Guide to Chapter President’s and Vice President’s Duties
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Introduction

This Guide to Chapter President’s and Vice President’s Duties is designed to help these chapter officers carry out the duties of their positions. The duties of President, as defined by Article XI, Section One of the General Regulations for Collegiate Chapters, are as follows:

“The President shall preside at chapter meetings, shall guide the conduct of the affairs of the chapter, and shall perform such other duties as the chapter may specify. He shall act for the chapter in all matters affecting the national organization; he shall have exclusive charge of and authorize all correspondence between the chapter and the national officers. Together with the chapter Secretary, he shall prepare the chapter report twice each year. He shall see that each chapter report, together with the required per capita tax and convocations tax payments, is forwarded to the National Headquarters at the proper time.”

The duties of President, as defined by Article XI, Section Two of the General Regulations for Collegiate Chapters, are as follows:

“The Vice President shall, in the absence or incapacity of the President, perform the duties of the President, and shall perform such other duties as the chapter may specify. The offices of Vice President and Fraternity Education Officer may be held by the same person.”

All chapter members should be aware of the responsibilities of the President and Vice President and should elect to these offices men who are strong and capable leaders.
President and Vice President Duties

The purpose of the following sections are to elaborate on the duties mentioned in the *General Regulations for Collegiate Chapters* and to provide specific examples of the duties that could be assigned to the President and Vice President within the chapter.

*"The President shall preside at chapter meetings."*

As the presiding officer of the chapter, the President has two very important tasks to complete. First, it is the President’s responsibility, with the help of the Executive Committee, to set the agenda for each meeting. Once a meeting is called to order, the first order of business should be the approval of the meeting agenda. A typical chapter meeting agenda may look something like the example provided below. Explanations are included where necessary.

I. Call to Order – *Opening Ritual for Fraternity Meetings*

II. Roll Call
   
The Secretary should call the roll and record the names of all absent members in the minutes. A majority (half plus one) of chapter members in good standing must be present in order for business to be transacted at any meeting.

III. Approval of Meeting Agenda
   
The chapter should vote on the meeting agenda. It may be amended prior to its approval. If possible, the agenda should be distributed to all members prior to the meeting, after its adoption by the chapter executive committee.

IV. Review and Approval of Minutes
   
The Secretary should read or distribute the minutes of the last meeting. The minutes should be amended, if necessary, and approved. Time will be saved by distributing minutes prior to the meeting. However, ensure that sensitive or secret information is removed from minutes that are widely distributed.

V. Reading of Correspondence
   
The President should read aloud any written correspondence received by the chapter since the previous meeting.

VI. Officers’ Reports
   
   A. Warden
   B. Historian
   C. Alumni Secretary
   D. Faculty Advisor
   E. Fraternity Education Officer
   F. Treasurer
   G. Secretary
   H. Vice President
   I. President
   
   Each officer should report on what he has done to fulfill the duties of his office since the previous meeting. Some officers may not have a report each week, but regular reports of some kind should be expected. Notice of reports should be made to the Executive Committee prior to the meeting. Ideally, officer reports will be in writing to save time during the meeting and in preparing the minutes.

*This Document is for Distribution Only Among Sfonians.*
VII. Committee Reports
Standing committees should report first, followed by special committees. The Executive Committee should preview the reports so potential problems might be eliminated or alleviated before the meeting. If a committee is making a recommendation for action by the chapter, approval of their report also approves the recommendation, and no motion is necessary during New Business. Requiring committee reports to be in writing will save time during the meeting and in preparing the minutes.

VIII. Song Rehearsal

IX. Special Orders
Special orders are important business items previously designated for consideration at the current meeting. Previous minutes will show such orders. Election of officers may also be considered a special order.

X. Unfinished Business

XI. New Business

XII. Special Programs or Announcements

XIII. Adjournment – Closing Ritual for Fraternity Meetings

In addition to setting agendas, the President must facilitate each meeting as a chairman. As chairman, it is the President’s responsibility to see that each meeting is run according to the rules of order the chapter has adopted. Some chapters strictly adhere to Robert’s Rules of Order, while others use rules of order that are suited specifically to their needs. In either case, the President must know the rules and operate according to them in all matters. Parliamentary procedure ensures that each member has an opportunity to express his opinion. By adhering to parliamentary procedure, control is taken out of the hands of the few and put into the hands of the entire chapter. It is the President’s job to fairly administer each meeting according to the rules of parliamentary procedure by recognizing members to speak and calling for decisions by the chapter.

Tips for chairing a meeting:
• Be firm in decisions.
• Explain procedures before beginning the transaction of business.
• Recognize those wishing to speak in a fair manner.
• Alternate between those speaking for a motion and those speaking against a motion. NOTE: At times, there may be a situation where only members wishing to speak for a motion ask to be recognized. In such cases, the chair may offer to close debate by saying, “I only see members wishing to speak for the motion. Therefore, without objection I will put the question to the chapter. Is there objection?” If there is no objection, the chapter can immediately vote on the motion. If there is objection, debate continues. The same would be true if only members wishing to speak against a motion asked to be recognized.
• The President must temporarily yield the chair to the Vice President if he wishes to speak in debate.
• Be flexible enough to recognize when consensus can be built and procedures can be relaxed.
• Keep things moving.
Do you and your chapter brothers ever get confused by Robert’s Rules? Does your chapter even use Parliamentary Procedure? We recommend pulling out this page and posting it on your chapter bulletin board, or using it as a reference during meetings. Learning this short list of motions can speed up your business meetings and help you accomplish more in less time, helping your chapter find time for fellowship and singing!

The motions below are listed in order of precedence. Any motion can be introduced if it is higher on the chart than the pending motion.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>$21 Close meeting</td>
<td>I move to adjourn</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>$20 Take break</td>
<td>I move to recess for</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>$19 Register complaint</td>
<td>I rise to a question of privilege</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>$18 Make follow agenda</td>
<td>I call for the orders of the day</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>$17 Lay aside temporarily</td>
<td>I move to lay the question on the table</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>$16 Close debate</td>
<td>I move the previous question</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
</tr>
<tr>
<td>$15 Limit or extend debate</td>
<td>I move that debate be limited to ...</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>2/3</td>
</tr>
<tr>
<td>$14 Postpone to a certain time</td>
<td>I move to postpone the motion to ...</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>$13 Refer to committee</td>
<td>I move to refer the motion to ...</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>$12 Modify wording of motion</td>
<td>I move to amend the motion by ...</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>$11 Kill main motion</td>
<td>I move that the motion be postponed indefinitely</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>$10 Bring business before assembly (a main motion)</td>
<td>I move that [or &quot;to&quot;] ...</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
</tbody>
</table>
Incidental Motions - no order of precedence. Arise incidentally and decided immediately.

<table>
<thead>
<tr>
<th>YOU WANT TO:</th>
<th>YOU SAY:</th>
<th>INTERRUPT</th>
<th>2ND?</th>
<th>DEBATE?</th>
<th>AMEND?</th>
<th>VOTE?</th>
</tr>
</thead>
<tbody>
<tr>
<td>§23 Enforce rules</td>
<td>Point of order</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>§24 Submit matter to assembly</td>
<td>I appeal from the decision of the chair</td>
<td>Yes</td>
<td>Yes</td>
<td>Varies</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>§25 Suspend rules</td>
<td>I move to suspend the rules which ...</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
</tr>
<tr>
<td>§26 Avoid main motion altogether</td>
<td>I object to the consideration of the question</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
</tr>
<tr>
<td>§27 Divide motion</td>
<td>I move to divide the question</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>§29 Demand rising vote</td>
<td>I call for a division</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>§33 Parliamentary law question</td>
<td>Parliamentary inquiry</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>§33 Request for information</td>
<td>Point of information</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
</tbody>
</table>

Motions That Bring a Question Again Before the Assembly - no order of precedence. Introduce only when nothing else pending.

| §34 Take matter from table  | I move to take from the table ...  | No        | Yes  | No      | No     | Majority |
| §35 Cancel previous action  | I move to rescind ...             | No        | Yes  | Yes    | Yes    | 2/3 maj. with notice |
| §37 Reconsider motion       | I move to reconsider the vote ...  | No        | Yes  | Varies | No     | Majority |

Based on Robert’s Rules of Order Newly Revised (10th edition)

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“[The President] shall guide the conduct of the affairs of the chapter.”

The duty of the chapter President to “guide the conduct of the affairs of the chapter” is often the most difficult to clearly define. It does not mean that the chapter President is the sole person in the chapter who initiates ideas for activities or programs. It also does not mean that the chapter President must authorize the individual actions of each and every member of the chapter. When a chapter President is elected, he is expected to clearly articulate expectations and set an example for the way the chapter will go about its business and activities. Much of this work can be done immediately after the chapter President’s election.

Activities of a chapter President immediately after election

Immediately after new officers are elected, the chapter President should meet with the newly elected officers to outline his vision for the chapter over his term in office and clearly articulate expectations of each new officer. In order to do this effectively, the chapter President must have a clear idea in his own mind of these expectations. The duties listed in the General Regulations for Collegiate Chapters as well as any additional duties that may be listed in chapter bylaws are excellent places to start. It is also a good idea to periodically reevaluate officer and chapter progress throughout the year.

In addition to setting expectations for officers, the President must appoint committees to work toward certain, specific goals for the chapter. Each committee needs an odd number of members, one of whom is the chairman. The chairmen of chapter committees should be committed to doing a lot of work for the chapter, and should be willing to have plenty of work delegated to them by the chapter President. In addition to membership, each committee needs a clearly written, specific charge provided to them by the chapter President. These charges tell each committee exactly what they are to accomplish during the year, and these charges can be amended throughout the year.

With clear expectations and goals for both officers and committees that are regularly evaluated, a chapter President can do much toward guiding the conduct of the affairs of the chapter. It should be noted that no officer or committee, including the chapter President, can take an action or start a program on behalf of the chapter without a vote of the chapter. Exceptions to this rule would have to be noted in chapter bylaws or standing rules.

“[The President] shall act for the chapter in all matters affecting the national fraternity.”

The chapter President must sign every report that is sent from the chapter to the National Headquarters, verifying its contents. Ultimately, any questions a national staff member or national officer may have regarding a chapter’s reports will be directed to the chapter President.

The chapter President is also the main contact person for Province Governors and Collegiate Province Representatives. Each province officer should be able to provide the chapter President with his expectations of the chapter for any type of visit, whether informal, formal, or official. In the case of an official Province Governor visit, the chapter President should be prepared to set up meetings with school administrators and faculty advisors, schedule both a chapter executive committee meeting and a full chapter meeting, and arrange for transportation and housing for the Province Governor if necessary.

Amendments to the National Constitution and General Regulations for Collegiate Chapters may be adopted by the National Council between Conventions. The National Council consists of the National Executive Committee, Province Governors, and chapter Presidents. Votes on these amendments are cast by mail ballot. In this way, each chapter President is the spokesman for their chapter on national Fraternity matters.
“[The President] shall have exclusive charge of and authorize all correspondence between the chapter and the national officers.”

All correspondence between a chapter and the national Fraternity should be authorized and signed by the chapter President. This does not mean that the chapter President should monitor the phone calls and email messages of every individual chapter member to make sure they are not contacting a province governor or national officer. This duty pertains specifically to correspondence on behalf of the chapter as a whole, which in cases other than regular reports would be previously approved by vote of the chapter.

“Together with the chapter Secretary, [the President] shall prepare the chapter report twice each year. He shall see that each chapter report, together with the required per capita tax and convocations tax payments, is forwarded to the National Headquarters at the proper time.”

Even though chapter personnel reports require information normally kept by the chapter Secretary and a check from the chapter Treasurer, it is the chapter President who assumes primary responsibility for ensuring that all chapter reports are filed correctly and on time. Be sure to follow the instructions, and allow plenty of extra time to ensure that a Faculty Advisor’s signature can be easily obtained before the deadline.
Personnel Report Instructions

This document is meant to be used by chapter officers as a reference in the proper completion of the Personnel Reports and additional forms. Within, you will find information on the Personnel Report Form, Operational Report Form, Discrepancy Report Form, Professional Semester Form, Transfer to Alumni Status Form, Transfer/Reactivation Form, and Credit Card Payment Form. In addition, there are tips and guidelines for strange 'What do I do?' situations, and the answers to frequently asked questions.

As always, if you cannot find your answer here, or if you need to report any corrections, please feel free to contact a member of the National Staff at Lyrecrest for assistance.
Step 1: Before You Start

Be sure you have each of the following:

- Personnel Report Form (PRF)
- Operational Report Form (ORF)
- Discrepancy Report Form (DRF)
- Transfer/Reactivation Form (TRF)
- Transfer to Alumni Status Form (TTA)
- Credit Card Payment Form (CCF)
- Personnel Reports Checklist
- Professional Semester Form (PSF)

If your package is missing any of these items, you should contact Lyrecrest, visit Lyrecrest Online (www.lyrecrest.net) to get copies, or check your Sinfonia Resource Disk (SRD). Files on the SRD or Lyrecrest Online are PDF's and require Adobe Acrobat Reader to view.

Additionally, you should read any included Memo's and make sure that any referenced forms or items are included in your package. If an item mentioned in a memo is missing, you should contact the author of the memo to get more information.

Making photocopies is okay. Sometimes, you may find it necessary to make copies of the forms for additional space. Go ahead! Please make copies rather than writing on plain paper or on the back of a form. Reports will not be processed unless filled out properly on the correct form.

To make the preparation and processing of your reports easier and more streamlined, the following are some recommended steps to take:

- Set dues deadline early
- Maintain open communication with the chapter Treasurer
- Develop and utilize a chapter membership roster
- Ship report and all relevant supplemental forms via a professional courier
- Photocopy EVERYTHING for your chapter's files

Step 2: Filling Out The Forms

Please make sure that all items are printed, except where a signature is requested. Use black or blue ink to fill in any report! It is always a good idea to use a photocopy of the forms first, and then fill the originals in when you're sure of the information.

The Personnel Report Form (Required)
The PRF is the central form for the entire membership records process. It is generated out of the National Database, so any inaccuracies such as name misspellings or incorrect graduation years should be noted, as this information is incorrect in the National Database as well. This also means that if a member of your chapter is not listed it is due to one of the following reasons:

- Initiation Reports Never/Not Properly Filed
- Member on Alumni Status
- Transfer/Reactivation not Properly Completed

There are a few things to remember when filing your PRF:

- Check that all members of your chapter are represented on the report
  - If not, fill them in on a blank line and include a Discrepancy Form for that member
- Check that all listed are current members.
  - If not, place an 'X' in the appropriate Membership Status column
  - Include all required documents when applicable
- In consultation with your Treasurer, check that all members have paid, and mark them appropriately on the PRF
  - Remember, payments received are applied to back per-capita first!

Questions? Call Lyrecrest at 1-800-473-2649. We will be glad to help!
• Mark all members with an ‘X’ in the appropriate Membership Status column
  o Good Standing, Suspended Chapter, Alumni, Expelled Chapter, etc
• Total the per capita column
  o Don’t forget your $80 Convocations Tax!
  o Have the Treasurer or President write one check for the total

The Chapter Operational Report Form (Required)
This is the best way for the National Officers and Staff to accurately get an overview of the health of your chapter. Please take the time to fill this form out completely and accurately.

The Discrepancy Report Form (Supplementary)
This form is designed to help clarify mistakes, data inaccuracies, or special situations with members. Do not be afraid to use the DRF, if it isn’t necessary it will be ignored. If however, you don’t include a discrepancy item for a situation which warrants it, you may find further problems down the road with member statuses and per-capita balances. You should include the member number of the person in question whenever possible, as it speeds the processing of your report.

The Transfer/Reactivation Form (Supplementary)
This form is required if a member is returning to active status or transferring in from another chapter. In order to properly complete the TRF, the following criteria must be met:
  • The member’s information should be listed on the Personnel Report Form
  • Per-capita tax for the current term must be included
  • The TRF must be signed by the member.

When we begin to transfer or reactivate the person, and find that the member is either suspended at his original chapter, has been expelled, or is ineligible for transfer or reactivation for some other reason, we will contact the report preparer. The person will not be transferred or reactivated until this situation is remedied. This person should not hold any office, or have voting privileges. The one exception to this is that an Alumnus may hold the office of Alumni Secretary without reactivating, but should not be allowed to vote at chapter meetings.

The Transfer to Alumni Status Form (Supplementary)
This form is required if a member is transferring to alumni status. A member is eligible to be transferred if they meet one of the following conditions:
  • Has paid 8 terms of per-capita tax *(The semester of probationary membership is not included.)*
  • Has left the institution in good standing either due to graduation or personal reasons.
***Alumni membership is not to be used as a safe haven for members with financial problems.***

The Professional Semester Form (Supplementary)
This form is required if a member is going to be studying abroad, student teaching, taking an internship or participating in any other professional activity that would prohibit him from participating as an active member of the chapter. Professional semesters are taken for one semester and members will automatically appear on the chapter’s Personnel Report the following semester. During the time of a professional semester, no dues shall be accrued.

The Credit Card Payment Form (Supplementary)
If members would like to place their per-capita tax on their credit card, they should fill out the CCF. The CCF MUST be signed and have the complete credit card information as requested. If a credit card is declined, we will contact the owner of the card. We treat declined cards as nonpayment of dues and the member will be placed on suspended status. We will contact the report preparer with that information.

Step 3: Final Preparation Steps
Check the report over to make sure there are no inconsistencies and that all relevant supplemental forms are included and properly filled out. Make sure you have all of the documentation for your discrepancies as well.

Questions? Call Lyrecrest at 1-800-473-2649. We will be glad to help!

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Don't forget to check the following:

- The PRF has been filled in completely and legibly in black or blue ink!
  - Remember, if your chapter's PRF can't be read, it can't be processed.
- Verify that all dues have been paid.
- Verify that all members have an "X" in their corresponding Membership Status column.
- Match your check amount to the total at the bottom of the report.
  - Don't forget Convocations Tax!
- Make a copy of everything you chapter's files.
  - This can save a lot of time and headache should your report get lost or damaged during shipping.

You're almost done, but first, do the following:

- Gather all completed required and supplemental forms.
- Check that you've made copies of all documents, including payment, for your chapter's files and address envelope (do not fold) to:
  
  Phi Mu Alpha Sinfonia  
  10600 Old State Road  
  Evansville, IN 47711-1399

- Place all documents in a 9"x12" manila envelope and take to the closest courier.
  - United States Post Office
  - United Parcel Service (UPS)
  - FedEx
  - *Obtain tracking number when available.

- Contact Lyrecrest 7 business days later to verify arrival.

NOTE: We suggest that you don't use your campus mail service for shipping reports, as this tends to result in lost reports or other delays. Do not send an initiation report or initiation cards in this package.

Oh No! It got lost in the mail. Here's where making copies of everything will save everyone involved a lot of time! Just make another copy of everything and send it in again. Make sure that you contact your bank and cancel the check you included in the first package, and that you include a new check in your second attempt. Because mail can get lost, it is usually a good idea to send in your package at least 3 weeks before the due date. This way, if it does get lost, you will still be able to meet the deadline and have your package postmarked before the due date.

Step 4: Responding To Requests For Further Information

Occasionally, the National Staff may need further information or documentation for discrepancies or clarification on your report. In these instances, the report preparer will be the first person contacted, followed by the president and faculty advisor. It is important to respond to these requests promptly, as your Personnel Report will not be processed until such clarifications or information is provided. When further documentation or information is requested, please respond expeditiously with exactly what is asked for and format your mailing envelope as follows:

Phi Mu Alpha Sinfonia  
ATTN: <name of person requesting information>  
10600 Old State Road  
Evansville, IN 47711-1399

What to do when the school can't issue the check in time

If, due to semester or year-end audits, the bursar or business office at your school cannot issue a check in time, you should ask for a letter from them indicating that payment of the amount is coming, and include this letter with

Questions? Call Lyrecrest at 1-800-473-2649. We will be glad to help!
your report. If this happens, your report will be placed in holding until payment is received by Lyrecrest. This situation can almost always be avoided by requesting the check at least 30 days before your deadline.

Hold On! We're coming to the Crest! (Run for the Gold)
If you are brave enough, and like an adventure, we would love to take hand-to-hand delivery of your reports! Take notice of the rules in your care package. Most importantly, if you are going to drive your reports in, make sure you have them filled out completely with Faculty Advisor signature and check for payment. CALL IN ADVANCE TO ALERT US OF YOUR ARRIVAL!

Codes, Tips, and Guidelines

Year in School Codes

<table>
<thead>
<tr>
<th>FR</th>
<th>Freshman</th>
<th>JR</th>
<th>Junior</th>
<th>GR</th>
<th>Grad. Student</th>
</tr>
</thead>
<tbody>
<tr>
<td>SO</td>
<td>Sophomore</td>
<td>SR</td>
<td>Senior</td>
<td>GD</td>
<td>Graduate</td>
</tr>
</tbody>
</table>

- Always use black or blue ink. Never fill out a PR, or supplemental forms, with pencil, crayon, marker or red ink. Especially red ink. The National Staff uses red ink to mark your reports once they arrive. Using red ink could cause confusion with marks made by the staff during report processing. Pencil can be erased and smudged too easily while crayon and marker are impossible to read. Remember that these reports need to be legible and accurate. Sending reports that are hard to read can jeopardize the integrity of your member's records and/or membership.

- Make a copy of the Personnel Report and all other documents pertaining to it. Having a copy in your chapter’s permanent file can save a lot of headache in the event that the National Headquarters never receives your report. It’s also beneficial for the chapter to have a copy for the sake of posterity!

- Work closely with your Treasurer. You’ll want to be sure that all members have paid in full and that their checks have cleared before sending payment to Lyrecrest. Set an early deadline to avoid the last minute rush. Remember, deadlines are useless if not enforced!

- Send only one payment. Never send more than one check or money order with your report, and NEVER send cash. It’s always easier and less expensive to cancel one check rather than multiple checks in the event that the report is lost during shipping. Depending on your bank’s policy, it’s not uncommon for there to be a fee, as much as $25 or more, for canceling checks.

- Mail your Personnel Report through a local post office, UPS or FedEx shipping center. Using a university mail system can cause delay and increase the risk of your report being lost. We suggest that you use the local post office or the local UPS or FedEx shipping center which will ensure that proper postage is used, as well as giving you a valuable tool for tracking your report on its journey to Lyrecrest.

- Give us a call. Remember that it never hurts to call Lyrecrest to verify that we have received your Personnel Report. We are also more than happy to help you with any questions you might have in preparing your Personnel Report.

Questions? Call Lyrecrest at 1-800-473-2649. We will be glad to help!

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FAQ (Frequently Asked Questions)

Q: Brother X is going to be student teaching or in an internship away from the sheltering institution this term. What should we do with him?
A: In an ideal world, Brother X would have the opportunity to remain involved with the chapter. If this will not be possible in any way, the brother may be transferred to alumni status, using a PSF, for one term and reactivated upon his return. This is only possible when Brother X will not be taking any other classes except the student teaching or internship in that term.

Q: Brother X wants to take a Professional Semester due to personal issues. Can he do that?
A: No. The Professional Semester is only to be used for an internship, study abroad program, student teaching or other professional obligations that prohibit him from participating as an active chapter member.

Q: Brother X wrote a check to the chapter, and it was deposited. We found out after mailing our reports in that the check Brother X wrote bounced, and he now is negligent in paying the chapter for his dues. What should we do with him?
A: The chapter should take disciplinary action against the member and suspend him until his financial obligation to the chapter has been made. It is essential that you notify us in writing of this action, and again when the member has been removed from suspension. If this happens repeatedly, consider taking payment in the form of cash, money orders, or cashier checks instead of personal checks.

Q: Brother X was responsible for the report filing last term, and he says he sent them in. However, on the report we received, everyone is listed as owing back per-capita taxes, and the chapter is listed as owing $120 of convocations tax. What should I do?
A: In this situation, your reports for last term were never processed. This could be due to a pending discrepancy, missing materials, reports getting lost in the mail, or officer negligence. In any situation, you should attempt to gather all possible copies of paperwork from the past term, and contact the National Headquarters about how to repair the situation.

Q: Brother X should have been reactivated last term, and he remembers filing out a reactivation form. However, Brother X is not listed on our reports. What should we do?
A: You should contact the National Headquarters to determine why the transfer was not completed.

Q: Brother X is listed on our reports, but he left a long time ago. It also says he owes $xxxx in back per-capita tax. What should we do?
A: First, find out when Brother X left your institution. Then, figure out how many terms have passed since that term to figure out how much back per-capita is due in that time period. Brother X would not be liable for back per-capita tax assessed after he left the institution. If all of the back per-capita listed is from the terms after he departed, put an ‘X’ in the ‘Transfer to Alumni Status’ column of the ‘Membership Status’ section of the PRF. You should also fill out the Transfer to Alumni Status form. In addition, put the date he departed the institution in the ‘Date Effective’ column. If Brother X still owed back per-capita when he left, you should put an ‘X’ in the ‘Expelled - Automatic’ column of the ‘Membership Status’ section of the Personnel Report Form, and put the date of his departure in the ‘Date Effective’ column.
“The Vice President shall, in the absence or incapacity of the President, perform the duties of the President.”

It is very important that each chapter Vice President is familiar with and able to execute the duties of the chapter President. He automatically assumes that role if the chapter President is absent for any reason.

“The offices of Vice President and Fraternity Education Officer may be held by the same person.”

While the General Regulations for Collegiate Chapters allows for the offices of Vice President and Fraternity Education Officer to be held by the same person, given the extensive responsibilities of the office of Fraternity Education Officer, it is not recommended. However, if chapter size or other limitations make such an arrangement necessary, it is recommended that no additional duties be given to the person assuming both roles.

“[The President and Vice President] shall perform such other duties as the chapter may specify.”

Each chapter may specify additional duties for the President and Vice President as deemed necessary. Typically, a chapter President is assigned very few additional duties, while a chapter Vice President is assigned many additional duties. Below is a list of suggestions that may be beneficial to the chapter and may be incorporated into the President’s and/or Vice President’s duties:

- Presidential Appointment of a Nominating Committee and other committees. Article X, Section Two of the General Regulations for Collegiate Chapters reads, “At least 15 days prior to the scheduled chapter election, and no later than March 15, the chapter President shall appoint a nominating committee which should include at least the President, one other officer, one graduating senior, and one member of junior standing. On or before election day and no later than April 1, the nominating committee shall report its choice of one man for each office to be filled. Additional nominations may be made from the floor by members in good standing.” In addition, Article XII, Sections Two and Three give the chapter President the power to appoint all standing and special committees except for the chapter Executive Committee.

- Vice President as Chapter Parliamentarian. While many chapters assign this role to the Warden, it could be effectively assigned to the Vice President as well. Knowledge and enforcement of the rules of parliamentary procedure are a skill that will be necessary should the Vice President later assume the office of chapter President. By assigning this role to the Vice President, it provides him with valuable training for a future role in chapter leadership.

- Vice President as Committee Coordinator. In a large chapter that incorporates several committees, the need for one individual to coordinate and guide all of the committees will certainly arise. As a committee coordinator, the Vice President can serve ex officio on every committee (except for the chapter executive committee, wherein his membership and duties are already described in the General Regulations for Collegiate Chapters.) The Vice President will ensure that committees are meeting as needed and accomplishing tasks as directed by the chapter and the president.

- Vice President as Music Coordinator. In many chapters, one of the Vice President’s additional duties is music coordinator. In this role, the Vice President would be responsible for organizing and facilitating all musical activities of the chapter, including activities such as recitals, musicales, sorority serenades, and services provided to the music department, such as the staging of recitals. The Vice President would also be responsible for scheduling chapter rehearsals, preparing chapter recital programs, and organizing musical presentations for chapter meetings.

- Vice President as Major Project Chairman. Many chapters use their Vice President as chairman of recurring or annual special events, such as festivals, contests, musical productions, or service projects. This arrangement fills the void for the Vice President and provides a close tie between the organization of the

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project and the leadership of the chapter. This role for the Vice President also provides valuable experience for later involvement in the presidency. Such experience is consistent with the training aspects of the Vice President’s job in many chapters. Vice Presidents who take charge of major projects are usually responsible for overseeing the entire range of the production. They must organize, delegate responsibility, manage a budget, and use time effectively if the project is to succeed. Many successful chapters have used this role for the Vice President to ensure effective leadership training for the future.

- **Vice President as Social Activities Coordinator.** Another role the Vice President can fill is that of chairman of the chapter’s social committee, fraternal activities committee, or some similar group. In this role, the Vice President would be responsible for everything from planning the Chapter Day activities to arranging for speakers and entertainment at meetings. By placing the responsibility of the development and coordination of an organized social activities program into one officer, a chapter can ensure that this aspect of chapter life is not overlooked. Since organized activities are less likely to get out of hand than impromptu events, the chapter can improve its program of social interaction through the establishment of such a role for its Vice President.
The Role of the Chapter Executive Committee

Article XII, Section One of the General Regulations for Collegiate Chapters defines the chapter Executive Committee as “the primary standing committee of the chapter.” Below is a description of the role of this committee.

Membership

“The chapter Executive Committee shall include the President as its chairman, the Vice President, the Secretary, the Treasurer, and such other elected officers as the chapter may deem appropriate. The Faculty Advisor shall be considered an ex officio member without vote.”

An important distinction between the chapter Executive Committee and other chapter committees is that members of the Executive Committee must be elected officers. In addition, the chapter, not the chapter President, determines the membership of the chapter Executive Committee outside of the five officers mentioned in the General Regulations for Collegiate Chapters. The term “ex officio” means that the Faculty Advisor is a member of the chapter Executive Committee by virtue of his office.

Duties

“The chapter Executive Committee shall act in an advisory capacity to the chapter President. It shall, at the opening of the year, arrange for regular meeting days which shall precede each regular chapter business meeting by no more than two days. It shall approve all expenditures, may recommend additions thereto, and shall perform such other duties as the President may direct.”

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The chapter Executive Committee can assist the chapter President in many ways. The most common way the chapter Executive Committee advises the President is by helping to set the weekly agenda. In addition, if the President chooses to place one Executive Committee member on each chapter committee, the Executive Committee can serve as a tool to oversee all chapter committees. Many times, especially in larger chapters, issues or concerns from outside of the chapter are communicated only to the chapter President, and he is responsible for communicating that issue or concern to the chapter. The chapter Executive Committee can help in this situation by advising the President on the best way to communicate that issue to the chapter. These are only a few of the many ways a chapter Executive Committee can assist the chapter President.

“[The chapter Executive Committee] shall, at the opening of the year, arrange for regular meeting days which shall precede each regular chapter business meeting by no more than two days.”

Setting the chapter Executive Committee no more than two days prior to the regular chapter meeting assists in the preparation for the meeting. This time frame allows for chapter committees and individual officers and members to work on a project assigned to them during the chapter meeting. They can then report their progress to the chapter Executive Committee before the agenda is set for the next chapter business meeting.

“[The chapter Executive Committee] shall approve all expenditures [and] may recommend additions thereto.”

Typically, each chapter adopts an annual budget, which estimates annual income and sets limits on annual expenses. Each specific transaction is approved, in accordance with the budget adopted by the chapter, by the chapter Executive Committee. If an expense limit, or line item, is met, but more money is needed to complete the year, the Executive Committee may then recommend to the chapter that the line item be increased. For example, if a chapter sets its recruitment expense at $100.00 for the year, and the FEO spends $25.00 producing and copying recruitment flyers, the Executive Committee approves the reimbursement of the FEO.
in the amount of $25.00. If the same chapter spends $75.00 on recruitment in the first half of the year, the Executive Committee may recommend that the chapter increase the recruitment expense line item from $100.00 to $150.00 in anticipation of the expenses incurred for the second half of the year.

“[The chapter Executive Committee] shall perform such other duties as the President may direct.” Much chapter business time can be saved by delegating certain items directly to the chapter Executive Committee. One of the most common of these tasks is the management of the chapter’s attendance policy by hearing excuses for absence.

Limitations

“A quorum of the chapter Executive Committee, defined as half the number of committee members plus one, shall be required for transaction of business.”
Reports and Forms

The chapter President is responsible for signing and filing all paperwork with the national Fraternity on behalf of the chapter. In most cases a Faculty Advisor’s signature is required on these forms as well. A brief description of each report or form is included below. All forms can be found on the Sinfonia Resource Disc (SRD) which is mailed to chapters in the Fall care package from Lyrecrest.

Chapter Personnel Report
The chapter Personnel Report is sent to chapters in the Fall and Spring care packages. Instructions for completing the report are mailed with the report, included on page 8 of this guide, and available on the SRD. Personnel Reports are due to the National Headquarters on November 1 and March 1.

Chapter Operational Report
The Chapter Operational Report is sent to chapters in the Fall and Spring care packages. These reports provide the Fraternity with important information about each chapter. In addition, the reports provide the opportunity for chapters to make requests of the province and national officers and the national staff. Operational Reports are due to the National Headquarters on November 1 and March 1 and should be mailed with Personnel Reports.

Chapter Update Form
The Chapter Update Form is sent to chapters in the Fall and Spring care packages. This form is the official way for chapters to update key chapter and officer contact information. The Chapter Update Form is due to the National Headquarters by September 30 and January 31.

Chapter Citations
Chapter Citations are awards given by the Province Governor to chapters based on a report of seven key areas of chapter activity: Alumni Relations, Chapter Operations, Fraternal Tradition, Membership Development, Musical Achievement, Province Interaction, and Special Projects. Applications for Chapter Citations are due on May 1 and are sent directly to the Province Governor. It is wise to delegate each application to an appropriate officer or committee. They should fill out the form and collect the supporting documentation and submit it to the chapter President. The chapter President should verify the contents and supporting documentation of each application prior to signing it and forwarding it to the Province Governor. Each application also requires the signature of the Faculty Advisor.

Orpheus Award
The Orpheus Award application is available on the SRD. Chapters wishing to present an Orpheus Award must complete the application and forward it, along with payment for the award, to the Province Governor for approval. The application must be sent at least three weeks prior to the planned date for presentation of the award.

Honorary Membership
The Chapter Honorary Membership application is available on the SRD. Chapters wishing to confer an honorary membership must complete the application and forward it to the Province Governor for approval. The application must be sent to the Province Governor in time for him to send his written approval to the National Headquarters no less than two weeks prior to the initiation.

Sinfonia Educational Foundation Matching Grant Application
The Sinfonia Educational Foundation Matching Grant Application is available on the SRD. These grants are available on an annual basis for chapters taking on special projects.
Handling Complaints and Conflicts

As the leader of the chapter, the chapter President becomes the sounding board for complaints by members and often arbitrates disputes and conflicts among members or groups of members within a chapter. The following methods can serve as a roadmap for chapter Presidents who find themselves in these situations.

C-L-E-A-R Steps to Handling Complaints

1. C – Remain Calm:

Don’t react to the anger. Normally, our first reaction is to take hostility as a personal attack, adopting a defensive shield to insulate ourselves from the anger. This is the worst possible response. It often raises the person’s emotional level even further.

The first step in handling any complaint is to try to reduce the person’s anger and emotion so that the problem can be dealt with objectively. The best strategy is to maintain a calm, friendly attitude while asking the person to explain the problem. Maintaining composure during a complaint sends the message that the problem will be resolved without the need for conflict. It lowers the person’s defenses so that the issue can be discussed rationally.

2. L – Listen Effectively:

Effective listening skills and positive nonverbal expressions convey our understanding of the problem. By letting the person sound off, we accomplish two things: first, we allow the person to get rid of any remaining anger; and second, we hear all the details of the situation so that we are better able to understand what happened.

While listening, we must make sure we don’t get distracted or interrupt the guest. We must listen for both the details of the problem and person’s feelings about it.

3. E – Empathize:

After we have listened to the problem, we need to let the person know we understand the situation and their feelings about it. Empathy is demonstrated by letting the person know that we understand the impact of the problem. Empathy also further reduces the negative feelings the person is carrying. By agreeing with the person’s assessment of the situation, we are making ourselves allies rather than adversaries.

4. A – Apologize:

Apologize to let the person know that we are genuinely sorry for the trouble the problem has caused. A sincere apology is an absolute must in the complaint handling process. It is a gesture that people expect as a measure of respect and reconciliation.

We should also thank the person for bringing the problem to our attention. Without complaints, we might never be aware of problems that affect our operations. A complaint is also an indication of a desire to make the organization better.
5. R – Remedy the Situation:

Once the person is calm and assured that the problem will be addressed, we need to tell them how we can help. Depending on the problem and on our policies we may be able to provide the remedy personally, or we may need to refer the person to someone else. If we cannot help we must make sure that we find someone who can.

Problem Solving

One vital skill to successful negotiation and resolution of conflicts is the use of the problem solving process to negotiate a consensus decision. The steps in the process that follows are simply stated and easy to apply:

1. Clarifying the problem. What is the tangible issue? Where does each party stand on the issue?
2. Generating and evaluating a number of possible solutions. Often these two sub-steps should be done separately. First, all possible solutions should be raised in a brainstorming session. Each possible solution should simply be stated, without criticism, evaluation, or judgment from other parties. Following the completion of the brainstorming phase, each proposed solution should be evaluated.
3. Deciding together (not voting) on the best solution. The one solution that is most acceptable to all parties should be chosen.
4. Planning the implementation of the solution. How will the solution be carried out? By whom? By what deadline?
5. Planning for an evaluation of the solution after a specified period of time. This last step is essential because the first solution chosen is not always the best or most workable. If the first solution has flaws, the problem solving process should be begun again at Step 1.