Report graduates, status of associate members and summer addresses for officers by April 15 of each year on the proper forms.
- Q. Prepare a yearly history of the chapter, forwarding a copy, on the correct form, to the International Headquarters by May 1.

**“D”**

- A. Read all materials pertaining to office (*Financial Management BRIEF*, Tax Guidelines, reference sheet, general letters, etc.).
- B. Have a basic understanding of accounting principles.
- C. Collect all dues and assessments.
- D. Organize a bookkeeping system.
- E. Consider retaining an outside accountant to do a quarterly audit and the chapter's tax forms (all chapters and colonies must file a 990 form every year).
- F. Be the main contact for ordering supplies from the International Headquarters and making other purchases on behalf of the chapter/colony.
- G. Require receipts for all purchases.
- H. Oversee budgeting process.
- I. Keep accurate files of debts owed by the members.
- J. Make sure a process for collecting accounts receivable goes into the chapter by-laws.
- K. Send all initiation dues (which must accompany the Personnel Record forms) to the International Headquarters two weeks prior to initiation.
- L. Organize a finance committee to assist with budget development (see the *Financial Management BRIEF*).
- M. Communicate with the “BB”
- N. Submit a weekly written report to the executive committee on finances.
- O. Prepare and distribute a monthly financial statement to the chapter.
- P. Periodically reaffirm the chapter's policies on overdue accounts.
- Q. Attend ABT meetings (the “D” is a voting member).
- R. Provide the ABT with a budget at the beginning of every term.
- S. Provide the ABT with a financial report by November 15, February 15, and May 15.

## “E”

- A. Read all materials pertaining to office (*Alumni Relations BRIEF*, *Alumni Newsletter BRIEF*, reference sheet, general letters, etc.).
- B. Contact alumni (ongoing).
- C. Produce at least two alumni newsletters per year. Read the *Alumni Newsletter BRIEF* for tips on publishing yours. Secure an alumni advisor / editor if possible.
- D. Submit *Quarterly* articles (deadlines: August 1, December 1, February 1, May 1). See the *Quarterly* Reference Sheet for complete instruction on *Quarterly* submissions. Send pictures! Be sure to put your name and the chapter name on all submissions.
- E. Coordinate alumni functions (Founders' Day, homecoming, special events, etc.).
- F. Correspond with alumni:
  - 1. Birthdays, anniversaries, etc.
  - 2. Acknowledgments
  - 3. Newsletter information
  - 4. Thank-you letters
  - 5. Special events
  - 6. Invitations
- G. Maintain an up-to-date mailing list and personal file on all alumni.
- H. Get a bulk-rate mailing permit (apply at the post office).

## “F”

- A. Serve as the Risk Management Officer and be totally familiar with Delta Chi's Risk Management Policies.
- B. Review the FIPG Policy each fall and spring with the brothers and with the new associate members.
- C. Read the *Risk Management Manual*.
- D. Monitor the behavior of the chapter in general; in the house, toward the associate members, etc.
- E. Insure that the Ritual material is properly cared for (cleaned, replaced), securely stored and that all necessary materials are on hand prior to an initiation.
- F. Coordinate initiations with the “A”.
- G. Oversee security at the chapter house (in conjunction with house manager).
- H. Assist the "A" in maintaining order at meetings.

### **RUSH CHAIRMAN**

- A. Read the Recruitment **BRIEF**.
- B. Conduct the rush program as developed by the chapter.
- C. Arrange rush committee meetings, notify members of time and place.
- D. Give a rush evaluation questionnaire to all new associate members.
- E. Organize a rush workshop for all members and an overview of the program for associate members as part of the Membership Education Program.
- F. Get the names of prospective members from brothers.
- G. Be a liaison with:   Executive Committee  
                                  IFC  
                                  Sororities  
                                  Alumni
- H. Schedule and organize a rush retreat/workshop to help develop goals for the chapter's rush program and improve members' rush skills.
- I. Post the rush program and calendar on bulletin board and hand out copies.
- J. Chair membership selection bid meetings of the chapter.
- K. Invite alumni to rush, either personally or through the "E".
- L. ORGANIZE-ORGANIZE-ORGANIZE!
- M. MOTIVATE-MOTIVATE-MOTIVATE!

### **ASSOCIATE MEMBER COUNSELOR**

- A. Read the *Big Brother*, *Membership Education* and *Pre-Initiation BRIEFs*.
- B. Coordinate the written Associate Member Program as adopted by the chapter, with the assistance and supervision of the executive committee.
- C. Coordinate the Big Brother Program (or supervise the person who does).
- D. Promote chapter participation in membership education.
- E. Submit weekly written reports to the "B".
- F. Provide members and associate members with a calendar of events.