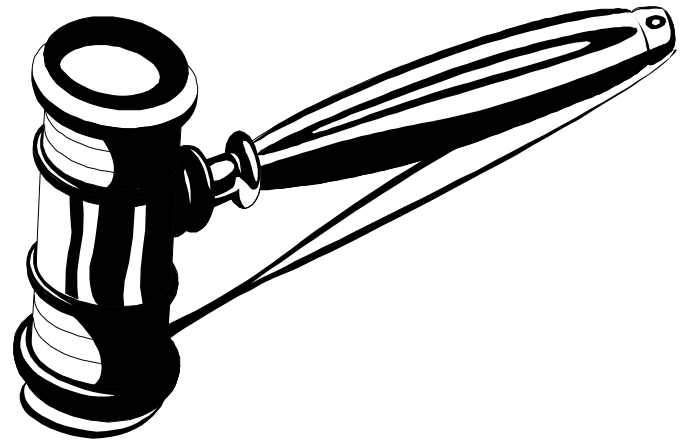


## **PRESIDENT'S GUIDE**



# PRESIDENT'S GUIDE

## TABLE OF CONTENTS

### INTRODUCTION

<b>Introduction</b> .....	<b>1</b>
A Message to All Presidents	
How to Use this Guide	
Objectives of this Guide	

### THE FRATERNITY

<b>The National Organization</b> .....	<b>2</b>
National Organization	
Executive Committee	
Triangle Fraternity Educational Foundation	

<b>Governance and Organization</b> .....	<b>3</b>
National Convention	
National Council	
National Committees	
National Headquarters	
Reports to the National Office	

<b>Governing Documents</b> .....	<b>4</b>
National Constitution	
National Bylaws	
Regulations	
Ritual	
Distribution of Governing Documents	

<b>National Awards</b> .....	<b>5</b>
National Service	
Chapter Service	
Professional Accomplishment	

<b>Chapter Awards</b> .....	<b>6</b>
Chapter Performance Award	
Publication Awards	
Scholarship Cup	
Scholarship Plaque	

<b>National and Regional Meetings</b> .....	<b>7</b>
National Convention	
Leadership School	
Regional Workshops	

**THE PRESIDENCY**

**An Overview** ..... 8  
Compliance with the Ritual, Constitution and Bylaws, and Regulations  
Appoint Rush Committees (and others)  
See that All Active Members Participate  
Invite Each Elected Rushee to Pledgeship  
Conduct the Pledging Ceremony  
Appoint the Ritual Committee  
Preside Over the Initiation Ceremony  
Administer the Release Oath  
Countersign Transactions of the Treasury  
Maintain Record of Activities  
Serve as Representative/Spokesman of the Chapter

**So, You're The New President** ..... 20  
Your Predecessor and Key Questions  
Building The Executive Board  
Making A Good First Impression

**APPENDIX**

**Forms** ..... 23

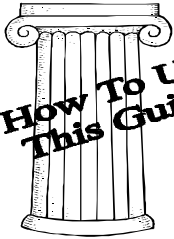
# PRESIDENT'S GUIDE

## INTRODUCTION



**A Message To  
All Presidents**

Congratulations on your recent election as chapter president. You are part of an elite group of leaders in the Fraternity. With the privileges of belonging to this unique group, however, come certain responsibilities.



**How To Use  
This Guide**

This guide has been designed for the purpose of educating you on your duties and responsibilities as President and providing tips and suggestions on how to work effectively towards fulfilling these responsibilities. This guide is organized into three parts; (a) information and suggestions that will help you make the transition into office, (b) an outline of your rights and responsibilities, and (c) suggestions for leaving office and effectively training the next President.

Upon taking office, each officer should get acquainted with this manual, gain an understanding of the relationship between the various officers, and promptly check the inventory of forms needed in connection with his official duties. Manuals should be passed on to successors, along with notes and recommendations developed during his term.



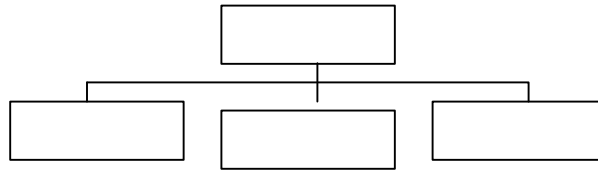
**Objectives  
Of This Guide**

In reviewing the contents of this guide, a chapter president will:

- ▲ learn more about the national fraternity
- ▲ gain a greater understanding of the president's responsibilities
- ▲ get tips and resources to assist in fulfilling your responsibilities

Suggestions for improvement to this manual are welcome and should be sent to the National Headquarters.

### THE FRATERNITY



The following overview of the Fraternity is provided here as an appropriate beginning to learning about your duties and responsibilities as a chapter president within Triangle Fraternity.

#### **National Organization**

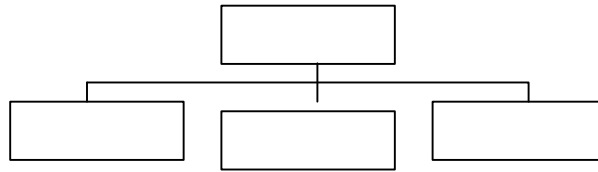
All of Triangle, all its units and members. The authority for everything done in the name of the National Organization rests with the membership, which has established and amends the Ritual and the National Constitution and Bylaws.

#### **Executive Committee**

The four top national officers; president, vice president, executive director, and immediate past president.

#### **Triangle Fraternity Educational Foundation**

The TFEF raises funds to support important educational initiatives such as leadership schools, regional workshops, and scholarships. The educational foundation also operates an educational loan program. Some undergraduate members may be eligible for loans.



### National Convention

Meeting of representatives accredited by their respective undergraduate and alumni groups plus other delegates accredited by virtue of their position in the Fraternity. This body of Triangle representatives considers reports and recommendations of the various national committees and task forces, along with proposals for action called resolutions. Convention by itself may amend the National Bylaws, while amendments to the National Constitution and the Ritual require ratification by the active and alumni organizations.

### National Council

The top management of the Fraternity, elected by and responsible to the entire membership. Each individual on the Council has specific duties as agreed upon by Council members. The president, vice president, secretary, treasurer, and immediate past president make up the Executive Committee, which has specific assignments. All members of the Council, field directors, and other volunteers serve as consultants to chapters and colonies.

### National Committees

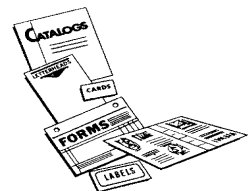
Groups of members with specific areas of long-term responsibility for advising National Council (i.e. Approved Courses Committee) or for accomplishing as assigned task (i.e. History Committee).

### National Office

The national business center or “headquarters” of the Fraternity, staffed by a full-time executive director, membership secretary and an assistant treasurer. In carrying out its mission, the National Office and its staff maintains all national records, keeps membership records up to date, issues THE EXPONENT, handles business management and editing of TRIANGLE REVIEW, issues publicity on national Triangle affairs, provides a repository for historical papers and objects, manages the National Leadership School, and writes and revises Triangle publications.

### Reports to the National Office

Reports which must be sent to the national office provide statistics or data on local operations which the National Council, Executive Director, Field Directors, and consultants utilize in providing fraternal service. Some are also needed for rating active organizations. Completeness, and clarity are fundamental in good reports. Proper use of the standard forms is important; so please follow instructions. If explanatory remarks are necessary, make them in the space provided or on an attached sheet.



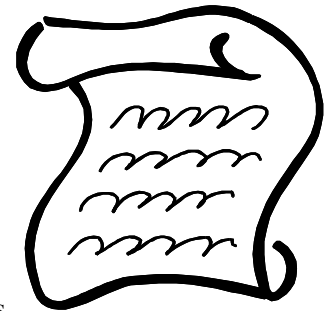


Superimposed on the 1972 Convention was a Constitutional Convention, with Past President Robert C. Deen (Kentucky, 1951) as Chairman and Councilman Randall E. Drew (Rose Hulman, 1968) as Secretary. The Constitutional Convention reviewed the National Constitution, Bylaws, and Ritual. The Constitutional Convention carefully reviewed the proposed new documents and presented them to the 1972 Convention. They were ratified in early 1973 by active and alumni organizations, and became our basic law.

Triangle principles and purposes have not changed over the years, nor were they changed by the Constitutional Convention.

### **National Constitution**

The Triangle Fraternity National Constitution defines the purpose of the Fraternity, its structure and government, and establishes relationships with the Ritual, Bylaws, and Rules and Regulations.



### **National Bylaws**

The bylaws to the National Constitution provides the detail needed to implement policies and program to affirm the principles established by the Constitution and the Ritual. The bylaws are required to conform to the fundamental principles expressed in the Constitution and The Ritual.

### **Regulations**

The National Constitution provides that “Rules and Regulations, and changes thereto, shall be adopted by the National Council to implement and provide for the continuance of those functions directed by the Constitution, Ritual, Bylaws, mandates of the National Convention, and/or good administrative practices not contrary to Triangle precepts and governing documents.”

### **Ritual**

The Ritual, considered part of the Constitution and equally authoritative in affirming the principles of the Fraternity, contains the concepts of the Founders in dramatic and ceremonial form. Copies of the Ritual and amended pages are transmitted to and from the National Office by registered mail or registered UPS only.

### **Distribution of Governing Documents**

Distribution of these governing documents is controlled as prescribed in the Rules and Regulations. All copies of the Constitution and Bylaws, The Ritual, and the Rules and Regulations have a serial number which is registered, along with the individual or group receiving the document, in the National Office.



One of the main areas of emphasis in Triangle's Vision and Strategic Plan is the Celebration of Achievement. Since its founding in 1907, Triangle has created a number of awards to recognize the efforts and accomplishments of deserving brothers.

The awards can be divided into three groups; awards for fraternity service and the national level, awards for fraternity service at the local level, and recognition for professional accomplishments.

### **National Service**

The highest award for service at the national level of the fraternity is the Triangle Service Key, proposed by Brother Alan Rockwood, Iowa '22, and first given in 1925. The Service Key recognizes preeminent work in developing the National Organization of Triangle in one or more national posts. The criterion is that of molding the character of the Fraternity and the members, and not that of finance or expansion. The member's service must have been clearly outstanding, not merely long-lasting, and must have had a positive effect on individual members and on the Fraternity as a whole.

Over fifty Triangle brothers have received the Service Key since 1925. Their efforts and accomplishments have served to support and inspire the many members who have known them, and many Service Key holders can point to an earlier recipient who served as the model for their own service to Triangle.

Triangle also acknowledges the efforts of National Service Volunteers and other members by awarding Certificates of Service to individuals who have served the Fraternity well in either official or unofficial positions.

### **Chapter Service**

The Outstanding Alumnus Award was created in 1961 to honor Triangle alumni who have dedicated time and effort to their local organization. The award is presented to members of Triangle in acknowledgement of their having rendered significant service to a Triangle chapter or association in such fields as expansion, finance, organization, or counseling.

In 1997, National Council recognized that there are a few dedicated Triangle alumni for whom the Outstanding Alumnus Award seems insufficient, and created the Order of the Transit, Triangle's highest award for service at the local level. This award is intended to complement the Triangle Service Key. The criterion is that of molding the character of the group and its members, and not that of finance or expansion. The member's service must have been clearly outstanding, not merely long-lasting, and must have had a positive effect on individual members and on the chapter or association as a whole.

### **Professional Accomplishment**

The Triangle Citation was created in 1961 to honor Triangle members who have made outstanding contributions in such fields as engineering, architecture, science, education, industry, government, and by virtue of this having enhanced the prestige of Triangle. It is Triangle's least frequently presented award, and has only been given to seven brothers since 1961.

The Triangle Wall of Fame was created in 1994 to provide a higher visibility method of recognizing Triangle's professional accomplishments. The members of the Triangle Wall of Fame include Triangles who have received widespread acknowledgement of success within their chosen fields. The Wall of Fame is intended to honor successful members, serve as a motivator for Triangle members, and be used as recruitment tool by chapters.



### **Chapter Performance Award**

Starting in 1962, National Council began recognizing the top ten chapters for their overall performance. The Chapter Performance Awards Program is an objective measure of the administrative efficiency of chapters. Details about this award and the criteria are available in an up-to-date edition on the fraternity's website.

### **Publication Awards**

The Publication Awards are designed to recognize excellence in communications with alumni. The awards were made available to Triangle by Herbert E. Scobie, Minnesota '35, long-time executive director and TRIANGLE REVIEW editor.

Awards are given in two divisions; printed and duplicated.

### **Scholarship Cup**

The Scholarship Cup is a traveling trophy awarded annually to the chapter having the highest scholastic record during the preceding school year. The first presentation of this award was in 1925. The original trophy was presented to Triangle by Founder Arthur Schwerin, Illinois '08. The present Scholarship Cup was provided by the Triangle Fraternity Educational Foundation.

### **Scholarship Plaque**

The Scholarship Plaque is also an annual traveling trophy provided by Founder Arthur Schwerin, Illinois '08. It is awarded to the chapter making the greatest improvement in scholarship during the preceding year. This first presentation of this award was in 1941.



### **National Convention**

National Convention shares with National Council the responsibility for governing Triangle. Convention is the legislative body of the Fraternity in which undergraduate and alumni delegates, along with National Council, enact legislation, and adopt positions on matters of national importance.

### **Leadership School**

Leadership School is the annual national meeting held in August. It provides an intensive several days of talks, discussions, problem solving, role playing on rushing, member education, financial management, leadership, and other important subjects.

### **Regional Workshops**

Regional workshops are one-day gatherings of four to eight chapters, along with national representatives, at a centrally-located host chapter. They are usually held in February and March. In any given year, these meetings together provide the opportunity for twice the number of undergraduate officers, advisors, alumni, and national representatives to get together to discuss local and national Triangle affairs, improve chapter performance, and promote friendships of life-long value.

## THE PRESIDENCY



Each and every member (active and alumnus) has rights and obligations bestowed upon them via membership in the FRATERNITY. The rights of members are protected through the National Constitution, Bylaws, Fraternity Regulations, chapter constitutions, and other documents which speak of due process and access to membership (and other forms of involvement).

As an initiated brother of Triangle Fraternity, you are extended privileges associated with such membership. As the chief executive officer of the active chapter, you are also expected to do your part in seeing that these privileges are extended to each and every member and that these rights are not unduly abridged or threatened.

In doing so, it is necessary to recognize your obligations as a member of Triangle Fraternity as stated in the Triangle Code of Ethics . . .

*As a member of Triangle, I recognize my obligation to:*

*Observe the precepts of the Fraternity as set forth in the Ritual;*

*Accept cheerfully my full share of any task, however menial, involved in maintaining a chapter home;*

*Preserve and promote the chosen ideals of my Fraternity;*

*Pay all personal bills promptly, and always live within my means;*

*Help create in my chapter home an environment in which enduring friendships may be formed;*

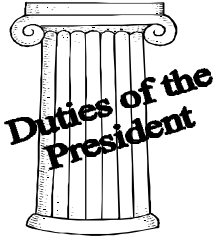
*Maintain a creditable scholastic record;*

*Promote the welfare of my profession;*

*Maintain my self-respect by proper conduct at all times;*

*Uphold faithfully the traditions and program of my Alma Mater;*

*Pay the price of success in honest effort.*



Fraternity Regulations list the responsibilities of the President in the following manner:

**Fraternity Regulation No. 5.1**

**ACTIVE ORGANIZATION ADMINISTRATION / President**

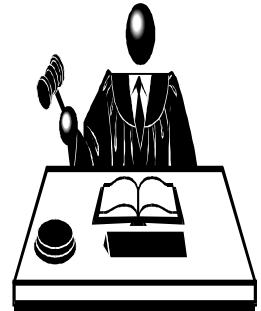
- 5.1.1 *The following specific duties that are assigned to the active organization president are listed for convenience and to avoid oversights. The listing of these duties in no way relieves the active organization president from any other duty that is specified or implied by the Ritual, Constitution, By-Laws or Rules and Regulations.*
- 5.1.2 *The active organization president is responsible for strict compliance with the letter and spirit of the Ritual, Constitution, By-Laws and Rules and Regulations, and for general supervision over the selection of suitable pledges and should be chosen for office with these responsibilities in mind.*
- 5.1.3 *He shall appoint such Rushing Committee(s) or Teams as are necessary to conduct the rush activities of the chapter. He shall replace any member of any committee at any time in the interest of the work of securing suitable rushees. Rush committees shall be maintained in active condition throughout the year.*
- 5.1.4 *He shall see that all active members take part in entertaining rushees.*
- 5.1.5 *He shall arrange to invite each elected rushee to pledgship.*
- 5.1.6 *He shall arrange to secure a definite answer from each elected rushee within a reasonable time after the invitation is extended.*
- 5.1.7 *He shall conduct the pledging ceremony and notify the National Office of each pledging (Form A).*
- 5.1.8 *He shall appoint the Ritual Committee to take charge of the Initiation Ceremony.*
- 5.1.9 *He shall preside over and take part in the Initiation Ceremony.*
- 5.1.10 *He shall administer the release oath when required.*
- 5.1.11 *He shall report to the National Office of all releases of pledges and of members of the chapter.*
- 5.1.12 *He shall report to the National Office the name of any affiliate following the election and the affiliate's acceptance of the chapter's invitation.*



*The active organization president is responsible for strict compliance with the letter and spirit of the Ritual, Constitution, By-Laws and Rules and Regulations, and for general supervision over the selection of suitable pledges and should be chosen for office with these responsibilities in mind.*

This power should be used only after consideration of the offense and circumstances of each situation. When fines are levied without proper thought, the result will likely produce friction, hard feelings, and resentment of authoritarianism.

A good approach is for the President to talk about the problem with an offender to see if they can discuss and work out a mutually agreeable solution. Very few brothers deliberately do things which are in violation of the spirit of the Fraternity's laws and ideals or the chapter's bylaws. If they do such a thing deliberately, the problem is already past the point where fines will have any real effect or meaning. "Disorderly conduct" often results merely from temporary irrational or wild behavior.



There are, however, several bad habits which consistently plague chapters and interfere with their normal functions. They are nearly all "sins of omission" (i.e. failure to perform duties or to carry out responsibilities). These offenses, usually resulting from laziness or indifference, can be cured by imposing fines.

If a member is consistently delinquent in the payment of dues, a reasonable late fee (i.e. \$10 per month) may cause him to re-examine priorities and evoke him to pay the debt (rather than to have to pay additional costs as time elapses).

If the chapter does decide to use a fine system, establish explicitly what the fine is for each specific offense. This will alleviate the problem of a President arbitrarily imposing judgments and punishments.

### **See That Chapter Officers Properly Perform Their Duties**

The importance of this position is not what the President actually does, but for what he has responsibility. He must see that every phase of the chapter's activities is properly executed. When the Treasurer fails to collect bills or the Rush Chairman is unable or unwilling to get new members, the President must step in. He has ultimate responsibility for the chapter's performance. Your sensitivity to your chapter's needs and your willingness to do whatever is necessary in any situation will insure the survival of your chapter.

- Read the job descriptions of the officers to fully understand the role and responsibilities of each officer.
- Demonstrate to the officers that you are knowledgeable about how to perform and are capable of performing each and every one of the responsibilities of the officers.
- Establish supervisory management style, communicate that style to the officers, and create mechanism(s) through which you will supervise and support officers.

### **Six Elements of Successful Supervision**

- Delegation and Coordination
- Feedback
- Personal Leadership Development
- Training and Development
- Motivation and Support
- Recognition

### **Provide Direction**

- Be Specific
- Have officers communicate their understanding of what is expected of them
- Explain how your directions fit into the mission and goals of the organization
- Tailor training and directives to the skills and abilities of individual officers
- Provide time lines and parameters (deadlines and performance measures) for all efforts
- Delegate effectively. Designate responsibility and authority for achieving objectives
- Monitor and follow-up

### **Provide Leadership**

- **Leading.** Leadership might be defined as the art and science of building, maintaining, and influencing others in the pursuit of greater goals than they themselves might have believed possible. Specific leadership behaviors include:
  - Press for results. Set high but realistic goals, and communicate expectations. Apply appropriate pressure, being assertive if necessary.
  - Paint the big picture for subordinates. Show the organization's annual goals, general strategies, and explain how the local unit fits in and contributes.
  - Lead or facilitate development of the officer's objectives and strategies. Ensure these are consistent with the broader goals of the organization.

### **Provide Support**

- Hold regular meetings with officers in either a group or individual setting
- Provide feedback as soon as possible after an event/project
- Ensure that your on-going support is readily available -- and is perceived to be so
- Model what you expect of the officers

### **Communicate Effectively**

Leaders and managers spend most of their time communicating. Key communications behaviors include:

- **Sound verbal communication skills.** An effective communicator is accurate, organized, articulate, concise.
- **Developed listening skills.** An effective communicator encourages a steady flow of information from subordinates; they hear and heed good advice.
- **Appropriate writing skills.** An effective communicator pens organized and concise memos, letters, and reports.



*(The President) shall appoint such Rushing Committee(s) or Teams as are necessary to conduct the rush activities of the chapter. He shall replace any member of any committee at any time in the interest of the work of securing suitable rushees. Rush committees shall be maintained in active condition throughout the year.*

Most chapters may allow the standing committees (Rush Committee, Social Committee, etc.) either to be selected or chosen by the Chairman. However, the President does technically have the power to appoint committees.

As the president and leader of the organization, you must decide on the level of involvement you want to have in this matter and how you are going to use your power to accomplish the desired goals.

**See that all active members take part in entertaining rushees.**

**Arrange to invite each elected rushee to pledgeship.**

**Arrange to secure a definite answer from each elected rushee within a reasonable time after the invitation is extended.**



*(The President) shall conduct the pledging ceremony and notify the National Office of each pledging.*

### **Perform Duties Assigned in The Ritual**

As a member of the ritual team, the President has specific responsibilities. Know these responsibilities, but you must also acknowledge the lead roles of the other important officers.

- Practice the Ritual
- Read the Ritual
- Assess the ritual team's performance
- Assess each officer's performance

**Appoint the Ritual Committee to take charge of the Initiation Ceremony.**



*(the President) shall Preside At the Initiation Ceremony (and Other Chapter Convocations).*

The President should be present at all activities and functions undertaken by the chapter. This often requires a changing role from function to function as dictated by the necessary degree of leadership. Some of the key types of chapter programs and events are discussed briefly below.

#### *Alumni Events*

While the President must be up-to-date with issues important to alumni -- particularly the chapter's alumni association -- the alumni relations officer must take responsibility for relating to the alumni at alumni events. This allows you, as the President, to get introduced to the alumni in attendance and mingle in casual conversation. At these events, you are a figurehead.

#### *Chapter Meetings*

In a meeting of the chapter, set the pace and offer leadership during the entire proceeding. Determine the priorities of the meeting and keep the meeting focused on those priorities.

#### *Rush Events*

At a rush function, you should be present in your capacity as the leader of the chapter. You should represent the chapter, but do not usurp the authority of the Rush Chair or the committee in planning or carrying out the function unless you're sure they need assistance.

#### *Social Events*

At social functions, the President has the responsibility of serving as an official host, welcoming guests and seeing that they enjoy themselves. You must, therefore, stay sober. The actual work of preparing for the function, though, is the business of the Social Chair and committee.



*(The President) shall administer the release oath when required.*

### **Handling Suspension, Expulsion and Voluntary Termination of Membership**

A Triangle member may be suspended or expelled as prescribed in Article I, Section 6 (B) of the National Bylaws.

Prior to such action, both the chapter and the man in question should be informed of the proposed action and its consequences. In many cases a vote of censure, a milder step than suspension, will effectively put the man in question on notice that the rest of the active organization finds his behavior and/or attitude questionable, and that he should take steps to correct them. Censure is not provided for in the National Constitution and Bylaws, but it is a recognized procedure in membership organizations and deliberative bodies.

If an active member no longer desires to be a member of Triangle, he may voluntarily terminate his membership. Before this action is taken, chapter officers should try to discover the real reasons for his desire to break affiliation by calmly discussing the situation with him. A misunderstanding may be cleared up that will keep the man in the organization. If he has a legitimate complaint, it may shed light on ways to improve the organization to the advantage of all.

#### **Suspension**

A member of an active organization may be suspended for no longer than an academic school year by a three-fourths vote of the active organization exclusive of the vote of the man in question.

A suspended member ceases all fraternal activities of Triangle during the suspension period; he has no vote and takes no part in social, athletic, or ritual activities of his chapter. Suspension does not relieve the active organization of the responsibility to pay the National Active Fee for the suspended member.

A suspended member is reinstated (1) when his period of suspension has ended, or (2) by a majority vote at any regular meeting of the active organization.

#### **Expulsion**

A member of an active organization may be expelled by a nine-tenths (9/10) vote of the active organization, exclusive of the vote of the man in question, or by a three-fourths (3/4) vote of the active organization and the unanimous vote of the alumni organization board. A member who is expelled shall be released as prescribed in Art. 1 Sec. 6 Para. 4 of the National Bylaws.

Such release shall be reported to the National Headquarters using Form H.

An expelled member shall return his (1) official badge, (2) membership certificate, and (3) membership card to the active organization which shall forward them to the National Headquarters. He is entitled to the return of his badge deposit. If he owes money to the active organization or the alumni organization, the amount of the debt should be deducted from the value of the badge and badge guard. Any amount paid by the active organization to an expelled member, and any amount charged against his badge deposit because of a debt will be credited to the active organization by the National Headquarters.

An expelled active may be reinstated only upon unanimous favorable vote of the active organization.

#### Voluntary Termination of Membership

An active member may seek and obtain a voluntary termination of membership by submitting a written request to the active organization president stating the reasons for such a request. Financial hardship cannot be one of the reasons. The member seeking termination must be interviewed by the active president, alumni president, and faculty advisor. The recommendation to terminate membership (Form H) and supporting information is to be forwarded to the National Headquarters along with certification that the member has no outstanding financial obligations to the Fraternity.

A member (active, alumnus, associate or honorary member) who is voluntarily terminated shall (1) cease all fraternal activities of Triangle, (2) have no vote, (3) not take part in professional, social, athletic, or ritual activities of the Fraternity. He shall return his badge, membership card and membership certificate to the National Secretary-Treasurer and shall receive the deposit for the badge.

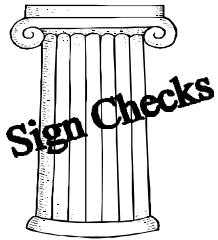
A member who has been voluntarily terminated may petition the chapter in writing for reinstatement. The petition shall state the reasons for reinstatement. Reinstatement may be granted only upon the unanimous favorable vote of the members present at the next chapter (active and alumni organizations) meeting.



*(The President) shall report to the National Office of all releases of pledges and of members of the chapter.*

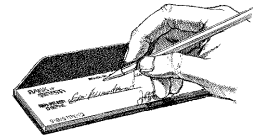
*(The President) shall report to the National Office the name of any affiliate following the election and the affiliate's acceptance of the chapter's invitation.*

As suggested in the opening statement of Fraternity Regulation 5.1, this list of responsibilities is not conclusive in any manner. It is further suggested that the president of an active organization of Triangle Fraternity may also have these responsibilities:



### Countersign Transactions of The Treasury

This operating policy, which requires that the President co-sign each check, cash withdrawal, or any other financial document, is simply good business. It provides a check against the misuse of power to insure funds are spent for the right purposes and that no single person has exclusive access to chapter funds.



The implications of the clause are that the President has a responsibility of being an overseer of the chapter's financial situation. If financial problems are not handled immediately and effectively, they could threaten to destroy the chapter. Financial problems frequently develop into morale problems as well.



Experience suggests that financial difficulties can often be the single major cause of the collapse of a chapter. The President must take responsibility for maintaining the solvency of the chapter. If you foresee serious financial difficulties, contact the National Headquarters for assistance.

As the President (and an officer named on all financial records), you should:

- Maintain a log of expenses separate from the Treasurer.
- Keep a separate copy of monthly financial reports.



**Maintain a record of organizational and personal activities.**

An all-too-common frustration of new officers is having nothing to go on as they take office; nothing about what the previous officer did; nothing about previous events or critical incidents that occurred; and nothing about how to effectively complete the necessary tasks. This occurs when an officer's manual is not passed on and whenever an officer fails to keep a log/record of activities or projects they have been involved with.

- File a monthly record/log of projects, activities, and issues. The report (see sample form in Appendix), should include projects you are working on, activities/events you've attended, and issues facing you as an officer and the chapter as a whole.
- Maintain a file of chapter agendas and minutes, financial reports (budgets, account statements), and judicial records (incident reports, hearing results, etc.).



**Serve as the representative/spokesman of the chapter.**

As the officer principally responsible for many of the internal operations of the chapter, the Vice President should communicate regularly with the officers and be familiar with committee projects. This leaves the President to concentrate on communicating with and establishing positive relations with officials outside of the chapter.

Do not, however, mistake your role as that of the Public Relations Chair of the chapter. You simply cannot afford to commit so much time to one responsibility. Work hand-in-hand with the PR Chair to distribute press releases, announcements and newsletters.

Communicating one-on-one with a variety of individuals and organizations around the country and around the block, though, is an important task for the President. Below are some suggestions on how to develop winning relationships with these individuals and organizations. In addition to these functional tips, remember that it is important to find out who these people in your community are. Keep the accompanying report of phone numbers and addresses on hand at all times.

### **The National Fraternity**

The Executive Director . . . nor any of the headquarters staff . . . has time to read weekly mail from every chapter. The staff does, however, want you to update records on the progress of the chapter, its financial status, and campus events. The best advice is to submit concise but complete reports on a regular basis.

- Submit membership report each academic term
- Submit changes in the chapter constitution
- Submit all judicial records
- Submit articles for publication in The Triangle Review

### **Chapter Advisors**

The relationship between you and the chapter advisor(s) could play a critical role in the long-term success of the chapter. Keeping them informed and involved will be vital towards this success, and you must remember . . . they are not out to close down the chapter. They can serve as some of your best allies, assist you with resources, offer advice as an impartial observer, and assist with discipline issues if they arise.

- Meet at least monthly with the chapter advisor
- Provide them with meeting agendas and minutes
- Provide them with monthly financial statements
- Clarify expectations you have of them as an advisor

### **City/Community Officials**

Let the public know about the positive things the chapter is doing in the community. Remember, these are the folks that write ordinances that often affect fraternities and sororities, get contacted by angry neighbors, and employ police officials who visit your chapter home on Friday and Saturday evenings.

You may not have a chance to become their best friends, but you can influence them by simply keeping them informed. Become an involved citizen . . . they like that; and may even call on you for support (or your vote).

- Meet twice each year with the Mayor or an assistant to discuss interests, concerns
- Invite a community official to facilitate a LEAD session or to a scholarship dinner/reception
- Send copies of your chapter newsletter to city officials

If you're reading this well after taking office and its too late to send an announcement about the recent election results to the Mayor's Office, be sure to recommend that the incoming President do so.

### **Neighborhood Representatives**

First and foremost, know your neighbors. Whether they are other fraternities, families, or non-Greek college students, you will benefit by establishing positive relations.

- Inform neighbors --in person-- of scheduled social events at least a week in advance
- Provide neighbors with your phone number in case they have concerns or questions

### **Campus Officials (Vice President for Student Affairs/Dean of Students, Greek Advisor)**

- Meet monthly with the Greek Advisor to discuss status of chapter, interests, concerns
- Give souvenir t-shirts to Greek Advisor . . . even they like to wear t-shirts on the weekends
- Send them copies of your chapter newsletter
- Get to know them personally . . . they are the ones you will have to face in discipline incidents

### **Other Greek Chapters**

- Meet monthly or more often if necessary with neighboring chapters
- Send flowers to sororities (the same kind as their national flower) on their anniversaries
- Send congratulatory letters to chapters who receive awards, initiate new members, etc.

## SO, YOU'RE THE NEW PRESIDENT

- ▲ Success in moving up to a leadership position is greatly determined by the quality of your problem solving skills, the questions you ask, and the usefulness of the information you collect.
- ▲ Success in moving up is synonymous with your personal definition of the balance you desire in life between school, relationships, and other important personal values.
- ▲ Effectively balancing your thoughts and emotions is key to managing your transitions successfully.
- ▲ Being promoted and moving up to an important leadership position is in itself a job and must be tended as if your future depends on it. Success generally won't come naturally or easily.
- ▲ Being promoted will almost always disrupt the steadiness by which you work and live. The first 12 months following your promotion entails a process of transition management with all attendant pulls, tugs, and stresses on your public and personal life.

### Your Predecessor and Key Questions

- ▲ **The Organizational Chart.** Ask about reporting relationships and “dotted line” relationships. Trace the work flow on the organizational chart. Does your predecessor think the organizational chart is functional and reflects the actual work flow? How might the organizational structure and work flow be changed?
- ▲ **The Mission and Goals of the Organization.** What are the organization's mission and goals? What is your predecessor's assessment of how well the organization is reaching its goals? What does your predecessor feel are the strengths and weaknesses that affect how well the organization reaches its goals?
- ▲ **Your Predecessor's Evaluation of the Organization.** What is your predecessor's assessment of the organization's capabilities, achievements, strengths, and weaknesses? What have been his or her greatest disappointments? Greatest achievements? What has brought him or her the most satisfaction?
- ▲ **Your Predecessor's Judgment of Members.** What is your predecessor's assessment of members? Who are the hard workers, high achievers, entrepreneurs, risk takers, and straight shooters? Where is the informal leadership? Who molds opinions? How does the grapevine work? Who pushes the limits, passes on stories, creates dissension? Who is temperamental? Who fudges time or information? Who would your predecessor like to get rid of? Who is in line for promotion? Who has earned it? Who expects it? Who can keep his or her mouth shut? Who can be trusted? Who is reliable?
- ▲ **The Most Urgent Needs.** What are the organization's most pressing needs to achieve its goals?
- ▲ **The Budget.** What is in the budget? How much of it is discretionary? What can be moved around? How much are fixed costs? When an unexpected requirement develops, where is the money usually taken from?
- ▲ **The Records.** What is in the files? Where are the membership files? The confidential files?
- ▲ **The MIS.** What is your predecessor's leadership information system? How does it work, which files are available to others, and which are available only to your predecessor?

- ▲ **Prioritization of Your Responsibilities.** What are the major job responsibilities? What did your predecessor spend his or her time on? What responsibilities are most important to the organization? Contrast important responsibilities to how your predecessor actually spent time and energy.
- ▲ **The Committees.** What are the major committees? Is there an executive committee? Who is its spokesperson? How are decisions delegated and made? How supportive and helpful is the executive team? Where is your likely competition?
- ▲ **The Hidden Problems.** Where are the land mines, the submerged icebergs both within and outside the organization? What are sources of unseen problems and danger to the organization and to your own position? Your predecessor should be able to tell you pitfalls to avoid, your advisor's hot buttons, and organizational areas that can cause problems for you.

### **Building the Executive Board**

An effective leader fosters a well-functioning work team. Characteristics include the following:

- ▲ The members understand and support the organization's vision and goals.
- ▲ The members share a small, focused, well-understood set of beliefs or values about quality and service.
- ▲ The members are aware of, and work to improve, their processes or modes of operation. This includes issues such as how decisions are made (generally by consensus), communication (open or direct), leadership styles (collaborative, situational), membership (flexible), and norms (shared).
- ▲ Members listen well to each other and pull for each other.
- ▲ People openly express feelings and ideas. Conflicts are managed constructively rather than stifled. Win-win conflict resolution is a norm, and both sides can accept the outcome.
- ▲ Group decisions are often made through consensus, as opposed to a majority vote or minority power plays. As necessary, those with authority make tough decisions when consensus is not possible or a decision needs to be made *now!*
- ▲ Assignments and responsibilities are clear and accepted by members.
- ▲ The members effectively manage influences from external forces such as policies, regulations, procedures, politics, and others.
- ▲ The members get results: high-quality work.

### **Making a Good First Impression**

- ▲ Make a good first impression during your first meetings with your new staff. Immediately begin to connect with on a personal level and build support.
- ▲ Expect a wide variety of feelings regarding your appointment, ranging from optimism and relief to concern, disappointment, resentment, and confusion.
- ▲ Initially, you will likely have a fragile base of influence and power that will need to be strengthened through credible work and positive relationships.
- ▲ Hold an initial, brief, but very upbeat meeting with your new organization.
- ▲ Spend a lot of one-on-one with people.
- ▲ Begin to seed the idea that you will be asking people to help in an “organizational health check” program.
- ▲ Try to develop an inclusionary management style
- ▲ Be careful of your vocabulary--emphasize we’s and our’s in your language.
- ▲ Meet individually with the unsuccessful candidates and extend an invitation to fully utilize their skills and experience.

Exit your current/previous position effectively. If possible, help with the transition of your replacement. This may go on simultaneously with your transition into office.

- ▲ Establish ground rules and communication with your leader about the transition process. Make sure you both understand and agree to the process and the timetable. Mutually establish these ground rules.
- ▲ Learn your job. Use your predecessor and key members as major sources of information. Review documents, files, organization charts, and many other available sources of information. Ask many people a wide variety of questions. Do perception checks.
- ▲ Become an advocate for the organization. Promote your organization, its people, and its resources with insiders and outsiders alike.
- ▲ Accept the challenge of raising expectations, hopes, and personal empowerment of your members.
- ▲ Build empowering relationships. Utilize a self-concept approach to managing people.

## APPENDIX: FORMS

