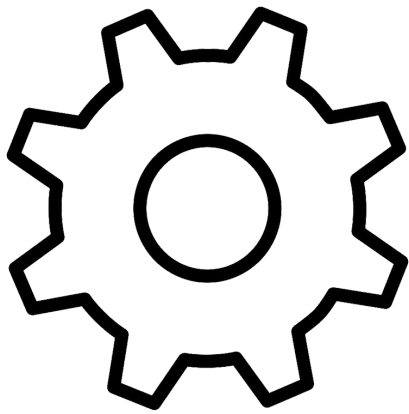




CHAPTER ADVISORY BOARD

A PHI MU DELTA RESOURCE



CHAPTER OPERATIONS GUIDE

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WELCOME

Phi Mu Delta would like to begin by first congratulating you on being elected as an executive officer and leader of your chapter. By being chosen a Chapter Officer your fellow Brothers have stated that they trust you to make the daily decisions that will guide the Chapter.

As an Officer, your primary duties involve overseeing all aspects of the chapter! All decisions ultimately rest on your shoulders, and you will be personally held responsible for all actions and functions of the chapter. The Executive Committee is charged with moving the Chapter forward with visioning and shall oversee all operations within the chapter and make sure all committee work runs smoothly and efficiently.

As an Executive Officer, try not to feel overwhelmed with all that you must do! Remember to delegate and be a good listener. Also, while Phi Mu Delta prides itself on the ideal of Democracy, DO NOT run the chapter like a popularity contest! The executive officers, specifically, the Chapter President, will be ultimately responsible for every action of every person and everything that happens within the chapter. In addition, all the good and bad actions by individual members will also, ultimately, make their way back to you. Always do what is ethical and right, not what will be perceived as the popular decision!

As an Officer, your main job is to keep the chapter focused on the Fraternity's goals and ideals. The Constitution and this manual will be your guide. When members begin to move away from our ideals it is your job to bring them back into the fold and re-invest them into the fraternity! Remember, each member took an oath to live up to the ideals of the Fraternity and an oath among gentlemen is sacred! You, therefore, are not only a leader, but an advisor. You must motivate, educate, console and insist. You must be friendly but firm as you guide each member toward the ideals.

Good Luck!



As the duly appointed Chapter Advisory Board Member
of the

_____ Chapter,

I, _____,

hereby promise to uphold the values and the ideals of the
Phi Mu Delta Fraternity and to do all in my power perform
the duties and responsibilities assigned to me.

CHAPTER ADVISORY BOARD

Role:

Provide support to the local chapter/colony

Expectations:

- Meet as a Chapter Advisory Board on a Monthly basis
- Mentor, support, and teach students
- Model appropriate behavior and hold members accountable
- Participate in volunteer training and certification programs
- Support the local chapter/colony in their development
- Attend Chapter meetings as required
- Understand and enforce Phi Mu Delta policies, by-laws, and resolutions
- Report any potential violations to the National Office immediately
- Review and follow through with assessment of Chapter/colony visitation reports
- Assist in the recruitment of Chapter Advisors for CAB
- Communicate regularly with the Regional Director, National Office, and Campus Greek Life Office

CHAPTER ADVISOR

Role: Serve as the primary Advisor to the Chapter and Chair to the Chapter Advisory Board. Ensures that the Chapter leadership is supported, challenged and guided to achieve the chapter's goals.

Expectations:

- Have regular contact with the Chapter President
- Attend all weekly chapter meetings
- Complete monthly CAB Report
- Meet with the executive board, at least, twice a semester
- Submit CAB report and communicate regularly with the District Governor
- Organize monthly Chapter Advisory Board meetings
- Attend all chapter rituals and initiation ceremonies (if an initiated member)

ACADEMIC ADVISOR

Role: Serve as the academic and scholarship advisor to the Chapter to ensure that the organization meets its academic goals and supports those that need improvement.

Expectations:

- Have bi-weekly contact with the chapter scholarship chair
- Attend, at least, one chapter meeting each semester
- Meet with new members at the beginning of the new member education process
- Assist member with identifying academic support mechanisms on campus
- Assist with the monitoring of members who are on Academic Probation
- Act as a faculty/staff liaison to the institution

MEMBERSHIP EDUCATION ADVISOR

Role: Serve as the education advisor to the Vice President of Member Development to ensure that membership development and orientation programming is consistent with Phi Mu Delta's values and goals

Expectations:

- Work closely with the VP of Member Development and help implement the Leading the Lion Pride curriculum (the National new member education program)
- Help the chapter identify areas of needed development
- Work with individual members as they seek to improve their leadership skills
- Ensure all programs are free of hazing and promote positive personal development

FINANCIAL ADVISOR

Role: Serve as the financial advisor to the Chapter to ensure that financial operations are sound and that the budgetary goals of the chapter are achieved.

Expectations:

- Work closely with the VP of Finance to develop the chapter budget each term
- Provide knowledge to the chapter to maintain consistent bookkeeping policies and financial accountability
- Review all statements, invoices, and audits
- Ensure that the chapter is planning for future needs and maintains a proper amount in savings each semester
- Assist, when needed, with the collection of dues and other payments

RECRUITMENT ADVISOR

Role: Serve as the recruitment advisor to ensure that the chapter meets its recruitment goals and retention of members.

Expectations:

- Work closely with the recruitment chair and VP of Membership to identify membership needs and growth potential
- Monitor ChapterBuilder to ensure members are holding each other accountable to their recruitment goals
- Help chapters understand the need to maintain high enough membership to meet the chapter's goals and allow members to enjoy their experience
- Assist with chapter retention issues
- Understand and support dynamic recruitment methods and procedures
- Assist the chapter with year-round recruitment goals and calendar

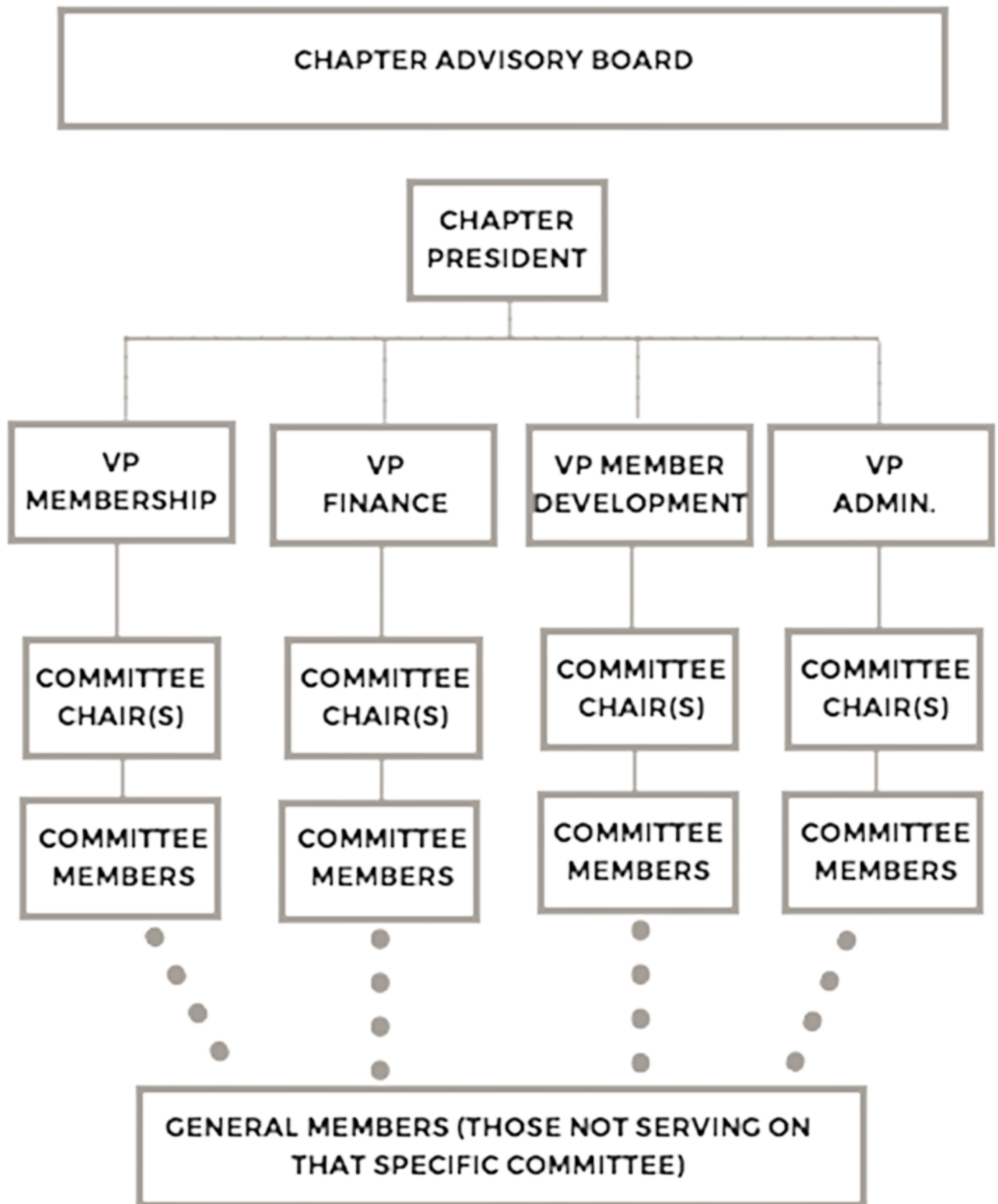
CONDUCT ADVISOR

Role: Serve as the advisor to the Chapter's Conduct Board and assists the Board with issues of due process and fairness.

Expectations:

- Understand chapter Conduct Board procedures
- Be present at all Conduct Board hearings and serve purely as an advisor – do not vote or run hearing
- Assist the board with recommendations for sanctions
- Work closely with Executive Board to assist with issues of accountability within the chapter

CHAPTER GOVERNING STRUCTURE



LEADING THE CHAPTER

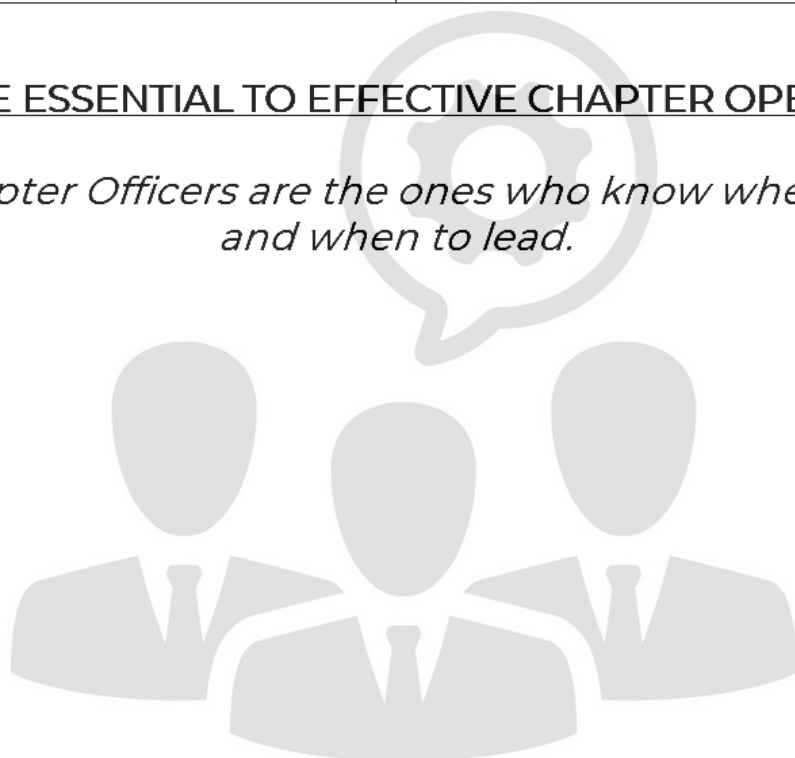
There has been an ongoing debate on the difference between leading and managing. The words "management" and "leadership" have been given numerous definitions. As the definitions continue to evolve, Warren Bennis and Burt Nanus in the book, *Leaders*, have most often defined management: Strategies for Taking Charge

"Leadership is doing the right thing.
Management is doing it right."

Managers	Leaders
Develop policies and procedures	Develop visions and strategy
Direct and Control	Motivate and inspire
Explain "What to do"	Explain "Where we are going"
Give directions	Ask questions
Concerned with the day to day	Concerned with the "long-view"
Bottom-line Oriented	Big picture Oriented
Concerned with projects	Concerned with people

BOTH ARE ESSENTIAL TO EFFECTIVE CHAPTER OPERATIONS

The best Chapter Officers are the ones who know when to manage and when to lead.



GOAL SETTING

One of the most important tasks a new Executive Committee completes is setting goals. The individual officers should make goals for their positions, but the board should create chapter-wide goals to ensure group success.

STEPS FOR GOAL SETTING

1. **Brainstorm:** Talk about what you want to accomplish, be creative and think big! Every single member is to contribute to the brainstorming process
2. **Prioritize:** After the goals have been developed, put them in order, by importance. The chapter should set a few important, achievable goals rather than a huge list of goals that may or may not be achieved.
3. **Developing an Action Plan:** Identify the steps needed to accomplish the goal. Decide which officer is responsible for accomplishing different aspects of the goals.
4. **Evaluate and Assess:** Continue to monitor each person's progress and evaluate the goals at the end of each term.

Attainable

Can you realistically accomplish the goal considering the nature of your abilities/skills and aptitudes?

Believable

Do you believe you can accomplish the goal in the allotted period?

Controllable

Do you have the ability to control the factors that affect and influence the outcome of your goals?

Definable

Can you express the goal clearly out loud or in writing?

Explicit

Are you specific about your goal and able to concentrate on the steps needed to achieve them?

For Yourself

Is this something you really want or something you're working towards because others believe it is right?

Growth Facilitating

Is the goal helping you or your chapter move forward?

Measurable

Is your goal expressed in numerical terms to evaluate progress?

PERSONAL GOALS

What are some of your strengths?

What are some of your weaknesses?

What qualities or characteristics would you like others to associate with you?

Ask 3-5 members to share with you the skills or qualities they think are important to being a strong leader.

What qualities, characteristics and skills will you need to possess in order to be successful in your chosen career?

What qualities, characteristics and skills will you need to possess to be successful in your life?

ACCOUNTABILITY

There was an important job to be done and Everybody was sure that Somebody would do it. Anybody could have done it, but Nobody did it. Somebody got angry about that because it was Everybody's job. Everybody thought that Anybody could do it, but Nobody realized that Everybody wouldn't do it. It ended up that Everybody blamed Somebody when Nobody did what Anybody could have done it.

Holding People Accountable

THE DIFFERENCE BETWEEN BEING A BROTHER AND BEING A FRIEND IS THAT BROTHERS HOLD EACH OTHER ACCOUNTABLE.

ASK YOURSELF TWO KEY QUESTIONS:

- Are you setting clear expectations with members?
- What are you doing when a member does not meet those expectations?

HAVING TOUGH CONVERSATIONS

- Confront the behavior, not the person: It's important to separate the person from the behavior. Just because they did something wrong, doesn't make them a bad person. Help him understand this too. Remind him that he is your brother and he represents himself but also the chapter. Help him understand why his behavior was inappropriate.
- Don't be a jerk: The worst thing you can do is be rude to the brother while trying to have this conversation. If you can't keep a cool head during the conversation, get someone else to do it.
- Don't yell at them: This goes with don't be a jerk, but the moment you raise your voice and yell at him, you've lost him. He will shut down and stop listening to you if you yell at him. be calm and try to understand where he is coming from.
- Don't make it a public spectacle: Confront them in private. Pull them aside to address the issue, don't embarrass them in front of people.
- It doesn't have to be anything elaborate: This is a simple conversation, it doesn't have to be a formal meeting or judicial board hearing.

THE EXECUTIVE COMMITTEE

The Executive Committee is charged with moving the Chapter forward with visioning. They oversee all operations within the chapter and create an environment where members can grow and succeed.

As an Executive Officer, your main job is to keep the chapter focused on the Fraternity's goals and ideals. The Constitution and this manual will be your guide. When members begin to move away from our ideals it is your job to bring them back into the fold and re-invest them into the fraternity! Remember, each member took an oath to live up to the ideals of the Fraternity and an oath among gentlemen is sacred! You, therefore, are not only a leader, but a role model. You must motivate, educate, console and insist. You must be friendly but firm as you guide each member toward your shared goals.



PRESIDENT

- He is the official representative of the Chapter
- He shall call to order and run all Chapter meetings and Executive Board meetings
- He shall direct the chapter's strategic plan and implement needed change within the organization
- He shall oversee all chapter operations
- He shall develop positive relationships with campus officials, alumni, undergraduate members, and all other constituents

VICE PRESIDENT OF MEMBERSHIP

- He shall perform all of the duties of the Chapter President in the event of his absence
- He shall ensure that all membership related paperwork is completed and submitted in a timely manner
- He shall oversee the implementation of the Chapter Conduct Board
- He shall oversee the recruitment planning and supervise the Recruitment Chair

VICE PRESIDENT OF FINANCE

- He shall be in charge of all financial matters for the chapter
- He shall serve as the Chair of the Finance committee and oversee the development of the chapter budget
- He shall be responsible for collecting all fees and dues
- He shall enforce all by-laws as they related to the chapter treasury

VICE PRESIDENT OF MEMBER DEVELOPMENT

- He shall direct all activities associated with the development of undergraduate members
- He shall ensure that the New Member Orientation is run in accord with guidelines and all New Members meet expectation prior to Initiation.
- He is responsible for the welfare, health and safety of all members
- He shall provide programming that is free of hazing and enhances the brotherhood experience in a positive manner



VICE PRESIDENT OF ADMINISTRATION

- He shall keep all the records of the chapter
- He shall type all meeting minutes and distribute them in a timely manner
- He shall maintain the chapter by-laws, constitution, and National by-laws.
- He shall ensure that all chapter documents are kept in a safe place and readily available
- He shall maintain all chapter rosters and attendance records

Important Dates & Reports

MEMBERSHIP REPORT	SUBMITTED BY	DESCRIPTION	DIRECTIONS
Induction Report	VP of Membership	Begins the process of initiation for all inducted new members	Due within 48 hours of the Induction Ritual with the \$40/new member fee mailed to HQ immediately.
Initiation Report	VP of Membership	Grants full membership to those who have accepted their bid and have completed new member orientation. Submitted through GreekTrack.	Due 10 days PRIOR to the Initiation Ritual and ALL must FEES paid 10 days prior.
Engagement Goals	Executive Board or appropriate chair	Corresponding with Accreditation, this report documents all chapter events and functions from civic engagement, brotherhood, recruitment, and programming. Submitted through GreekTrack.	Submitted by GreekTrack form by February 14/September 14
Chapter Membership Roster	VP of Administration	Automatically generated by GreekTrack with all members transitioned to Active Status	Finalized on GreekTrack by February 7 and September 7.
Officers' Roster	VP of Administration	This report details the 5 Executive Board members and their contact information.	Due by December 1 or ANYTIME a new executive board member is elected.

National Payments

FEE TYPE	HOW ITS CALCULATED	DUE DATE	HOW TO PAY
Induction Fee	\$40 for each member that participates in the Induction Ritual. GreekTrack will auto-invoice.	Immediately following the Induction Ceremony.	The Chapter must send a check or pay through GreekTrack within 48 hours of the Induction Ritual to the National Office.
Initiation Fee	\$300 for each initiated member. The new member is invoiced through GreekTrack.	10 days PRIOR to the Initiation Ritual.	The individual member can pay through GreekTrack or the Chapter can send a check for the total amount owed by the new members.
Brotherhood Service Fee	The BSF is \$110 per active brother – including those studying abroad, on internship or student teaching.	February 7 and September 7	The chapter can pay via GreekTrack or send a check to the National Office.
Chapter Service Fee	The CSF is \$800 per chapter/colony regardless of membership size.	February 7 and September 7	The chapter can pay via GreekTrack or send a check to the National Office.
Liability Insurance Fee	Based on the number of members expected to return in the fall semester. This is driven by the End of Term Report. The specific amount is determined by the chapter's performance the previous academic year. There is a tiered system in place for chapters/colonies.	October 1/ March 1	The insurance company will send the VP of Finance instructions for payment.
Conference Registration Fee	All registration fees are announced in the fall semester, with registration opening in the spring. Fees are set depending on the number of members required to attend and the location of the program.	Registration open in the spring semester	The payment information will be announced prior to registration.

Executive Operations Semesterly Check List

Task	Completion/Frequency
<input type="checkbox"/> Interview & Select Committee Chairs	First Week of Semester
<input type="checkbox"/> Hold Regular Executive Committee Meetings	Weekly
<input type="checkbox"/> Review Chapter Budget	Weekly
<input type="checkbox"/> Review Accounts Payable & Financial suspensions	Weekly
<input type="checkbox"/> Review Upcoming Membership Development Programs	Weekly
<input type="checkbox"/> Communicate regularly with Regional Director & National Office	As Necessary
<input type="checkbox"/> Upload Chapter Roster	February 7/September 7
<input type="checkbox"/> National Dues Paid to the National Office	February 7/September 7
<input type="checkbox"/> Upload Potential New Members	As Necessary
<input type="checkbox"/> Transition PNMs to New Members/Submit Induction Report & Fees	Immediately upon completion of Induction Ritual
<input type="checkbox"/> Transition New Members to Active Members	Immediately upon completion of Initiation Ritual
<input type="checkbox"/> Transition Active Members to Alumni Status	Last Executive Committee Meeting of the Semester
<input type="checkbox"/> Prepare Agenda for Chapter Meeting & Distribute	Weekly
<input type="checkbox"/> Ensure Chapter is educated on Risk Management & Crisis Management Policies	By the Third Week of the Semester
<input type="checkbox"/> Develop & Submit Next Semester Budget	No Later than one Month before the end of the Semester
<input type="checkbox"/> Transition Newly Elected Officers	As Necessary

Executive Operations Chapter Advisory Board Check List

Task	Completion/Frequency
<input type="checkbox"/> Attend all Executive Committee as the role requires	Weekly
<input type="checkbox"/> Meet as a Chapter Advisory Board	Monthly
<input type="checkbox"/> Support the Chapter's strategic planning and needs	Ongoing
<input type="checkbox"/> Mentor and provide knowledge	Ongoing
<input type="checkbox"/> Work with Chapter Officers to submit paperwork and fees on time	Ongoing
<input type="checkbox"/> Reach out to National Office and/or Regional Director for assistance	As necessary
<input type="checkbox"/> Prepare and send alumni correspondence	As necessary
<input type="checkbox"/> Assist with the Transition of New Advisors	As necessary

CHAPTER

COMMITTEE SYSTEM

Advantages to having a Committee System

- Spreads out the responsibilities of a chapter
- Cultivates new ideas
- Opens up new lines of communication
- Increases the self-value of individual chapter members
- Creates an environment where new members are acclimated easily
- Chapter business is carried in a faster and more effective manner

How to Establish a Committee

Every chapter is different, and will require different needs. It is very important for a chapter to ask themselves, how many committees do they feel that they need? This can be done very easily during the Brotherhood Retreat, list all the committees that you feel are important, and write a brief and general description of the purpose of that committee.

Committees should have a chair, which will direct business within the committee and report back to the appropriate Vice President of the chapter. Chapters shall develop an application process for selection of Chairmen. Committee Chairs should NEVER be elected positions within the chapter. This allows the Vice Presidents to hold Chairmen more accountable and easily replace them should they not follow-through.

Each Vice President of the chapter is typically responsible for monitoring the work of the committees under his supervision. Chairmen of committees are expected to report to him weekly with updates to allow each Vice President to report back to the chapter.

CHAPTER COMMITTEE ASSIGNMENTS

PRESIDENT	VP OF MEMBERSHIP	VP OF MEMBER DEVELOPMENT	VP OF FINANCE	VP OF ADMINISTRATION
Executive board	Conduct Recruitment Social Activities	Diversity & Inclusion Scholarship Service Ritual	Budget Fundraising Philanthropy	Public Relations Social Media Historian

Committee size

Committees are not created equal, despite that importance of each committee to the organization as a whole, there is no need to have a set number of individuals on each committee. A chapter should decide on the number of individuals needed to accomplish their tasks.

Who is on the committee?

This is one of the most interesting aspects of the committee system, the resource allocation aspects of it. Chapter membership in all chapters is diverse and each member has at least one strength to bring to the group. This is the time where the chapter gets to use that strength by placing individual members into areas where they will be most useful to the entire group as a whole.

Application Process

The Executive Committee through an application process should select committee Chairs. The National Fraternity can provide you with a sample application. The Executive Committee should establish a time to interview applicants and select worthy chairs. Anytime you have an elected position, the only process that may be used to remove that person is an impeachment process. Committee Chairs need to be quickly removed should they fail to do their duties.

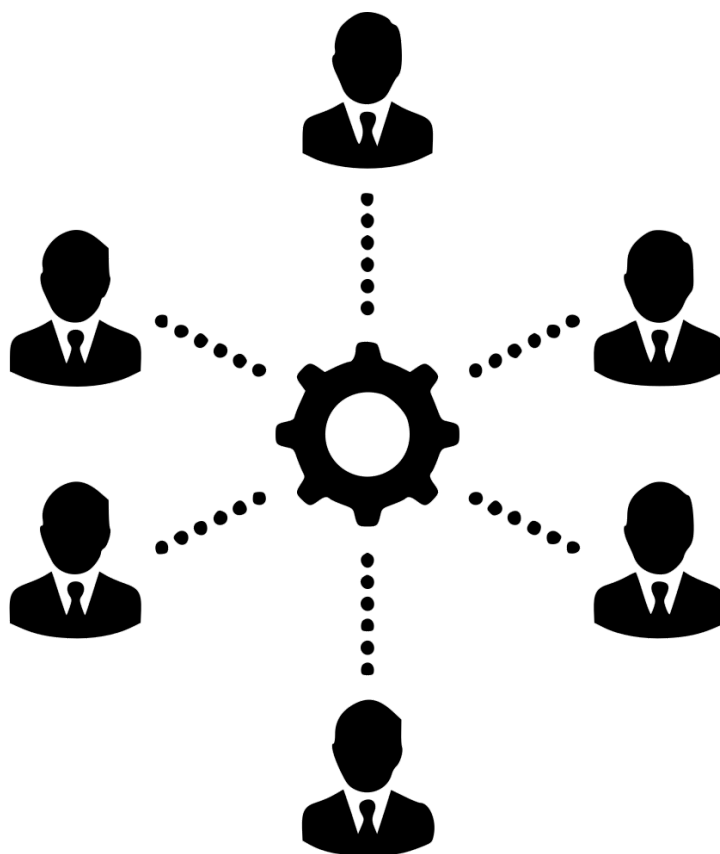
CHAPTER COMMITTEE ASSIGNMENTS

Committees do not need to function 100% of the time. For example, the Finance Committee can be functioning during the budget development and presentation period but then only called upon during key financial issues throughout the semester.

HOW OFTEN SHOULD COMMITTEES MEET?

Depending on the committee's goals and needs, it may only need to meet 1-2 times a month or they may need to meet weekly. As an executive board member, you should provide each committee with a task and goals so they know what they should be achieving during their term.

Each Vice President should either sit in on the committee meetings or meet regularly with the chair to ensure that goals are being achieved.





PHI MU DELTA
— REDEFINING FRATERNITY —

Phi Mu Delta Chairman Application

Name:

Cell:

Address:

E-Mail:

Year:

Major:

GPA (Cumulative):

Do you current hold a job?

Hours per week?

Please answer the following questions on an attached sheet of paper:

1. Please share with the Executive Committee which Chairmanship you seek to hold and why?
2. List any offices that you have held in ALL organizations and give a brief description of your responsibilities.
3. What are your current time commitments?
4. What skills, classes, and/or work experience have you had that would assist you in this position?

Applications are due by _____. Interviews will begin on _____. If you are selected, you will be contacted for an interview with the Executive Committee and notified of the time and location.

COMMITTEE DESCRIPTIONS

RECRUITMENT COMMITTEE

Members:

- Recruitment Chair
- Reports to VP of Membership
- 2-3 members appointed by the Executive Committee

Duties:

- Managing the PNM names list
- Regularly communicating and building relationships with potential new members
- Advocate for potential new members during the voting process
- Evaluate and assess recruitment process

CONDUCT COMMITTEE

Members:

- Sgt.-at-Arms (Chair)
- Reports to VP of Membership
- Members appointed by the Sgt.-at-Arms (Must be in Good Standing)

Duties:

- Serve on the Conduct Hearing Board
- Apply sanctions, as needed, to those members who violate conduct expectations
- Evaluate the Conduct process for the Chapter

COMMITTEE DESCRIPTIONS

SOCIAL COMMITTEE

Members:

- Reports to VP of Membership
- Social Chair
- Members appointed by the Executive Committee

Duties:

- Create and organize social activities for the chapter members with other campus based organizations
- Organize any formal or semi-formal events
- Ensure that Risk Management policies are applied to all events with alcohol

ACTIVITIES COMMITTEE

Members:

- Reports to VP of Membership
- Activities Chair
- Intramural, brotherhood, social chairs (if applicable)
- Members appointed by the Executive Committee

Duties:

- Create and organize activities for the chapter members to build fellowship together
- Create and organize activities for the chapter members to get to know other student organizations on campus
- Identify programs to support the developmental needs of the membership
- Evaluate and assess the brotherhood and interfraternalism within the chapter

COMMITTEE DESCRIPTIONS

DIVERSITY & INCLUSION COMMITTEE

Members:

- DEI Chair
- Reports to VP of Member Development
- Members appointed by the Executive Committee

Duties:

- Understand the needs of the diverse membership and assist in the implementation of supportive structures
- Create and organize programs to enhance the diversity learning and understanding of all members
- Promote and celebrate cultural/ethnic holidays and festivals
- Evaluate and assess the D&I needs of the Chapter on a regular basis

SCHOLARSHIP COMMITTEE

Members:

- Service Chair
- Reports to VP of Member Development
- Members appointed by the Executive Committee

Duties:

- Create and implement an academic plan to celebrate success and assist those in need
- Monitor members' academic records
- Promote high standards of academic success
- Support the academic mission of the institution through support of intellectual pursuits and programs

COMMITTEE DESCRIPTIONS

SERVICE COMMITTEE

Members:

- Service Chair
- Reports to VP of Member Development
- Members appointed by the Executive Committee

Duties:

- Assist in the brainstorming of and implementing service projects
- Track members' service hours
- Promote service throughout the brotherhood
- Evaluate and assess service within the chapter

RITUAL COMMITTEE

Members:

- Chaplain (Chair)
- Reports to VP of Member Development
- 12 members appointed by the executive board (4 from each older class)

Duties:

- Execute ritual ceremonies in a professional manner
- Practice the Initiation Ceremony regularly
- Assist in the Pre-Initiation Ceremony discussion with new members
- Assist in the Post-Initiation Ceremony with new members

COMMITTEE DESCRIPTIONS

BUDGET COMMITTEE

Members:

- VP of Finance (Chair)
- Steward (if applicable)
- House Manager (if applicable)
- One to three members appointed by the Executive Committee.

Duties:

- Assist in the creation and preparation of the Chapter budget
- Examine the accounts and review past expenses
- Assist in collections of individual's membership dues
- Enforce penalties for delinquent accounts

FUNDRAISING COMMITTEE

Members:

- Philanthropy Chair
- Reports to VP of Finance
- Members appointed by the Executive Committee

Duties:

- Execute, or develop and execution plan for, fundraising events
- Create plan for distribution of monies collected through fundraising
- Promote fundraising events
- Evaluate and assess fundraising events

COMMITTEE DESCRIPTIONS

PHILANTHROPY COMMITTEE

Members:

- Philanthropy Chair
- Reports to VP of Finance
- Members appointed by the Executive Committee

Duties:

- Brainstorm philanthropy event ideas
- Plan philanthropy events
- Promote philanthropy events
- Execute, or develop and execution plan for, philanthropy events
- Evaluate and assess philanthropy events

PUBLIC RELATIONS COMMITTEE

Members:

- Public Relations Chair
- One to three members appointed by the Executive Committee.

Duties:

- Assist in the creation and preparation of the Public Relations plan for the Chapter's platforms
- Create posts for distribution
- Assist other Committees with advertising events and programs
- Evaluate marketing of the Chapter on all social media platforms

COMMITTEE DESCRIPTIONS

SOCIAL MEDIA COMMITTEE

Members:

- Social Media Chair
- Reports to VP of Administration
- Members appointed by the Executive Committee

Duties:

- Work with Committee Chairs to produce Social Media postings
- Plan Social Media postings throughout the semester
- Promote all events on Social Media
- Evaluate and assess Social Media presence

HISTORY COMMITTEE

Members:

- Historian (Chair)
- Reports to VP of Administration
- Members appointed by the Executive Committee

Duties:

- Documents the history of all Chapter events, programs and members
- Maintains records, files and photos
- Safeguards Chapter documents and maintains the Charter
- Oversees the production of the Chapter Composite and the preservation of past Chapter Composites

MEETINGS & PROCEDURES

The Meeting: Why are We Gathering?

In order for meetings to run effectively and efficiently, meetings should be conducted on a regular basis with the time and place being consistent. Don't call a meeting unless it's necessary. Members should always know the basic purpose of the meeting:

1. Basic purposes for meetings:
2. Exchange information
3. Solve problems
4. Make decisions
5. Share concerns
6. Explain issues

Before the Meeting Checklist

- Set a starting and finishing time for the meeting.
- Reserve meeting room. Notify the members in advance of the time and location.
- Decide on physical set-up/arrangement.
- Prepare an agenda. Distribute the agenda in advance so committee chairs and members can prepare reports.
- Copy previous minutes and distribute.
- Prepare visual aids (if needed).
- Reserve audio-visual equipment (if needed).
- Invite guests.
- Prepare an evaluation of the meeting, if necessary.

Chapter Meeting Agenda

- | | |
|---|-------------------------------|
| 1. Call to Order | President |
| 2. Roll Call | VP Administration |
| 3. Recitation of the Creed | All Standing |
| 4. Read/Approval of Previous Minutes | VP Administration |
| 5. VP of Finance Report | VP Finance |
| a. Cash on Hand (Account Balances) | |
| b. Accounts Receivable (Who Owes the Chapter) | |
| c. Accounts Payable (Outstanding Invoices) | |
| d. Budget Update | |
| e. Financial Suspensions and/or Conduct | |
| 6. VP of Membership Report | VP Membership |
| a. Recruitment | |
| b. Conduct | |
| 7. VP of Member Development Report | VP Member Development |
| a. Academic Report (Once a Month) | |
| b. Service/Philanthropy Report | |
| c. Upcoming Member Development | |
| 8. Committee Reports | Standing Chairs |
| 9. Old Business | President, and from the Floor |
| 10. New Business | President, and from the Floor |
| 11. Advisor's Remarks | Chapter Advisor |
| 12. Awards and Recognition | Awards Recipients |
| 13. Pass the Gavel | |
| 14. Adjourn the Meeting | President |

Executive Committee Meeting Agenda

1. Call to Order
2. Read/Approval of Previous Minutes
3. VP of Finance Report
 - a. Cash on Hand (Account Balances)
 - b. Accounts Receivable (Who Owes the Chapter)
 - c. Accounts Payable (Outstanding Invoices)
 - d. Budget Update
 - e. Financial Suspensions and/or Conduct
4. VP of Membership Report
 - a. Recruitment
 - b. Conduct
 - c. Accreditation
5. VP of Member Development Report
 - a. Academic Report (Once a Month)
 - b. Service/Philanthropy Report
 - c. Upcoming Member Development
6. VP of Administration Report
 - a. Social Media
 - b. Public Relations
7. Recognition of Membership
8. Old Business
9. New Business
10. Adjourn

Parliamentary Procedure for Running Meetings

Robert's Rules of Order is the standard for facilitating discussions and group decision-making. Copies of the rules are available at most bookstores. Although they may seem long and involved, having an agreed-upon set of rules makes meetings run easier. Robert's Rules will help your group have better meetings, not make them more difficult. Your group is free to modify them or find another suitable process that encourages fairness and participation, unless your bylaws state otherwise.

Remember, these processes are designed to ensure that everyone has a chance to participate and to share ideas in an orderly manner. Parliamentary procedure should not be used to prevent discussion of important issues.

Committee chairpersons and other leaders may want to get some training in meeting facilitation and in using parliamentary procedure. Additional information on meeting processes, dealing with difficult people, and using Robert's Rules is available from district office staff and community resources such as the League of Women Voters, United Way and other technical assistance providers. *Parliamentary Procedure at a Glance*, by O. Garfield Jones, is an excellent and useful guide for neighborhood association chairs.



Tips in Parliamentary Procedure

The following summary will help you determine when to use the actions described in Robert's Rules.

- A main motion must be moved, seconded, and stated by the chair before it can be discussed.
- If you want to move, second, or speak to a motion, stand and address the chair.
- If you approve the motion as is, vote for it.
- If you disapprove the motion, vote against it.
- If you approve the idea of the motion but want to change it, amend it or submit a substitute for it.
- If you want advice or information to help you make your decision, move to refer the motion to an appropriate quorum or committee with instructions to report back.
- If you feel they can handle it better than the assembly, move to refer the motion to a quorum or committee with power to act.
- If you feel that the pending question(s) should be delayed so more urgent business can be considered, move to lay the motion on the table.
- If you want time to think the motion over, move that consideration be deferred to a certain time.
- If you think that further discussion is unnecessary, move the previous question.
- If you think that the assembly should give further consideration to a motion referred to a quorum or committee, move the motion be recalled.
- If you think that the assembly should give further consideration to a matter already voted upon, move that it be reconsidered.
- If you do not agree with a decision rendered by the chair, appeal the decision to the assembly.
- If you think that a matter introduced is not germane to the matter at hand, a point of order may be raised.
- If you think that too much time is being consumed by speakers, you can move a time limit on such speeches.
- If a motion has several parts, and you wish to vote differently on these parts, move to divide the motion.

TO INTRODUCE A MOTION:

Stand when no one else has the floor. Address the Chair by the proper title. Wait until the chair recognizes you.

- Now that you have the floor and can proceed with your motion say "I move that...", state your motion clearly and sit down.
- Another member may second your motion. A second merely implies that the seconder agrees that the motion should come before the assembly and not that he/she is in favor of the motion.
- If there is no second, the Chair says, "The motion is not before you at this time." The motion is not lost, as there has been no vote taken.
- If there is a second, the Chair states the question by saying "It has been moved and seconded that ... (state the motion). . . , is there any discussion?"

DEBATE OR DISCUSSING THE MOTION:

- The member who made the motion is entitled to speak first.
- Every member has the right to speak in debate.
- The Chair should alternate between those "for" the motion and those "against" the motion.
- The discussion should be related to the pending motion.
- Avoid using a person's name in debate.
- All questions should be directed to the Chair.
- Unless there is a special rule providing otherwise, a member is limited to speak once to a motion.
- Asking a question or a brief suggestion is not counted in debate.
- A person may speak a second time in debate with the assembly's permission.

VOTING ON A MOTION:

- Before a vote is taken, the Chair puts the question by saying "Those in favor of the motion that ... (repeat the motion)... say "Aye." Those opposed say "No." Wait, then say "The motion is carried," or "The motion is lost."
- Some motions require a 2/3 vote. A 2/3 vote is obtained by standing
- If a member is in doubt about the vote, he may call out "division." A division is a demand for a standing vote.
- A majority vote is more than half of the votes cast by persons legally entitled to vote.
- A 2/3 vote means at least 2/3 of the votes cast by persons legally entitled to vote.
- A tie vote is a lost vote, since it is not a majority.

MEMBER MANAGEMENT

The Importance of Good Membership Management

While making good decisions is the responsibility of every chapter member, helping people become educated about risk management issues and appropriate decisions is the responsibility of the Executive Committee. These responsibilities could/should include:

Membership Software

ChapterBuilder - ChapterBuilder is a product produced by TechniPhi, leaders in the recruitment software industry. Phi Mu Delta has contracted to provide each Chapter with a premium account for the purposes of recording, tracking, and maintaining relationships with potential members.

GreekTrack - GreekTrack was acquired in the Fall of 2021 as the new Membership Management Portal for Phi Mu Delta's undergraduate and alumni member. The system is interfaced with the National Database to ensure real-time data. In addition, the system allows for tracking of membership activities, finances and learning.

The logo for ChapterBuilder features the word "Chapter" in white and "Builder" in white, with a stylized orange and yellow flame icon replacing the letter 'B' in "Builder".

ChapterBuilder

app.chapterbuilder.com/login

The logo for greektrack features the word "greektrack" in white lowercase letters on a solid blue rectangular background.

greektrack

members.phimudelta.org

Managing the Chapter

Requirement Progress

Service Hours Progress [view/update](#)
0% Complete 0 of 25

Meeting Progress [view/update](#)
0% Complete 0 of 14

President Dashboard

Budget: \$0 remaining [view details](#)

16 events ready to be completed! [view events](#)

Resources [view all](#)

- [PMD Certificate of Liability Insurance 2021...](#)
- [Risk Management Policies 2019.pdf](#)
- [RISK MANAGEMENT CERTIFICATION.pdf](#)
- [PMD Certificate of Liability Insurance 2021...](#)
- [RISK MANAGEMENT CERTIFICATION.pdf](#)

Forms [view all](#)

Document/File Submission [Complete Form](#)
This form is used to submit a document or file to the National Office. *Always Available*

My Upcoming Events

You're not signed up for any events

[find an event](#)

As an Officer, you will have access to a summary Officer's Dashboard when you log into your account. The Dashboard gives you details on finances, online resources, forms to submit and any events that you have created. In addition, you will be able to track any required programs, such as service hours & meetings.

[Event](#) [Email](#) [SMS](#) [Announcement](#) [Files](#) [Forms](#) [Courses](#) [Minutes](#) [System Settings](#)

Events & Requirement Progress [Attendance Report](#) [Progress Report](#)

Meetings [10/3 Chapter Meeting needs to be completed!](#)

Service Requirements [9/25 Mostly Mutt's - Service needs to be completed!](#)

Services There are no upcoming services. [create service](#)

[+ create event type and corresponding requirement progress bar](#)

Members [Families](#) [Invite Member](#) [Transition Members](#) [Member Report](#)

[Prospects](#) 0

[New Members](#) 0

[Members](#) 43

[Alumni](#) 1,008

Account Manager Start typing a name... [Manage](#) or [Individual Report](#)

Award Voting [Ballot Closed](#). To open ballots, first [define your awards](#) then setup your ballot.

Officers 10 positions, all filled.

Advisors [Assign advisors to these vacant positions:](#)

Finances [Budget](#) [Invoices](#) [Log Payment](#) [Charge Fee](#) [Transaction Ledger](#)

Dues are due on 9/8/2021 at 12:00am. [You haven't configured how much each member owes in dues.](#)

Online Payments [Enabled](#)

Fundraising Campaigns [Create a fundraising campaign to raise money for a cause or your chapter.](#)

Website

Blog Write a [new blog post](#) to tell your community about your chapter.

Photo Albums Upload photos into a [new photo album](#) to showcase your chapter.

External Website Customize your [external website](#) by connecting your social media accounts and creating custom webpages.

External Links Add external links to your menu for easy access to external resources for your members.

In addition, selecting the "Manage" tab at the top of the screen will grant you access to the detailed Dashboard. This will allow you to "deep dive" into all aspects of your membership management. In addition, the Dashboard will alert you to incomplete items or submissions.

The Chapter Roster

The Chapter Roster is the foundation of all operations within the membership management platform. It is critical that the roster is properly maintained and accurate. All National Fees and insurance fees are based on the Active membership displayed on the Chapter Roster. Members can be added and removed through the upload and transitioning process (described below). All members start as Prospects and will transition to Alumni status.

Officers

5 Members



Brady Harmon

VP Membership Development



Cole Millhime

VP Membership



Ryan Chen

VP Finance



Carson Babbit

VP Administration



Jesse Verner

President

Undergraduates

36 Members

Aaron Lease

Alexander Duke

Atlee Carr

Bailey Wade

Ben Spoerke

Brenden Kelly

Cade Myers

Casey Bercaw

Chris Pfaff

Cole Swartz

Daniel Cantu

Devin Fetty

Devin Swartz

Evan Kauffman

Hunter Tolson

Jared Hoshaw

Khanneth Prak

Logan Sanderson

Mac Olson

Matthew Frommer

Michael Gallagher

Michael Myers

Nash White

Nick Kamatali

Rhys Lang

Robby Klise

Ryan Krautheim

Ryan Nichols

Samuel Canter

Sean Mild

Spencer Short

Ty Weir

Warren Rehberg

Will Hrivnak

Zak Kratowicz

Zane Davis

Advisors

5 Members

David Dellifield

Recruitment Advisor

Jessica Hinson

Academic Advisor

Karen Kier

Chapter Advisor

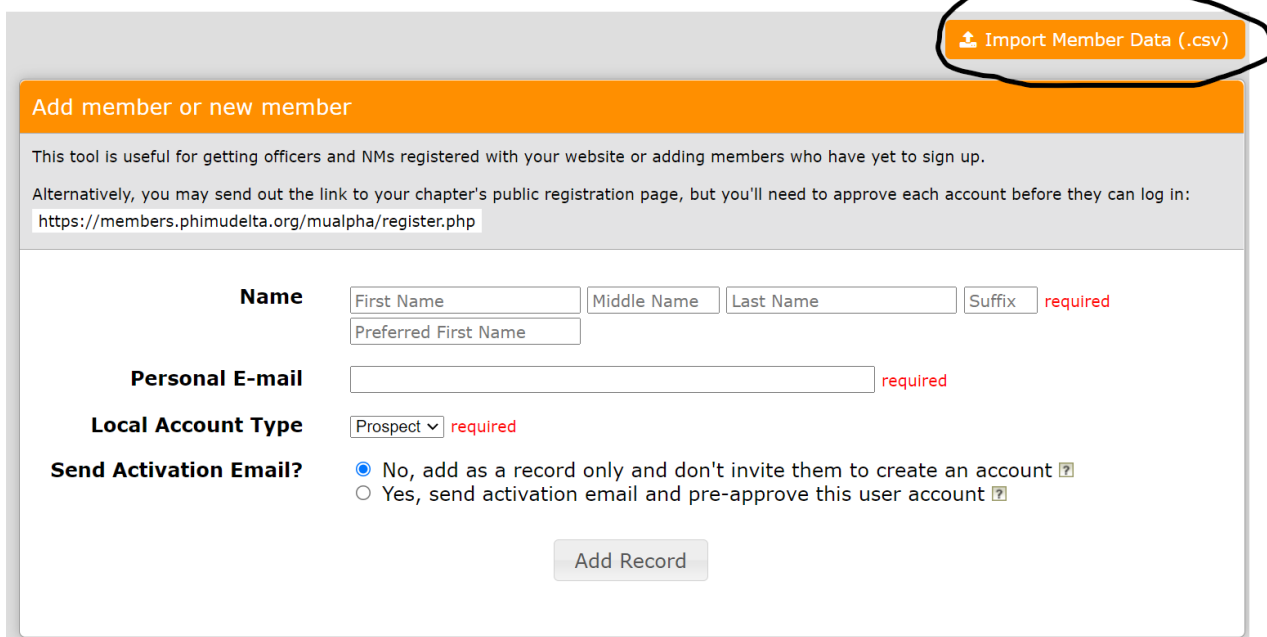
Kyle Parker

Conduct Advisor

Zach Woods

Member Development Advisor

Uploading & Transitioning Members



Import Member Data (.csv)

Add member or new member

This tool is useful for getting officers and NMs registered with your website or adding members who have yet to sign up.
Alternatively, you may send out the link to your chapter's public registration page, but you'll need to approve each account before they can log in:
<https://members.phimudelta.org/mualpha/register.php>

Name
First Name Middle Name Last Name Suffix **required**
Preferred First Name

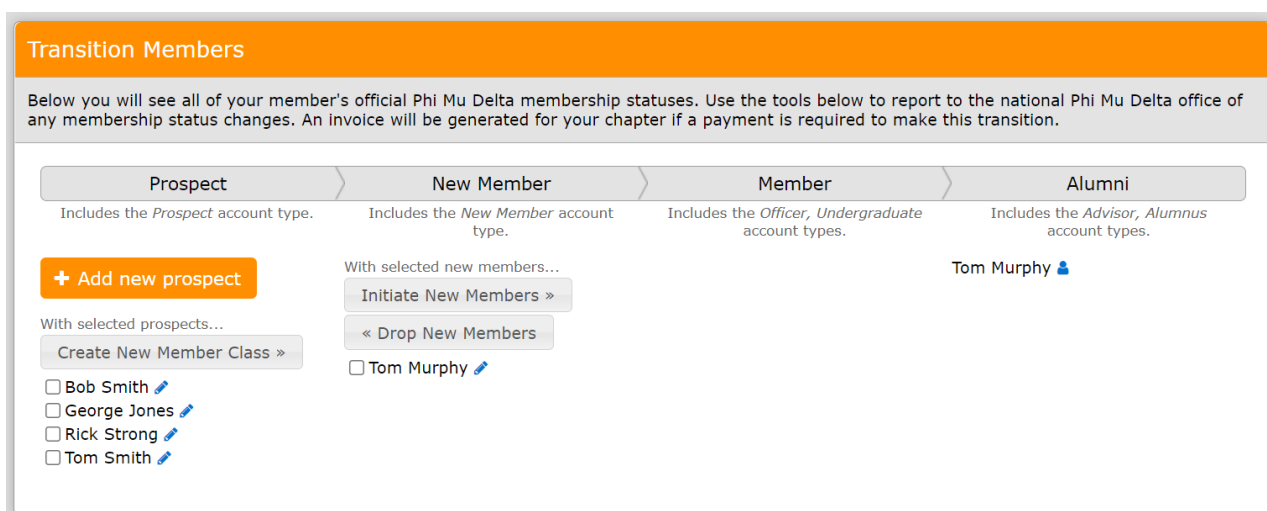
Personal E-mail
 required

Local Account Type
Prospect **required**

Send Activation Email?
☒ No, add as a record only and don't invite them to create an account
☐ Yes, send activation email and pre-approve this user account

Add Record

Members can be added two ways. Under the "Members" tab, select "Add New Members". You may select to add each member individually through the screen shown above. Or, you may select to bulk upload members using the "Import Member Data" tab in the upper right corner. You will be walked through this process, however, please note that the data **MUST** be in a .csv format.



Transition Members

Below you will see all of your member's official Phi Mu Delta membership statuses. Use the tools below to report to the national Phi Mu Delta office of any membership status changes. An invoice will be generated for your chapter if a payment is required to make this transition.

Prospect	New Member	Member	Alumni
Includes the <i>Prospect</i> account type.	Includes the <i>New Member</i> account type.	Includes the <i>Officer, Undergraduate</i> account types.	Includes the <i>Advisor, Alumnus</i> account types.

+ Add new prospect

With selected prospects...
Create New Member Class »

- ☐ Bob Smith
- ☐ George Jones
- ☐ Rick Strong
- ☐ Tom Smith

With selected new members...
Initiate New Members »
<< Drop New Members

☐ Tom Murphy

Again, under the "Members" tab you will have several options at the top of the screen highlighted in purple. Select the "Transition Members" tab to create a New Member Class or to transition members into Active Members after they are initiated. Simply click the box next to the member's name before transitioning. Transitioning members will autogenerate the Induction Report, Initiation Report or Graduation Report as soon as members transition to the next level. In addition, Induction and Initiation Fees will be auto-invoiced. **IMPORTANT:** You cannot transition members to the next stage until fees are paid, in full.

Uploading & Transitioning Members

Define your chapter officers & advisors

After you've [set up your chapter officer & advisor positions](#) we'll use this page to define who holds each position. If they already have accounts we'll assign them their position. If they don't have an account we'll send them an activation email. Any member removed from their officer position will be returned to 'Active' account type, removed advisors will be returned to the 'Alumni' account type.

Officer Positions	Member's First & Last Name	Email for Invitation
President	<input type="text"/>	<input type="text"/>
VP Administration	<input type="text"/>	<input type="text"/>
VP Finance	<input type="text"/>	<input type="text"/>
VP Member Development	<input type="text"/>	<input type="text"/>
VP Membership	<input type="text"/>	<input type="text"/>

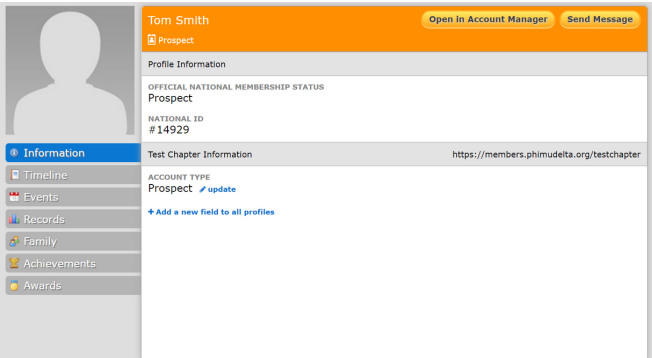
[+ add officer / advisor](#)

[Update Officers and Send Activation Emails](#)

ⓘ Activation emails will only be sent to members who haven't yet activated their accounts.

Soon after elections, you will again go to the "Members" tab. Select "Transition Officers" from the top of the screen. Transitioning Officers is as easy as typing in the member's name. The report should autogenerate the remaining information so long as his data is up to date in the system. Please note that new Officers should not be transitioned until the end of the term. Otherwise, current Officers will lose access.

Removing Membership Status



Tom Smith
Prospect

[Open in Account Manager](#) [Send Message](#)

Profile Information

OFFICIAL NATIONAL MEMBERSHIP STATUS
Prospect

NATIONAL ID #14929

Test Chapter Information <https://members.phimodelta.org/testchapter>

ACCOUNT TYPE
Prospect [update](#)

[Add a new field to all profiles](#)

Account Manager

Tom Smith [Profile](#) [Attachments](#) [Message](#)

Test Chapter [Account](#) [Records](#) [Awards](#) [Family](#) [Events](#)

Tom Smith Prospect

Member Account Type & Membership Status

Change a member's account type, set a Chair Position, or remove someone from this chapter. If you remove someone and they have an account with another GreenTrack website, only this chapter's data will be removed but their account will still be active on their other sites.

Account Type: Excluded

Email Notification

☒ Send Tom a notification of this change (Tom requested this option)

☐ Do not send a notification of this change

Add a reason for change to the notification message:

[Update Account Type](#)

Unfortunately, sometimes members are removed through expulsion or they resign membership. To remove a member, simply select the member's name. This will bring up the member information screen (left). Under "Account Type", select update and the Account Manager screen will open (right). Select the drop-down adjacent to the "Account Type" to change the Member's status to "Expelled" or "Resigned", as appropriate.

General Rights & Responsibilities of Chapter Members

Members are expected to understand the purpose of the National Fraternity and pursue activities which fulfill its purpose. It is understood that the objectives of the chapter will be compatible with the objectives of the National Fraternity and the college/university and not in violation of college/university, local, state and federal regulations and statutes.

1. Members are expected to attend meetings and functions
2. Officers are expected to inform and involve members and the advisor prior to making any financial commitments. The advisor and the members of the chapter may wish to define what expenditures should be reviewed by the advisor.
3. Members are expected to take advantage of opportunities to enhance their skills (i.e. participation in Conclave, Sapphire Leadership Academy, Regional Leadership programs, etc.).
4. Members are expected to provide positive and constructive feedback and confront inappropriate behavior in other members and the advisor which they deem to be detrimental to that individual and/or the chapter.
5. Members are expected to treat the advisor as an individual who possesses dignity, worth and self direction.
6. Members have the right to be listened to by other members and the advisor.
7. Members have the right to choose their levels of involvement in the chapter.
8. Members have the right to voice their disagreements with the decisions of the advisor and appeal those decisions to the Regional Director.

Phi Mu Delta • _____ Chapter

Membership Expectations Agreement

Bound by our oath to each other and to the Creed by which we live, we are obligated to hold each Brother accountable. In so doing, the members of __[SAMPLE]__ Chapter agree to the following basic expectations of membership and to hold accountable those men who fail to abide by these standards.

STATEMENT OF MEMBERSHIP EXPECTATIONS

- To abide by the Constitution of Phi Mu Delta Fraternity and the by-laws of the [Insert designation] chapter.
- To attend weekly chapter meetings.
- To become a member of at least one committee and participate in its meetings.
- To promote Phi Mu Delta's values of Democracy, Service and Brotherhood.
- To abide by the Risk Management Standards of Phi Mu Delta Fraternity and the rules established by [Insert College or University Name], especially those relating to alcohol.
- To neither use nor support the use of illegal drugs or the misuse of alcohol.
- To neither participate in, nor allow any member of my chapter to participate in any form of hazing.
- To maintain at least a _____ (out of 4.0) semester grade point average.
- To actively assist in increasing chapter membership by participating in all recruitment events. To meet all my financial obligations to the [Insert designation] chapter and Phi Mu Delta Fraternity in a timely manner.
- To support and conform to all requirements and standards for fraternities at
- To assist in the upkeep and maintenance of the Chapter House
- To confront and hold accountable any member who does not abide by this agreement.

FAILURE TO MEET MEMBER EXPECTATIONS

The means of discipline within the chapter shall be the following:

- Removal of voting rights
- Assigning of additional community service hours
- Fines
- Suspension from specific chapter activities
- Removal from office or suspension from the chapter
- Expulsion from the chapter
- The Conduct Board can also assign more specific disciplines as they deem appropriate to help educate the individual or chapter, prevent reoccurrence of the misconduct, or provide compensation to a wronged party.
- The Membership Expectations apply to a member's actions at all times, and is not limited to Phi Mu Delta or events.
- The Conduct Board shall inform the chapter of any rulings at each chapter meeting during its report but can inform an individual of its rulings at any time.

OVERCOMING APATHY

FIGURE OUT WHY MEMBERS DON'T CARE

The only way you'll know how to fix the problem is to figure out what the problem is. Ask members who were once involved and are not now: why? What happened? What changed?

FIX THE ISSUES

Once you know why members aren't participating, try to fix the issues they've stated are concerning to them. If they aren't coming around anymore because they don't feel valued, involved them more and verbally extend appreciation! If they aren't participating in service events because they don't enjoy doing the specific project planned, plan an event that they're passionate event or have them plan an event!

HAVE FUN

Why have a chapter/colony, if you aren't having fun? Find something the members enjoy doing and do it. This is the purpose of having a brotherhood/activities line item in your budget – use it! Don't allow fraternity business to creep into conversations or use it as a ploy to get business done. Genuinely have fun together and enjoy each other's company.

At first, there may only be a few members that show up, but don't let discourage you! The more people realize that it's not a "business" fraternity event, they will be more willing to attend.

DON'T MAKE EVERYTHING MANDATORY

This seems like a great idea in theory but it will burn out your chapter leaders and annoy your general members. Some events are an expectation of members (Ritual events, for example) but setting general expectations for attendance and then allow brothers to choose what they want to attend (and can attend).

For example, every service project shouldn't be mandatory. Have a minimum expectation total hours completed by the end of the semester, then provide opportunities for brothers to do service together but don't force them to go to every event.



MOTIVATING THE MIDDLE

UNDERSTANDING WHO'S IN YOUR CHAPTER

Top Third

Student leaders, the ones who do most of the work, the one always stepping up, the ones attending almost all of the events, their entire identity is based on their involvement

Middle Third

The ones who attend everything they're supposed to attend, they are well-liked, they care about Phi Mu Delta but it's not their entire life. They want to contribute in their own way and that is probably not through an executive board position but maybe a chair position.

Bottom Third

These members rarely attend anything, and when they do attend – they're negative about EVERYTHING. They only attend the "fun" stuff and don't seem to contribute expect make excuses and criticize. These people drive the top third of the chapter crazy.

SO, WHY CARE ABOUT THAT? HOW DOES THAT INFLUENCE MOTIVATION?

Top Third

They like awards, recognition, and appreciation. Help these members understand that everyone joins for a different reason and commit are varying levels. Not everyone lives, breathes, and walks Phi Mu Delta like they do.

Middle Third

FOCUS ON THIS GROUP! Most membership resignations come from this section of the chapter – they watch the top third argue with the bottom third and feel neglected.

They want to feel validated and heard. Support these members, give them options and choices for ways to contribute. They more than likely want a support role, not a leadership role.

Bottom Third

Stop exhausting yourself by worrying about them. Set minimum expectations for them and hold them to those – they have chosen to commit the least amount to the organization and leaders need to be okay with that.

RISK MANAGEMENT

A Structure for Chapter Risk Management

While making good decisions is the responsibility of every chapter member, helping people become educated about risk management issues and appropriate decisions is the responsibility of the Executive Committee. These responsibilities could/should include:

- Being familiar with all applicable federal, state and local laws, as well as national fraternity and college or university policies and regulations.
- Developing a year-round educational plan or helping members learn about risk management issues.
- Learning about campus, community and national resources for risk management.
- Making sure chapter policies are consistent with federal, state and local laws, as well as college or university and national fraternity policies.
- Helping each individual chapter officer identify the potential areas of risk associated with that position's programs and/or responsibilities and how to minimize such risk.
- Working with the chapter house corporation and/o the college or university to ensure a safe chapter living facility.
- Reviewing all relevant fraternity policies with all members of the chapter each year.
- Ensuring that every chapter activity is evaluated for potential risks and that all possible actions are taken to manage such risks.
- Developing a Crisis Management Plan and making sure each chapter member is familiar with the actions contained within the plan.

TEN RISK MANAGEMENT BASICS

Don't Break the Law

It's pretty simple: the drinking age is 21 in all states, and anyone (a member, new member, or a guest) who consumes alcoholic beverages underage runs the risk. Chapters do not have liquor licenses and therefore cannot provide alcohol.

No open parties

Know who your guests are! The chapter roster or a list of Facebook friends does not constitute a guest list.

Do not serve minors

It should go without saying that it is against the law to purchase for or serve to someone who is under 21 years of age. AGAINST THE LAW = RISK

All or nothing rule

Any chapter that co-sponsors or co-finances an event with other chapters/organizations is equally liable for an incident if any of the other groups purchase alcohol. That means the chapters **SHARE THE RISK** even if they are following every other part of the Risk Management Policy.

Dry new member activities

Like "dry" rush/recruitment in #8, **THERE CANNOT BE ANY ALCOHOL INVOLVED WITH THE DEVELOPMENT OF NEW MEMBERS**, even if a new member is of legal drinking age. Most new members are under the legal drinking age anyway, which means it's not only illegal, but it makes the risk and liability especially high.

No chapter purchase or bulk quantities

No funds collected by the chapter in any form, including dues or "passing the hat," can be used for the purchase of alcohol. **THE CHAPTER IS NOT A TAVERN**, so we shouldn't be in the business of providing alcohol.

No illegal drugs in the chapter!

This one is cut and dry. There is **ZERO TOLERANCE** for chapters who have illegal drugs or controlled substances on chapter premises or at chapter events.

No co-sponsorship with distributors

The chapter is equally liable if they co-sponsor an event with a vendor/tavern where alcohol is present, given away, or sold to those present, even if the event doesn't take place at a bar.

Dry rush & recruitment

Any individual expected to make a life-changing choice (accepting a bid) cannot be counted upon to make an educated decision when under the influence of alcohol. Additionally, if alcohol is the only selling point the chapter has to a prospective member, then it is time for the chapter to rethink why they exist.

No drinking games

Just like bulk quantity in #2, Drinking games **ENCOURAGE HIGH RISK DRINKING**, which increases the risk of an accident. Chapters that don't permit, tolerate, encourage, or participate in such antics significantly reduce their risk.

Phi Mu Delta Risk Management Policy

The Phi Mu Delta Risk Management Policy includes the provisions which follow and shall apply to all fraternity entities and all levels of fraternity membership.

ALCOHOL AND DRUGS

1. The possession, sale use or consumption of ALCOHOLIC beverages, while on chapter premises, during a fraternity event, in any situation sponsored or endorsed by the chapter, or in any event an observer would associate with the fraternity, must be in compliance with any and all applicable laws of the state, province, county, city and institution of higher education, and must comply with either the BYOB or Third-Party Vendor Guidelines.

2. No alcoholic beverage may be purchased through chapter funds nor may the purchase of same for members or guests be undertaken or coordinated by any member in the name of or on behalf of, the chapter. The purchase or use of a bulk quantity or common sources of such alcoholic beverage, i.e. kegs or cases, is prohibited.

3. No members, collectively or individually, shall purchase for, serve to, or sell alcohol beverages to any minor (i.e., those under legal “drinking age”).

4. The possession, sale or use of any ILLEGAL DRUGS or CONTROLLED SUBSTANCES while on chapter premises or during a fraternity event or at any event that an observer would associate with the fraternity, is strictly forbidden.

5. No chapter may co-sponsor an event with an alcohol distributor, charitable organization or tavern, (tavern defined as an establishment generating more than half of annual gross sales from alcohol) where alcohol is given away, sold or otherwise provided to those present.

6. No chapter may co-sponsor or co-finance a function where alcohol is purchased by any of the host chapters, groups or organizations.

7. All rush activities associated with any chapter will be a DRY rush function.

8. No member shall permit, tolerate, encourage or participate in “drinking games.”

9. No alcohol shall be present at any pledge/associate member/novice program activity or ritual of the chapter

HAZING

No chapter, colony, student or alumnus shall conduct nor condone hazing activities. Hazing activities are defined as: "Any action taken or situation created, intentionally, whether on or off fraternity premises, to produce mental or physical discomfort, embarrassment, harassment or ridicule. Such activities may include but are not limited to the following: use of alcohol; paddling in any form; creation of excessive fatigue; physical and psychological shocks; quests, treasure hunts, scavenger hunts, road trips or any other such activities carried on outside or inside of the confines of the chapter house; wearing of public apparel which is conspicuous and normally in good taste; engaging in public stunts and buffoonery; morally degrading or humiliating games and activities; and any other activities which are not consistent with academic achievement, fraternal law, ritual or policy or the regulation and policies of the educational institution or applicable state law.

SEXUAL ABUSE & HARASSMENT

The fraternity will not tolerate or condone any form of sexist or sexually abusive behavior on the part of its members, whether physical, mental or emotional. This is to include any actions which are demeaning to women or men including but not limited to date rape, gang rape or verbal harassment.

FIRE, HEALTH, & SAFETY

All chapter houses should meet all local fire and health codes and standards. All chapters should have posted by common phones emergency numbers for fire, police and ambulance and should have posted evacuation routes on the back of the door of each sleeping room. All chapters should comply with engineering recommendations as reported by the insurance company. The possession and/or use of firearms or explosive devices of any kind within the confines and premises of the chapter house is expressly forbidden.

REQUIRED RISK MANAGEMENT EDUCATION

Chapters and colonies of Phi Mu Delta shall annually instruct its students and alumni on the Risk Management Policy . Additionally, all members shall annually receive a copy of said Risk Management Policy.

PHI MU DELTA NATIONAL POLICIES

Open Expansion Policy (Support for New Fraternities on Campus)

Whereas, as a member organization of the North-American Interfraternity Conference, the National Fraternity of Phi Mu Delta supports the expansion positions of the conference and its member organizations, and

Whereas, the National Fraternity of Phi Mu Delta believes, that the a strong and thriving college and university based fraternity community benefits each chapter as well as the National Fraternity, and

Whereas, the National Fraternity of Phi Mu Delta recognizes that the size of any national fraternity is not indicative and that fraternity's ability to administer a successful expansion project and provide a positive fraternal experience, and

Whereas, the National Fraternity of Phi Mu Delta, supports the growth of fraternal opportunities by working in cooperation with colleges and universities to provide a positive fraternal experience, and

Whereas, the National Fraternity of Phi Mu Delta, recognizes the right of any collegiate group to seek affiliation in a fraternity of its choice,

Therefore, Let It Be Resolved that the National Fraternity of Phi Mu Delta reaffirms its commitment to act in good faith and supports the rights and responsibilities of all students in looking to gain a fraternal experience as well as the rights all member fraternities in their efforts to continue to provide a positive fraternal experiences.

Freedom of Association

Whereas, The North-American Interfraternity Conference has long maintained as a cardinal value the rights of college and university students freely to associate and responsibly to exercise their freedom of speech; and

Whereas, the National Fraternity of Phi Mu Delta supports the NIC's anticipation that each campus ensures that no NIC member organization is prohibited from selecting undergraduates for the purpose of establishing a chapter on the campus of the host institution, and

Whereas, the National Fraternity of Phi Me Delta supports the opportunity for each college man in good standing with his college/university to decide when is the best time for him to affiliate with a fraternity if he so chooses, and to do so without restriction from his institution

Therefore, Let It Be Resolved that the National Fraternity of Phi Mu Delta supports the freedom of association of all college students and disapproves of measures enacted by colleges and universities that target fraternities and are not applied equally to the entire student body.

PHI MU DELTA NATIONAL POLICIES

Gender Identity Policy

Whereas, Phi Mu Delta Fraternity was founded as an inclusive and non-discriminatory organization in 1918, opening its membership to all men seeking to live our values; and,

Whereas, Phi Mu Delta seeks to create leaders who are able to be successful in a global and diverse society; and,

Whereas, Fraternities and sororities have the right under the United States Constitution and civil rights laws to exist as single-gender organizations and to maintain that status, especially under the First and Fourteenth Amendments; and,

Whereas, Phi Mu Delta is a national Fraternity built on the brotherhood and fellowship of men. Any individual who identifies as male is welcome to seek and/or maintain membership in the Fraternity. This policy is intended to uphold the mission of Phi Mu Delta as a brotherhood of men and should not be interpreted as changing the all-male character of the Fraternity.

Therefore, be it resolved by the National Council on September 18, 2017, Phi Mu Delta remains true to our history of inclusion by allowing chapters to offer membership to those individuals who identify as male.

Sexual Harassment Policy

Whereas, given the values and founding principles of Phi Mu Delta, and

Whereas, the fraternity values the dignity and respect of all individuals, and

Therefore, let it be resolved that the Sexual Harassment Policy of the National Fraternity of Phi Mu Delta read as follows:

Phi Mu Delta Fraternity will not tolerate or condone any form of sexist or sexually abusive behavior on the part of its members, whether physical, mental, or emotional. This is to include any actions which are demeaning to women or men. The fraternity will not tolerate sexual assault in any form. Furthermore, let it Be Resolved that Phi Mu Delta chapters, colonies, and membership will not sponsor or participate in any activity, including competitive games and other endeavors, which are abusive and degrading to human beings. Each chapter will educate its membership on the issues of sexual harassment/assault through Phi Mu Delta's Risk Management Program and New Member Education Orientation process.

PHI MU DELTA NATIONAL POLICIES

Exotic Dancer/Treatment of Women Policy

Whereas, given the values and founding principles of Phi Mu Delta, and
Whereas, the fraternity values the dignity and respect of all individuals, and
Whereas, the National Fraternity of Phi Mu Delta reaffirms its fraternal values and the respect for the dignity of all persons,

Therefore, let it be resolved that no chapter or member acting on behalf of Phi Mu Delta fraternity shall engage or participate in acts or performances that are degrading to any person.

Furthermore, be it resolved that no fraternity event or function should involve exotic dancers.

Auxiliary Groups/Little Sisters Policy

Whereas, the North-American Interfraternity Conference has taken a position against auxiliary women's organizations, commonly referred to as "little sisters", as a practice that is inconsistent with the concept of separate and equal women's fraternities, and

Whereas, the Fraternity Executives Association has taken a position against auxiliary women's organizations, and Whereas, "little sister" groups pose a real and tangible threat to Phi Mu Delta's protected status as a single sex organization, and

Whereas, "little sister" groups are not desirable adjuncts to a chapter of Phi Mu Delta,

Therefore, Be It Resolved that the National Fraternity of Phi Mu Delta reaffirms its position on not supporting "little sister" organizations as part of the fraternal experience and its commitment to ensuring that each chapter of Phi Mu Delta act in accordance with the spirit of this resolution.

Thematic Events Policy

Whereas, given the values and founding principles of Phi Mu Delta, and
Whereas, the fraternity values the dignity and respect of all individuals, and
Whereas, the National Fraternity of Phi Mu Delta reaffirms its fraternal values and the respect for the dignity of all persons,

Therefore, Be It Resolved that no event or function sponsored by any chapter or any member on behalf of the fraternity have an event theme that is degrading or derogatory to any person, persons, race, ethnicity, creed, gender, or any other group or collection of individuals.

PHI MU DELTA NATIONAL POLICIES

Contiguous U.S. Event Policy

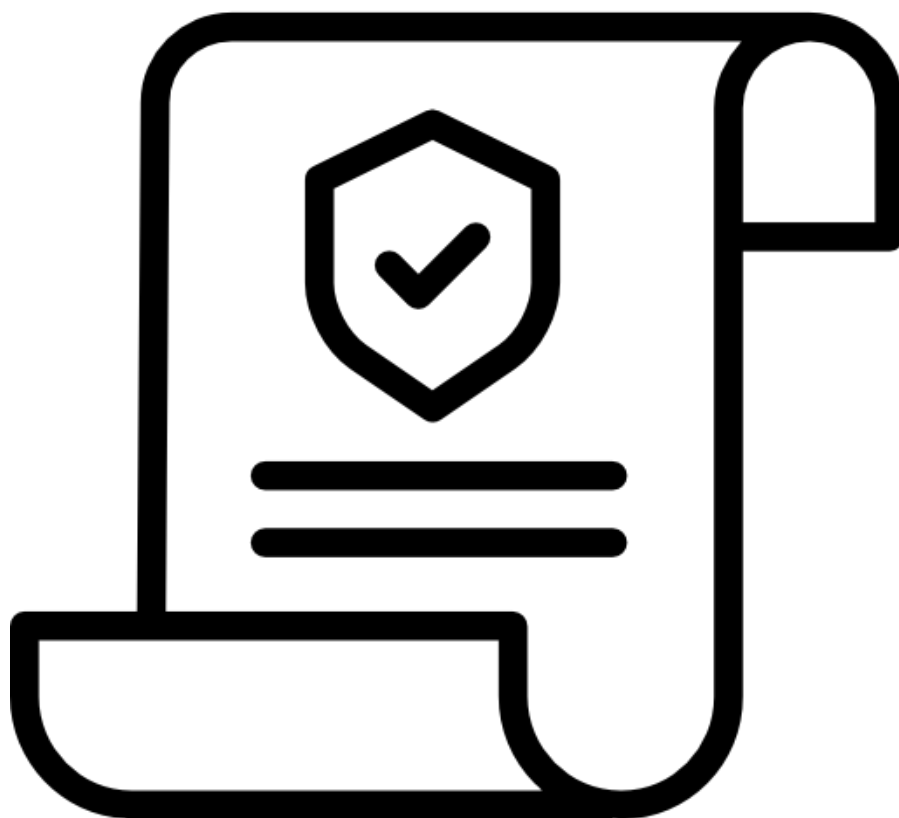
Whereas, the National Fraternity of Phi Mu Delta, as well as each undergraduate member is provided general liability insurance and protection for acts that occur under the auspices of and within the guidelines and expectations of the fraternity, and

Whereas, this coverage does not extend to fraternity events occurring outside of the contiguous United States, and any event occurring outside of the contiguous United States is done so at great risk to the fraternity and its members, and

Whereas, some chapters may either consider hosting or host events that occur outside of the contiguous United States for the purposes of avoiding fraternity policies and applicable federal, state, and local statutes, and

Whereas, these actions are not congruent with the mission, values, and expectations of Phi Mu Delta,

Therefore, Let It Be Resolved that no chapter of Phi Mu Delta, nor may any member, contract to host or sponsor an event in the name of Phi Mu Delta outside of the contiguous United States.



CRISIS MANAGEMENT

Unfortunately, some dangerous and harmful situations occur involving brothers and guests of Phi Mu Delta, and at times in the chapter house. When these dangerous and harmful situations transpire, it is essential that all brothers are prepared to properly handle the situation.

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 chapter Executive Committee 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 President or an Advisor is in charge in the case of emergency. The President will consult with other brothers who possess more expertise or insight, including the Headquarters staff and college/university administration.

Final instructions to chapter/colony brothers rest with the President. In the case that the President is unavailable or absent, the Chapter must predetermine who assumes his responsibilities related to the Crisis Management Plan (usually Sgt.-at-Arms or Risk Manager). All brothers must know who is in charge and be prepared to follow instructions.

A review of the chapter's crisis management plan should occur each term.

CRISIS MANAGEMENT PROCEDURES

1. NOTIFY APPROPRIATE EMERGENCY PERSONNEL

Briefly and calmly, explain the situation so that the appropriate emergency personnel can respond.

2. CLOSE THE CHAPTER HOUSE OR AREA

The chapter cannot maintain control if brothers are leaving and strangers are entering. Permit only chapter brothers, alumni brothers, and appropriate officials to enter. Assign a few responsible brothers to calmly control access to the chapter house.

3. NOTIFY THE FOLLOW (IN ORDER):

1. Chapter President
2. Chapter Advisor
3. National Office 609-220-4975
4. University Greek Advisor
5. House Corporation President (if applicable)

4. 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 chapter president or chapter advisor 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.

5. HANDLING THE MEDIA

If the news media should contact the chapter, only the chapter president or chapter advisor should speak for the chapter. With the help and approval of the National Office staff, the chapter will draft an appropriate statement before any response is issued to the media.

Media can also be instructed to direct inquiries to the executive director at National Office. Do not release any names until an investigation has been completed and the timing is appropriate.

6. INVESTIGATING WHAT OCCURRED

The chapter president will work in concert with the appropriate chapter officers and the National Office 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.

7. COMPLETE THE INCIDENT REPORT FORM & SUBMIT TO NATIONAL OFFICE

Serious Injury or Death of a Brother

In the event of a serious injury or death, medical or police personnel with appropriate training 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 President to call and share concerns on behalf of the chapter.

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 more 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. Discuss with the family or the family's clergyman the possibility of conducting the Fraternity memorial service.

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

Remember that the National 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.

PHI MU DELTA FRATERNITY INCIDENT REPORT

Use this form to report potential risk management violations. Please be as thorough as possible to accurately portray the facts of the incident.

If additional space is needed, please attach sheets to this form. Once complete, please email it to the National Office at HQ@phimudelta.org. If you have additional questions regarding incident reports, contact the Phi Mu Delta National Office.

Today's Date: ____/____/____

Your Name: _____

Chapter/Colony: _____ College/University: _____

Your Position/Relation to the Incident: (Risk Management chair, Chapter President, Campus Greek Advisor, Chapter Advisor, witness, etc.): _____

Date/Time of Incident: _____ Location of Incident: _____

Nature of Violation: (e.g. Alcohol, hazing, unregistered party, etc.) _____

Who was present during the incident? _____

Description of Incident (Please be as specific as possible, including a chronological review of events):

Additional Comments:

RESOURCES

North-American Interfraternity Conference (NIC) www.nicindy.org

The trade association representing most International and National Men's Fraternities. The NIC serves to advocate the needs of its member fraternities through enrichment of the fraternity experience; advancement and growth of the fraternity community; and enhancement of the educational mission of the host institutions.

Association of Fraternity/Sorority Advisors (AFA) www.afa1976.org

AFA provides exceptional experiences, a vibrant community, and essential resources for the success of fraternity/sorority advisors. AFA has an ongoing commitment to the professional development of our members, a deep appreciation of both academic and applied research that examines the entire spectrum of the fraternity/sorority experience and the advising profession, and a commitment to collaborations within and between the higher education and interfraternal communities.

Northeast Greek Leadership Association (NGLA) www.ngla.org

NGLA builds community among students from a variety of fraternal experiences, challenges members to align their actions with fraternal values, and empowers advocates to transform and improve their communities.

The Association of Fraternal Leadership & Values (AFLV) www.aflv.org

AFLV exists to stimulate the growth and development of fraternity/sorority councils, chapters, and members by promoting leadership, educational, and values based experiences and resources for student leaders, their advisors, and the larger fraternal market.

RESOURCES

Mental Health

ULIFELINE – www.ulifeline.org

An anonymous, online resource center, where college students can be comfortable searching for information they need and want regarding topics such as depression, stress, anxiety, and suicide prevention.

THE JED FOUNDATION – www.jedfoundation.org

An organization that works nationally to reduce the rate of suicide and the prevalence of emotional distress among college students.

HALF OF US – www.halfofus.org

A website sponsored by MtvU and The Jed Foundation that raises awareness about the prevalence of mental health issues and connects students to the appropriate resources to get help.

Hazing

HANK NUWER'S UNOFFICIAL CLEARINGHOUSE TO TRACK HAZING DEATHS & INCIDENTS **www.hazing.hanknuwer.com**

CAMPUSSPEAK, INC. **www.campusspeak.com/programs/hazing**

HAZING LAW **www.hazinglaw.com**

STOP HAZING **www.stophazing.org**

QUESTIONS/CONCERNS

If you have any questions or concerns throughout your term as an Executive, please do not hesitate to contact:
hq@phimudelta.org

VISIT PHI MU DELTA'S ONLINE SUPPORT PLATFORMS

Website: phimudelta.org

Membership Portal: members.phimudelta.org

STAY CONNECTED WITH PHI MU DELTA

Like Us on Facebook at:

www.facebook.com/PhiMuDeltaHQ

Follow Us on Instagram at: [@phimudeltahq](https://www.instagram.com/phimudeltahq)

Join Us on LinkedIn at: www.linkedin.com/groups/57065/

E-Mail: hq@phimudelta.org



