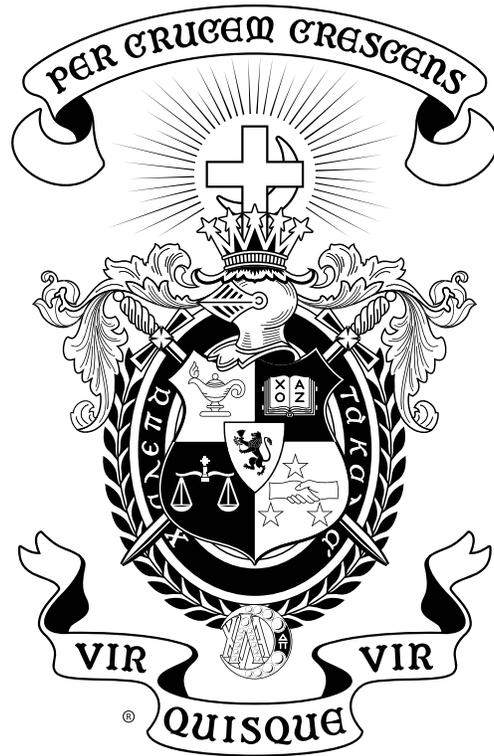


# High Alpha Operations Guide

⊕ a Lambda Chi Alpha resource





*As the High Alpha of \_\_\_\_\_ Zeta,  
I, \_\_\_\_\_, hereby promise to  
uphold the ideals of Lambda Chi Alpha and  
diligently perform the duties and responsibilities  
associated with this position.*



# Operations Guide

## President: High Alpha

### The Official Charge of the High Alpha

Brother High Alpha, the high station to which you have been raised involves great responsibilities. The interests, well-being, and development of this chapter, and the guidance of each brother and associate member are now placed to a large degree in your hands. In order that you may carry out the duties of your office to the best of your ability, consider carefully these rules of action:

1. Strive ardently for the chapter's welfare, but let your efforts be wisely directed.
2. Demand strict adherence to our laws and standards, but look well that there is no fault to be found with your example.
3. Seek the aid of others, but remember that you are responsible for their actions.
4. Heed the advice of all, but do not be swayed by undue influence.
5. Be deliberate in judgment, but prompt in execution.
6. Conduct yourself with dignity, but do not be overbearing.
7. Be firm, but not severe.

If you feel that you are not possessed of all these attributes of leadership, know that you may attain them through sincere study, earnest effort, and persistent practice. Make it your goal to strive until these virtues are your own so those who follow you will be guided by your example.

## In Order to Lead, You Must First **MODEL IT**

To MODEL IT means to implement the required functions of your office in order to lead the chapter effectively. These seven directives are the basic expectations for each brother during his term in office

- M**otivate: The chapter's officers to plan ahead and to implement their plans.
- O**rganize: Support for the chapter's officers.
- D**elegate: The management and operations of your office to the chapter's officers.
- E**valuate: The performance of the chapter's officers.
- L**ead: By exemplifying the Seven Core Values, the ideals, and the teachings of our rituals.
- I**nspire: Chapter officers to the highest level of operational competency.
- T**each: Through your example as a leader and brother.



# Operations Guide

## A Message from the International Headquarters

Congratulations brother on your appointment as your chapter's High Alpha. This position will require you to work diligently to ensure that your chapter lives up to its highest standards. The document you are currently accessing is your officer Operation's Guide. This interactive document will be your go-to resource in successfully implementing the standards that this officer position entails.



The first part of the Operations Guide is the specific operations you should be completing. These operations are separated by Basic, Advanced, and Exceptional. With each of these operations, you can click on the "Jump to Section" to view a page that will give you a description on how to complete that operation. The operations list also has a checkbox you can use when you have completed the operation. When your Educational Leadership Consultant visits with you, he will evaluate you on whether or not you have completed these operations.

There is also a navigation tab at the bottom of the screen that can take you to the previous or next page or the first or last page. You can click on the Basic, Advanced, or Exceptional tabs on the right side of each page to jump back to the operations list at the beginning of the document. At the end of this document, there is a textbox where you can keep notes and blank list where you can create your goals and task.

Should you have any additional questions about the operations of your officer position that are not covered in this Operations Guide please feel free to e-mail the Chapter Service's staff at [programming@lambdachi.org](mailto:programming@lambdachi.org).

From all of us at Lambda Chi Alpha International Headquarters, we wish you the best going forward as you continue to promote the values and lessons of our Fraternity.

In ZAX,

A handwritten signature in black ink, appearing to read "Nick Zuniga". The signature is stylized and fluid.

Nicholas Zuniga  
Director of Chapter Services  
Lambda Chi Alpha Fraternity

# Operations Guide

## Basic Operations

Officer Task	Jump to Section	Frequency
1. Prepare and complete officer transition	<a href="#">Jump to Section</a>	First week in office
2. Schedule weekly chapter meetings and serve as the chairman and moderator	<a href="#">Jump to Section</a>	Weekly
3. Ensure the presence of quorum of chapter members at each weekly chapter meeting in order to conduct official business of the chapter	<a href="#">Jump to Section</a>	Weekly
4. Coordinate with the High Beta and High Pi to host a High Zeta retreat	<a href="#">Jump to Section</a>	Each academic term
5. Host High Zeta meetings on a weekly basis to encourage collaboration among officers regarding all chapter events and initiatives	<a href="#">Jump to Section</a>	Weekly
6. Host Executive Committee Meetings on a weekly basis with quorum of voting members	<a href="#">Jump to Section</a>	Weekly
7. Review the Executive Committee Manual and distribute the manual to all members of the Executive Committee	<a href="#">Jump to Section</a>	Upon Election
8. Review proper financial planning procedures with the Executive Committee and the High Tau	<a href="#">Jump to Section</a>	Ongoing (365 days)
9. Review Chapter Operating Standards with Standards Chairman to assess current state of the chapter and create appropriate plans to achieve chapter operating standards	<a href="#">Jump to Section</a>	Upon election
10. Communicate regularly with the High Pi to utilize him as a resource for the chapter and yourself	<a href="#">Jump to Section</a>	Ongoing (365 days)
11. Ensure chapter representation in campus Interfraternity Council (IFC) meetings	<a href="#">Jump to Section</a>	As necessary
12. Serve as a liaison between campus officials and the chapter	<a href="#">Jump to Section</a>	Ongoing (365 days)
13. Ensure proper attendance at area regional conclave meeting and summer conference (Leadership Seminar/General Assembly)	<a href="#">Jump to Section</a>	Each academic year
14. Prepare for and meet with the Educational Leadership Consultant during his visit to the chapter	<a href="#">Jump to Section</a>	Each academic term
15. Ensure all membership reporting is completed and submitted to the General Fraternity in a timely manner	<a href="#">Jump to Section</a>	As necessary
16. Confirm the chapter statement balance with the General Fraternity is paid in full by the deadline set by the Office of Administration	<a href="#">Jump to Section</a>	Each academic term
17. Ensure the Harm Reduction Report is submitted to the General Fraternity by the deadline set by the Office of Administration	<a href="#">Jump to Section</a>	Each academic term
18. Review all Event Planning Forms, and send documentation of your approval to the General Fraternity, in accordance with event planning procedures	<a href="#">Jump to Section</a>	As necessary
19. Follow the chapter's crisis management plan to contact a representative of the General Fraternity when necessary	<a href="#">Jump to Section</a>	As necessary
20. Transition to incoming High Alpha	<a href="#">Jump to Section</a>	End of officer term

### Basic / Core



The lamp is symbolic with learning and consistent with the initial levels of the Inner Circle and True Leader (Faithful Steward). At the basic level, the officer demonstrates an understanding of the essential duties needed to meet the most basic duties of his High Zeta position.

# Operations Guide

## Advanced Operations

Officer Tasks	Jump to Section	Frequency
1. Review Robert's Rules of Order with the chapter and encourage all members to exhibit proper decorum during chapter meetings	<a href="#">Jump to Section</a>	Ongoing (365 days)
2. Partner with the Standards Chairman to hold each chapter officer accountable to the duties of their position	<a href="#">Jump to Section</a>	Ongoing (365 days)
3. Review the process of the informal and formal disciplinary hearings with all members of the Executive Committee as outlined in the Constitution & Statutory Code	<a href="#">Jump to Section</a>	Each academic term
4. Review Consultant Visit Reports from at least the previous two visits from the Educational Leadership Consultant	<a href="#">Jump to Section</a>	Prior to each academic term
5. Introduce yourself and the High Zeta officers to the alumni volunteers of all alumni organizations	<a href="#">Jump to Section</a>	Upon election
6. Meet with the campus Greek Adviser every month to discuss the current state of the chapter	<a href="#">Jump to Section</a>	Each month
7. Encourage members of the chapter to get involved with leadership opportunities established through the General Fraternity (i.e. Student Advisory Committee, International Ritual Team, Council of Presidents, etc.)	<a href="#">Jump to Section</a>	Ongoing
8. Work with appropriate High Zeta officers to apply for General Fraternity awards	<a href="#">Jump to Section</a>	Each academic year

### Advanced / Essential



The cross & crescent is symbolic of growth and the cross is our guide in following that ideal. At the advanced level, the officer not only meets basic expectations but demonstrates a higher understanding and is able to effectively teach and delegate officer tasks to associate members and other brothers in the chapter.

# Operations Guide

## Exceptional Operations

Officer Tasks	Jump to Section	Frequency
1. Review all High Zeta officer Operations Guides with each chapter officer upon election	<a href="#">Jump to Section</a>	Upon election
2. Facilitate a strategic planning workshop with the High Zeta to determine long-term goals for the chapter (5 years) and what steps can be taken over time to achieve these goals	<a href="#">Jump to Section</a>	Each academic term

### Exceptional / Preferred



The exceptional officer incorporates the basic and advanced expectations and is able to tie the Core Values and Learning Model into his efforts to teach and delegate officer tasks to associate members and other brothers in the chapter.

### *Jump to Appendix*

Supplementary material that support each task required as an officer

### *Jump to Personal Tasks*

Write in your own personal goals for your term as an officer task required as an officer

# Prepare and Complete officer transition

According to Code III-16 of the Constitution & Statutory Code of Lambda Chi Alpha,

“The High Alpha shall be the executive head of the Chapter and shall preside over its meetings. He shall have power to call extra or special meetings when he considers it necessary, provided that in such case every Collegiate Brother and Associate Member of the Chapter shall be duly notified. He shall issue signed vouchers to the High Tau for each and every liability of his Chapter. He shall countersign all checks or requisitions for checks or cash issued from Chapter funds. He shall see that the officers of the Chapter discharge their duties faithfully, impartially, accurately, and promptly, and shall enforce strict observance of the Laws and policies of the Fraternity. He shall decide points of order. He shall have the power to appoint any officers or committees not provided for by the Laws of the Fraternity or the action of his Chapter. He shall be an ex-officio member of all committees, and shall have a vote in each committee. He shall not be entitled to vote within the Chapter except in event of a tie or when his vote could change the outcome of the vote, in electing the Chapter’s Official Delegate, in balloting on candidates for admission into the Fraternity, and in deciding upon the advisability of granting charter. He shall have such further powers and duties as may be prescribed in the Laws of the Fraternity.”

A successful High Alpha understands and executes all of the various responsibilities of his office. At times certain responsibilities may take precedence, but the most effective High Alpha never loses sight of all his responsibilities. The High Alpha must understand that his responsibilities are constant; he cannot pick and choose the time to assume his High Alpha responsibilities while ignoring those duties at other times. The High Alpha is constantly being evaluated and reviewed by his fellow members. The High Alpha’s success often stems from his ability to consistently be a leader, and his ability to create other leaders inside the chapter.

## Officer Transition

For a chapter/colony to be successful, it is important that its officers don’t “reinvent the wheel”. Valuable information and resources are lost each year due to an ineffective transition process. To assist in this process, an [Officer Transition Checklist](#) was created and can be found in the Appendix

# Schedule weekly chapter meetings and serve as the chairman and moderator

## Planning a successful chapter meeting

The High Alpha's most visible role is running the meetings for his chapter. For many members, their primary impression of the High Alpha's abilities, good or bad, will come from how he conducts the chapter meeting and utilizes his chapter's talents during these sessions; thus it is important that a High Alpha prepare for chapter meetings. Chapter meetings have a different purpose than committee meetings or High Zeta meetings and that purpose should be clearly communicated to the chapter's membership.

## Chairman and moderator

In the absence of the High Alpha, the next highest ranking officer present shall chair meetings. The chairman is responsible for running the meeting and granting the floor to other speakers as he sees fit. Permission to speak may be requested by raising one's hand. All members not granted the floor are expected to remain silent. The chair of the meeting may dismiss a member from the meeting for talking without being granted permission for any other disruptive behavior.

There may be issues during the chapter meeting that arise and create a conflict within membership. For any issues that arise and create conflict within the chapter membership, the High Alpha is responsible for serving as a moderator. An effective moderator will help keep a controversial debate under control by calling on members who raise their hand, allowing people on all sides of the issue a set amount of time to relay their thoughts, and to keep discussion respectful and appropriate.

Unsuccessful chapter meetings are generally ones where too many details are discussed. If the High Alpha feels the chapter does not have enough information to offer an informed decision about something, he should make sure more information is provided. If the details become the subject of debate, the High Alpha should table the issue and send it back to the proper committee, allowing interested members more time to settle the details and then forward the proposal back to the chapter for a final decision.

## Scheduling

When scheduling a time for chapter meetings, the High Alpha should keep in mind the length of the meeting, as well as the schedules of other members. Meetings should be properly scheduled well in advance, as to give members plenty of time to attend. Scheduling chapter meetings is most effective when done prior to the start of the semester, taking into consideration the academic calendar and other chapter events that may have already been planned.

Continued

# Schedule weekly chapter meetings and serve as the chairman and moderator

## Agenda

It is the High Alpha's role to make sure the meetings are efficient, effective, and properly ran. A meeting agenda will help the chairman follow a pre-decided itinerary. To create the weekly agenda, the High Alpha should work with the High Gamma to make sure that all the appropriate information is included, and that the agenda and previous meeting minutes can be sent out to the entire chapter prior to the meeting. Information that will most likely be discussed will include:

- Call to Order
- Creed of Lambda Chi Alpha
- Roll Call
  - The High Gamma should take attendance for all collegiate brothers and associate members in attendance, and recognize any guests including alumni.
- Approval of the Last Meeting's Minutes
  - It is important that each week, before the start of new chapter meeting minutes, that the previous week's minutes are approved by a quorum. This should be accomplished at the beginning of every chapter meeting.
- Guests
  - It is appropriate to give guests an opportunity to address the chapter at the start of the meeting. Examples may be presenters from a department on campus, alumni in attendance, or representatives of other student organizations, including other fraternities and sororities.
- Officer Reports
  - Each officer should have an opportunity to present to the chapter any relevant updates.
- Committee Reports
- Old Business
- New Business
- Open Discussion
- Adjournment

Continued

# Schedule weekly chapter meetings and serve as the chairman and moderator

An example of [sample chapter meeting minutes](#) can be found in the Appendix.

## Arrangements prior to the meeting

- The High Alpha should be certain that current resources such as Chapter By-Laws, the Constitution & Statutory Code, and Robert's Rules of Order are readily available for reference.
- If it is a formal meeting, the High Alpha should ensure the High Phi has prepared the equipment for the Ritual for Conducting Business Meetings.
- Confirming details of the chapter meeting with any guest who has been invited to present to the chapter or be in attendance is an important role of the High Alpha.

## Immediately following the meeting

- The High Gamma should send out a copy of the meeting minutes to all members for proper review prior to the next meeting.



# Ensure the presence of quorum of chapter members at each weekly chapter meeting in order to conduct official business of the chapter

## Establishing Quorum

According to Article III, Code III-35 as stated in Lambda Chi Alpha's Constitution & Statutory Code, a quorum is defined, as "a majority of the Collegiate Brothers in good standing of a Chapter shall constitute a quorum. There shall be no voting by proxy. Absentee ballots may be cast only in elections of Chapter officers and on candidates for initiation. Absentee ballots may be cast in the case of absences that are deemed unavoidable by a unanimous vote of the Executive Committee or, in the case of Chapters at schools that, as a feature of the curriculum, require their students to be off campus. Collegiate Brothers voting on candidates for initiation shall have been on campus during a portion of the associate period, which portion shall be determined by the Chapter".

When scheduling chapter meetings, it is crucial to set a time that all, or at least strong majority, of members can attend. Once obtaining a quorum of Collegiate Brothers in good standing, the official business of the Chapter can occur during a meeting as normal. Action may be taken at any meeting by a simple majority of those present and voting, unless otherwise specified by the Constitution and Statutory Code, the Chapter Bylaws, or Robert's Rules of Order.

If quorum is not reached, no actual business can occur or be voted upon during the chapter meeting. Any action taken without proof of a quorum shall be considered null and void until a quorum is reached.

It is important to note that quorum is established at the beginning of a meeting. Once quorum is achieved, all actions of the Chapter meeting are allowed to proceed, even if individuals leave a meeting.

# Coordinate with the High Beta and High Pi to host a High Zeta retreat

The High Zeta Retreat is a working session held on or off campus in a setting free of interruptions.

Prior to establishing the agenda for the High Zeta Retreat, the Executive Committee should conduct an assessment of the strengths and weaknesses of the chapter to determine what areas most need to be improved. Once the strengths and weaknesses have been assessed a preset agenda should be established by the Executive Committee to focus on addressing the areas which need strengthening or improvement.

The High Alpha should work very closely with the High Pi, who may serve as a facilitator during various points of the retreat. The High Alpha should also speak with the High Pi about important topics that should be covered during the retreat.

Before the High Zeta Retreat, each High Zeta officer should prepare an outline of his proposed events for the semester and suggested dates for the events to be placed on the chapter master calendar.

The agenda of the retreat should include:

- A review of the previous term's goals
- A S.M.A.R.T. goal setting session where at least 3 specific chapter and officer goals are developed to address the areas which need improvement
- Review the chapter's committee structure
- Develop the semester's calendar
- Officer budget requests are reconciled and the semester's budget is developed
- A session on event planning procedures is held
- The Standards for Chapter Excellence are presented to each officer and the Standards review process is discussed
- A review of all laws and policies the chapter is expected to uphold, including campus policies, the Lambda Chi Alpha Constitution & Statutory Code, and FIPG Policies

An example of a sample High Zeta retreat agenda may be found in the appendix.

The High Alpha should collaborate with the High Beta to assist with the planning of the location, food, activities, and any other accommodations for the retreat.

Any retreat that will take place more than ten miles from campus, or lasts more than six hours, requires the completion of the Event Planning Form within the timeframe requested by the General Fraternity.

# Host High Zeta meetings on a weekly basis to encourage collaboration among officers regarding all chapter events and initiatives

## Encouraging Collaboration Among High Zeta Officers

One of the High Alpha's most visible roles will be in overseeing the operations of the High Zeta. Each chapter's High Zeta is comprised of the officers that carry a Greek letter designation, a total of eleven undergraduate officers and one alumnus. Keeping these 12 leaders focused on the chapter's goals, their office's goals and current projects is a difficult task if it is not managed correctly.

A High Zeta meeting should be scheduled as a standing meeting to occur on a weekly basis with all chapter officers. The scheduling and timing of the High Zeta meeting should be planned at a time when all chapter officers are able to be in attendance.

### Not a Preview of the Chapter Meeting

High Zeta meetings should allow officers to do three things: discuss recent chapter events, prepare for upcoming chapter events, and adopt unified positions on chapter goals or problems. High Zeta meetings should never be used as a preview of the chapter meeting, with officers reporting what they will say at that meeting.

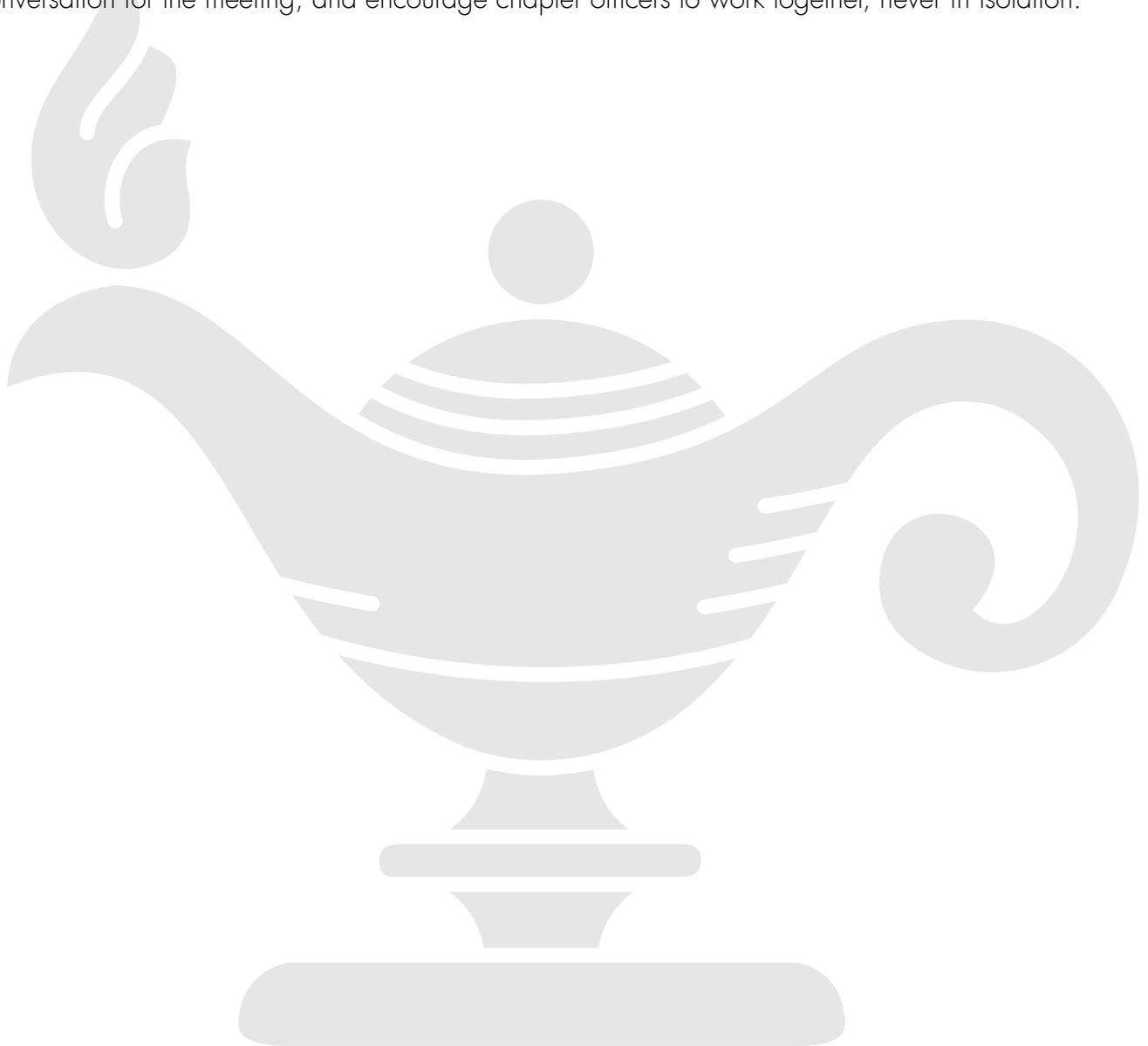
The difference between a High Zeta meeting that is effective versus a waste of time is very simple: preparation. The High Alpha should be prepared to lead the chapter officers through a planning session that is based on a specific topic, not just a general update of what each chapter officer intends to work on throughout the week.

For example, if the chapter is preparing for the a large-scale philanthropy event to take place later in the semester, the High Alpha should plan a High Zeta meeting dedicated solely to this event as far in advance as possible. The emphasis of this meeting should be that each chapter officer can play a role in helping make this event a success. Too often, a chapter-sponsored event turns into an event being managed by one chapter officer.

In this example, a large-scale philanthropy event may be thought of as a "High Theta event" by some of the chapter officers; they may think they have no obligation to contribute or participate in the planning of the event. It is the duty of the High Alpha to change the perception of how chapter officers think of events. No single event should be considered exclusive to one officer position, but rather, all events should be considered "Lambda Chi Alpha events," meaning each officer may have a role in helping with the planning. For example, when planning a large-scale philanthropy event, the High Gamma should help create attendance registration, the High Iota should make sure to manage the completion of the proper event planning procedures, the High Rho should consider how to communicate this event to particular alumni or alumni organizations, and so on. Each officer may have a role in the planning process. A highly functioning chapter will then take these assignments back to the committee level to delegate responsibility.

# Host High Zeta meetings on a weekly basis to encourage collaboration among officers between all chapter events and initiatives

The High Zeta meeting offers a great opportunity for the High Alpha to encourage collaboration among the chapter officers. The High Zeta meeting should not be a time for each officer to simply update the group on what he intends to do during the week. It is up to the High Alpha to determine the topic of conversation for the meeting, and encourage chapter officers to work together, never in isolation.



# Host Executive Committee Meetings on a weekly basis with quorum of voting members

## Functionality of the Executive Committee

The Executive Committee is composed of the following members:

- High Alpha
- High Pi
- High Tau
- Member-at-Large
- Member-at-Large
- Alternate
- High Beta (ex-officio, non-voting)
- High Theta (ex-officio, non-voting)
- High Sigma (ex-officio, non-voting)

The High Alpha is the chairman of the Executive Committee and has a vote. The High Pi also has a vote. As Chief Judicial Officer within the chapter, the High Pi may choose not to vote on disciplinary matters so as to remain impartial.

The alternate may fill in for any absent member, including the High Pi. He would replace the High Alpha only if the High Beta is unable to do so, and in that case, the chairman would be the highest ranking High Zeta member present. If not replacing anyone, the alternate is a non-voting member.

The High Beta, if not elected as a member-at-large, would vote only in case of the High Alpha's absence. In that case, the High Beta would be the chairman. If the High Alpha is absent and the High Beta is an elected member-at-large, the High Beta would become the chairman and the alternate would fill in for the High Beta as a member-at-large.

Non-voting members may participate in all informal hearings and all discussions. They may be present during voting, but cannot vote. The High Alpha may invoke a closed meeting whenever sensitive matters are being discussed. A quorum of the Executive Committee is three of five. It is suggested that at least four members be present at any formal or informal hearing. Therefore, it is possible that an Executive Committee meeting could consist of the High Beta, two members-at-large, and the alternate. This does not mean the High Beta can gather these members together and hold an Executive Committee meeting. It means that, should the High Alpha, High Pi and High Tau be unable to attend a duly authorized meeting, the Executive Committee, and thus the chapter, will still be able to operate.

If charges are brought against an Executive Committee member or members, these members must relinquish their membership on the Executive Committee until the final decision of the case is reached.

Continued

# Host Executive Committee Meetings on a weekly basis with quorum of voting members

## Responsibilities

The Executive Committee has six basic responsibilities paraphrased below:

1. Acting for the chapter in all matters not requiring the vote of the entire membership and not otherwise provided for in the laws of Lambda Chi Alpha.
2. Representing the chapter in all transactions with the house corporation.
3. Preparing the annual budget for approval by the chapter and house corporation.
4. Hiring, determining salaries, and dismissing employees of the chapter.
5. Removing any officer of the chapter from office and filling the vacancy by appointment or special election.
6. Imposing any penalty in a private informal hearing.

It is important to note that, for numbers 3, 4, and 5, these powers allow for any member to take the decision to the chapter for a vote. This would normally be done at a chapter meeting. Number 6 can be appealed only by the disciplined brother and this would result in a formal disciplinary hearing.

The Executive Committee reviews the involvement of all chapter brothers. The Executive Committee also has a responsibility to see that the officers of the chapter are executing their duties and meeting their goals. The Executive Committee is the body that enforces and sees that all members of the chapter are meeting the minimum expectations of membership.

It is important to note that the Executive Committee is not a group that should engage in any event planning practices for the chapter. Event planning is the duty of the High Zeta. Chapter officers who also serve on the Executive Committee need to realize the different purpose of these two groups.

The High Alpha should ensure that all members of the Executive Committee have been issued a copy of the Executive Committee Manual, which includes many resources for the Executive Committee to take advantage of.

# Review the Executive Committee Manual and distribute the manual to all members of the Executive Committee

## Set the Foundation for a Successful Executive Committee

At the beginning of his term, the High Alpha should distribute a copy of the Executive Committee Manual to all members of the Executive Committee, preferably as a hard copy, however some may prefer a digital copy.

The Executive Committee should take time during the first 2-3 meetings to review all the material in the Executive Committee Manual. Everyone on the Executive Committee should be particularly familiar with the process of the informal hearing, as well as automatic disciplinary penalties for financial delinquency or scholastic deficiency.

The High Alpha should set an agenda for the Executive Committee to follow on a weekly basis. A sample Executive Committee agenda may be found in the Executive Committee Manual.



# Review proper financial planning procedures with the Executive Committee and the High Tau

## Procedures for Sound Financial Management

Since the success of chapter operations is so closely linked to financial stability, the High Alpha should make the financial planning of the chapter a high priority. He should be engaged in all chapter budgeting conversations with the High Tau and the Executive Committee. Remember that a chapter's priorities can easily be identified by their budget appropriation. A chapter that truly values a strong sense of brotherhood or fraternity education will reflect these priorities in the chapter budget.

The High Alpha's relationship with the High Tau is extremely important, as they need to develop a close working relationship. The chapter needs to feel confident that the two undergraduates who are charged with Lambda Chi Alpha's financial affairs are comfortable working together.

The High Alpha, shortly after his election, should make sure he and the new High Tau are listed as the signatures of record at the bank. Typically, some paperwork must be completed by the incoming and outgoing officers, including the High Gamma. It is a good idea for the incoming officers to go to the bank personally and introduce themselves to the manager, in case they ever need to call on the bank for additional services in the coming year.

The High Pi should also be listed as a signer for all checks written over \$500. This allows the alumni of the chapter to have some basic control over the major expenses of the chapter. This safeguard is one of the key checks and balances built into the role of the High Pi in the chapter.

A new High Alpha should try to attend the transition meeting between the old and new High Taus. This will allow the High Alpha to understand all of the aspects of the High Tau's duties. The High Alpha needs to be aware of the following procedures and operations concerning finances:

1. What are the methods of payment to the chapter for any/all bills?
2. What are the deadlines for payment of dues for the coming school term?
3. What are the total costs for being in the chapter this term?
4. Where does all the money go?
5. What does each officer have to spend this term and what percentage of the total money available to all officers does this represent?
6. What does money paid to the IFC get used for?
7. What outside vendors does the chapter use for services and what are the costs involved?
8. What incentives does the chapter currently offer for people to pay their dues early and in full?

Continued

# Review proper financial planning procedures with the Executive Committee and the High Tau

9. What members already have established payment plans with the Executive Committee?
10. What members are interested in meeting with the Executive Committee to establish payment plans for the coming term?
11. What are the chapter's current liabilities (debts)?
12. Are any members financially suspended or are there members who need to be financially suspended?

## The Executive Committee

The Executive Committee is responsible for the budgeting of all chapter finances, not the High Tau. The Executive Committee is also responsible for reviewing and approving each individual member who wants a payment plan.

The Executive Committee should meet with all members who are falling behind on their dues payments before their 30 day grace period is up. After 30 days, the Executive Committee needs to meet and finalize the automatic suspension of members as outlined in Code VIII-7 of the Constitution & Statutory Code. The High Alpha should never let the High Tau play too major a role in dealing with these issues, as it will make the Tau seem like he doesn't have the backing of the chapter. The Executive Committee is always the forum for these issues to be discussed.

## Financial Operations

In most chapters, the High Alpha will be signing checks for expenses on a regular basis. To maximize efficiency and time for both officers involved, the High Alpha and High Tau should identify two or three times a week when each is available to sign checks. Also, all officers or members requesting checks should complete a form for the High Tau letting him know what event the check is for, who the recipient of the check is, and how much he intends to spend. In this way, the High Tau and High Alpha will know about the chapter's expenses before they happen, and can prevent officers and members from spending at will. The High Alpha should never sign a blank check for any officer or member.

Each week, the High Tau should be preparing a copy of the Executive Committee Weekly Treasurer Report (a copy of the form for this can be found in The Executive Committee Manual). This report updates

Continued

# Review proper financial planning procedures with the Executive Committee and the High Tau

the status of:

1. Members who owe the chapter money.
2. Outside vendors that are owed money by the chapter.
3. The balance of the chapter's account with the Lambda Chi Alpha International Headquarters
4. The status of each officer's individual budget.
5. The income and expense for the past week.
6. The current balance of all chapter checking and savings accounts.

It's important that this report be updated and distributed weekly, to at least the members of the Executive Committee. The Executive Committee has a responsibility to know all the details of financial management, and they must regularly address this issue. Keeping up with the financial data each week will keep small cash flow problems from increasing. The High Alpha and the High Tau should review the weekly report before it is submitted to the Executive Committee, so the High Alpha is aware of any concerns before the meeting begins. The High Alpha should keep copies of these weekly reports.

# Review Chapter Operating Standards with Standards Chairman to assess current state of the chapter and create appropriate plans to achieve chapter operating standards

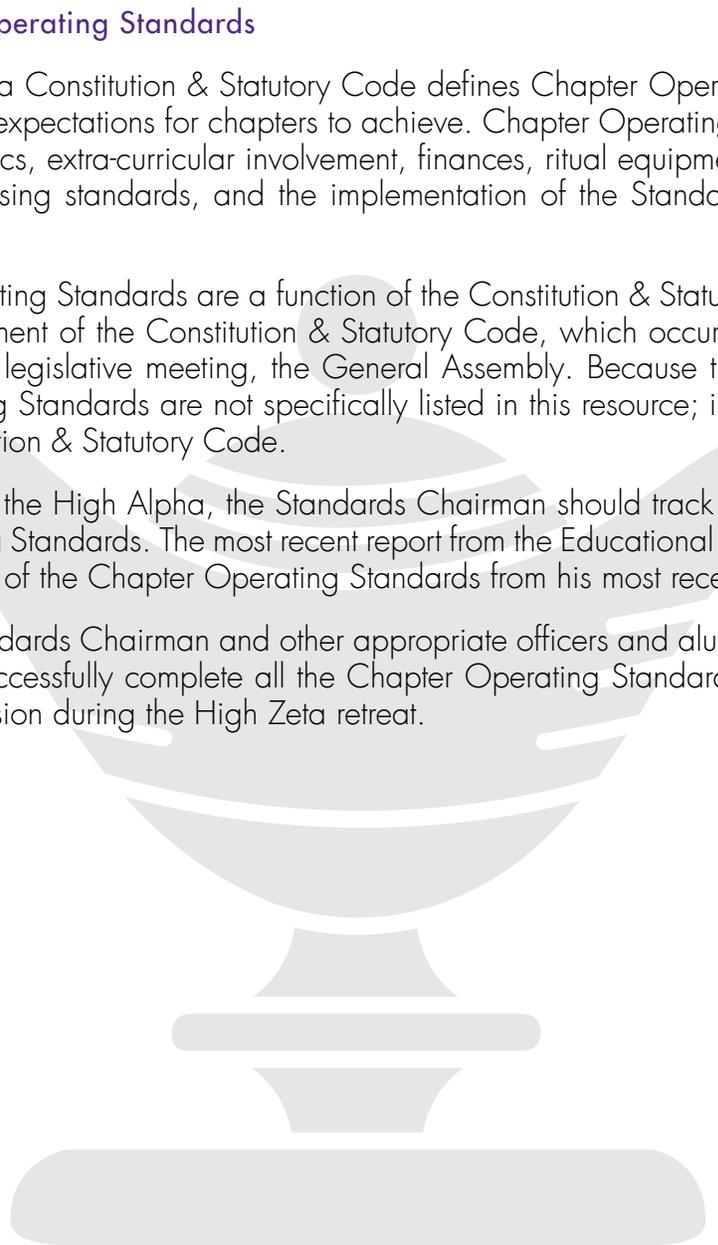
## Achieving Chapter Operating Standards

The Lambda Chi Alpha Constitution & Statutory Code defines Chapter Operating Standards, which are the basic operational expectations for chapters to achieve. Chapter Operating Standards mostly relate to membership, academics, extra-curricular involvement, finances, ritual equipment, alumni, bylaws, conference attendance, housing standards, and the implementation of the Standards for Chapter Excellence program.

As the Chapter Operating Standards are a function of the Constitution & Statutory Code, they are subject to change by amendment of the Constitution & Statutory Code, which occurs most regularly at Lambda Chi Alpha's bi-annual legislative meeting, the General Assembly. Because they are subject to change, the Chapter Operating Standards are not specifically listed in this resource; instead reference the current version of the Constitution & Statutory Code.

Under the direction of the High Alpha, the Standards Chairman should track the chapter's completion of the Chapter Operating Standards. The most recent report from the Educational Leadership Consultant (ELC) also outlines the status of the Chapter Operating Standards from his most recent visit.

Working with the Standards Chairman and other appropriate officers and alumni groups, the High Alpha should set goals to successfully complete all the Chapter Operating Standards. This is most easily done during a planning session during the High Zeta retreat.



# Communicate regularly with the High Pi to utilize him as a resource for the chapter and yourself

## The Relationship Between the High Alpha and High Pi

The High Alpha's relationship with the High Pi is among the most important relationships he will have during his term of office. With a shared vision and goals, the High Alpha and High Pi can work together to move the chapter forward. Without a shared vision and goals, the High Alpha and High Pi will often find themselves at odds and the chapter will suffer from the lack of unified leadership.

The High Pi is the chancellor of the chapter and his duties are clearly outlined in the Constitution & Statutory Code. As Chancellor, the High Pi acts as the representative of the Grand High Zeta and Lambda Chi Alpha at the chapter level. Thus, the High Pi becomes the ultimate arbiter of Fraternity laws and policies on the chapter level, and has the limited ability to cancel events that don't comply with Lambda Chi Alpha's standards, ideals or policies.

The High Alpha and High Pi should meet weekly to discuss chapter business and membership issues. During this meeting, the High Alpha should cover the following details:

- The agenda for the next chapter meeting
- The agenda for the next Executive Committee meeting
- The results of any events held since the last time the High Pi was at a chapter event
- Any emerging problems with individual chapter members
- The status of the chapter's finances
- The status of any paperwork due to the school or Lambda Chi Alpha headquarters
- Housing issues with the chapter
- Alumni relations issues with the chapter

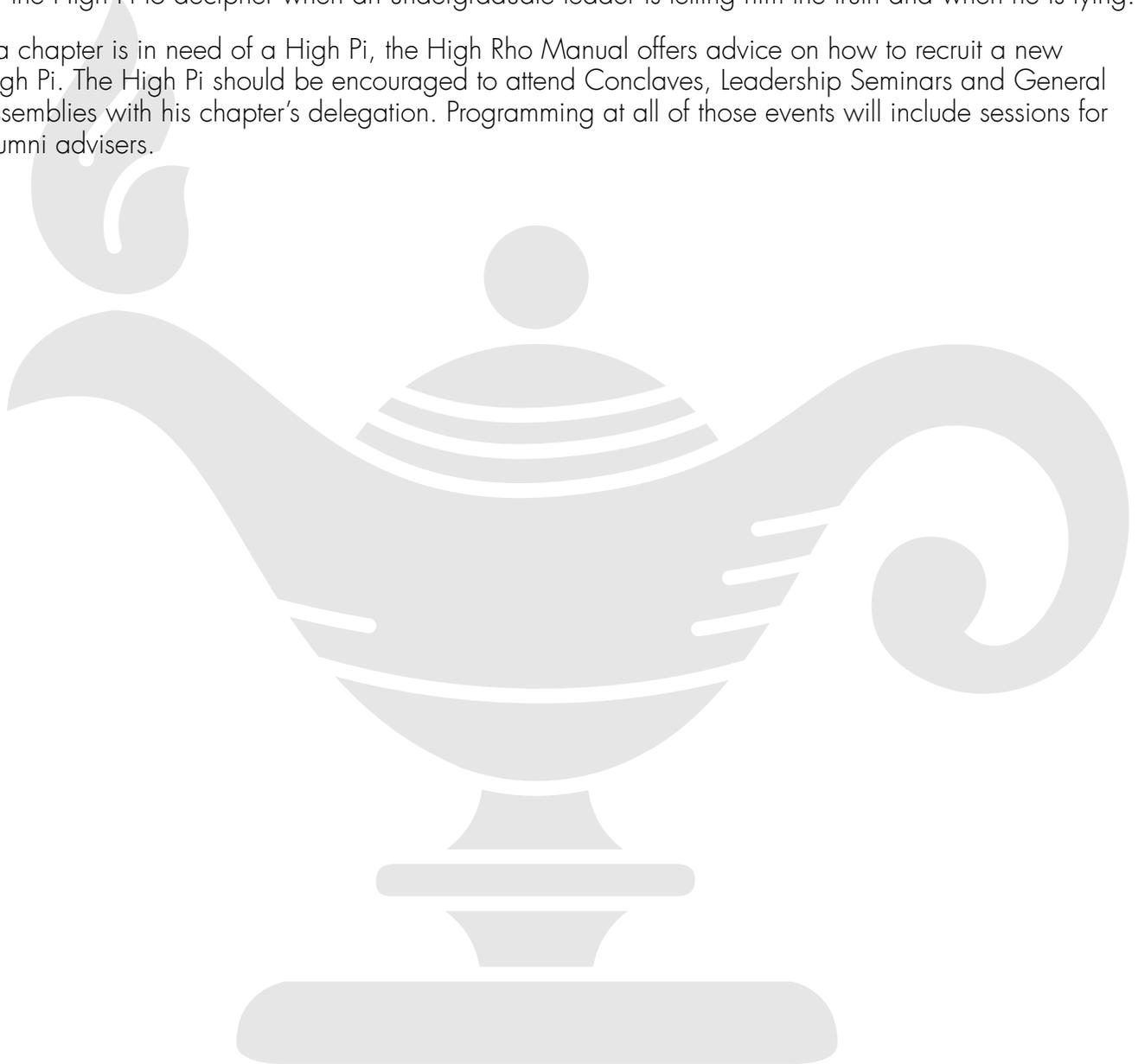
It is the High Alpha's duty to keep the High Pi informed of events and happenings at the chapter level and to try and seek the High Pi's help and involvement. A High Pi will become more active with a chapter if the High Alpha has strong communications with him, and clearly defines why the High Pi's increased involvement is part of an overall plan to improve the group. Conversely, a High Pi can drift away from the chapter if he is kept in the dark about chapter issues and events, and no one ever goes out of their way to let him know his efforts are appreciated.

Continued

# Communicate regularly with the High Pi to utilize him as a resource for the chapter and yourself

The High Alpha and the High Pi must have a relationship built on trust, which means the High Alpha cannot hide anything from the High Pi. Once the High Alpha starts down that path, it becomes difficult for the High Pi to decipher when an undergraduate leader is telling him the truth and when he is lying.

If a chapter is in need of a High Pi, the High Rho Manual offers advice on how to recruit a new High Pi. The High Pi should be encouraged to attend Conclaves, Leadership Seminars and General Assemblies with his chapter's delegation. Programming at all of those events will include sessions for alumni advisers.



# Ensure chapter representation in campus Interfraternity Council (IFC) meetings

On many campuses the Interfraternity Council (IFC) or a similar type of governing body is responsible for creating and implementing new policies or regulations. These are meant to foster a positive and progressive environment for Greek students at each campus. It is your duty as the High Alpha to stay engaged with the fraternity community, and possibly even take an active role in the brainstorming, legislation, and voting of these policies or regulations.

The member that represents the chapter within IFC will vary depending on your institution. At some schools, the chapter president is the primary chapter representative. At other schools, the representative is not expected to be the chapter president.

Most IFCs or similar governing body will have weekly meetings scheduled at regular times. The representative of your chapter is obligated to attend these meetings in order to learn about upcoming events, common issues, recent developments, and approaching deadlines etc. Even if you're not the IFC representative, being present and informed on the topic matter at each meeting will be able to help guide the IFC in their work. Additionally, you should contribute to conversations pertaining to issues that any members of the chapter would be effected by.

Things to especially look out for are IFC dues, for both collegiate brothers and for associate members. Although some of the information discussed may not be your direct responsibility, you need to ensure that the information is effectively and timely communicated to the respective chapter officer.

Listed below are some sample questions each High Zeta officer should be able to answer about campus rules and policies. This listing is generic and should be added to at the chapter level, so the officers are familiar with the school's policies.

## High Gamma

- Does the school require a membership roster to be turned in? If so, when is it due?
- Does the school require a roster of officers? If so, when is it due?

## High Tau

- What are the costs of IFC dues and when are they to be paid?
- What is included in the chapter's IFC dues?
- Does the chapter owe additional money to the IFC for each associate member who joins? If so, how much is the cost and when is it due?

Continued

# Ensure chapter representation in campus Interfraternity Council (IFC) meetings

## High Iota

- Does the school or IFC require paperwork/approval of social events with alcohol or large events? If so, where is the paperwork available, and how soon before an event is it needed?
- Does the school or IFC require any risk management education? If so, what is required, and how does the chapter document it?
- What is the IFC/school alcohol policy?
- How is the IFC /school alcohol policy enforced, and how are violations reported?
- Does the school offer any risk management training for chapter officers?

## High Kappa

- Does the campus or IFC require any educational sessions be attended by the whole chapter or the associate members?
- Does the school have any sort of leadership training program open to Greeks?
- Does the school or IFC offer any sort of training for new officers of a chapter?

## High Delta

- What paperwork and fees are required for all of the men who join the chapter?
- What rules surround visiting prospective members in on-campus residence halls?
- What rules are there regarding advertising, flyers, and other promotional materials for recruitment?
- What rules are there about having contact and conversation with prospective members? Do these rules change depending on when and where the conversation takes place?
- What are the rules governing the offering of bids for membership to a prospective member?
- What are the penalties for violating an IFC or campus recruitment policy?
- Is the minimum G.P.A. for recruitment higher than Lambda Chi Alpha's? If so, what is it?

Continued

# Ensure chapter representation in campus Interfraternity Council (IFC) meetings

## High Phi

- Does the school or IFC require notification of when the chapter will hold initiation?
- Does the school have a set limit on the length of association before a man must be initiated?
- Does the school have academic requirements a man must meet before he can be initiated?
- Does the school require a copy of the events taking place in the pre-initiation week?

## High Sigma

- What are the campus and IFC rules regarding academic performance for Greeks?
- Does the chapter have to achieve a minimum grade point average to retain full privileges on campus? If yes, what is the G.P.A. the chapter must achieve, and what benefits can be lost if the chapter does not meet this goal?
- When does the chapter need to update its academic roster, so the university can determine the member and chapter grades?
- How does the chapter remove a name from the academic roster after a member has left school or has left Lambda Chi Alpha?
- What awards and incentives does the IFC offer for academic achievements by the chapter or individual members?

## High Epsilon

- Does the school or IFC require paperwork/approval of social events with alcohol or large events? If so, where is the paperwork available, and how soon before an event is it needed?
- Does the school or IFC require any risk management education? If so, what is required, and how does the chapter document it?
- What is the IFC/school alcohol policy?
- How is the IFC /school alcohol policy enforced, and how are violations reported?
- Does the school offer any risk management training for chapter officers?

Continued

# Ensure chapter representation in campus Interfraternity Council (IFC) meetings

## High Rho

- Does the school or IFC have any rules regarding alumni events, other than the rules that already govern the chapter?
- Can the school help the chapter locate alumni who are no longer on the chapter's mailing list?

## High Pi

- Are there meetings the chapter adviser is required to attend? If so, when and where are they?
- What education does the campus or IFC offer to alumni volunteers?

The chapter's High Alpha, High Beta and IFC representative should be able to answer all of the questions regarding campus and IFC policies.

Once the chapter's officers are educated, they can share this education with the entire chapter. At the first meeting of the year, the High Zeta officers might remind chapter members about the relevant campus/IFC policies and inform them of any changes in campus policy.

Campus and IFC policies should be posted on a chapter bulletin board, if a chapter has a house. The more the High Alpha can see that members are becoming aware of the campus policies, the more comfortable he will be with it.

# Serve as a liaison between campus officials and the chapter

## Understanding the Chapter/School Relationship

The college, university or institution that houses every chapter and colony of Lambda Chi Alpha has formed a partnership with them, a partnership aimed at improving the quality of student life at that school. Lambda Chi Alpha believes in that partnership and looks for ways to solidify that partnership and improve the on-campus assistance offered to our chapters and members.

Both the school and Lambda Chi Alpha agree that the members of Lambda Chi Alpha are students first and members of a fraternity second. This is true for academics and any situation that involves a violation of school policy. The school will seek to deal with members first as students, then as a member of a student organization.

Because every campus is different, the partnership a chapter has with the school is different. The stronger a partnership is, the more a chapter can rely on assistance from the school as well as from the Lambda Chi Alpha International Fraternity. Weaker partnerships breed distrust among both parties involved, which may result in fewer opportunities for our members. The High Alpha is one of the key players in developing and improving the relationship the chapter has with the administration of the school.

The High Alpha should first seek to understand how services are provided to students at his school, and understand how Greek life fits into the services provided. Every school's organizational chart is different and that has an impact on the chapter. At some campuses, the High Alpha will find one single person has control over the chapter on campus: usually a Dean of Students or Greek Adviser. On other campuses, especially where the chapter is using university housing, the chapter might have two or three different people that oversee the group or different elements of the chapter's operations. The High Alpha must seek to understand how the school's support system works and who can assist him with the chapter's various needs.

The High Alpha is the primary contact person between any campus officials and the chapter. It is important to serve as a liaison between campus officials and the chapter in any instances of new opportunities, emergencies, or questions from the chapter as a whole.

Building a relationship with various campus administrators will help open the line of communication in time of need. By acting as an effective liaison between the chapter and campus officials, your chapter, by extension from you, will form a personal relationship that can prove invaluable.

The best way to form a relationship is by meeting people in-person. The most fundamental way to do this is by attending meetings hosted by the IFC or other campus departments that are specifically designed for chapter presidents. Make an effort to meet with campus officials (besides the Greek Advisor) at least once a term. Some campus leaders outside of the Greek community that may be sought out are:

Continued

# Serve as a liaison between campus officials and the chapter

- Deans of Students
- Harm reduction officers
- Campus security
- A representative of the campus office for academic success

The meetings you have with them could range from quick meetings in their office to an invitation to a chapter-sponsored dinner or chapter meeting.

Some basic Do's and Don'ts for a High Alpha in working with the administration of his school include:

## Do's

- Meet once a month with the Greek Adviser or campus official responsible for Greek life to discuss chapter and campus programming.
- Be honest in working with the school.
- Participate in special committees and panels on campus to study ways to improve student life.
- Attend all meetings and programs the school or IFC plans for Greek leaders.
- Seek out the advice of other chapter presidents on campus and use them to build consensus for positive changes in the system.
- Keep all commitments made to campus officials, oral and written.
- Keep the Greek Adviser informed, through regular written updates on chapter programming.
- Help the campus enforce its policies at the chapter level.
- Look for ways to involve the school's administration in the chapter's public relations, fraternity education, scholarship, social and alumni programming.
- Look for outstanding faculty members that might be interested in serving the chapter as advisers.
- Fill out all forms and reports requested by the school and turn them in on time.
- Cooperate fully with the school when they request the chapter's help.
- Plan events that will allow the chapter's membership to interact with the faculty and administration.

Continued

# Serve as a liaison between campus officials and the chapter

- Encourage the chapter's leaders to take part in IFC or other Greek "umbrella" organizations on campus.
- Understand that Greek life is a complement to the educational experience at a college or university, not a replacement for going to class.

## Don'ts

- Ignore the resources available to the chapter on campus.
- Burn bridges with the school over a policy or incident. Rarely will one situation be worth the chapter damaging its relationship with the school.
- Allow the High Alpha to be the only chapter member that develops a relationship with the Greek Adviser or other key players on campus.
- Forget to turn in forms or rosters the school requires.
- Ignore the rulings and policies of the IFC or other Greek "umbrella" organizations.
- Forget that school, not Lambda Chi Alpha, should be every member's first priority.

The school's relationship with the chapter is a long-term one. Thus, the school's perspective is similar to the chapter's alumni: Often times, what's good for the immediate future is not the best long-term answer. Both the alumni and the school will almost always be searching for the best long-term answer to a problem or situation inside the chapter. A High Alpha who can think past the next month, year, or even this generation of chapter members, will be able to communicate and deal more effectively with campus administrators.

# Ensure proper attendance at each summer conference (Leadership Seminar/General Assembly) and area regional conclave meeting

## Attending General Fraternity Sponsored Events

### The General Assembly

The General Assembly is the supreme ruling body of Lambda Chi Alpha. The General Assembly meets every other year, in even numbered years, to elect the officers of the Lambda Chi Alpha International Fraternity and to determine policies and procedure for the chapters, colonies and members.

Each chapter is required to send at least two representatives to the General Assembly, including one Official Delegate. While a chapter is encouraged to send as large of a delegation as possible to the General Assembly; only one member may serve as Official Delegate. The chapter should elect and register the Official Delegate early in the spring of a General Assembly year, so that he can fully participate in the committees and actions of the General Assembly. The High Alpha can serve as the Official Delegate. The chapter should elect at least one alternate who will attend the General Assembly and can be ready to assume the duties of the chapter's Official Delegate should he be unable to attend.

The chapter's Official Delegate will have a vote at all General Assembly proceedings, including the election of the Grand High Zeta. The Official Delegate will be appointed to serve on a legislative committee for the General Assembly, which considers new laws and policies for the entire Fraternity. By law, undergraduates must comprise at least 66 percent of the votes at the General Assembly, meaning any significant legislation must be endorsed and supported by a majority of current undergraduate members. Any chapter which fails to pay its bill 60 days prior to the General Assembly runs the risk of losing its right to vote at the General Assembly.

Any chapter or member may propose legislation to change the Constitution & Statutory Code, or other applicable policies and standards of Lambda Chi Alpha. Any proposed legislation must be submitted to the Lambda Chi Alpha Headquarters no later than 45 days prior to the General Assembly. Typically, many chapters submit legislation for each General Assembly. In addition, the Student Advisory Committee and the Grand High Zeta will also sponsor legislation.

The chapter's Official Delegate is expected to reflect his chapter's position on legislation for the General Assembly. He is also expected to review the decisions of the General Assembly with the chapter when the chapter opens for business in the fall. After each year's General Assembly, a chapter is expected to update their bylaws to comply with any changes in the Constitution & Statutory Code. These changes must be made as soon as possible after the General Assembly. After the changes to the bylaws are made, a copy must be forwarded to the Lambda Chi Alpha International Fraternity for approval.

Alumni participate in the General Assembly and can comprise up to 34 percent of the votes in any given year. All members of the Grand High Zeta, along with Board of Councilors and Order of Merit recipients, enjoy full voting rights. On the first day of the General Assembly, after the final number of chapters with voting privileges has been determined, the other alumni present may elect up to 18 delegates to voting positions for the General Assembly.

Continued

# Ensure proper attendance at each summer conference (Leadership Seminar/General Assembly) and area regional conclave meeting

## The Leadership Seminar

The Leadership Seminar is held annually, either alone or in conjunction with the General Assembly. On odd-numbered years, the Leadership Seminar is held on a college campus; on even-numbered years the Leadership Seminar is held at the property where the General Assembly will take place. The Leadership Seminar is focused more on the educational aspects of Lambda Chi Alpha and is targeted toward undergraduates, much more so than the “pomp and circumstance” of the General Assembly.

The Leadership Seminar has been held since 1949 and is designed to develop the programming and leadership skills of Lambda Chi Alpha’s undergraduates. Since 2007, the conference has been referred to as the Stead Leadership Seminar, thanks to the generous contributions of alumni brother Jerre Stead (Iowa '65).

## How to attend and maximize the Leadership Seminar experience

The High Alpha should help the chapter prepare to send as many people as possible to the Leadership Seminar. With multiple tracks of programming and other educational opportunities, the Leadership Seminar is too vast in scope for just one or two chapter members to cover. Two representatives is the minimum requirement according to the Chapter Operating Standards of the Constitution & Statutory Code.

The chapter should review the schedule of events for the Leadership Seminar when it is first published and identify which officers and members would benefit the most from attending the event. These officers should then be encouraged to attend, or to send a representative from their committee. The chapter should set aside enough money to help the entire delegation attend the event. While each individual member can pay part of the cost, more people will be able to attend if the chapter sets aside money for travel costs.

After the Leadership Seminar, the chapter members who attended should plan a workshop or series of workshops to transmit the information to the entire chapter. If the chapter has a retreat scheduled prior to the start of the school year, this would be an excellent opportunity to share the knowledge acquired at the Seminar. Often, the people attending the Seminar will be asked to set goals for the chapter they are representing. These goals should immediately be shared with the entire chapter upon their return, to get everyone to accept and support these goals.

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# Ensure proper attendance at each summer conference (Leadership Seminar/General Assembly) and area regional conclave meeting

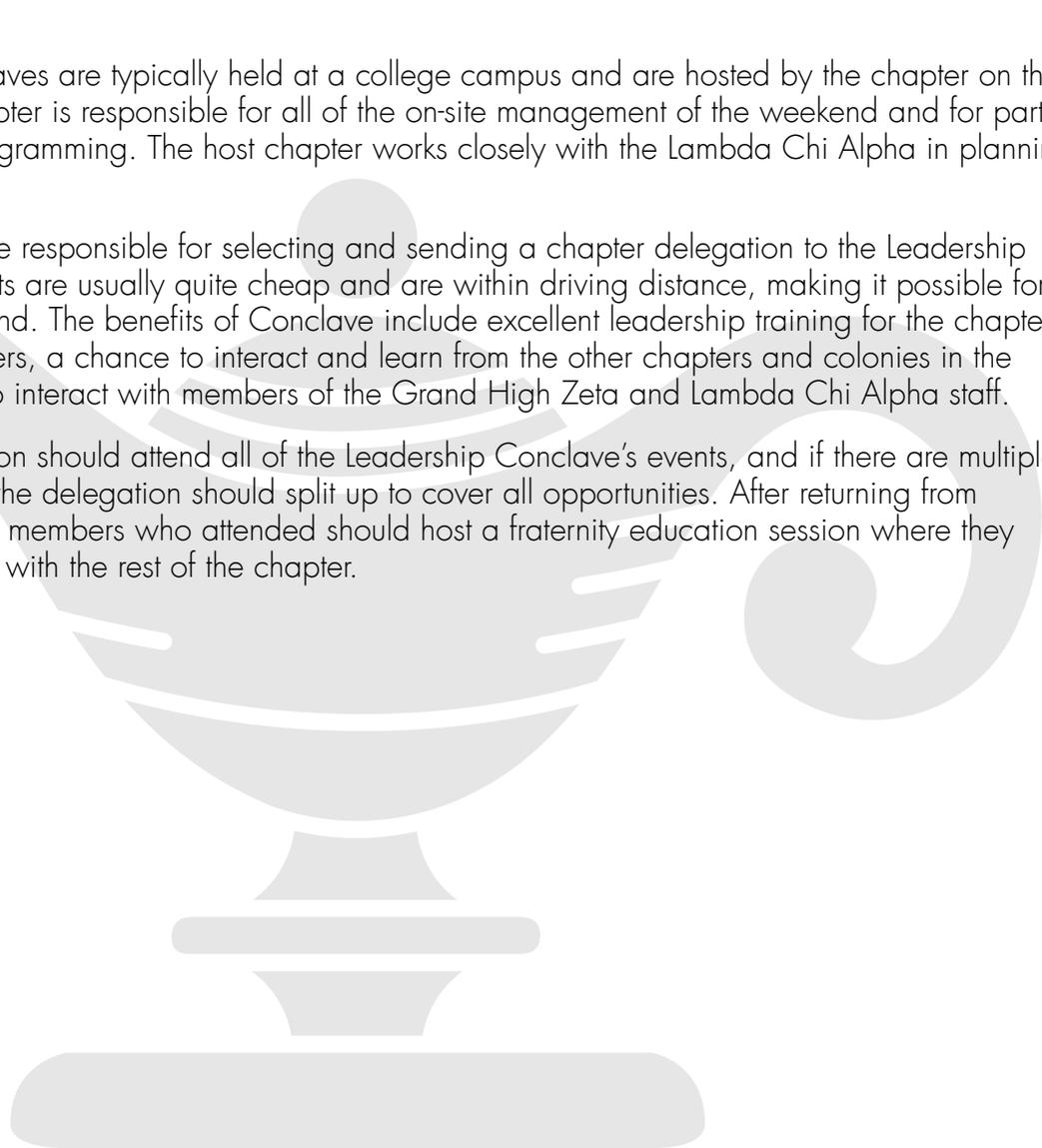
## The Regional Conclave

Each year (typically in the spring), the Lambda Chi Alpha International Fraternity sponsors regional leadership weekends, called Conclaves. These Conclaves are almost as old as Lambda Chi Alpha itself, dating to 1921 when three Indiana chapters gathered for a weekend to discuss chapter programming.

The Leadership Conclaves are typically held at a college campus and are hosted by the chapter on that campus. The host chapter is responsible for all of the on-site management of the weekend and for part of the educational programming. The host chapter works closely with the Lambda Chi Alpha in planning the event.

The High Alpha will be responsible for selecting and sending a chapter delegation to the Leadership Conclave. These events are usually quite cheap and are within driving distance, making it possible for many members to attend. The benefits of Conclave include excellent leadership training for the chapter's new members or officers, a chance to interact and learn from the other chapters and colonies in the area, and a chance to interact with members of the Grand High Zeta and Lambda Chi Alpha staff.

The chapter's delegation should attend all of the Leadership Conclave's events, and if there are multiple educational sessions, the delegation should split up to cover all opportunities. After returning from Conclave, the chapter members who attended should host a fraternity education session where they share their knowledge with the rest of the chapter.



# Prepare for and meet with the ELC during his visit to the chapter

## Maximizing the ELC Visit

Lambda Chi Alpha's frontline resources for chapter assistance are the Educational Leadership Consultants (ELCs). These men are recent college graduates with outstanding records as fraternity members, campus leaders and scholars. Each ELC has accepted a two year assignment to work for Lambda Chi Alpha.

ELCs travel across North America, visiting two chapters a week to assist with programming, brotherhood and recruitment. The ELCs main job is to make the undergraduate experience at each chapter better. The ELC is not intended to be a cop or lawyer, although part of the job entails enforcing and explaining the policies passed by the Grand High Zeta and the General Assembly.

The ELCs spend three months in training at Lambda Chi Alpha's International Headquarters in Indianapolis. The ELCs learn the latest in fraternity management techniques, teaching skills and programming opportunities.

The ELC is scheduled to visit each chapter twice a year, once in the fall and once in the spring. If the High Alpha would prefer a specific time for the ELC visit, he should send a written request to Lambda Chi Alpha International Headquarters requesting a specific date for a visit and listing the reason why it would be beneficial to the chapter. Generally, most written requests are honored.

## Preparing for the ELC Visit

The ELC visit takes place twice a year, once in the spring and once in the fall. Prior to the visit, the High Alpha will receive written correspondence from the ELC outlining the dates for the visit as well as specific requests for his visit.

The ELC will call the High Alpha seven to ten days before his visit to finalize all the details of the trip.

The High Alpha will need to schedule some time to prepare himself and the chapter for the ELC's visit. The following steps will need to be completed prior to the ELC's arrival:

1. Inform the chapter of the dates for the upcoming ELC visit
2. Schedule an opening meeting with the entire chapter for the first night of the ELC's visit (if the chapter already has a business meeting or other function that night, use that event to introduce the ELC). This meeting is mandatory and designed for the ELC to develop an understanding about what the chapter hopes to accomplish during the ELC's visit.
3. Schedule a closing meeting with the entire chapter on the last night of the ELC's visit. This meeting should be scheduled for one hour, and the hour before that meeting should be left open on the ELC's schedule so he can prepare his remarks. This final meeting will be used for the ELC to offer

Continued

# Prepare for and meet with the ELC during his visit to the chapter

recommendations and suggestions to the chapter about how to improve their experience as members, and possibly an activity to help the chapter gain understanding of a certain topic.

4. Be sure to allow time on the ELCs schedule to attend chapter events such as intramurals, recruitment, fraternity education, etc. Attending a well-run chapter event will help the ELC have a better understanding of how a chapter operates.
5. Each officer is required to meet with the ELC for an hour to discuss their office.
6. The High Alpha should distribute the appropriate sections of the ELC Visit Guide to each officer, who should complete their section before their officer evaluation.

## Getting the Most out of the Visit

Before the ELC arrives, the chapter should discuss its strengths and weaknesses and identify some areas they would like assistance in improving. The ELC is available to deliver fraternity education session to the chapter on nearly any fraternity-related subject, provided the High Alpha gives him ample time to prepare such a presentation.

When the ELC calls the High Alpha prior to the start of his visit, the High Alpha should take the time to discuss the current state of the chapter and what problems they would like to target during the ELC visit. Developing rapport with the ELC prior to his arrival will make for a smooth visit and a better relationship.

The High Alpha should go out of his way to see that all members of the chapter meet the ELC. The ELC will get a much clearer picture of the chapter by meeting more members. The High Alpha should encourage all chapter members to sit in on at least one officer meeting during the ELC's visit. Doing so will allow the recommendations given by the ELC to be implemented more quickly, as more members will be aware of the reasoning for the change. More members involved in the ELC visit will hopefully lead to a greater understanding of the recommendations provided by the ELC.

The High Alpha needs to encourage the chapter to be open and receptive during the ELC's visit. By "sweeping problems under the rug", the chapter will lose the opportunity for help in addressing its problems. The ELC is ready and willing to help a chapter confront problems, even difficult ones.

## Follow-up after the Visit

After the ELC leaves, the High Alpha will need to do some follow-up on the visit. First, the chapter will receive an evaluation form for the visit, asking how the ELC did and what impact he had on the chapter.

Continued

# Prepare for and meet with the ELC during his visit to the chapter

It is important for the High Alpha to complete this online form, as it helps to provide feedback for improving the ELC program.

At the next High Zeta meeting, each officer should take a minute to discuss the recommendations the ELC gave them, and how he intends to follow up on those recommendations. The High Alpha should track these recommendations and recognize an officer or committee when one of the recommendations has been completely implemented.

The ELC's visit is designed to help make the chapter a better place for all members. The High Alpha's preparation and follow-through can make the difference between an average and excellent visit for the ELC, which will make a difference in the brotherhood experience for all members in the chapter.



# Ensure all membership reporting is completed and submitted to the General Fraternity in a timely manner

## Complete all membership reporting to the General Fraternity

The High Alpha should be responsible for overseeing the proper completion of all membership reporting to the General Fraternity. The High Gamma should be the officer to carry out the membership changes under the direction of the Executive Committee.

All membership changes should be reported as they happen. The annual reporting deadlines to the General Fraternity are October 15 in the fall, and February 15 in the spring. These deadlines affect the billing of the chapter from the General Fraternity. The High Alpha should be aware of these deadlines, and ensure that the membership roster is completely up to date at all times.

All officers, including the High Alpha, should create their account for Officer Portal immediately upon taking their position. All membership changes should be processed through Officer Portal.

The membership changes that are available to be selected through Officer Portal are as follows:

- *Report members graduating:* members that are graduating in good standing from their host institution.
- *Report members that left school:* members that are leaving the university or college but are not graduating, or if a member is taking one or more semesters off.
- *Report members that are entering the military:* members that are entering active duty military service, not necessarily ROTC or the National Guard. *Note:* this is only to be completed when he is on active duty and is missing a semester of education.
- *Report members being placed on financial suspension:* members who have been declared to be on financial suspension through the Executive Committee.
- *Report members that have resigned:* initiated members that have decided to resign from the fraternity. *Note:* this is not for associate members who have decided to leave or officers that have resigned from their office.
- *Report members that are being placed on disciplinary suspension:* members receive disciplinary suspension from the chapter in accordance with the Constitution and Statutory Code, those members cannot attend chapter functions.
- *Report members that are being placed on academic suspension:* members that have been placed on academic suspension through the Executive Committee.
- *Report members that are "8 semesters" inactive:* once a chapter member has been an active dues-paying undergraduate for 8 semesters, they have the right to take an inactive status if he so chooses, relinquishing voting rights at chapter meetings, on committees and should not attend chapter functions except chapter meetings.

Continued

# Ensure all membership reporting is completed and submitted to the General Fraternity in a timely manner

- *Report members that are entering a co-op education program:* members who are working away from the university or college where the chapter is located for an educational purpose. *Note:* this should not be done if the brother is still living within the chapter house or attending chapter functions during the semester.
- *Report members that have been expelled by your chapter:* initiated members who have been duly expelled by the Executive Committee. *Note:* if the former chapter member appeals the process, still complete the status change to reflect the change on the system.
- *Report members that have been married:* members that get married while they are an active member, have the right to take an inactive status if they choose. *Note:* if they choose to do so, they cannot attend chapter functions and lose the right to vote at chapter meetings. If a chapter brother gets married and chooses to stay active, do not report the marriage to the Office of Administration.
- *Report associate members that have disassociated:* associate members who resign from the fraternity. *Note:* if he chooses to re-affiliate with the chapter, the chapter must still vote to reinstate his associate member status.
- *Report members that are studying abroad:* members of the chapter that are studying abroad (meaning away from the chapter's host institution). *Note:* if a member will spend the majority of the semester at the chapter and only study a few weeks in another location, you should not mark him as studying abroad.
- *Report members that have transferred:* members that are leaving the university or college to attend a different school full time, even if it may only be for one semester.
- *Report members Returning to Active Status:* members that are returning to active status from previously being on a different status. *Note:* for some statuses, once they return to active standing or graduate, they will be back billed for their membership fees within Lambda Chi Alpha.

Continued

# Ensure all membership reporting is completed and submitted to the General Fraternity in a timely manner

Some important paperwork cannot be submitted through Officer Portal and needs to be mailed or emailed to the General Fraternity. These documents are still highly important and can be found below:

- High Pi Application
- Request for Honorary Initiation
- Report of Death
- Judicial Series – Charge and Summons
- Transcript of Proceedings
- Summary of Trial
- Ritual Book Order Form

# Confirm the chapter statement balance with the General Fraternity is paid in full by the deadline set by the Office of Administration

As the High Alpha, it is your responsibility to oversee the payment of all chapter bills, including the payments assessed by the General Fraternity. All fees paid to the General Fraternity go toward the support of Lambda Chi Alpha chapters, mainly through means of visitation resources, conferences, and staff support.

The High Alpha should review the chapter statement with the High Tau at the beginning of each semester to ensure all the information is correct, and to submit payment before the due date determined by the Office of Administration.

The chapter statement from the General Fraternity is available to be viewed and downloaded from the Officer Portal Dashboard. Working with the High Tau, the High Alpha should ensure the chapter statement is correct before payment is submitted or the bill is due. Waiting past the due date to notify the General Fraternity of corrections to an error in the chapter statement may result in the statement being permanent.

The Risk Management Assessment is a fee charged to each member, separate from Active Member Dues. This fee is directly impacted by the chapter's most recent Harm Reduction Report, as well as the chapter's housing situation, past claims history, recent incidents, chapter operating standards including membership, alumni, academics, financial management, and conference attendance.

## Associate Members and Initiation Fees

As Lambda Chi Alpha encourages year-round recruitment, the charge for a new Associate Member is assessed whenever they join. The deadline for payment is determined based on the date the new Associate Member was reported through Officer Portal. This fee is outlined in the Constitution & Statutory Code. Each Associate Member is also charged the chapter's Risk Management Fee, providing them with general liability insurance, just like all collegiate brothers.

The chapter is billed for each Associate Member when the chapter completes the "Request for Initiation" through Officer Portal. The Initiation fee is required to be paid in full to the General Fraternity before the Initiation Ritual Exemplification takes place in order to avoid a fine for hosting an illegal initiation. The Initiation Fee is also outlined in the Constitution & Statutory Code.

# Ensure the Harm Reduction Report is submitted to the General Fraternity by the deadline set by the Office of Administration

## Completing the Harm Reduction Report to the Office of Administration

The Harm Reduction Report is a document that the High Iota of the chapter should be responsible for submitting to the General Fraternity each semester by the deadline set by the Office of Administration.

The Harm Reduction Report is a reflection of the chapter's ability to take appropriate steps to create a healthy chapter environment, as well as educate members on topics of harm reduction. The scoring of this report directly affects the overall Risk Management Assessment Fee for the chapter. A better report will result in a greater savings for the chapter.

The High Iota should be keeping documentation for all components of the Harm Reduction Report throughout the entire semester, in order to avoid rushing to create the document at the end of the semester. This includes any supporting documentation, such as sign-in sheets, presentation slides, handouts, pictures, etc.

The different sections of the Harm Reduction Report are as follows:

1. Crisis Management Plan
2. Event Planning
3. Harm Reduction Education
4. House Safety
5. Fire Safety

The High Alpha should request to see a copy of the chapter's Harm Reduction Report as it is being created throughout the semester, as well as before the final report is submitted to the Office of Administration.

# Review all Event Planning Forms, and send documentation of your approval to the General Fraternity, in accordance with event planning procedures

The High Alpha is responsible for working with the High Iota to ensure the proper steps are taken to complete the event planning process for each applicable event with the Office of Administration. Just as most campus offices for Fraternity and Sorority Life require the completion of some type of an event planning form or registration, the Lambda Chi Alpha Office of Administration requires chapters to complete the event planning process based on the type of event being held. The event planning process is meant to be an educational tool to help the event coordinators consider all areas of potential risk.

Events that meet the following factors require the use of the Event Planning Form available on Officer Portal are as follows:

- Contracts have been or will be signed with a third party vendor (caterer, licensed cash bar, bartenders, rental facility, security company, bus company, etc.)
- The event is planned at a site more than 10 miles from the chapter house or campus
- The event is planned to exceed more than six hours in duration
- During a similar previous event, an accident or injury occurred
- The total number of people, including members, that will be allowed to attend will exceed three times the chapter membership (the number of associate and active members)
- The event is co-sponsored with another fraternity or sorority
- A third party has requested to be named as an additional insured on the Fraternity's insurance policy

If you are planning to hold an event, most likely an Event Planning Form will be needed to be completed. All forms must be submitted to the Office of Administration 15 days prior to the date of the event. Remember, all forms require High Alpha and High Pi approvals before being submitted to the Office of Administration. If you have a contract for your event the form must be in at least 30 days prior. Once the chapter has decided to host an event, you need to decide which form to submit. Any event a chapter plans to host will fall into one of the following three (3) categories:

- No Alcohol, No Contracts event
- No Alcohol, w/ Contracts event
- Alcohol and Contracts event

Once you determine the type of event you need to plan, log onto the Officer Portal and complete the Event Planning Form that best matches your event.

Not being aware of these forms is not an excuse for failing to complete the event planning process. The High Alpha should be fully aware of these steps to help make the event as safe as possible for all members and guests.

# Follow the chapter's Crisis Management Plan to contact a representative of the General Fraternity when necessary

## Contacting Lambda Chi Alpha International Headquarters in a Crisis

### Preparation

These guidelines are provided for you in an effort to ease the shock and provide a logical framework in the event of a crisis. Read them. Distribute them to all brothers and keep them in a readily accessible place. It is our hope that you will never have to use them. Appropriate preventive measures — fire safety, risk management, and others — could help you avoid many potential crises. By taking time to prepare and ultimately prevent tragedies, a brother's life and the chapter's life could be saved.

Unfortunately, dangerous and harmful situations may occur, involving members of Lambda Chi Alpha or guests at a chapter event. When these dangerous and harmful situations transpire, it is essential that all brothers are prepared to properly handle the situation. The following information should be considered when preparing a crisis management plan at the chapter and when educating all brothers on the components of that plan.

### Procedure for Reporting Chapter Incidents

Before contacting Lambda Chi Alpha Headquarters, be sure that the individual(s) receive appropriate emergency care. The immediate safety and well-being of all chapter members and guests is always the most important thing to consider.

Prompt reporting often prevents minor incidents from developing into major problems. Because of occasional late reporting of accidents or claims (either actual or potential), it is important to remind all chapter brothers and alumni brother volunteers about claims reporting procedures.

To report an accident or potential insurance claim, please follow these instructions:

If necessary, be sure that the individual(s) receive appropriate emergency care.

Notify Lambda Chi Alpha Fraternity International Headquarters through the following points of contact. It is imperative to exhaust this list until you have made contact with a staff representative.

1. Contact the chapter's Educational Leadership Consultant
2. 317.872.8000 (24 Hour Emergency Hotline)
  - Complete the **Incident Form** on the Lambda Chi Alpha Website
  - Email: [harmreduction@lambdachi.org](mailto:harmreduction@lambdachi.org)
3. Notify chapter High Pi and key alumni volunteers.

Continued

# Follow the chapter's Crisis Management Plan to contact a representative of the General Fraternity when necessary

4. Notify University/College officials – typically the Greek Adviser.
5. Do not acknowledge responsibility or admit liability for any accident or occurrence.
6. Take record of names and contact information of all parties involved, including witnesses.

Important information to note should include:

- Name(s) of individual(s) involved in or on the scene of the incident.
- Phone numbers and addresses of those involved or present.
- Exact location of incident.
- Description of circumstances leading up to the occurrence, including time of day, if alcohol was involved, if it was in relation to an official chapter activity
- Any emergency medical attention and treatment that occurred.

Members insured under the General Fraternity insurance policy shall not, except at their own expense, voluntarily make any payment, assume any obligation or incur any expense other than for first aid to others at the time of the accident.

All guidelines for reporting accidents and potential insurance claims should be implemented in conjunction with the Fraternity's Crisis Management Plan.

## **Assemble all brothers for a chapter meeting**

Explain that there is an emergency and that the chapter house is closed. They are not to speak to anyone outside the chapter — the High Alpha and/or High Pi will be the official spokesperson for the chapter. Do not discuss details, speculate on events, or otherwise project consequences. To do so would only create unrest and unnecessary upheaval. It is important for the chapter to remain calm.

## **Handling the media**

If the news media should contact the chapter, only the High Alpha or the High Pi should speak for the chapter. With the help and approval of the High Pi and the International Headquarters staff, the chapter will draft a statement issued to the media or will be instructed to direct all media inquiries to the Director of Chapter Services at 317.872.8000. In any case, the International Headquarters staff should evaluate this statement before it is disclosed. Do not release any names until an investigation has been completed and the timing is appropriate.

Continued

# Follow the chapter's Crisis Management Plan to contact a representative of the General Fraternity when necessary

## Investigating what occurred

The High Alpha will work in concert with the High Pi, High Iota (or other appropriate chapter officer) and the International Headquarters staff to determine what occurred surrounding the incident. It is important that all information is gathered and shared exercising full disclosure. Once all information is made available, appropriate follow-up actions can be determined.

## Developing a Crisis Management Plan

The High Iota should be able to use the Crisis Management Plan from the previous semester, simply updating the relevant contact information. The template for a standard Crisis Management Plan is available to be downloaded from the Document Library of Officer Portal.

## Brotherhood Education

A crisis management plan is only effective if it can be implemented the instant a crisis ensues, and it can only be implemented effectively if each undergraduate brother and alumni brother volunteer are prepared to implement the outlined steps. The entire High Zeta should review the Crisis Management Plan and be familiar with important concepts of handling a crisis. Every officer should have a copy of the Crisis Management Plan.

Be certain that all brothers in the chapter know that the High Alpha and High Pi or an alumni adviser are in charge in the case of emergency. The High Alpha will consult with other brothers who possess more expertise or insight, including the International Headquarters staff and college/university administration. Final instructions to chapter/colony brothers rest with the High Alpha. In the case that a High Alpha is unavailable or absent, the chapter must predetermine who assumes his responsibilities related to the Crisis Management Plan. All brothers must know who is in charge and be prepared to follow instructions.

## Serious Injury / Death of a Brother

Do not notify the parents until after a medical or law enforcement official has done so. In the event of a serious injury or death, medical or police personnel will notify the family. The chapter should always have parent/guardian information on file for each brother and made available to proper authorities. After the family has been notified, it is appropriate for the High Alpha or High Pi to call and share concerns on behalf of the chapter.

Continued

## Follow the chapter's Crisis Management Plan to contact a representative of the General Fraternity when necessary

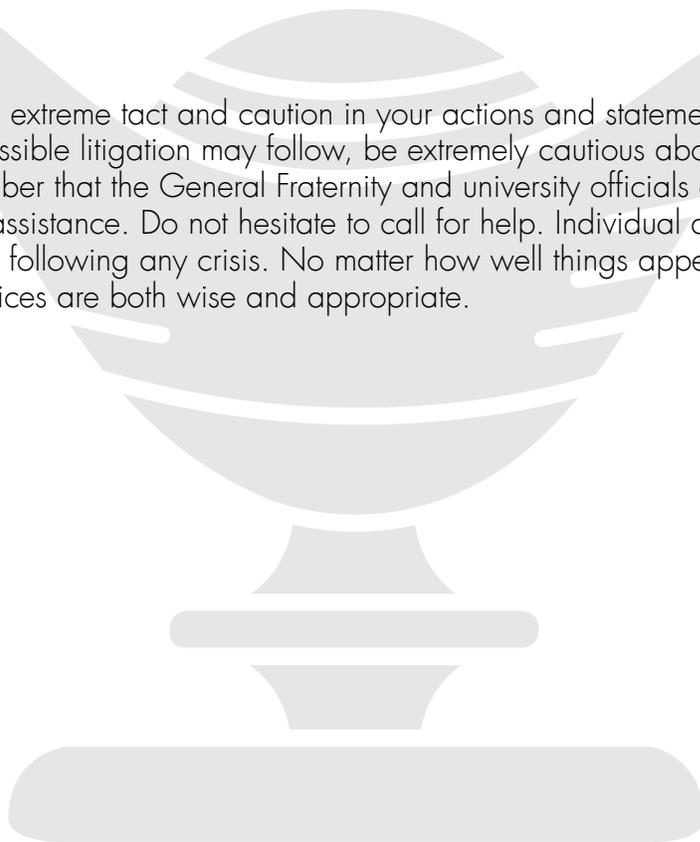
In the event of a death, do not remove any personal items from the deceased brother's room. Do not let brothers enter the room. Temporarily move the deceased brother's roommate to another room in the house, and allow only authorized personnel to enter the room. If possible, keep the door locked. Ask the family members what their wishes are with regard to the brother's possessions. The chapter may offer to pack them in boxes, but the family will likely want to do this themselves. Before they arrive, make sure any borrowed items are returned. When they arrive, have empty boxes available and offer to help. Understand that this is a difficult time for them and the family may want privacy.

The chapter will want to coordinate brothers' attendance at the funeral or memorial service. Along with the High Pi, discuss with the family or the family's clergyman the possibility of conducting a Lambda Chi Alpha Fraternity memorial service. Use the guidelines found on pages 139-140 of the High Phi Manual.

In the case of serious injury or illness, find out the visitation wishes of the family and coordinate this with chapter.

### **Moving Forward**

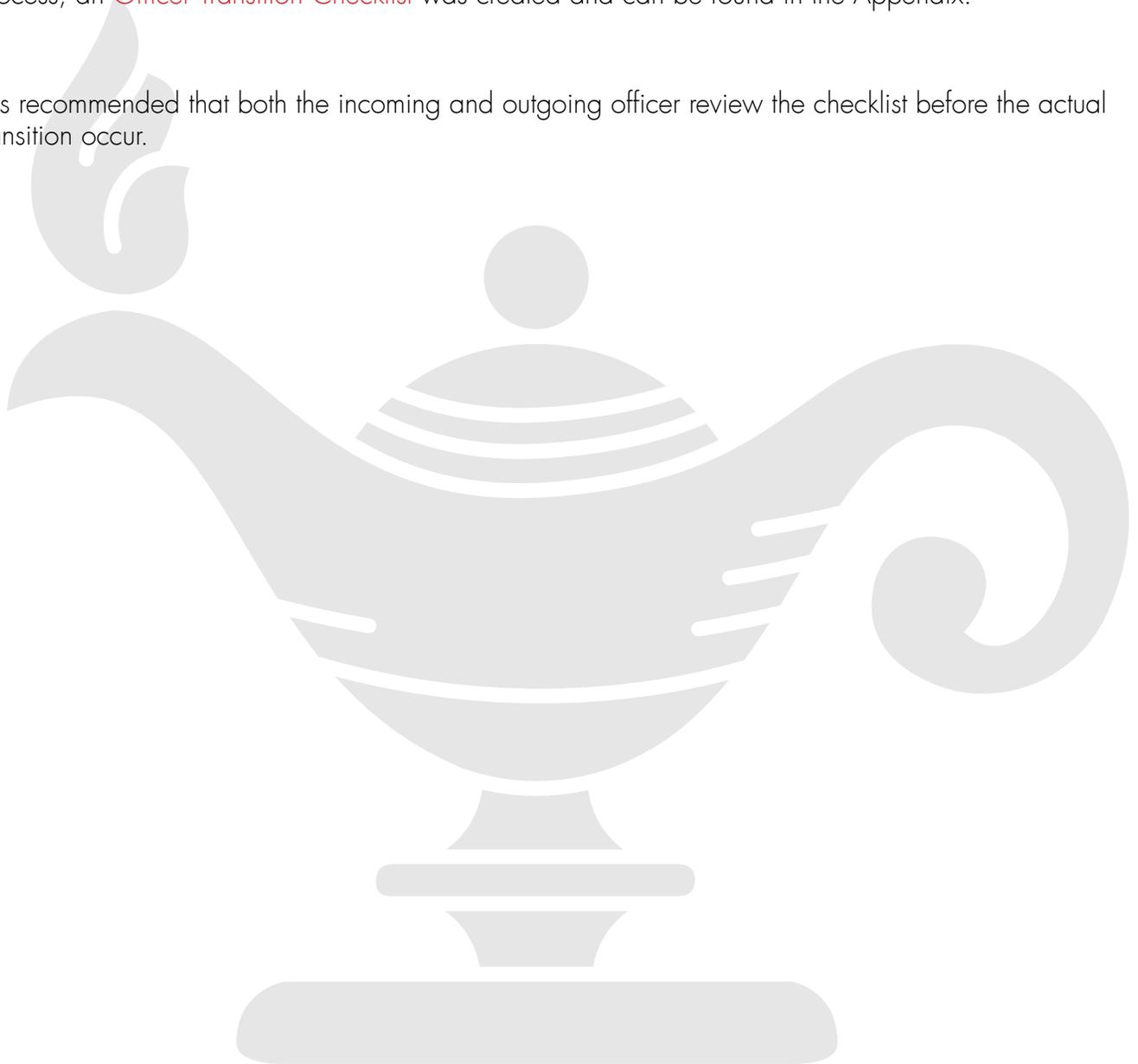
In any emergency, use extreme tact and caution in your actions and statements to brothers, the media, and others. Where possible litigation may follow, be extremely cautious about jumping to conclusions or speculation. Remember that the General Fraternity and university officials are always available for counseling and other assistance. Do not hesitate to call for help. Individual and group counseling are strongly recommended following any crisis. No matter how well things appear to be going, counseling and other support services are both wise and appropriate.



# Transition to incoming High Alpha

For a chapter/colony to be successful, it is important that its officers don't "reinvent the wheel". Valuable information and resources are lost each year due to an ineffective transition process. To assist in this process, an **Officer Transition Checklist** was created and can be found in the Appendix.

It is recommended that both the incoming and outgoing officer review the checklist before the actual transition occur.



# Review Robert's Rules of Order with the chapter encourage all members to exhibit proper decorum during chapter meetings

*Robert's Rules of Order* provides common rules and procedures for deliberation and debate in order to place the entire Chapter on the same level and speaking the same language. The High Alpha should be thoroughly familiar with Robert's Rules of Order, which govern the process for having a meeting. Robert's Rules of Order allow meetings to flow quickly and smoothly, if used correctly, by imposing a strict process for taking certain types of actions. While a chapter meeting is not expected to be as formal as Congress or Parliament, the High Alpha who cannot utilize Robert's Rules of Order will find the chapter meetings running out of control, causing lengthy debates, delays, and a general lack of understanding about the actions the chapter ultimately takes.

Proper decorum should always be displayed, whether it is at the altar of Lambda Chi Alpha during formal business meetings, or the members dress during meetings. It will be at the discretion of the High Alpha, along with the Chapter Bylaws, as to what is proper decorum for meetings, and what the punishments for failure to abide by them are.

## Decide or Act on Issues

There are certain decisions that can only be made by the entire chapter, such as electing officers or making changes to Chapter Bylaws. Whenever possible, these decisions should sit on the table for one week to allow people to consider them and allow for informal discussion outside the chapter meeting. Some decisions, such as voting on initiation, are required to be tabled for one week. Specific voting procedures and percentages for approval are outlined in the Constitution & Statutory Code as well as the Chapter Bylaws.

A [snapshot of Robert's Rules of Order](#) is available in the appendix.

Continued

# Partner with the Standards Chairman to hold each chapter officer accountable to the duties of their position

## Utilizing the Standards Chairman

The ability of a chapter to hold its officers and members accountable to the duties of their positions and obligations of membership is an attribute that will help any chapter flourish. This task of ensuring that all officers and members are living up to duties of their position and the standards of the fraternity ultimately rests in the hands of the High Alpha. The Standards Chairman is an officer that is appointed by the High Alpha to serve as the primary officer to carry out the function of officer and member accountability. It is important to distinguish that the Standards Chairman is not an officer that processes judicial matters within the chapter, which is a function of the Executive Committee.

At the discretion of the High Alpha, the Standards Chairman may form a committee to assist with the duties associated with the Standards position. This may be helpful for younger members in the chapter to learn about different aspects of operations within the chapter. Utilizing a committee may also help remove any biases from the reviews.

## Schedule Reviews at the Beginning of the Term

The High Alpha shall schedule reviews of chapter officers with the Standards Chairman to take place throughout the entire academic semester, preferably on a weekly basis, with a different High Zeta officer being reviewed each week. It is helpful for each chapter officer to know well in advance when their review with the Standards Chairman will take place. When scheduling reviews, the High Alpha should consider strategically the most logical time for each officer to be reviewed based on the chapter calendar. For example, it may make sense to review the High Delta closer to the beginning of the semester, based on the schedule of formal or informal recruitment sponsored by IFC.

## Reviews Based on Chapter Officer Operations Guides

The Standards Chairman should use the Operations Guides for each review and submit all recommendations to the Executive Committee. The desired outcome of each officer review is to determine what tasks listed in the Operations Guide have already been completed, which tasks are in progress, and which tasks still need to be accomplished. The Standards Chairman should assist the officer with making a plan to complete all tasks that have not yet been accomplished. Reviews should be conducted with the intent of giving constructive feedback, both positive and negative, to the respective officer.

## Executive Committee Utilizing Reviews by the Standards Chairman

The Standards Chairman should submit his review of the chapter officer to the Executive Committee. The Executive Committee should use this information to congratulate the chapter officer for any aspects of the job that have been done well, and reinforce the recommendations made by the Standards Chairman.

Continued

# Partner with the Standards Chairman to hold each chapter officer accountable to the duties of their position

At the discretion of the Executive Committee, a negative review may result in the removal of a member from a certain officer position. This Executive Committee should not be hesitant to remove a member from any position; however, this should only be the last resort. A removal should only come after an effort of due diligence from the High Alpha and other chapter officers working to help the chapter officer be successful. If a chapter officer is removed, the reasons for removal should be very clearly outlined to the former chapter officer to help him understand his shortcomings, and how he can improve as a leader in the future.

## Holding Chapter Members Accountable to the Obligations of Membership

At the direction of the High Alpha, the Standards Chairman may also be responsible for the duty of reviewing individual members relative to their obligations of membership and other standards of chapter membership. This may include components of the Constitution & Statutory Code, Chapter Bylaws, and other member contracts or oaths members have agreed to.

One practice conducted by the Standards Chairman is to issue a “brotherhood survey” to all members of the chapter. The preferred format for an exercise such as this is a survey where brothers rate themselves in the fashion of a self-assessment (preferred) or perhaps even an anonymous survey.

It is important to remember that the Standards Chairman does not play the role of adjudicator within the fraternity, as all decisions of official member discipline or conflict resolution are funneled through the Executive Committee. The Standards Chairman simply does the work of presenting the results of his reviews to the Executive Committee in a non-judgmental fashion. It is the responsibility of the Executive Committee to interpret the findings of the Standards Chairman and take action, either positive or negative, moving forward. The end goal is to always promote a healthy and developmental environment for members of the fraternity.

# Review the process of the informal and formal disciplinary hearings with all members of the Executive Committee as outlined in the Constitution & Statutory Code

## Prepare for an Informal and Formal Hearing

Just as each member of the Executive Committee should be equipped with the Executive Committee Manual, each Executive Committee member should have a copy of the Constitution & Statutory Code, which outlines the process of the informal and formal disciplinary hearing. It is important each member of the Executive Committee be able to answer questions to the rest of the chapter regarding this process.

At the election of a new group of Executive Committee members, the High Pi and the High Alpha should lead the new group through an informal and formal hearing training session. A mock informal hearing is a great way to educate the members of the Executive Committee and any other members of the chapter that want to learn about the process.

## Difference Between the Informal and Formal Hearing

The informal hearing is always the first step to adjudicate charges that have been brought against a member of the fraternity. The informal hearing is conducted by the Executive Committee, and can be closed at the discretion of the High Alpha. A member has the right to appeal the decision of the informal hearing

The formal hearing is only ever conducted if a member appeals the decision of the informal hearing. The formal hearing is conducted as a function of the entire chapter, including Associate Members, where all members in good standing vote on the decision. In extreme circumstances, a member has the right to appeal the decision of a formal hearing to the Grand High Zeta.

As the process of the informal and formal hearing is subject to change, please reference the Member Discipline section of the current version of the Constitution & Statutory Code to learn more about the process of the informal and formal hearing.

# Review Consultant Visit Reports from at least the previous two visits from the Educational Leadership Consultant

## Review State of the Chapter According to Previous Consultant Reports

Upon election as the High Alpha, it is necessary to obtain at least the previous two visit reports from the Educational Leadership Consultant (ELC). The chapter should keep all these reports on file, both in a place of physical permanent storage and a permanent digital storage network.

The Educational Leadership Consultant (ELC) completes a detailed visit report after every regular consultant visit to the chapter. The ELC will provide a copy of his report to the chapter shortly after his visit, which will summarize the visit and outline recommendations for each officer.

The ELC visit report also audits the chapter's position for each of the Lambda Chi Alpha Chapter Operating Standards, as outlined in the Constitution & Statutory Code. Viewing at least the two previous consultant reports will give the High Alpha a clear picture of the chapter's status of the Chapter Operating Standards.

ELC Reports may also be used in the evaluation of a chapter officer. Has the officer implemented any of the suggestions of the ELC? Why or why not? The High Alpha should work to reinforce these recommendations with each officer. The recommendations listed in a consultant report are specific to each High Zeta officer, who discussed these tasks during his meeting with the ELC. Thus, few recommendations or suggestions from the ELC should come as a surprise to the chapter.

When preparing for an upcoming ELC visit, the High Alpha should review the recommendations of the last ELC and note which recommendations have been completed. This list of completed recommendations should be given to the ELC upon his arrival. Completed recommendations indicate that a chapter is working to improve.

# Introduce yourself and the High Zeta officers to the alumni volunteers of all alumni organizations

## Becoming Familiar with Alumni Organizations

The High Alpha will often be the most visible undergraduate member to the alumni of the chapter. Thus, the High Alpha will have to work closely with the High Rho to communicate with alumni. An effective High Alpha can assist both the High Rho and the house corporation or Alumni Advisory Board to increase alumni involvement.

The High Alpha will represent the undergraduates in all their relations with the various alumni groups such as a house corporation or an alumni advisory board. If the High Alpha seeks to understand the alumni perspective on issues affecting the chapter, he must keep the lines of communication between the chapter and alumni open. The High Alpha should be present for all alumni meetings.

While chapter officers change every year, volunteers associated with alumni organizations tend to transition less frequently. Upon election as the High Alpha, it is necessary to have an understanding of the structure of different alumni organizations that the chapter interacts with.

Many alumni organizations have different structures, and not one model is correct or incorrect. Different alumni organizations to become familiar with may include:

- Alumni Advisory Board (AAB)

An Alumni Advisory Board (AAB) is a non-governing group of advisors that is meant to exist with the purpose of mentoring chapter officers, usually managed and organized by the High Pi. Each alumni volunteer on the AAB is assigned a High Zeta position he specializes in to serve as an advisor. For example, a local accountant may advise the High Tau, and a local police officer may advise the High Iota, etc.

- Alumni Association

An Alumni Association usually exists to provide opportunities for fellowship with alumni brothers. An Alumni Association is often a regional group, but it could also be a group for alumni of a specific chapter. A regional Alumni Association is meant to include any alumni brother of Lambda Chi Alpha who lives in a certain area, regardless of the chapter where he was initiated.

- Alumni Control Board (ACB)

An Alumni Control Board is a group of alumni officially appointed by the Grand High Zeta to gain emergency authority over the actions of a chapter for the preservation and rehabilitation of a chapter.

Continued

# Introduce yourself and the High Zeta officers to the alumni volunteers of all alumni organizations

- House Corporation

A house corporation may exist in correlation with a chapter that uses some type of a facility. The relationship between the chapter and the house corporation will be unique at each institution, as these organizations may exist and function in many different capacities.

## The Alumni Advisory Board

An Alumni Advisory Board (AAB) exists solely to improve the Lambda Chi Alpha experience for the undergraduate chapter. Men who serve on the AAB are looking to give some of their time and knowledge back to the chapter.

Starting and maintaining an AAB is generally the responsibility of the High Pi and the High Rho, but again the High Alpha will be expected to play a highly visible role in the group's operations.

An Alumni Advisory Board has four main objectives:

1. Act as mentors, counseling and guiding undergraduate members
2. Act as teachers to develop and refine fraternity related skills
3. Act as evaluators to help measure success and compliance with Lambda Chi Alpha's standards
4. Act as an encourager to help provide and recognition for achievements by the chapter and individual members

Most chapters have some type of alumni advisory resources available to them. Often alumni involvement surfaces on a regular basis and is utilized by the chapter. In too many instances, however, a chapter has only a few alumni involved on a sporadic basis, and alumni become organized in advising the chapter only when the chapter's operations decline to the point of being life-threatening.

So why is a functioning alumni advisory board so important to the successful operations of a chapter or colony?

- It shows alumni commitment
- Provides a process for alumni involvement and help, which then becomes easier to manage and coordinate.
- Provides an experienced perspective by supplying the chapter with information, expertise and insight
- Provides regular and individualized officer support, training and advising

Continued

# Introduce yourself and the High Zeta officers to the alumni volunteers of all alumni organizations

- Assists the chapter in making the “tough brotherhood” decisions by helping members develop self-discipline and responsibility
- Teaches techniques of good leadership
- Assists the chapter in working toward the achievement of its objectives and goals
- Assists the chapter in obtaining more alumni support and involvement
- Provides a better networking system, for both undergraduates and alumni
- It further strengthens the fraternal experience

Simply outlined, the purpose of an AAB is to work hand-in-hand with the chapter’s officers, committees and members toward the goal of expanding the day-to-day operations and programs of the chapter.

Usually, the AAB is chaired by the High Pi. The AAB can contain anywhere from three to 15 alumni working closely with an officer or a committee. Ideally, an alumnus works only with one officer or committee in an area where he has a natural interest or expertise.

Alumni participation in the AAB will vary, but a good adviser will be in contact with his undergraduate officer twice a month by phone or e-mail, and will meet with the officer at least twice a term to have a more in-depth discussion. When possible, some more involved alumni will want to participate in High Zeta meetings, committee meetings, and chapter events.

The Alumni Advisory Board itself should meet at least four times a year, always when school is in session, so members can meet directly with their respective undergraduate officers. At the meetings of the AAB, discussion should center on how the alumni can help the chapter address some pressing problems, or how to help the chapter meet its current goals.

Why do alumni want to be involved with an Alumni Advisory Board?

Some common reasons alumni choose to make a commitment as a member of an Alumni Advisory Board:

- To add to the undergraduate’s fraternal experience
- To gain opportunities to work with other alumni
- To pass on their life’s experiences to those who share their fraternal affiliation
- To continue friendships gained at school and to develop new ones

Continued

# Introduce yourself and the High Zeta officers to the alumni volunteers of all alumni organizations

- To further direct and develop a chapter's pursuit of excellence
- In some cases, to help a chapter out of a desperate situation
- To be a role model and teacher of fraternity to men in a highly developmental stage
- To gain the enjoyment of observing young men mature into responsible leaders
- To repay Lambda Chi Alpha for what it provided to him as an undergraduate member
- To develop undergraduate loyalty to Lambda Chi Alpha

The High Alpha can choose to help make the Alumni Advisory Board a strength of the chapter or he can simply ignore the opportunities that are available in the AAB. In assisting with the operations of the Alumni Advisory Board, a High Alpha must set the example by meeting regularly with his own alumni adviser and seeking advice from that adviser. The High Alpha also must constantly remind other officers to make contact with their alumni advisers, to keep them informed and to seek advice whenever possible.

In many cases the High Alpha might need to work with the High Pi and High Rho to develop a schedule of AAB meetings for the year, so they coincide with chapter events the alumni might want to attend. Finally, the High Alpha must continually help with the recruitment of alumni to serve on the AAB. Over time some alumni will need to drop their commitment to serve. Through recruitment, the chapter can always have a replacement ready to step in and keep up the counseling and mentoring.

For chapters looking to start an alumni advisory board, the Lambda Chi Alpha's Educational Leadership Consultants often schedule time to help organize an AAB or update an operating group on current Fraternity trends and policies. If a chapter wants help in forming an AAB or working with one already in place, the High Alpha should call a Lambda Chi Alpha staff member to request specific assistance.

## **The Alumni Association**

An alumni association is another major group within the alumni membership whose activities and functions differ from those of other alumni-related groups. Whereas a house corporation maintains the physical assets and insurance needs of a chapter house, an Alumni Advisory Board advises the undergraduate chapter operations in addition to the High Pi, Alumni Associations are more specifically related to the alumni themselves.

The primary intent of an Alumni Association is to increase the participation and interest level among area alumni by building communication links and hosting gatherings. Each Alumni Association shall also be responsible for promoting Lambda Chi Alpha Fraternity to the local community.

Continued

# Introduce yourself and the High Zeta officers to the alumni volunteers of all alumni organizations

The reasons for alumni to participate in an Alumni Association are often similar to the reason for joining Lambda Chi Alpha as an undergraduate. Some of these include the opportunity to mentor a local chapter, social and professional networking opportunities, create scholarship opportunities through fundraising, community service functions, and cultural education. It is vital to remember that alumni have varying interests, sometimes based on demographics, and alumni associations often program events accordingly.

## Chapter Involvement with the Alumni Association

Of the different types of alumni organizations that exist, it is likely the chapter will have the least interaction with a local alumni association compared to the house corporation or Alumni Advisory Board. The High Alpha and the High Rho should take the initiative to introduce themselves to the president of the Alumni Association and any other alumni heavily involved in the leadership of the Alumni Association.

The chapter should work with the Alumni Association when planning any large-scale alumni events. In most cases, the board members of the alumni association will have a greater ability to effectively distribute information about an event compared to the stand alone efforts of the active chapter.

It is also plausible for members of the active chapter to attend functions hosted by the Alumni Association. When introducing himself, the High Alpha should ask the president of the Alumni Association to be notified if there are events that would be acceptable for active members of the chapter to attend. Networking events may be very beneficial to older members of the chapter. An open line of communication between the chapter officers and the Alumni Association will be mutually beneficial for both parties.

## The Alumni Control Board (ACB)

An Alumni Control Board is officially appointed by the Grand High Zeta as a means of addressing a dire chapter situation. This situation may stem from lack of support and direction by a current alumni organization or from general disregard for harm reduction policies. Generally, a chapter was operating at a level that was inconsistent with the fraternity's operating standards or a chapter was in danger of a status of suspension if current conditions persisted. Here are some examples of the situations that require Alumni Control Board action:

- The chapter has failed to meet regularly
- The chapter's officers are performing at a poor level over an extended period
- The Executive Committee has failed to enforce the Constitution and Statutory Code for an extended period
- Chapter officers are using financial resources in inappropriate ways (i.e. funds are being used

Continued

# Introduce yourself and the High Zeta officers to the alumni volunteers of all alumni organizations

toward the purchase of alcohol) for an extended period

- The chapter chronically violated policies related to harm reduction or hazing

As a result, the Grand High Zeta declared that a local alumni group could be given the power to form an emergency Alumni Control Board in dire chapter situations. This is authorized by Code III-45 of the Constitution and Statutory Code, which states:

“The Grand High Zeta shall have the right to delegate to the Board of Directors of the Chapter Alumni Organization, or any other group of Alumni Brothers, whatever emergency authority may become necessary for the preservation of the chapter. Any discipline of members undertaken by such group shall be subject to the provisions of Article VIII, Sec. 4 of the Constitution and the approval of the Grand High Pi. The Grand High Zeta will establish procedures and guidelines for the actions of such groups, which take into account due process.”

The goal of this board is to “control” everyday operations within a chapter and to provide mentoring that was previously lacking. Often, the chapter was allowed to make only trivial decisions about chapter operations and events. The control board may handle officer elections, chapter finances (specifically holding the chapter checkbook and writing checks were deemed appropriate), enforce the Chapter Operating Standards, review officers and members on a weekly basis, and ensure that the chapter is meeting operating standards in accordance with The Constitution and Statutory Code.

## The House Corporation

Every chapter that rents, leases or owns a chapter house is required to have a house corporation. The house corporation is responsible for the long-term chapter house maintenance by providing needed continuity. With a complete membership turnover every four years, a chapter cannot provide the stability necessary to maintain a property over a long period of time. In short, the house corporation is necessary to maintain the physical assets of the chapter, to encourage sound undergraduate chapter management and to provide continuity to the undergraduate chapter operations.

The functions of house corporations will differ between chapters, depending upon the chapter house arrangements, relationship with the school, and the presence of other chapter-alumni organizations. For example, where an Alumni Advisory Board is present, the house corporation would generally not advise chapter operations, beyond basic house maintenance. While house corporation functions can be as broad or as specific as desired, the general objectives are as follows:

- To hold the legal title to any real property
- To secure and maintain housing for the benefit of the chapter
- To provide continuity to undergraduate chapter management and operations

Continued

# Introduce yourself and the High Zeta officers to the alumni volunteers of all alumni organizations

- To encourage sound undergraduate chapter management through advice and counsel, with particular emphasis on the physical condition and maintenance of the chapter house and the financial condition of the chapter
- To serve as a liaison between the chapter, school and the Lambda Chi Alpha headquarters
- To represent the interests of all alumni members of the chapter, and to insure that the undergraduate chapter thrives and survives
- To provide for both a short-term chapter house maintenance plan and a long-term house improvements strategy
- To recruit alumni to serve as new volunteers for the house corporation
- To properly perform these functions, every effort should be made to establish and continue an active organization of members who are willing, have the time and possess the ability to devote themselves to the duties of the house corporation. The house corporation should not be viewed as a group that gathers for social reasons; it must be a working organization.

## The Structure of the House Corporation

A house corporation is a separate legal entity from the chapter and in many states or provinces, the corporation is required to submit annual reports detailing its activities and plans.

To be fully functional, every house corporation must have a set of bylaws which outline its objectives, governance, membership, duties, meetings, etc. It is suggested that there be 13 directors on the house corporation, at least three of whom should be undergraduate members. The High Alpha, High Tau and High Rho should be full members of the house corporation Board of Directors. When possible, the House Manager should also be on the board. The undergraduate terms on the corporation should mirror their terms as High Zeta officers. Alumni terms vary from chapter to chapter.

The election of other directors, the alumni, should occur at the annual meeting of the corporation. The corporation is required to hold at least one meeting a year where all members are invited to attend and discuss corporation business. Generally, this meeting coincides with a major chapter or campus event like homecoming or initiation. The time of the annual meeting should be stated in the corporation's bylaws.

The Board of Directors for the house corporation should meet at least four times a year, though monthly is the ideal time frame. Typically, the Board of Directors consists of a President, Vice President, Treasurer and Secretary. Corporation bylaws could detail other specific offices. Otherwise, the other directors are merely at-large members of the Board.

Continued

# Introduce yourself and the High Zeta officers to the alumni volunteers of all alumni organizations

The house corporation should have several standing committees, which could have undergraduate representation. These committees should be enumerated in the bylaws, and could include a fund raising committee, an alumni communications committee, an events committee, and a property management committee. All house corporations should have an audit or financial management committee (with the High Tau and the Alumni Treasurer sitting on that committee). This committee is responsible for having the corporation's finances audited by a professional accountant each year, and preparing the corporation's annual report.

Undergraduate representatives must be aware of the long-term aspects of a house corporation. The house corporation must be able to balance a short-term maintenance plan and a long-term strategy for the condition of the housing facility. Thus, undergraduates must understand that all of a house corporation's resources cannot be exhausted over a short period. Undergraduate representatives on a house corporation are important because they provide insight concerning the current living conditions and operations of the chapter. They also act as the corporation's representative to the active chapter.

The High Alpha should make a regular written and oral report to the chapter after attending any house corporation meetings, including meetings of the corporation's Board of Directors. Where possible, the High Alpha should encourage potential leaders to attend house corporation meetings to learn about the group's plans and operations. The High Alpha must be careful in presenting undergraduate concerns to the house corporation, as problems can arise with a group that meets so infrequently. Relationship problems with alumni can take longer to solve, so the High Alpha must express his opinions, but also must listen attentively to opposing viewpoints and look to build consensus. The High Alpha must convince the chapter to take a long-term viewpoint when considering housing issues, for that is the viewpoint the corporation will take in making decisions.

# Meet with the campus Greek Adviser every month to discuss the current state of the chapter

## Develop a Relationship with the Campus Professional Responsible for Fraternity and Sorority Life

It is important that the High Alpha develop a close working relationship with the school official that oversees Greek life. While this person typically has a variety of titles on a campus, the term Greek Adviser shall be used here.

The Greek Adviser has been trained to work closely with Greeks, and is an advocate for Greek life, not an opponent of it. This official will want to work closely with the chapters on campus to see that they are upholding their own lofty ideals and are meeting the school's requirements.

On a typical campus, a Greek Adviser could have a myriad of other duties to execute, including working with housing, student activities, student orientation, or academic advising. Many campuses with larger Greek systems have a Greek Adviser who works on just the Greek system, but has up to 50 chapters on a campus to work with. The High Alpha needs to understand what responsibilities the Greek Adviser has and how much time that allows the official to focus on Greek life and the chapter. By understanding the Greek Adviser's responsibilities, time demands and areas of expertise, the High Alpha will have a better understanding of how the chapter can utilize the Greek Adviser to improve.

Immediately after his election, a new High Alpha should meet with the Greek Adviser to introduce himself and to set a regular meeting time. Hopefully, this post-election meeting is not the first contact the High Alpha has ever had with a Greek Adviser.

At the High Alpha's first meeting with the Greek Adviser, lines of communication should be opened and expectations outlined. The High Alpha should leave the meeting aware of the following items:

- How to contact the Greek Adviser/campus security in a chapter emergency?
- What forms are due to the school and when?
- What money is due to the school/IFC and when?
- An understanding of the alcohol policy and how the school enforces it on campus?
- What steps does the chapter have to take to have a social event approved?
- Are there any standards and expectations the school has of the chapter?
- When can the chapter apply for campus awards?
- What workshops/resources does the Greek Adviser and his/her office have available for the chapter?
- Are there regular meetings of all Greek Presidents on campus?

Continued

# Meet with the campus Greek Adviser every month to discuss the current state of the chapter

- Is the Greek Adviser interested and available to join the chapter for a meal sometime in the near future?
- Can other officers come and discuss programming with the Greek Adviser?
- Is the Greek Adviser aware of the chapter's goals for the coming year?

The High Alpha should also use that meeting with the Greek Adviser to establish a schedule of regular meeting times. It is recommended that the High Alpha meet with the Greek Adviser at least once a month to discuss chapter goal setting, problems and programming. This meeting should last one hour.

The High Alpha will want to bring other officers to his regular meeting with the Greek Adviser. He might select one to three officers a month to take with him. This allows the Greek Adviser to develop a relationship with other members of the chapter and also allows the Greek Adviser to offer direct programming advice to those officers. For example, the High Alpha might take the High Delta, High Kappa and High Sigma along to the first meeting of the school year, so the chapter's officers can discuss recruitment, membership education, and scholarship development with the Greek Adviser before the school year starts.

The High Alpha should see that the Greek Adviser has a written copy of the chapter's goals and that regular updates are given to the Greek Adviser. These updates serve to remind the Greek Adviser of the work the chapter is attempting and completing.

While the High Alpha wants other officers to work with the Greek Adviser, it is the High Alpha/Greek Adviser relationship which will likely define the chapter to the school's administration. Listed below are some Do's and Don'ts in trying to build a solid relationship with the Greek Adviser

## Do's

1. Be honest.

Nothing will poison the relationship quicker than lying or attempting to keep the truth from the Greek Adviser. The Greek Adviser can be an advocate for the chapter only if the chapter has painted an honest picture of its operations.

2. Ask for help.

The Greek Adviser is there to serve the chapter. If no assistance is sought by the chapter, most Greek Advisers will shift their attention to groups that want and need the help.

3. Be appreciative of assistance.

Just as the chapter recognizes members and alumni who work on the chapter's behalf, so too must

Continued

# Meet with the campus Greek Adviser every month to discuss the current state of the chapter

the chapter recognize a Greek Adviser who works to improve the chapter. A thank you note, a gift certificate for dinner, flowers, or a thank-you advertisement in the school newspaper can serve to let the Greek Adviser know the chapter appreciates the assistance and support.

4. Provide information early and often.

The Greek Adviser should receive copies of the chapter's goals, roster, phone list, master calendar, monthly financial reports, chapter and executive committee meeting minutes, and any other information that will allow better advice to be given. High Zeta officers with a great deal of planned programming (Beta, Delta, Kappa, Phi, Epsilon, Rho) should be giving the Greek Adviser a written description of the chapter's planned programming, seeking suggestions for improvements. The more information the Greek Adviser has, the better advice the chapter is likely to receive, because that advice will be tailor-made for the chapter's situation.

5. Seek to understand what the Greek Adviser expects from the chapter.

The Greek Adviser typically has a long-term perspective on the chapter, and has seen its ups and downs. The Greek Adviser also has an opinion about what the chapter can realistically expect to accomplish, and can thus help the chapter refine its goal setting for a term or year. The High Alpha must also make sure he has learned everything the chapter must do for the school and/or the IFC to maintain its partnership with the school.

6. Seek to learn what the Greek Adviser expects from the Greek system.

The school generally has some expectations for the entire Greek system. Often times these expectations are carefully explained and enforced through the Greek Adviser's office. The High Alpha must understand these expectations and must educate the chapter on them as well. By understanding these system-wide obligations, the High Alpha will have an understanding of how each chapter and member fits into the larger picture of the Greek system.

7. Use the Greek Adviser to help educate the chapter.

The Greek Adviser has a vast knowledge of fraternity operations and is generally available to share that information with the chapter. The chapter's High Kappa might want the High Alpha to arrange a fraternity education session with the Greek Adviser every term, switching subjects each term, so the Greek Adviser can share as many different areas of expertise as possible with the chapter. This exposure to the chapter's general membership will help the Greek Adviser get a better understanding of how the chapter works and what motivates it to succeed.

8. Use the Greek Adviser to recruit potential Faculty Advisers.

The Greek Adviser will be aware of much of the campus faculty, and will know how the chapter can

Continued

# Meet with the campus Greek Adviser every month to discuss the current state of the chapter

solicit prospective Faculty Advisers. The High Alpha should specifically ask the Greek Adviser for assistance in this area, and then the High Alpha should supervise the High Beta or High Sigma in seeing that this recruitment takes place.

9. Ask the Greek Adviser to evaluate the performance of the chapter.

The Greek Adviser has the ability to objectively view the chapter compared to other groups on campus, pointing out the strengths and weaknesses of the chapter. The High Alpha should ask the Greek Adviser to provide the feedback on a quarterly basis, as it will help the chapter with goal setting and in providing an honest appraisal of how they compare to the campus competition. Such an assessment would be invaluable to the chapter, as it shows what the chapter is projecting to the outside world.

10. Ask the Greek Adviser to participate in some chapter events.

While the chapter should be using the Greek Adviser in Lambda Chi Alpha educational program, other events could include the Greek Adviser. The High Alpha should invite the Greek Adviser to several events each term, recognizing that the Greek Adviser's schedule will prevent an appearance at most chapter functions. Still, if the Greek Adviser does attend an event, it allows the chapter a great opportunity to display its work in a particular programming area. It is appropriate to invite the Greek Adviser to recruitment events, fraternity education, pre-initiation events, open ritual ceremonies, community service, faculty receptions, alumni events and social events.

## Don'ts

1. Don't hide the truth or lie.

This only prevents the Greek Adviser from working with the chapter to solve problems. Even though a problem might force the Greek Adviser to penalize the chapter, lying will never help the chapter. The chapter will nearly always receive a lesser penalty for being honest and sincere, than if they hid the problem and denied it to the end.

2. Don't avoid meeting with the Greek Adviser.

Nothing tells the Greek Adviser the chapter isn't interested in a partnership like simply ignoring the Greek Adviser's existence. Because of the Greek Adviser's other duties and the other people seeking help, if the chapter does not initiate contact with the Greek Adviser, their only contact could come when the chapter has a problem.

3. Don't let issues linger.

Once the chapter and the Greek Adviser have discussed an issue, the High Alpha needs to see it addressed in the chapter immediately. Letting issues between the chapter and the school grow will only breed resentment and distrust on both sides.

Continued

# Meet with the campus Greek Adviser every month to discuss the current state of the chapter

4. Don't forget to meet the school's schedule.

Each school has its own deadlines and requirements for paperwork, award applications, and other items the chapter needs to complete. The High Alpha needs to see that these items are done on time, and correctly, to avoid having the Greek Adviser or his/her staff waste time hunting this information down.

5. Don't forget the Greek Adviser has other people who need assistance.

The chapter needs to be aware there are other Greeks that need the time and attention of the Greek Adviser. Often times a crisis situation with another chapter could prevent the Greek Adviser from delivering promised support to the Lambda Chi Alpha chapter. The High Alpha must be sensitive to the needs of his fellow Greeks, and thus should seek to maximize any time he has in working with the Greek Adviser.

6. Don't stop the flow of information.

If the Greek Adviser has out of date information or incomplete information, then the advice offered by the Greek Adviser will not be helpful. Providing complete and timely information to the Greek Adviser serves as a regular reminder of the open and honest relationship you have. Cutting that information off could call into question the chapter's relationship with the Greek Adviser.

7. Don't be the only member who knows the Greek Adviser.

The High Alpha must be helping other chapter members meet and develop a relationship with the Greek Adviser. It is a smart idea for members who are interested in running for High Alpha, whether or not they have the support of the current High Alpha, to meet the Greek Adviser.

The Greek Adviser receives a copy of the Educational Leadership Consultant's report after each visit, including the recommendations for improving operations at the chapter. It is appropriate for the High Alpha to meet with the Greek Adviser to discuss these recommendations and how the chapter can implement them.

The High Alpha will learn that the Greek Adviser can be a trusted advocate for the chapter and someone for him to turn to personally as his term wears on, if the High Alpha is willing and able to be honest and proactive in making the Greek Adviser a part of the chapter's planning and operations.

# Encourage members of the chapter to get involved with leadership opportunities established through the General Fraternity (i.e. Student Advisory Committee, International Ritual Team, Council of Presidents, etc.)

## Encourage Involvement with the General Fraternity

It is the duty of the High Alpha to communicate all available leadership opportunities to the members of the chapter. Opportunities that exist on a regular basis include:

- Student Advisory Committee (SAC)
- International Ritual Team (IRT)
- Council of Presidents (CoP)

### Student Advisory Committee (SAC)

The Student Advisory Committee (SAC) was formed in 1970 and reports directly to the Grand High Zeta. SAC was formed to help the Lambda Chi Alpha staff and the Grand High Zeta stay in touch with current undergraduate concerns and problems, and allow undergraduates to communicate directly with Lambda Chi Alpha's highest levels of international authority.

SAC plays a vital role in Lambda Chi Alpha's ability to remain on top of the fraternal world. SAC has developed and helped pass almost all of the significant legislation inside Lambda Chi Alpha including: the alcohol policy, the anti-hazing policy, associate membership, higher academic standards, and the creation of minimum operating standards for chapters.

Each of Lambda Chi Alpha's fourteen Conclaves is represented by a SAC member, selected by the delegation at each regional Conclave. The SAC members serve a one year term, starting at the beginning of the academic school year and running through the following Leadership Seminar or General Assembly.

### International Ritual Team (IRT)

At the General Assembly/Leadership Seminar each summer, degree teams assembled from chapters throughout the United States and Canada exemplify the Initiation Ritual. Serving as a member of the International Ritual Team (IRT) is one of the highest honors of service as a collegiate brother of the fraternity.

The High Alpha should direct any collegiate brothers interested in serving on IRT to submit the application available on Officer Portal to the General Fraternity by the date determined by the Office of Administration.

Continued

# Encourage members of the chapter to get involved with leadership opportunities established through the General Fraternity (i.e. Student Advisory Committee, International Ritual Team, Council of Presidents, etc.)

Team members are chosen based on the following criteria:

- Experience on their chapters' degree teams
- Geographical distribution
- Recommendations from educational leadership consultants and others
- Possible benefit to their chapters (preference is given to brothers from chapters who have not had a member on the International Ritual Team in recent years)

Applicants are not expected to be "ritual buffs;" indeed, one of the purposes of the International Ritual Team is to increase the ritual knowledge of its members, and thereby of the chapters represented. All applicants must have a full academic year of school (two semesters or three quarters) remaining after General Assembly/Leadership Seminar, so their experiences may be shared with their chapters and colonies.

## Council of Presidents (CoP)

As the active High Alpha of the chapter, you are a member of the Council of Presidents. The Council of Presidents (CoP) is an organization that consists of the High Alpha of each active chapter and colony. The High Alpha serves a term on the Council of Presidents that is concurrent with his term as High Alpha of the chapter.

CoP elects a chairman and a vice-chairman who serve as members of the Grand High Zeta, as the Grand High Nu and Grand High Psi, respectively. The chairman and vice-chairman of CoP are elected by the entire delegation of the Council of Presidents on an annual basis during the summer conference of the General Assembly or Leadership Seminar.

The duties of CoP include improving communication between the Grand High Zeta and the active High Alphas, as well as communication between all active High Alphas. As voting members of the Grand High Zeta, the chairman and vice-chairman are present at all Grand High Zeta meetings as well as the General Assembly and Leadership Seminar.

# Work with appropriate High Zeta officers to apply for General Fraternity awards

Lambda Chi Alpha presents General Fraternity Awards each summer at the General Assembly or Leadership Seminar. The only way for a chapter to win an award is if they apply. To review the award category and application process, visit the Lambda Chi Alpha website.



# Review all High Zeta officer Operations Guides with each chapter officer upon election

## Ensure Each Chapter Officer is Positioned to be Successful

The High Alpha should be considered the Chief Executive Officer of the chapter. With this position comes the added responsibility to be knowledgeable of all major plans of the chapter, as well as which chapter officer is responsible for each division of operations within the chapter.

An insatiable thirst for knowledge and resources is a trait of many successful High Alphas. A dynamic High Alpha will use this knowledge to form a vision for the chapter to guide the actions of the High Zeta and position the chapter to be as great as it could possibly be. There is an abundance of information to be digested by the High Alpha, and the mountain of information may be daunting.

The High Alpha should ensure that each chapter officer is prepared with the necessary resources to be successful. Each chapter officer should have a digital and printed copy of their Operations Guide, which may be downloaded from the Document Library of Officer Portal. The High Alpha should also keep a digital and printed copy of each of these documents for his reference.

Upon election, the High Alpha should schedule time to review all Operations Guides with each respective chapter officer. During this meeting, the High Alpha and the chapter officer have the opportunity to go through each task on the list and discuss a plan of action to accomplish each task on the list based on the recommended frequency. It would be most beneficial to have these meetings completed before the beginning of the upcoming academic term. If possible, it is recommended that the High Pi be present during these meetings to offer insight and suggestion. Members of committees associated with the chapter officer should also be encouraged to attend.

# Facilitate a strategic planning workshop with the High Zeta to determine long-term goals for the chapter (5 years) and what steps can be taken over time to achieve these goals

## Creating a Long-Term Plan for the Chapter

A trait of a strong High Alpha is the ability to think past their term as the chapter president, or even past the time of their own graduation. As the High Alpha of the chapter, you have the ability to instill your vision of the chapter with future generations of brothers for years to come.

A strategic plan is a written living document that should guide all actions of the chapter. Strategic planning requires the chapter to clearly identify core priorities. Once the chapter has identified and clearly defined its core priorities, the Executive Committee, High Zeta, and committees will utilize these as guideposts in future decision making. As the chapter and its officers makes decisions from this point forward, you should ask yourselves: Is this action in line with the chapter's strategic plan? Will it help us move closer to achieving on of our strategic goals? If the answer to these questions is "No," then the chapter should reconsider the action.

Strategic planning is NOT an attempt to make future decision today, nor is it an attempt to blueprint the future in a static, unchanging model. Strategic planning is also a reiterative process. Your chapter's strategic plan is a living document that is meant to be guiding, but also engaging (much like the chapter's constitution and bylaws).

Even the best vision for success won't gain footing without buy-in from the key stakeholders of the chapter, including the active membership, alumni, the institution, and the General Fraternity. Including these different groups in the long-term planning process will only benefit the organization in the long-run.

A strategic planning workshop is meant to focus on your chapter's future. Strategic planning is the process by which you will envision the future of your chapter and identify the areas on which you want the current and future Executive Committees to focus. This vision helps give the chapter direction and the potential energy to begin moving.

## Simple Framework for Strategic Planning Workshop

- Assess Current State of the Chapter
  - What are our priorities based on what we spend the most time and money on?
  - How do these priorities align with the values of the fraternity?
  - Has the chapter achieved all the basic Chapter Operating Standards of Lambda Chi Alpha?
  - Are there immediate needs of the chapter to satisfy before thinking about long-term goals?

Continued

# Facilitate a strategic planning workshop with the High Zeta to determine long-term goals for the chapter (5 years) and what steps can be taken over time to achieve these goals

- Future Planning

- What do we want the chapter to look like in 5 years?
- What are the main priorities we need to focus on to make this dream a reality?
- What internal and external barriers will we face to accomplish these goals?
- How will the chapter combat these barriers?
- How do we include the alumni, institution, and General Fraternity in these plans?

# Chapter Meeting Minutes Template

**Lambda Chi Alpha**

**[Chapter / Colony Name]**

**Chapter Business Meeting - High Alpha Agenda**

*[Insert Date]*

1. Call to Order
2. Creed
3. Roll Call
4. Approval of Previous Meeting's Minutes
5. Communications:  
*Guests:*
6. Officer Reports:  
*High Alpha*  
a) Report  
*High Beta*  
a) Report  
*High Theta*  
a) Report  
*High Gamma*  
a) Report  
*High Tau*  
a) Report  
*High Iota*  
a) Report  
*High Kappa*  
a) Report  
*High Delta*  
a) Report  
*High Sigma*  
a) Report  
*High Phi*  
a) Report  
*High Epsilon*  
a) Report  
*High Rho*  
a) Report  
*High Pi*  
a) Report

Appointed Offices:

*Athletic Coordinator*

Continued

Basic

Advanced

Exceptional

Appendix

Personal

# Chapter Meeting Minutes Template

- a) Report

*Standards Chair*

- a) Report

*IFC Representative(s)*

- a) Report

## 7. Report of Committees

- a) Standing Committees

- b) Special Committees

- c) Executive Committee

- i. Report

## 8. Old Business

- a) Report

## 9. New Business

- a) Report

## 10. Open Discussion

- a) Awards/Recognitions (i.e. Brother of the Week)

- b) Report

## 11. Closing

# Officer Transition Checklist

This checklist will provide the incoming and outgoing officer with many talking points that should be covered during the transition.

- Duties and Responsibilities**
  - What are my officer duties and responsibilities?
  - Approximately how much time do I spend with each?
- Officer Manual**
  - Do you have a copy of the officer manual?
  - Were there any sections that you found more beneficial?
- Officer Notebook**
  - Do you have an officer notebook?
  - What should be included in it?
- Officer Reports**
  - Are there any reports that I am responsible for?
  - If so, when, by whom, and how do they need to be completed?
- Event Planning Form**
  - What is the Event Planning Form?
  - When do I need to complete them?
- Constitution and Statutory Code, By-Laws**
  - Are there any policies that directly relate to this office?
  - Are there any policies that I am responsible for enforcing?
- Ceremonies/Rituals**
  - Do I have a role in the Associate Member Ceremony?
  - Do I have a role in the Ritual for Conducting Business Meetings?
- Advisers**
  - Do I have an adviser? If so, what is the role between the two of us?
  - What is my role with the Greek adviser?
  - Who is the educational leadership consultant in this area?
- Committees**
  - What committees am I on?
  - What do I need to know?
- Meetings**
  - What is my role at the chapter meeting? High Zeta meeting?
  - Am I a member of the Executive Committee?
- Officer Goals**
  - What were your goals?
  - What goals were met and which ones were not? Why?
  - Brainstorm and develop new goals.
- Budget**
  - Can I see a copy of your budget from last term?
  - What areas do I need more or less money?
  - Brainstorm and develop a budget proposal.
- Yearly Calendar**
  - When did you schedule your events? When should I?
  - Are there any deadlines I should know about?
- Programs and Events**
  - What programs, projects, and/or events were effective during the year? Why?
  - What programs, projects, and/or events were not effective during the year? Why?
- Advice**
  - If you had an additional year, what would you do different?
  - What advice do you have for me?
- Additional Questions/Concerns**

# Sample High Zeta Retreat Agenda

1. Arrival  
*(If necessary for a location outside the chapter house and/or campus)*
2. Retreat Overview  
*(Cover the agenda for the entire retreat, including objectives and goals for the retreat)*
3. Chapter Operations Programming:  
*(This can be any area of operation that either the chapter needs help in or needs to make a priority for the coming school year. Below are just a few examples you may add/subtract what you need)*
  - a. Recruitment  
*(Assess the chapter's strengths and weaknesses for recruitment and hold a workshop or two focusing on the area's needing improvement. Some ideas include: Role Playing, Membership Criteria, Tracking Prospective Members, Year-Round recruitment, Retention, Closing the Deal, etc.)*
  - b. Alumni Relations  
*(Some ideas include: Contact Campaign, Founders Day, Alumni Weekend, Homecoming, Capital Campaign, Newsletters, etc.)*
  - c. Big Brother Program  
*(Some ideas include: Using the BB Guide, Retention, BB Accountability, BB Ceremony/etc.)*
  - d. Finances  
*(Some ideas include: Accountability, Collections, Budgeting, Fundraising, etc.)*
  - e. Brotherhood  
*(This should be focused on bringing everybody together and building morale. Some ideas include: Weekend camping trip, hiking, lock-in, sports, games, etc.)*
4. Brotherhood Event  
*(Use this time to have some fun with everyone and forget about chapter operations for the time being. Building morale and creating brotherhood should be the focus.)*
5. Personal Goal Development  
*(Use this time to encourage chapter members to develop some personal goals for themselves for the upcoming semester. Start by facilitating a goal development process; i.e. SMART goals, before everyone begins creating goals for themselves.)*
6. Brotherhood Event  
*(End any retreat with another brotherhood event, something a bit more low-key than the first. Some ideas could be: Candle-pass, Brotherhood Web, Truth Session, ZAX session, etc.)*

# Robert's Rules of Order at a Glance

## Parliamentary Procedure at a Glance Robert's Rules of Order

Robert's Rules of Order date back to 1876 when General Henry M. Robert, frustrated with meeting logistics, decided to bring the rules of the American Congress to other groups. His publication of *Pocket Manual of Rules of Order* sold half a million copies before the revision of 1915 and made Robert's name synonymous with the orderly rule of reason for meetings. Now in its 10th edition, Robert's Rules of Order is the most accepted guide for parliamentary procedure.

### By using Robert's Rules of Order you will:

- Keep a meeting on track. Those speaking out of turn are asked to wait until item is up for discussion per the agenda
- Identify when discussion may occur and when to call for a vote
- Determine the quorum number and majority vote

### Some common motions made at chapter meetings:

- ✓ "I move to approve the minutes of the last meeting as presented by the Secretary."
- ✓ "I move to approve the financial report presented by the Treasurer."
- ✓ "I move to spend \$25 on publicity posters for the upcoming chapter recycling project."

### A Glossary of Parliamentary Terms

**ballot:** Voting in writing can take place if the issue being discussed is a sensitive matter and the chair or members wish the voting to be secret.

**chair:** The presiding officer of the meeting, generally the chapter President.

**floor:** A member is considered to "have the floor" when the chair calls upon him or her to speak. In most cases, it is improper to interrupt someone who currently has the floor.

**motion:** The method used to place an issue, question, or decision in front of the members so it can be discussed and voted upon. Discussion on an issue to be decided is out of order unless an appropriate motion has been made.

**order:** Comments or discussion presented by a member are "in order" if the chair has properly recognized the member and the comments made pertain to the issue being discussed. Likewise, the member is "out of order" if either of these two conditions is not met.

**quorum:** The number of members needed to be present to conduct business legally. This number is set in your chapter's bylaws.

**second:** Most motions need a second (that is, another member must agree that the question or issue should be discussed). This keeps items that are of interest to only one member from taking up time during a meeting.

**voice vote:** The chair requests that members indicate their preference on the issue by responding "yes" or "no" when asked to do so. The chair decides, based on the voices, whether the "yes" or "no" votes were in the majority. The chair may ask for a show of hands if it is unclear by voice vote how members voted.

Continued

# Robert's Rules of Order at a Glance

## Parliamentary Procedure at a Glance

Based on Robert's Rules of Order Newly Revised (10th Edition)

**Motions** are listed in order of precedence. A motion may be introduced if it is higher than the pending motion.

To do this:	Say this:	Second needed?	Is it debatable?	Can it be amended?	Vote Needed
Adjourn meeting	"I move that we adjourn"	Yes	No	No	Majority
Lay aside temporarily without debate	"I move to lay the question on the table"	Yes	No	No	Majority
Stop debate and move to a vote	"I call the previous question"	Yes	No	No	Two-thirds
Give closer study to issue	"I move to refer the matter to the committee"	Yes	Yes	Yes	Majority
Change issue or question discussed	"I move to amend the motion by..."	Yes	Yes	Yes	Majority
Introduce new business to be voted on	"I move that..."	Yes	Yes	Yes	Majority

**Incidental Motions** have no order of precedence. Arise incidentally and are decided immediately.

To do this:	Say this:	Second needed?	Is it debatable?	Can it be amended?	Vote Needed
Protest a breach of parliamentary rules	"Point of order"	No	No	No	No vote, Chair decision
Avoiding considering or discussing an improper issue	"I object to consideration of this motion"	No	No	No	Two-thirds
Verify a voice vote by having a show of hands	"I call for a division"	No	No	No	No vote, Chair carries out
Request information	"Point of information"	No	No	No	No vote, Chair responds
Begin discussion on issue previously tabled	"I move to take from the table..."	Yes	No	No	Majority

# Personal Notes

The area below is for you to write notes that will help you fulfill your role as an officer of your Zeta.

# Officer Transition

The table below allows you to create your own Officer Tasks, the frequency with which you should complete the tasks, and a check box to use once you completed the task. When the next brother takes over your position you can review this section as part of your officer transition.

Officer Tasks	Frequency

Use the text box below for additional notes about your personal officer tasks

## Questions/Concerns

If you have any questions about the specific content in this document, please contact:  
[programming@lambdachi.org](mailto:programming@lambdachi.org).

If you are experiencing any technical difficulties with this document, please contact:  
[communications@lambdachi.org](mailto:communications@lambdachi.org).

## Visit Lambda Chi's Web Platforms

Website: [lambdachi.org](http://lambdachi.org)

Member Portal: [mylca.lambdachi.org](http://mylca.lambdachi.org)

Officer Portal: [op.lambdachi.org](http://op.lambdachi.org)

## Stay Connected on Social Media

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a lifetime of true brotherhood