



**DELTA TAU DELTA**

**Letters of Distinction.  
Lives of Excellence.**

**VOLUNTEER  
ADVISORY  
TEAM MANUAL**



## THE BRIDGE-BUILDER

by Will Allen Dromgoole

*An old man going a long highway  
Came at the evening, cold and gray,  
To a chasm vast and wide and steep,  
With waters rolling cold and deep.  
The old man crossed in the twilight dim –  
The sullen stream had no fears for him;  
But he turned when safe  
on the other side,  
And built a bridge to span the tide.  
“Old man,” said a fellow pilgrim near,  
“You are wasting your strength  
with building here.  
Your journey will end  
with the ending day,  
You never again will pass this way.  
You’ve crossed the chasm,  
deep and wide,  
Why build you this bridge at eventide?”  
The builder lifted his old gray head.  
“Good friend, in the path  
I have come,” he said,  
“There followeth after me today  
A youth whose feet must pass this way.  
The chasm that was as nought to me  
To that fair-haired youth  
may a pitfall be;  
He, too, must cross in  
the twilight dim –  
Good friend, I am building  
this bridge for him.”*

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**WELCOME**

# WELCOME

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**Welcome aboard as chapter advisor!** Whether your recruitment was made by a visit from a Division Vice President, a phone call from a chapter consultant, a plea from undergraduates, a favor to your retiring predecessor, or a feeling of personal obligation, you have stepped forward to advise an undergraduate chapter of Delta Tau Delta. Accepting this obligation, you have become a leader who will shape young men's lives and help secure the future existence of the chapter for generations of Delts to come.

The Fraternity applauds your commitment and recognizes the importance of your position. Several Fraternity education programs have been created to better serve you. We believe an effective and knowledgeable chapter advisor is crucial to the success of an undergraduate chapter.

We realize your time is precious and should not be wasted wading through pages of extensive manuals. You are in the trenches working with undergraduates on a daily basis and need a reference guide that gives you the information you need when you need it. With that thought in mind, notice that this guide places at your fingertips references to information you will be using frequently.

Due to good chapter advisors, weak chapters turned around, and strong chapters maintain their commitment to excellence. In that same vein, those chapters that have not experienced the influence of a strong chapter advisor continue to decline as leaders on their campus or languish in mediocrity.

**Your task is no small one!** You are called to be many things to many people. However, your reward will be the ever-present reminder of what Delta Tau Delta is all about, "the education of youth and inspiration of maturity." You have been charged to live up to these expectations, and it is our hope that this guide will provide information to help you assume your obligation and properly discharge your duties.

It would be impossible to capture in these pages every aspect of being a chapter advisor. Experience will be your best instructor. This manual is designed to get you started on the right foot as chapter advisor. As your knowledge of this vital position grows, we hope you will share your thoughts with us so we can pass them along to other advisors. The sharing of ideas is what created this manual, and represents the essence of fraternity itself. Thank you again for your service and commitment.



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**GETTING STARTED**

# GETTING STARTED

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As a member of an Alumni Advisory Team, you have been asked to walk a thin line between being a trusted friend of the brothers and maintaining an air of authority. You definitely should not become one of the boys; but members must feel comfortable around you so that you know what is happening in the chapter. This is not an easy task, but your greatest asset as an advisor will be your ability to maintain your closeness to the brothers, as well as outside objectivity.

A question that is constantly running through an advisor's mind is "How frequently should I visit the chapter?" Obviously, if you are never present, the brothers will fail to know or trust you. In that same vein, if you are present all the time for meals, committee meetings, late night bull sessions, and parties as well as chapter meetings, the brothers could begin to take you for granted causing you to lose your effectiveness. A delicate balance must be maintained. A seasoned Chapter/Colony Advisor can give you guidance on how often you should attend chapter/colony functions. A good rule of thumb is that you attend one chapter meeting and one Executive or Administrative Committee meeting per month. In fact, if you believe you could be more effective at the Executive meetings, you might try to attend most of them while missing a chapter meeting. It depends on the individual situation, but regardless, you should be in contact with your undergraduate counterpart weekly, either by phone or in person.

In reference to social events and parties; it is recommended that you attend as many as feasible but at least two per term. By doing this, you will have a good idea of your chapter's decorum and social graces, and at the same time get to know the brothers better on an informal basis. Do not, however, overdo it. Remember you are serving as a role model, and discretion in this area is very important.

Time and again you will serve as an instructor, facilitator and discussion leader, usually on a very informal basis. You are intricately involved in developing the learning process within your chapter. The old adage of "people tend to support what they help to create" is the foundation for motivating an undergraduate chapter. You will always be involved in planting the seeds of an idea. The chapter/colony will come up with the idea, and thinking it was their own, implement it for the good of the chapter/colony. Your objective as an advisor should be to think with undergraduates instead of telling them.

# GETTING STARTED

## THE THREE TAKE AWAYS

As an advisor, you should feel free to offer comments to the chapter concerning business being discussed, and should not feel that it is necessary to be asked for your opinion in order to participate. You should not become an “active participant” at each chapter/colony meeting but instead, should speak up only when the issue at hand warrants your mature and experienced opinion. Certainly, the chapter/colony meeting is the proper time to convey any formal statements or communications to the chapter/colony.

### Three quick take aways:

1. Attend one chapter meeting and one Executive or Administrative Committee meeting per month
2. The objective as an advisor should be to think with undergraduates instead of telling them
3. You should not become an “active participant” at each chapter/colony meeting but instead, should speak up only when the issue at hand warrants your mature and experienced opinion

# GETTING STARTED

## VOLUNTEER ADVISORY TEAM

The volunteer advisory team is designed to benefit the chapter and colony by providing an advisor for each chapter or colony officer and committee. Your volunteer team must meet and set dates to visit the chapter or colony. If this does not happen the team will ultimately fail the undergraduates. Building a master calendar with who will be attending on what dates will help ensure a consistent presence with the group. Below you will find an outline of the basic duties and responsibilities of a volunteer team.

### Basic Functions

- To carry out the duties and responsibilities assigned to the Chapter Advisor and the Assistant Chapter Advisor, by the Arch Chapter, as outlined in Article VIII Sections 10 and 11 of the *Constitution*
- Members of the Alumni Advisory Team will be appointed by the Division President. In addition, the Chapter Advisor and the Assistant Advisor will be confirmed by the Arch Chapter

### Common Duties and Responsibilities

- Certify that the actions of the chapter/colony are not in conflict with the *Constitution and Bylaws* of the Fraternity
- Ability to meet with undergraduate counterpart(s) periodically throughout the school year; the meetings will keep the advisor up to date on the chapter/colony's progress and allow the officers to seek advice and suggestions
- Ability to keep current on new Fraternity programs and the host institution's policies and procedures to effectively advise
- Must meet once per month in order to remain focused on the chapter/colony's goals and visions
- Ability to receive and reply to email and texts on a regular basis
- Ability to physically visit assigned chapter/colony as determined by the needs of the chapter/colony and its Chapter/Colony Advisor (Chapter Advisor to visit assigned chapter/colony at least two (2) times a month for meeting)
- Willingness to attend regional training sessions, a division conference or Karnea for initial advisor training session within 12 months of appointment
- Willingness and availability to attend division conference or Karnea with chapter/colony delegation every other year (Chapter/Colony Advisor each year)
- Willingness to serve in said role for a minimum of two years

# GETTING STARTED

## ALUMNI ADVISORY TEAM

### Chapter/Colony Advisor

- Serves as Chairman of the Alumni Advisory Team
- Organizes the education of the Alumni Advisory Team members
- Organizes meetings of the Alumni Advisory Team
- Monitors chapter/colony progress on university-sponsored events
- Meets with the chapter/colony president
- Periodically attends chapter/colony and executive board meetings
- Ensures the Alumni Advisory Team attends Online Conference Call Training
- Delivers the “Outer Mysteries” and the “Charge” at *Ritual*, completes the initiation report form, and sees that the initiation dues and all debts to the chapter/colony are paid **prior** to initiation
- Performs the “Installation of Officers” ceremony in the *Ritual*

### Assistant Advisor

- Meets with the Vice President(s) of the chapter/colony
- Advises the administrative committee, periodically attends the administrative committee meetings
- Helps administer new programs and policies
- Meets with the campus advisor to Fraternities twice per year for the purpose of establishing a working and cooperative relationship

### Financial Advisor

- Assists the chapter/colony treasurer with budget planning and completing reports
- Assists the chapter/colony treasurer and/or the financial committee with financial standards
- Serves as a member of the Finance Committee
- Serves as chief financial consultant to the chapter with such specific duties as certifying completion of monthly financial reports, annual budget and financial reviews
- Has the power to waive the 10 percent fine that is automatically levied on unpaid members' accounts if not paid by the tenth of the month in which the account was billed

# GETTING STARTED

## ALUMNI ADVISORY TEAM

### Recruitment Advisor

- Assists with the facilitation of recruitment workshops for chapter/colony members at the beginning of each semester
- Meets with the chapter/colony recruitment Chairman
- Knows and understands the IFC recruitment dates and rules
- Assists with the education and implementation of the 365-day-a-year recruitment philosophy

### Membership Education Advisor

- Creates productive and positive new member educational programming
- Meets with the chapter/colony new member education chairman
- Helps facilitate brotherhood building activities and other leadership programming
- Administers and certifies satisfactory completion of the Fraternity examination prior to initiation of each new member
- Contacts the parents of each new member, informing them of Delta Tau Delta, its purpose, annual costs, and the organization's strong stand against hazing and alcohol abuse
- Provides counsel to members and new members if and when necessary

### Risk Management Advisor

- Reviews and advises the chapter/colony's risk management policy each semester
- Meets with the chapter/colony Risk Management Chair
- Reviews all social events for risk concerns
- Encourages non-alcoholic programming

### Academic Advisor

- Assists with the development and maintenance of scholarship requirements for chapter/colony members
- Meets with the chapter/colony academic chairman
- Helps develop and implement scholarship programming
- Meets at least once with the entire new member class during new member period to discuss the importance of good scholarship as a member of Delta Tau Delta
- Assists with the development of external and internal tutorial assistance for members
- Reviews and monitors the GPAs of chapter/colony members

# GETTING STARTED

## ALUMNI ADVISORY TEAM

### Alumni Advisor

- Assists the chapter/colony alumni chairman with the alumni newsletter
- Helps the chapter/colony keep track of alumni interests, alumni addresses, and any other programs relating to alumni involvement
- Assists the chapter/colony alumni chairman with any alumni events
- Recruits additional alumni to assist with the chapter/colony
- Networks with other Delt Advisors in the area and with other advisors on campus to attack situations of common concern and to glean new ideas that have worked elsewhere

### Leadership Advisor

- Supervises day-to-day advising of the chapter/colony officers and members
- Assists with the facilitation of officer transitions and chapter/colony retreats
- Holds an officers' retreat with newly elected officers as soon after elections as feasible to record progress and chart and set goals for the coming year
- Assists with the development and maintenance of leadership education for the chapter/colony

### Road Advisor

- Assists the chapter/colony members with life skills, such as resume writing, interviewing skills, etiquette and manners, graduate school applications, financial planning, health and wellness, insurance matters, community involvement beyond graduation, and fraternity involvement as an alumnus.

### Community Service Advisor

- Assists the chapter/colony members by supporting community service initiatives
- Assists the chapter/colony philanthropy chairman in the development and sustainment of long-term community service initiatives
- Develops relationships with organizations within the community that are in line with the Fraternity's values and mission statement

# GETTING STARTED

## ALUMNI ADVISORY TEAM

### Ritual Advisor

- Composes a *Ritual* education program in conjunction with the chapter/colony Guide and vice president
- Serves as the primary back up to the Chapter/Colony Advisor in his *Ritual* duties
- Assists the chapter/colony in mastering all *Ritual* Ceremonies
- Inspects and validates that *Ritual* equipment is maintained and within specifications

### House and Grounds Advisor

- Serve as a liaison between the undergraduate chapter/colony and the house corporation
- Designs with the undergraduates and House Corporation the operating conditions for the facility. What maintenance is the Corporation responsible for? What maintenance is the Chapter responsible for?
- Develops, in cooperation with the undergraduates, a housing contract between each member and the Corporation
- Develops, in cooperation with the undergraduates, a daily, weekly, and monthly cleaning schedule for the shelter

# GETTING STARTED

## VOLUNTEER RECRUITMENT

### Volunteer Advisory Team

Volunteer selection criteria for members of the Volunteer Advisory Team (exception chapter/colony advisor) includes (must statements indicated with a\*):

1. Skill set of volunteer matches need(s) of the chapter/colony.\*
2. If alumnus of Delta Tau Delta, he is a member in good standing.\* If not an alumnus, candidate meets first criteria and has qualities that make him/her preferred mentor to the chapter/colony.
3. Qualifications of the candidate are quantified.
4. Ability to physically visit assigned chapter/colony as determined by the needs of the chapter/colony and its chapter/colony advisor.\*
5. Willingness and availability to attend monthly webinar training/best practices calls.\*
6. Ability to receive and reply to email, phone calls and texts on a regular basis.\*
7. Willingness to attend at least the Division conference or Karnea for initial advisor training session within 12 months of appointment.\*
8. Willingness to serve in said role for a minimum of two years.

*Remember a member of the Volunteer Advisory Team does not have to be a Deft.*

# GETTING STARTED

## ALUMNI RECRUITMENT

### Chapter/Colony Advisor

Alumni volunteer selection criteria for chapter/colony advisor includes (must statements marked\*):

1. Alumnus in good standing or eligible to be initiated (never been initiated into a Greek-letter social fraternity). Article IV, Section 4 of the *Constitution*.\*
2. Served as a committee chairman and/or executive officer as an undergraduate.
3. Ability to physically visit assigned chapter/colony at least two (2) times per month for meeting.\*
4. Live within a 45 minute drive of the campus or has the ability to meet criterion three.
5. Ensure that each chapter meeting has a member of the Alumni Advisory Team present.\*
6. Willingness and availability to attend chapter new member and Initiation ceremonies.\*
7. Willingness and availability to attend Division Conference or Karnea with chapter/colony delegation every other year.\*
8. The candidate should be at least four (4) years removed from his undergraduate experience.
9. Ability to receive and reply to email on a regular basis.\*
10. Willingness to attend at least the Division/Regional conference or Karnea for initial advisor training session within 12 months of appointment.\*
11. Serve as chairman of the Alumni Advisory Team.\*
12. Willingness to serve in said role for a minimum of two years.



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**THE BASICS**

# THE BASICS

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## MEMBERSHIP RECRUITMENT

Recruitment is like sales. The best chapters generate a pipeline of potential new members, organize the men into a trackable names list, and systematically contact as many as possible. This is a brief primer on the first few steps a chapter can take to generate more leads, close more bids and become a recognized leader on campus.

### 1. Develop a Vision for the Future

What will the chapter have achieved five years from now? One year from now? What needs to be done today to achieve those goals? Oversee a visioning exercise with the chapter leadership and decide on a long-term vision for the chapter. Future recruitment efforts will revolve around this vision.

### 2. Develop a Tracking Mechanism

Track recruits using a spreadsheet with columns for first and last name, year in school, phone number, email, chapter contact and notes. Also include a sortable column for status within the recruitment process (ie 1=Accepted Bid, 2=Outstanding Bid, 3=Ready for a Bid, 4=Have met but need more contact, etc.) An electronic version of a standardized tracking sheet is available from the Central Office. Email [expansion@delts.net](mailto:expansion@delts.net) for a copy.

### 3. Measurable Eligibility Standards

Creating a set of measurable standards ensures that we are taking the type of men who will help us achieve our long-term goals. The chapter may use the five obligations of a Delt as a framework for these standards. Urge the chapter to create a measurable minimum standard for membership with regards toward recruitment, financial integrity, involvement, conduct and academic achievement. Post the new standards in a conspicuous location, and use them when discussing membership in the Fraternity.

# THE BASICS

## MEMBERSHIP RECRUITMENT

### 4. Develop The Pipeline

Perform this activity with the entire chapter. Your goal is to grow the names list as quickly as possible.

Give a prize for the man who can list the most names of unaffiliated undergraduate males. Hand out sheets of paper and tell the men they have 10 minutes to write down as many names as they can. They get triple points if they write down the man's phone number as well. Encourage them to think of men who (are):

- Service minded
- Successful
- In a club or organization
- Campus leaders
- Traveled abroad
- Sit nearby in class
- International students
- Transfer students
- Incoming freshmen
- Facebook friends
- Cell phone contacts
- Live nearby
- Spiritually minded
- Athletic

Remember to have each member include his own name at the top of his list so he may be used as a reference when contacting these men.

Immediately add all names and contact info to the tracking sheet. Additional names may be added through referrals from campus administrators, professors, sorority members and alumni. Unless you have contact information for every unaffiliated undergraduate male, you have not finished growing the names list.

# THE BASICS

## MEMBERSHIP RECRUITMENT

### 5. Be Yourself

What event or activity can your chapter own? Take the time with the chapter to identify three things your chapter can do to become the recognized campus leader. What are the brothers passionate about? These things might be community service, intramurals, student government, arts and culture, outdoor activities or virtually any other activities available for students on campus. Identify three things and decide on one as a chapter.

Strategically place members of the chapter in organizations that share this focus. This will open new avenues of recruitment and expose members of those organizations to the Fraternity.

With regard to recruitment events, remember this—like attracts like. Recruitment events centered around alcohol will attract future alcoholics. Events centered around service will attract service minded individuals. The best chapters integrate recruitment into everything they do. There is no need for specialized recruitment events in these chapters, since the chapter routinely invites potential new members to regular chapter activities. This is the best way to introduce men to the Fraternity, as it presents a true example of what membership will be like.

Through this process of getting to know potential new members, be sure to paint a clear picture of how the chapter works currently, what the chapter wishes to achieve in the future, and how that young man might play a role in that future. It is important to let the man know about the chapter culture and obligations of membership.

# THE BASICS

## MEMBERSHIP RECRUITMENT

### 6. Close The Deal

Offering a bid is a delicate process and the chapter advisor should be involved if at all possible. Essentially the chapter is offering this man an invitation to become a brother for life. The solemnity of the occasion must be apparent from the very beginning of the discussion.

Set the stage by asking to meet in a quiet place free from distractions. Ask the man if he has any questions regarding the fraternity. Then, ask him about his feelings on the system of values.

If the chapter has recruited him properly, it should be apparent that Delta Tau Delta is a values-based organization, and that you expect him to hold those same underlying principals in high regard. Go over the values once again. Explain how important those values are to the fraternity's existence. Relate how those values are personally important to you, and how being a member of the Fraternity has positively affected your life. Ask once again if he has any questions, and then ask him if he would accept an invitation to join if the Fraternity presented him with one. If he says yes, extend the offer. If he needs time, ask again if he has any questions that he feels haven't been answered.

It is perfectly alright for a man to take his time with a decision like this. He is pledging his faith, his veracity, and his sacred honor to a group of fellow students, and one should not enter into a brotherhood like that lightly. Explain that you would like to offer him an invitation to become a brother of Delta Tau Delta. Then ask "What do you think?" and wait for his response.

Not everyone is cut out for membership, but by the time you offer a bid, you should be fairly certain of the candidate's response. Remember to be sure to review the chapter's eligibility standards before deciding to extend a bid, and dig deep regarding the man's feelings on Delt values. We are not offering tickets to a four year party. We are offering an invitation to become a brother for life.

# THE BASICS

## WHERE TO LOOK FOR HELP

1. Leadership Conferences
2. Working with your Chapter Consultant
3. Our Website
4. Central Office Staff
5. Contact Division Presidents and Vice Presidents



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**RETREATS**

# RETREATS

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Chapter retreats are a necessity for every chapter. They are ideal for getting away from daily distractions to allow members to focus on the Fraternity rather than school, athletics or social events. In fact, retreats are one of the most effective methods for renewing members' commitment to and enthusiasm for the Fraternity.

**What exactly is a chapter retreat?** A chapter retreat is nothing more than a weekend away from the shelter. Some retreats require all members to attend; whereas others may only require a specific group of people with a very sharp focus. The retreat's subject matter, therefore, will determine who attends. Whatever the reason is for having a retreat, make sure it is well-planned and interesting for all members. You want members to return to school feeling refreshed and enlightened.

## Planning a Retreat

Planning a retreat requires innovative ideas and a strong commitment. Besides deciding on the agenda for the weekend, you need to determine who should attend and where and when to hold the event. Deciding who to invite should be fairly simple. It depends on the focus of the retreat and financial costs. Although many retreats may only involve certain members, you should have one retreat for the entire chapter.

The best time to have a retreat is at the beginning of the new school year or at the beginning of a new officer's administration. Having retreats during these periods can capitalize on the enthusiasm the brothers bring back to school or from being elected to office. Select your site carefully. A bad site can ruin a well-planned retreat. You should choose a location for the retreat that stimulates creative thinking. The place should be far enough away from campus to avoid distractions and large enough to accommodate everyone. No distractions, comfort, a focused agenda and an affordable location all contribute to the success of your retreat.

# RETREATS

## WHY

### Retreats are Essential to Goal Setting

Every chapter president starts off his term with ideas and goals on which he campaigned during elections. However, all too often many of these goals are never realized and the chapter is more or less in the same shape one year later. The president does not accomplish these goals, not because he is a typical politician, but rather, because he simply does not know the correct way.

In order to improve the chapter and the officers, he must know where they want to be in one year, six months or one week and then work to get there. The chapter must have goals for itself, and the president and chapter officers must know the chapter's goals in order to lead the chapter toward obtaining them.

Goals must be obtainable. When a chapter only has 25 members on a campus with 50 fraternities, instead of shooting for a Hugh Shields Award or best on campus, a realistic goal would be to increase membership. By having a retreat, the chapter can step back, take a look at the present situation, and set realistic objectives for itself. Often a chapter will work to be best on campus, obtain its goals, and then sit back on its status. Once a chapter is good, it must fight to remain good. Complacency and stagnation creep into outstanding chapters, and before they know it, they are fighting to get where they once were. A retreat helps the chapter keep up with the times and constantly work to improve itself. This constant evaluation marks the difference between a good chapter and an outstanding one.

To motivate brothers, men must feel they have had input into the goals they are working toward. Get them involved in planning chapter goals. The more people that help plan the chapter's objectives, the more people the officers will have to help obtain the goals. A retreat can change the concept of goals being dictated by the officers or President to the goals of the chapter membership.

A chapter retreat sets goals for the chapter and helps the chapter retain its present status by avoiding stagnation and complacency. It also allows the officers to gain support from a broader base of the chapter membership and helps motivate the brothers toward obtaining the goals.

# RETREATS

## WHO

### Who Should Attend

The attendance at a retreat will depend on the size of the chapter and the cost factor. Retreats can range in attendance from the entire chapter, to just the officers and committee chairmen, to a new member class retreat. Generally, the more input into the retreat, the more brothers will support it and more varied opinions will be presented.

When the entire chapter attends a retreat, everyone is involved with the goal setting, and therefore, everyone will theoretically work toward accomplishing those goals. The challenge is large chapters. It is difficult to coordinate; keeping everyone busy all the time takes much planning and forethought.

New members or new member officers attending a retreat can add fresh insight to problems the chapter faces and can involve the new members in the chapter. The chapter will be able to note those new members who contribute ideas to improving the chapter and who may be potential leaders. Take advantage of their unbiased viewpoint before they get into standard chapter thinking.

Each chapter will need to determine who will contribute the most to a chapter retreat, whether everyone should attend, just the officers and committee chairmen, or the new member officers or entire new member class.

# RETREATS

## WHEN

### When to Hold the Retreat

Since a retreat or goal-setting session is the beginning of improvement, it should coincide with another beginning, i.e., the start of school in the fall or the beginning of a new officer's administration.

Retreats held at the beginning of the school year capitalize on the enthusiasm brothers bring back to school with them. This enthusiastic attitude gets everyone involved early and sets the chapter off on the right foot for the entire year. Chapter officers in the middle of their term understand the problems facing the chapter, and working with a larger group can help them tackle those problems. Keeping these goals in mind throughout the year provides continuity for new officers elected toward the middle of the year.

Many officers, when elected, feel there are certain things that should be changed. A retreat within a few weeks after elections gives the new administration a chance to lead the chapter in the direction it feels it should take, and builds support for the new administration. Everyone is able to rally around the new officers, giving them the authority to lead the chapter and the support necessary to get things done, as well as cutting unnecessary ties with the old administration.

**The beginning of the school year, or shortly after officer elections, offers the most convenient time for the chapter to meet and retreat.**

# RETREATS

## WHERE

### Where to Hold the Retreat

To be successful, you will want to hold your retreat well away from the distractions of the campus and the Shelter. You want an atmosphere that stimulates new thinking and creativity. On campus or in the Shelter, you have to contend with telephones, television, homework, and other problems interrupting your program. To avoid these problems, select your site carefully, while looking for the proper size and facilities to provide comfortable surroundings.

A good rule of thumb is to pick a site at least 20 miles or 30 minutes driving time from the campus. This gives you a complete change of scenery and hopefully gets you out of town and into the suburbs or the country. It is perfectly alright to go farther away as long as travel doesn't become expensive or time-consuming.

You can pick the home of an alumnus or the home of one of the brothers. A cabin by a lake or in a state park is preferable as well as a place near a beach or ski resort. You want to look for a balance between recreational opportunities and a quiet, serious atmosphere where work can get done. Getting the work done is the first priority.

#### **Wherever the retreat is held, you should remember these factors:**

1. cost
2. accessibility to main roads
3. distance from the campus
4. the setting for the planning part of the retreat

With a little bit of imagination and a quick survey of possible sites nearby, you can easily come up with a place that will fit your needs and help make your retreat a success.

# RETREATS

## SAMPLE RETREAT AGENDAS

### Sample Retreat Agenda No. 1: Addressing Specific Problem Areas

The retreat should begin with a short introduction by the president pointing to areas he perceives as challenges. Any last minute questions should be answered at this time. The group will want to break into committees of four to five brothers and discuss each area. The makeup of each committee should be carefully planned to facilitate discussion; committee chairmen should not discuss their particular area.

Often a committee chairman will stifle discussion in his area because he either has strong views as to what should be done, or he feels he has the most expertise. Keep in mind that the retreat should come up with new ideas and approaches to problems; do not be content to do things the way they have always been done.

Several committees will be working at the same time. The chapter may decide to have several of these discussions, perhaps lasting an hour per area. Each session will cover a different area with different people on the committee.

#### Sample Itinerary:

12:00	Introductory remarks by president
12:30 p.m.	First Session
	a. Recruitment
	b. Scholarship
	c. Alumni Relations
1:30 p.m.	Break
1:45 p.m.	Second Session
	a. New Member Education
	b. Committee Structure
	c. Public Relations
2:45 p.m.	Break
3:00 p.m.	Third Session
	a. Social
	b. Morale
	c. Finances
4:00 p.m.	Break
4:15 p.m.	Final Session
	a. Discuss each area; report by Committee Chairmen
	b. Approval of final action program report.
	c. Each committee should discuss the following:

*What it perceives to be the problems in its area.*

*What goals should be accomplished in a specified time span?*

*How the chapter can accomplish the goals.*

# RETREATS

## SAMPLE RETREAT AGENDAS

### Sample Retreat Agenda No.1(Cont.)

Minutes should be kept at each committee meeting. Instead of keeping the same people on each committee, switching personnel will stimulate new thought.

Once all the committees have met, a final meeting should be held at the end to briefly discuss each report. At that time, all reports should be finalized and prepared for typing when the group returns to the chapter. The reports should then be presented at the next chapter meeting and kept for future reference.

After the work is done, some sort of recreation at the end such as a campfire, cookout, movies, swimming, etc., should follow to let the brothers enjoy each other's company.

Depending on the size of the chapter, the retreat may want to concentrate on only a few areas of chapter operation which are presently the weakest. If you are part of a smaller group, rather than break into "committees" you may want to meet as a group to discuss each agenda item. The length of the retreat will depend on the location and the amount of time brothers can be away from school. There are many other versions of the above basic theme for a retreat, but most of these essential items are included in all successful ones: an agenda, committee-type discussion, goal-setting, solutions, a timetable to implement the solutions, and a typed report.

# RETREATS

## SAMPLE RETREAT AGENDAS

### Sample Retreat Agenda No. 2: *Goal Setting and Morale Building*

Another option for retreats is to focus on broad goals as a chapter and then spend some time building morale as a group. There are several activities enclosed in this guide to help you reach this goal.

This retreat need not take all weekend to be effective. Saturday or Sunday afternoon is an ideal time to get away and discuss chapter goals. The best time of the year is the beginning of the fall semester when the officers are new and want some direction on what to accomplish during their terms. A recommended agenda would be as follows:

#### Sample Itinerary:

- 11:45 p.m. Arrive
- 12:00 p.m. Guest Speaker:  
For example, get your campus greek advisor to say a few words to the chapter
- 12:30 p.m. Goal Setting Activity (described in this section)
- 2:30 p.m. Brother Building Activity (described in this section)
- 4:30 p.m. Pizza and brotherhood activities  
Softball, Football, etc.

# RETREATS

## RETREAT ACTIVITIES

### Retreat Activity: Goal Setting

This activity is fundamental and can be done at the beginning of each term. It follows the rule that “people support what they help create” because it gives chapter members the opportunity to be involved in the goal-setting process. They will then be much more supportive of these goals when they are put into action by the committee chairmen and officers.

#### **The Goal:**

To set the goals of the chapter for the upcoming term and to build support for these goals.

#### **Time Required:**

Between one and a half and two hours.

#### **The Process:**

1. Have the chapter fill out the following questionnaire. Encourage them to take ample time to think about the chapter and what direction they would like it to take and remind them not to sign their names to the paper.
2. When completed, have the chapter put the papers in a single pile. Then, mix these up and randomly hand them out to the members.
3. Break the chapter into small groups and have each group read the responses to each other. Have them discuss what they feel the strengths and weaknesses of the chapter are and create a list to present to the chapter.
4. Get the chapter back together in a large group and have the groups present their lists of strengths and weaknesses.
5. In the large group, have the chapter create a list of goals they want to achieve in the upcoming semester. Write them down on a chalkboard or a large piece of butcher paper so the group can see them easily. There should be some good discussion on these. Don't write a goal down until it is agreed upon by a consensus of the members. Keep in mind the three rules a good goal must meet:
  - a. It must be specific
  - b. It must be quantifiable
  - c. It must be attainable with a degree of difficulty

# RETREATS

## RETREAT ACTIVITIES

### Retreat Activity: Goal Setting (Cont.)

This is the end of this process at the retreat. From the retreat, take this list of goals to the next executive committee meeting and have them approved. Have the recording secretary type the goals, ensure that each member has a copy, and post copies around the shelter or meeting space so that they are constantly in view of the chapter.

This list of goals should be referred to constantly through the year. They should be reviewed by the executive committee weekly, and should be taken to an administrative committee retreat to discuss their implementation.

#### An Additional Idea:

Once these goals have been identified, break the chapter down again into small groups to examine each goal and brainstorm an action plan for how to achieve it. If the goal is related to a specific committee chairman or officer, ensure that he is in that group to listen to the suggestions.

Each group should formulate a checklist of things to be done to ensure the goal is accomplished. This may be done at the chapter retreat or at the administrative committee retreat.

#### Chapter Goal Setting Questionnaire:

Every once in a while, we all lose our way. We get off the path we thought we were on and are unsure of where to go next. The best thing to do is to consult our own personal road map, figure out where we are right now, and where we need to be. This is what we will do today as a chapter to ensure that we are on the path that we all want to travel on. Spend a few minutes on your own and write down your response to the following questions. Take your time and be sure your answers are in-depth (write on the back if necessary).

- What words would you use to describe the chapter?
- What words would you like to use to describe the chapter?
- What are the strengths of the chapter?
- What needs to be improved in the chapter?
- How does the rest of the campus perceive the chapter?
- What do you perceive as a competitive edge?

# RETREATS

## RETREAT ACTIVITIES

### Retreat Activity: Throw Me A Line

This activity will build the bonds of brotherhood by focusing on the values of honesty and trust in the chapter. Also, it develops self-knowledge about how one is perceived by the other members of the chapter. This activity offers each brother the chance to learn about himself as well as the other members of the group. Not only will it make for a closer brotherhood, but the self-knowledge gained from it can contribute to the leadership development of each brother.

#### Materials Needed:

A ball of yarn (or any object you can throw, i.e. tennis ball, softball, baseball)

#### Time Required:

Anywhere from 45 minutes to an hour and a half, depending on the size of the group.

#### Process:

1. Have the chapter break into groups of equal numbers (all of different ages and new member classes). Select a leader from each group to facilitate the activity. Give that leader a copy of this sheet and have them break off into areas where the groups will not disturb each other.
2. Have the groups sit comfortably in a full circle and explain that they will be doing an activity designed to build trust and brotherhood and to gain self-knowledge. If they take it seriously, it can have a positive impact on chapter unity.
3. Instruct them that only one person may speak at a time and that person must have the ball. The activity begins by having the first person with the ball throw it to another member of the group and give him some positive feedback. A brief explanation of that person's positive quality is all it takes. Keep throwing the ball around the circle until everyone has received at least one bit of feedback. If you are using a ball of yarn, it will add to the activity if you unravel it as you throw it around, signifying the bonds of brotherhood.
4. The second round is the difficult part of the activity. Explain that they will be moving on to a different stage of the activity in which the group will still toss the ball, but give constructive criticism to each other. Remind them to focus on making positive suggestions for change and to think of it as an opportunity to help each other. Allow it to go around until everyone has given and received some constructive criticism.
5. Wrap up with one more round of positive feedback, and then open it up for discussion.

# RETREATS

## RETREAT ACTIVITIES

### Retreat Activity: Brother Building

How well do you know every member of the chapter? This is an activity designed to promote interaction between all members and new members in the chapter; freshmen and seniors, engineers and English majors, athletes and musicians. Sometimes it is easy to fall into a certain clique or circle of friends and forget about brothers with whom you may not have as much in common. Brother Building can overcome this. It will build a strong sense of chapter unity, promote self-knowledge, and allow each group member to know the other members very well.

#### Time Required:

This activity can run anywhere from 90 minutes to three hours.

#### Set Up:

Break the chapter into groups no larger than 12 to 14 members and select one facilitator for each group. Choose group leaders who are well-respected in the chapter. Try to even out the groups so that they are representative of various groups within the chapter.

Have the group sit in a circle with everyone on the same level (i.e., either everyone in chairs or everyone on the floor). It is important that everyone can see everyone else. Have the facilitators explain that the groups will be having a structured conversation that will build unity and improve relations within the chapter.

#### How it Works:

The group leader will ask a question and whoever wants to start with an answer can start and say what he wants. The person to his left answers next and the pattern continues this way until everyone has had the chance to answer the question. If a person needs time to think of an answer, he can simply say pass and the group leader will go on to the next person. After everyone has answered, have the group leader go back and ask each person who passed if they want to answer. They can simply say pass a second time. Do not pressure anyone to answer any question.

# RETREATS

## RETREAT ACTIVITIES

### Retreat Activity: Brother Building (Cont.)

#### Suggestions for the Facilitator:

- Ask anyone who speaks softly or mumbles to speak up. It is important that the group hear each answer.
- As you ask questions, maintain eye contact with whomever is answering.
- Watch the clock. Ample time should be allowed for this activity, but it is easy to lose track of time. About 20 minutes before the activity is scheduled to end, be sure to skip to the wrap-up questions.
- Make sure you understand this activity thoroughly. Ask questions if you are unsure.
- Identify the questions you want to ask beforehand.
- Don't stay on one category of questions for too long. In general, you will want to progress from lightweight to heavyweight, but if the mood is too serious, you may want to lighten it up.

#### Points to be Emphasized to the Group:

- Only one person may speak at a time.
- No comments on others' answers. This is not a debate and if the conversation becomes unstructured, it will not work.
- If participants don't care to answer, they may pass.
- Questions are not to be explained. Each person should react to what they hear. (If a person does not understand a question, repeat it with no further explanation)

# RETREATS

## RETREAT ACTIVITIES

### Retreat Activity: Brother Building (Cont.)

#### Lightweight Questions:

- What was your first impression of Delta Tau Delta?
- Describe your feelings about your hometown
- What's your favorite food?
- What leisure time activity do you enjoy the most?
- What do you most often look forward to?
- If a movie were made about you, who would play you?
- What is your most embarrassing moment?
- Who is the luckiest man alive?
- What kind of car are you?
- What is the best compliment you have ever received?
- If you could not live in the United States or Canada, where would you live?
- What's your favorite TV show/movie/musician?
- What's the last book you read?
- If you could be any animal other than man, what would you choose?
- What is your favorite time of year?
- If each day had six more hours, how would you spend them?
- What would you like to receive on your next birthday?
- What's your favorite holiday?
- What do you most often dread?
- In the future, what would you like to own?
- Select a word that describes the chapter.

#### Middleweight Questions:

- What do you like/dislike the most about the Fraternity?
- What is the greatest problem in the country right now?
- Who's your role model?
- What are you looking for in the perfect mate?
- Describe your feelings about your family.
- What talent would you like to have?
- What event in the last three months stands out in your mind the most?
- Select a word that describes your life at this moment.
- If you could grow in only one area, in which of the four would it be: Intellectually, emotionally, spiritually or physically?
- If you could have a committee of three people (living or dead) help you make decisions, who would you choose?
- What do you want to be doing ten years from now?
- Who in the chapter would you like to be more like?
- If you were shipwrecked on a desert island, what one item would you take (excluding a TV, radio or a friend)?
- Describe your feelings about your new member class.
- What is the greatest value that guides your life?
- What embarrasses you the most?
- What one person (not a relative or a chapter brother) could you truly call a brother?
- From what do you derive the most hope?
- When do you feel most productive?
- How would your parents describe you?
- When was the last time you lost your temper?
- What is one thing you could do to improve your life?
- What day are you looking forward to the most?
- Describe your best phone call ever.

# RETREATS

## RETREAT ACTIVITIES

### Retreat Activity: Brother Building (Cont.)

#### Heavyweight Questions:

- What does the Fraternity mean to you?
- What is your biggest worry?
- When did your life last take a major shift?
- How would your best friend describe you?
- For what would you lay down your life?
- What person would you follow the farthest?
- What decisions are the hardest for you to make?
- What is one day that you would like to live over?
- What's one problem you have a hard time facing?
- What are the top five priorities in your life?
- What is your most significant moment in the Fraternity so far?
- When do you feel most alive?
- What is your greatest aspiration in life?
- What is something that most people misunderstand about you?
- When you think of a tragedy, what do you think of?
- What is your greatest fear?
- What is your greatest hope?
- What do you think people like in you the most and least?
- What person has most influenced your life?
- What is the kindest/cruellest thing ever done to you?
- What is the last thing you would give up?
- What's the biggest mistake you've ever made?
- Describe your life 20 years from now.

#### Wrap-up/Synthesis

- Which person did you learn the most about?
- Which person surprised you the most?
- Which person had the deepest insight?
- What is one gift you would like to give to the chapter?
- I would just like to say...  
(leave the last question completely open-ended.)



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**FINANCES**

# FINANCES

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Sound financial management is a prerequisite for a quality chapter operation. As a member of the chapter Finance Committee, you will have an opportunity to provide the business leadership and continuity necessary for chapter leaders to wisely manage their financial resources. The functions of the Finance Committee are specified in the treasurer's job description section at: <http://www.delts.org/media/treasurer.pdf>.

**The chapter Finance Committee should meet a minimum of twice each month.**

You can be especially helpful at both of these meetings by assisting the treasurer in reviewing the collection of unpaid members' accounts. The Committee should review all requests for late payment of accounts due the chapter and make recommendations to you.

Remember, only the chapter advisor may waive the 10 percent fine imposed by the Fraternity's *Constitution and Bylaws* on accounts due to the chapter. This is one of the most important duties as chapter advisor. If you take the unyielding position that unpaid members' accounts will be held at a minimum, you will find yourself spending less time in this area. As chapter advisor, you should make sure the chapter's financial tradition breeds sound fiscal management. (For more information on collection of overdue accounts, see Article VIII, Section 2, of the Fraternity *Bylaws*.)

# FINANCE

## FINANCE REPORTS

### Monthly Financial Reports

Each month the chapter treasurer is required to prepare a report showing, in considerable detail, the financial condition of the chapter for the previous month through QuickBooks Online. The monthly financial report (MFR) is due by the 15th of each month. Late submission will result in a chapter fine.

For instructions on how to correctly complete the MFR you may follow this link:

[http://www.delts.org/media/DTD\\_Monthly\\_Reporting.xls](http://www.delts.org/media/DTD_Monthly_Reporting.xls)

A video tutorial, which will review the entire QuickBooks online system including financial reports, is available at:

<https://delts.webex.com/delts/ldr.php?AT=pb&SP=MC&r10=84802507&rKey=03f934212f3806a1>

**At the first Finance Committee meeting of each month, this report should be reviewed and signed by each member.**

For this reason, the first Finance Committee meeting of each month should take place on or about the tenth of the month (the date when all house bills are to be paid). The report has value only if it is prepared accurately and on time. As chapter advisor, you should require the treasurer keep the books and reports current. You should insist the report be reviewed with you (if you cannot attend the Finance Committee meeting in which it is reviewed). In addition, you should make sure you know how to read the report and understand the meaning of the various spreadsheets.

# FINANCE

## BUDGET

### The Budget: The Chapter Financial Road Map

During April and early May, the Finance Committee should draft the preliminary budget for the next fiscal year. This will be the financial road map for the next year and one of the most important jobs the Committee will have during the year.

The preliminary draft of the chapter budget is due to the Central Office by April of each year.

As chapter advisor, you will have an opportunity to play an important role in developing the chapter budget. While the chapter treasurer, along with undergraduate members of the Finance Committee, should do the actual work in preparing the budget, your experience and judgment will be of great value.

Not only can you help in reaching wise decisions as to charges and expenditures, but you can provide the benefit of experience on budgeting techniques and calculations gained in previous years' work. You should be in a better position than the treasurer to know which expenses are fixed and which are variable. If you can help the treasurer determine the expenses which are dependent on membership, you will be in a better position to guide the chapter in setting minimal recruitment requirements based on budget needs.

# FINANCE

## BUDGET

### Overview of Budget Year

Prior to the close of a college year, the chapter finance committee prepares the budget for the next fiscal year. This is the preliminary draft the chapter submits to the Central Office. After the Central Office examines the budget, it is returned to the chapter with suggestions for improvement.

When the new treasurer assumes office on Feb. 1, he is not immediately concerned with the preparation of a budget. He is, however, charged with the important duty of becoming conversant with the budget in use. He should then compare it with current operations to determine whether the financial trend is favorable or unfavorable. The new treasurer should consult the previous finance committee, including the retiring treasurer, with questions on the budget that are not entirely clear to him.

The trend of the chapter's financial condition should be favorable before February, and if it is not, a retrenchment policy to offset losses already accrued should be inaugurated promptly. A retrenchment policy, which takes the form of a curtailment of expense to bring expense within income, is generally preferable to increasing charges to members to provide the necessary income to balance the budget. In most instances a budget will include certain items that can be curtailed or even completely eliminated without hampering the normal operation of the chapter.

If the finance committee finds, however, that expenses cannot be curtailed enough to reverse an unfavorable trend, then additional income must be provided to balance the budget. Many chapters have discovered at midyear that their budgets were unrealistic and they have not increased house bills sufficiently to keep pace with rising costs. In such instances, the finance committee should be quick to admit its error and to put charges to members in line with current economic conditions.

**The finance committee must keep one principle in mind: A deficit cannot be carried over to the next year.**

The *Constitution and Bylaws* wisely provide that any deficit incurred during the year must be met by special assessment and charged equally among all chapter members before the close of the academic year.

The new treasurer and the finance committee who have had to levy a deficit assessment should profit enough by the experience to resolve that their next budget is tempered with realism. Too often finance committees indulge in wishful thinking by establishing house bills they know will have to be increased later in the year. This sort of planning is both unsound and dangerous.

# FINANCE

## BUDGETING AIDS

### Membership

When estimating membership, you must be sure to specify how many active brothers and new members you will have for the entire year, as well as broken down for each semester. For example, if billing for active dues for the year, you may have several categories.

- + 30 men at \$100 per month for 9 months. All members who will be in school all year.
- + 8 men at \$100 per month for 4 months. Seniors who will graduate in December.
- + 18 men at \$75 per month for 4 months. New initiates in January active for the spring.

### Operating Gain

The question is often raised: How much of a gain in operations should a good budget anticipate?

The purpose of budgeting for a gain is to provide a margin of safety and increase the chapter's working capital. If a rule of thumb is needed, it is suggested the finance committee allow approximately 5 percent to 7 percent of the total budgeted income to accrue as surplus. Thus, if the budgeted income is \$30,000, the chapter might safely budget an operating gain of \$1,500.

To budget no gain is the most dangerous form of optimism. Nine out of 10 chapters that have experimented with this procedure have found it necessary to make substantial revisions in the budget before the end of the school year.

Further, even though we are a not-for-profit organization, we can still make money in our chapters. The gain that we make should then be placed in savings or investments for future purchases or chapter improvements.

# FINANCE

## BUDGETING AIDS

### Conference/Karneia Expenses

It is common practice in most chapters to make some budget allowance for official delegates to attend conferences and Karneias. The policy should be explicitly defined by the finance committee. The first official delegate to the Karneia may be reimbursed by the Fraternity for his round trip transportation expense on a mileage rate, but he or the chapter must bear the expense of meals, lodging, registration and incidentals.

A few chapters have divided the Fraternity travel payment among several members, supplementing it with an allowance from the chapter treasury, so the benefits of Karneia attendance may be spread over a greater percentage of the chapter members.

**Inflation and the Chapter Budget:** In inflationary times, the budget must certainly allow for increasing prices. Especially critical to watch are food costs and fuel expenses. If, during the year, prices rise even beyond your projections, you must react through increased income from members, fewer meals served, less fuel consumption, etc.

# FINANCE

## UNPAID ACCOUNTS

### Collecting Unpaid Members Accounts

Here are some ideas your chapter should be using that have proven their worth in other Delt Chapters.

#### **Before school starts in the fall or before the next school term begins...**

1. Have unpaid members sign a promissory note for any past due amounts. (Chapter Advisor should keep all promissory notes in his possession.)
2. Do not hesitate to use a member contract.
3. Require each active brother and new member to put up a deposit at the beginning of the school year so that any amount owed to the chapter during the year may be collected from the member's deposit.
4. Issue, at the beginning of school, a double house bill for the first month and last month of the school year.

#### **As the school year winds down be sure to use these ideas...**

1. Some schools cooperate with the chapter and will withhold registrations, grades or diplomas until all debts with the chapter are settled. Each chapter should check with the host institution to see if this option is available.
2. Inform all seniors with delinquent bills the local credit bureau will be notified if they leave school without clearing their debt to the chapter.
3. Let the chapter know that unless unpaid amounts are collected, an assessment on all members will be necessary. Get support in helping the Finance Committee do its job.
4. Make sure everyone with any unpaid balance signs a promissory note before the school year is over. If payment is not received by the agreed date, go to small claims court. The last action for nonpayments would be through a collection agency.

# FINANCE

## UNPAID ACCOUNTS

### Collecting Unpaid Members Accounts (Cont.)

**During the school year, hold regular monthly meetings with the Finance Committee and use these ideas...**

1. Strict enforcement of the *Constitution* with regard to collections, including:
  - a. Use of 10 percent fine if accounts are unpaid by the 10th of the month.
  - b. Suspension of house privileges if account is not paid by the 15th of the month.
  - c. Instigation of suspension or expulsion proceedings if the account is unpaid at the first of the next month.
2. Impress upon the individual the burden of unpaid brothers. He is accepting charity from those brothers who are paying their bills.
3. Use personal contact with a non-executive brother to talk to the unpaid brother. Perhaps someone close to him can make an impression.
4. Proper utilization of the chapter advisor on the Finance Committee can greatly reduce the unpaid member situation (he is the only person who can waive the automatic 10 percent fine).
5. Post a list of unpaid members in a conspicuous place in the Shelter, such as a bulletin board.
6. Inform parents of delinquent members that their son owes money to the Fraternity.
7. Assist the delinquent member in obtaining a loan to fulfill his obligation to the chapter.

# FINANCE

## PROMISSORY NOTE

### PROMISSORY NOTE

DATE: \_\_\_\_\_

COUNTY: \_\_\_\_\_

STATE \_\_\_\_\_:

I, the undersigned, being over eighteen (18) years of age, do hereby acknowledge my indebtedness to:

Chapter of \_\_\_\_\_ Fraternity, a fraternal association, in the amount of \$\_\_\_\_\_.

Said indebtedness (to include any further debt in addition thereto incurred by me) shall be paid as follows:

It is acknowledged that time is of the essence; it being expressly understood and agreed that if default is made in the payment of any of the aforesaid installments, or any part thereof, as and when the same shall become due and payable, then, and in such event, the unpaid balance of the aforesaid principal sum, at the option of the holder hereof, may become due and payable, anything hereinabove contained to the contrary notwithstanding.

In the event of such default in the acceleration of the unpaid balance, said amount shall bear interest at the rate of ten percent (10%) per annum from the date of such default. If said indebtedness is collected by law or through an attorney at law, the undersigned agrees to pay all costs of collection, including fifteen percent (15%) as attorneys' fees. The undersigned waives demand, protest and notice of demand, protest and non payment. This contract is to be construed in all respects and enforced according to the laws of the State of \_\_\_\_\_. The undersigned may prepay at any time without penalty.

The undersigned hereby irrevocably makes, constitutes and appoints the President of said Chapter as his true and lawful attorney for purposes of service of process as to any proceeding brought under this Note. Said attorney in fact and agent for service of process shall upon such service deliver to the last known address of the undersigned by mail, any such process or notices; service upon said attorney in fact being acknowledged as service upon the undersigned.

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

HOME ADDRESS: \_\_\_\_\_

SOCIAL SECURITY NUMBER: \_\_\_\_\_

HOME TELEPHONE NUMBER: \_\_\_\_\_

**NOTE: Should default occur, prior to filing suit, consult with your house corporation or their attorney.**



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**CRISIS MANAGEMENT**

# CRISIS MANAGEMENT

There are several steps to follow in the event of a crisis, with additional steps and consideration dependent on each case or situation. Below is a general listing of those steps followed by notes regarding a possible tragedy or crisis other than injury or death.

## Procedures for a tragedy or a crisis

1. **You or the president are now in charge**-- Be sure every person in the chapter knows the president is in charge of every emergency situation involving serious alarm, injury or death. In his absence, a rank order of officers should be established, with each knowing where to find a copy of this policy. Where appropriate, be sure the housemother is aware of this list of procedures.
2. **Close the Shelter**--If a tragedy has occurred within the Shelter, close immediately. The leadership cannot offer instructions if members are leaving and outsiders are entering. Permit only members and appropriate officials to enter.
3. **Call for Assistance**--The first phone call should be to the appropriate emergency number for ambulance or police assistance. In the case of a fire, contact the nearest fire station (911, if applicable, for any emergency situation). Where installed, alarms will automatically bring the fire truck.

Before leaving the phone, the second call must go to you, the chapter advisor, and the third to the campus fraternity advisor. Both will discuss the situation with you and, in all serious cases, be at the Shelter in a matter of minutes. If in doubt as to whether a situation is serious or not, call!

4. **Assemble the Membership**--As soon as possible, assemble the membership in a group. Explain to them there is an emergency situation and the Shelter is closed. Ask them to cooperate in halting outgoing phone calls until further instructed. Do not allow the officers to discuss specifics of the situation until you arrive. Depending upon the situation, out of house new members and members may need to be called in. No brother should make statements to anyone other than university or college officials. All media requests should be forwarded to the Central Office.
5. **Do Not Notify Parents**--In the event of a serious accident or illness, the medical personnel will notify parents and advise them of the student's physical situation. In the event of a death, university or college officials will notify parents.
6. **Follow Up**--In the case of a brother's death, do not announce it until a university or college staff member has arrived to help. Be very careful with this information, as they will call the university or college media office to release an official statement only after all members of the immediate family have been notified. If the deceased brother lived in the Shelter, do not move any of his personal possessions.

It is, of course, proper to send sympathy cards, flowers, etc. If a funeral is within driving distance, the chapter should consider sending a delegation. Delta Tau Delta has a memorial *Ritual* pertaining to the Chapter Eternal.

# CRISIS MANAGEMENT

## Other Possible Tragedies or Crisis

**Significant Property Damage**--A fire or other natural phenomena may cause damage to the Shelter or grounds. Depending on the severity of damage and related accidents, steps 1-4 should be followed.

**Death of a Member of A Brother's Immediate Family**--The chapter's reaction will likely be influenced by how the individual himself reacts. Flowers and a delegation to the funeral are certainly appropriate. The brother will be shaken for some time following his loss. The chapter must remain sensitive to this and assist in any way possible.

**A Brother is Arrested**--As much as possible, the chapter should stand clear of any involvement. In the case the arresting crime was committed in the Shelter or at a chapter sponsored event, steps 1-4 should be followed. Comments to the public or media should only be made by the Central Office. In no case should chapter funds be used as bail money.

If you need to contact the Central Office immediately, please call 317-340-3033.



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**TRADITIONS**

# TRADITIONS

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## YOUR *RITUAL* DUTIES

From the outside, fraternities may look and act like a host of other campus organizations. But a fraternity is a very special organization. While many of its members may engage in the same activities as students outside the chapter, something sets fraternity men apart; the *Ritual*.

To the extent a chapter honors *Ritual*, the closer it becomes a functioning fraternity; to the extent a chapter ignores the *Ritual*, the more it resembles a social club.

You will play an important role in the *Ritual* ceremonies of your chapter. Because of the annual turnover in membership, continuity is necessary to prevent errors from creeping into the *Ritual* and to ensure proper perspective is maintained in its planning and performance. It is essential to guarantee the appropriate atmosphere prior to Initiation. Your presence will add seriousness to the occasion and you should require each member be dressed in coat and tie with all distractions eliminated prior to the *Ritual* performance. The following is a brief discussion of the various *Rituals* of Delta Tau Delta.

### Pledging Ceremony

The new member ceremony should be performed as soon as possible. At this time, each new member receives his new member badge and member manual and takes an oath affirming his desire to become a member of Delta Tau Delta. (For more information see the Pledging Ceremony, Page 12, of the gold book.) It is important to verify with the treasurer that all new member dues have been paid ahead of time.

### *Rite of Iris*

This ceremony is Delta Tau Delta's tribute to the Rainbow Fraternity. It can be used effectively at almost any point between pledging and initiation, but it is commonly performed right before Initiation or in the days proceeding. The same respect and care given to the *Ritual* should be given to the *Rite of Iris*.

# TRADITIONS

## YOUR *RITUAL* DUTIES

### Opening and Closing Ceremonies

These ceremonies must be used in conjunction with all initiations and as part of all formal chapter meetings. They are outlined in the *Ritual* Book.

### Ceremony of the Initiation

Rather than a culmination of the new member program, the Initiation Ceremony is actually the beginning of a young man's Delt experience. During this ceremony each man will take an oath of lifelong allegiance, service and loyalty to the Fraternity. This is the most powerful message the Fraternity sends to its initiates and you should make every effort to see that nothing distracts from the seriousness of this ceremony.

One portion of the Initiation Ceremony is known as the Charge, which is always delivered from memory by either the chapter advisor or guest alumnus (for more information on the Initiation Ceremony the *Ritual* Book).

### Installation of Officers

This ceremony is delivered entirely by the chapter advisor. If you are looking for a way to begin emphasis on the *Ritual* within your chapter, the memorization and proper performance of this ceremony is where you start.

This is more than a simple "pass the gavel" ceremony. Your chapter officers have responsibilities to you and to the Fraternity. In this ceremony, they must stand in front of the entire chapter and swear on their Fraternal Oath to efficiently and accurately discharge their duties. This kind of ceremony lifts a mere officer transition to a level of importance more suited to the crucial affect each set of officers has on your chapter (for more information see Installation of Officers, in the *Ritual* Book).

# TRADITIONS

## YOUR *RITUAL* DUTIES

### Outer Mysteries

There is nothing mysterious about the Outer Mysteries. It is simply a time, usually just before Initiation, when you give instruction on the *Ritual of Initiation*. It is important to verify with the treasurer that all initiation dues have been paid ahead of time.

### Fraternity Examination

Article X of the Fraternity's *Bylaws* requires each candidate for Initiation take and pass a Fraternity Examination before he is initiated. The examination is in two parts and must be administered by the chapter advisor. This test reflects the information learned during the new member program. A 70 percent is required to pass. A copy of the test can be obtained by contacting the Director of Chapter Services.

### *Ritual* Education

The chapter advisor or *Ritual*, advisor in conjunction with the Guide and vice president, should compose a *Ritual* education program. This should be an ongoing program throughout the year for all members. It is during this period that the new initiates are told how the *Ritual* can be expressed in their everyday relations with their brother Delts and fellow men.

# TRADITIONS

## YOUR *RITUAL* DUTIES

### The Importance of *Ritual* Education

*Ritual* education is extremely important to a chapter; at no other time are the rights and responsibilities of membership more clearly stated. The following quote states clearly your mission in developing a *Ritual* education program.

“Much is written and spoken concerning the secrets of Initiation into membership in Delta Tau Delta. The real secrets of our Fraternity, however, can be realized only in each Delt's heart and perfect realization discovered by each Delt's conduct and habits of mind. The Delt who keeps the lessons of Initiation in his heart will be drawn nearer to his God and learn better the meaning of life. Being Initiated merely points the way and each Delt must determine for himself whether he will seek more from his Fraternity and the lessons taught by it.”

Al Sheriff (Washington and Jefferson College, 1949)

Attached as Appendix A is a statement prepared by the former President of the Fraternity, Dr. Frederick D. Kershner, Jr., for chapter advisors to read to new members just prior to Initiation or at the time the Outer Mysteries are administered. Dr. Kershner's statement briefly, but clearly, explains the meaning of ceremonial Initiation. You may use the statement as written or expound upon it, but we urge you to instruct the new members in the value and meaning of initiation.

(Notes and thoughts taken from “The Purpose of Delta Tau Delta” written by Alvan E. Duerr (Kenyon College, 1893)

# TRADITIONS

## A STATEMENT ON MEANING

### **A statement on the meaning of Ceremonial Initiation prepared by the vice president and Ritualist for chapter advisors to read to new members prior to Initiation into Delta Tau Delta.**

It is now time for you to think more seriously than ever before about the meaning of fraternity. Unless you were eager to accept the responsibilities of full membership in your Fraternity, Delta Tau Delta, you would not be here at this moment. The Initiation which you are about to experience is a ceremony, or rite of passage, from one stage of life to another, from the new member period to adulthood. In symbolic terms, the new member program represents the last few months of your high school adolescence, the last stage of your freedom from responsibility and your last linkage with only one family the family of your birth.

By contrast, Initiation into full, active membership in our Fraternity symbolizes acceptance of new things, one of the great changes in your life. For example, Initiation testifies to your willingness to give up adolescence for manhood; replacing freedom from responsibility with self-reliance and responsibility for all your actions; and the beginning of preparation for a new home and family of your future. Thus, through Initiation, in the eyes of your friends and peers, you are willingly entering that last phase of maturation when you accept a man's obligations and begin to plan your ultimate style of life and social contribution as a practicing adult.

In American life and culture today, Initiation into Delta Tau Delta, or some similar college fraternity, is the only true rite of passage and commitment to adult behavior, which most young men ever experience. As far back in time as history goes, every strong, cohesive culture, from caveman to computer, has attributed great importance to its rites of passage from adolescence to adulthood. Your Initiation is the modern form of that long, human tradition.

Now let me explain a few of the important aspects of the Initiation experience that lie ahead, to prepare you for entrance into Delta Tau Delta as an adult-oriented college fraternity.

First, be reminded that this is a serious, idealistic experience, in sharp contrast to any festive activity that may have preceded it. A group that has no serious purpose and ideals quickly loses its identity and dies. Delta Tau Delta has lived more than a century due to its ideals, not to its parties, athletics and campus honors, however enjoyable these may be.

Second, this Initiation will explain our major ideals to you, in symbols and symbolic language. There is a practical reason for this language. Ritualism and symbolism, rather than prosaic legal language, have for thousands of years permitted brothers to share a commitment, and yet, also allow and encourage individual interpretation of that commitment in terms of each brother's personal experience and cherished beliefs.

Next, the basic commitment you accept is to seek maturity, that is, to be a man. Among other things, maturity means the ability to empathize and cooperate with others; the will to rely upon reason rather than mere emotional desire; the capacity for self-restraint and compromise; the willingness to accept responsibility for your own actions for better or for worse.

Finally, it represents your formal entry into a unique college peer group, or fraternity. I say unique because it serves as a bridge of communication between generations, between men of all ages and professions on a basis of equality. Your future active membership in Delta Tau Delta will help you to prepare for postgraduate life far better than you could ever do alone and unaided. It will equip you with the skills of effective participation in the many voluntary associations and human communities of which adult society is composed. Remember, that once fully initiated, you are a Delt not just for your college years, but for life.



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**THE ROAD**

# THE ROAD

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## What is The Road?

The Road is the Delta Tau Delta personal development program. The program provides learning opportunities for new members and initiated members focused on five areas: career development, financial stability, health and wellness, life skills and personal leadership. The Road began as a set of 20 consultant-facilitated workshops called Road Connections. The consultants continue to facilitate Road Connections, but chapters now have the opportunity to implement The Road in their chapter and make it their own.

## Why is The Road important to a chapter advisor?

Through engaging, interactive and informative programming, The Road is designed to help members grow and develop. It is important because this is one way we can help our members learn life skills that aren't taught in the classroom. The Road doesn't have to be another program, but a compliment to what your chapter is already doing. Some examples from other chapters are inviting alumni to speak to the chapter for a recruitment event, learning how to ballroom dance with a sorority, or going to a ropes course for a brotherhood event.

## How do I help my chapter implement The Road?

In an effort to give the undergraduate members an easy implementation plan, we have identified six steps. Your chapter may not need to start at step one, but this will help you to identify where your chapter is in the process and resources available.

# THE ROAD

## SIX STEPS

### **Step #1: Select a Point Person**

Chapters vary on their approach to membership education and The Road. Some chapters have used existing positions that work with education, such as the new member educator, guide/Ritual chairman or academic affairs to coordinate The Road. Other chapters have selected a membership education officer/Road chairman and this is his primary responsibility.

### **Step #2: Chapter Road chairmen should complete the online Road training**

Go to [www.delts.org](http://www.delts.org) and complete the online training about The Road under the Implementation tab. This 10 minute tutorial will walk you through all of the information you need to get started.

### **Step #3: Develop a Chapter Road Map**

It is important to include your chapter members in the process of developing your chapter Road program. Go to <http://www.delts.org/main/road.html> under the Implementation tab for the Chapter Road Map facilitator guide and worksheet. The Chapter Road Map is a 30-minute session you or a chapter consultant can facilitate at a chapter meeting for your members.

### **Step #4: Meet with your campus Greek advisor and chapter advisor to discuss The Road**

It is important that the Road chairman utilize resources to make the educational programs valuable and enjoyable for members.

### **Step #5: Develop a schedule of educational programs for the year**

The Chapter Road Map helps the Road chairman identify program ideas for each of the five elements. The next step is to outline a schedule of when the programs will be held, who will facilitate the program, and what the intended outcome is for each program.

### **Step #6: Submit the Road Report on March 1**

Chapter Road chairmen are asked to submit a Road Report by March 1. This report is available on the Delt website and will be sent electronically to all Road chairmen.

# THE ROAD

## RESOURCES

### What resources are available to help advisors or executive board with The Road?

- Chapter consultants are fully trained on the program and able to facilitate Road Connections for the chapter. They can also help with strategies to get members bought into a member education program.
- The director of leadership development is the staff member responsible for The Road. The director is available to provide coaching and resources to both advisors and students.
- The website, [www.delts.org](http://www.delts.org), has extensive information on The Road.
- The Road blog is a very helpful tool that is easy for students to follow and learn from.
- Training will be available at division conferences on The Road. Road chairmen and advisors are strongly encouraged to attend this training opportunity.

### The Road Timeline

September- Meet with President to develop a job description and responsibilities for a Road Chairman

October- Secure a member of the advisory team to work with the new Road chairman

December- Meet with new Road chairman and advisor to provide training and set expectations

February- Participate in programs at division conference to learn more about The Road

March- Road Plan due to the Central Office

April- Meet with executive board to strategize The Road for the fall semester



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**WORKING WITH OTHERS**

# WORKING WITH OTHERS

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## THE DELT PARENT

Today's parents are more involved with their children's lives than ever before. Here are some thoughts to keep in mind when working with parents.

- The parents may or may not know their son joined Delta Tau Delta Fraternity. Keep this in mind if communicating for the first time.
- The parents may be funding the member's dues and room and board. They may feel a deeply vested interest in their son's experience.
- At the end of the day each Delt is a legal adult and is responsible for his own actions; discipline issues need not involve the parents unless the situation demands their attention.

### To help promote positive chapter/parent relations:

- Include them on the alumni newsletters.
- Invite them to attend the pledging and Right of Iris ceremonies.
- If a legacy is involved, invite the father to participate in *Ritual*.
- Plan events in conjunction with campus parent's weekend.
- After building a relationship, you may want to involve them as Volunteer Advisor. Remember not everyone on the team needs to be a Delt and females work great as advisors too.

Many times parents see Chapter Advisors as providing "Adult Supervision." Be prepared to discuss your role with an inquisitive parent and provide insight on how/why the Fraternity operates as it does. Let them know that you are an advisor there to advise not oversee. You may want to let them know this is not a paid position but one of caring about the chapter as a whole. This is the time for these young adults to govern themselves and be responsible for their own actions.

# WORKING WITH OTHERS

## OFFICERS

Each time an officer is elected, it is your duty as chapter advisor to make sure he understands the functions of his office. The following represents items you should emphasize with each officer. These points are thoroughly explained in each officer's job description contained at Delts.org, under the Chapter Life tab, but many times you will have to personally communicate these responsibilities to each officer.

### President

1. How to conduct an effective chapter meeting.
2. How to effectively fill appointed positions within the chapter's administration.
3. How to analyze the strengths and weaknesses of the chapter.
4. How to effectively work with vice president(s).
5. Explain the president's responsibility on the Finance Committee.
6. How to organize and conduct a retreat.
7. How to effectively work with the Executive and Administrative Committees to set goals and stay on track throughout the year.

### Vice President

1. Explain the vice president's role as chief ritualist of the chapter.
2. Help develop the relationship between the vice president and president.
3. Describe the duties of the vice president as chairman of the Administrative Committee.
4. Reiterate how important the office of vice president is to the smooth execution of chapter programming.
5. How to effectively work with the Executive and Administrative Committees to set goals and stay on track throughout the year.

# WORKING WITH OTHERS

## OFFICERS

### Corresponding Secretary

1. Detail the corresponding secretary's responsibility for the chapter's report.
2. Describe the process for recording affiliations, suspensions and expulsions.
3. Relate the importance of written communication (hand written thank you notes) to guests and alumni.

### Recording Secretary

1. Instruct the recording secretary in the proper method of keeping chapter minutes.
2. Explain and show how the recording secretary should maintain the Initiation roll book.
3. Describe the process for maintaining the integrity and continuity of the chapter organizational files.
4. Outline the process of properly recording suspensions and expulsions of chapter members.

### Treasurer

1. Make sure the incoming treasurer is familiar with the chapter's current accounting system. The assistance of the retiring treasurer should be enlisted to supplement this introduction to the system.
2. Explain the responsibilities and duties of the treasurer as the chairman of the Finance Committee.
3. Detail the process for collecting accounts receivable from both undergraduate members and alumni.
4. Make sure the treasurer has secured the services of an assistant who he is training as the next treasurer.
5. Make sure the treasurer understands the chapter's financial obligations to the house corporation and various other creditors.
6. Confirm with the treasurer the current dues structure paid to the Fraternity for initiation dues, annual dues and new members dues.
7. Educate the treasurer on the importance of collecting new members dues and initiation dues BEFORE each ceremony.
8. Ensure the treasurer understands the due date for annual dues, insurance and division dues.
9. Make sure the treasurer understands he is responsible for MFR's and creating/following a budget.

# WORKING WITH OTHERS

## THE ARCH CHAPTER

**You are your chapter's link to the Arch Chapter**-For this reason, it is important for you to know enough about this governing body to adequately explain and answer questions chapter members will pose questions from time to time.

Members of the Arch Chapter, other than the presidents of the divisions, are elected biennially at the Karnea by majority vote, and the president of each division is elected biennially by majority vote of chapters in his respective Division.

### **No Member Of The Arch Chapter Receives A Salary From The Fraternity!**

Like you, these men have their own careers and provide service to Delta Tau Delta on a voluntary basis. With the exception of the Director of Academic Affairs, no member of the Arch Chapter is entitled to hold the same office for more than two consecutive terms. This body of men gives of their free time to an organization in which they believe; many of whom have served as chapter advisors.

### **President**

The President shall preside over meetings of the Arch Chapter, Board of Directors and by its consent appoint ambassadors, enter into agreements, and represent the Fraternity in an official capacity. The President shall sign all charters and disperse information to chapters regarding the state of the Fraternity. The President can, with the approval of the Arch Chapter, authorize the formation of an Alumni Supervisory Committee under Article VIII, Section 6, of the Constitution. The President shall serve as the temporary chairman of the Karnea.

### **Vice President**

The Vice President and Ritualist of Delta Tau Delta shall have charge of all Rituals of the Fraternity and serve as custodian of the Mysteries. He shall supervise Ritual education. In addition the Constitution directs the Vice President to supervise all future planning, forecasting, expansion strategy and Karnea presentations regarding review of duties of Arch Chapter members. The Vice President also reviews all discipline proceedings against individual members as well as certifying all initiates prior to the Installation of a new chapter.

(Ritual education is an area that has been re-emphasized in recent years and one in which you as chapter advisor will play an important role.)

### **Second Vice President**

The Second Vice President shall have charge and coordinate the preparation and review of Fraternity education programs and manuals on a regular basis; he shall make recommendations for new services and programs to be provided to the chapters. He shall have charge of leadership training, development, and manuals for both undergraduates and alumni, and shall review or cause to be reviewed the leadership manuals and programs of the Fraternity on a regular basis.

# WORKING WITH OTHERS

## THE ARCH CHAPTER

### Treasurer

The Fraternity's Treasurer is the only bonded agent on the Arch Chapter. His financial responsibilities are primarily to the Board of Directors of the Fraternity. He shall prepare or cause to be prepared a budget and regular reports on the financial condition of the Fraternity. He shall be responsible for establishing and maintaining programs to assist house corporations in the development, financial management, and maintenance of undergraduate shelters.

### Secretary

The Secretary supervises the keeping of minutes for both the Arch Chapter and Board of Directors. These minutes are recorded and permanently kept at the Central Office for future historical reference.

Delta Tau Delta has a sincere interest in developing community and campus leaders in its undergraduate chapters and, for that reason, the Karnea directed the Arch Chapter to devote the office of Secretary to the development of Fraternity-wide public relations programs. He shall give guidance to the editor of *The Rainbow*, promote and encourage alumni activities and shall lend assistance to and actively support the establishment, continuation, and maintenance of alumni chapters. He shall be in charge of undergraduate alumni relations programs, alumni recognition programs, and alumni education.

### Director of Academic Affairs

In 1923, the Karnea voted to increase the Arch Chapter by one person whose office was known as Supervisor of Scholarship, thus becoming the only fraternity to have a member of its governing board with the sole responsibility of promoting academic programming in its undergraduate chapters.

Since that time, the title has changed to "Director of Academic Affairs," but the purpose of the office has remained the same; to make recommendations to the Arch Chapter, to promote good scholarship and motivate chapters to improve their scholarship through Fraternity awards and scholarship aid programs.

### Division President

Presidents of the five divisions are representatives of their respective divisions on the Arch Chapter. Serving as the presiding officer at Division Conferences, the division president stays well informed of the condition of his chapters and reports the condition of his division to the Arch Chapter at each regular meeting. They shall, by and with the consent of the Arch Chapter, appoint chapter advisors and assistant advisors for each chapter in the division, and shall have the power to remove any advisor for failure to perform duty.

Each Division President may appoint as many Division Vice Presidents as the division constitution specifies. As chapter advisor, you should get to know the Division Vice President assigned to your chapter. A section of this guide on Division Vice Presidents is provided for your convenience and you should refer to it for additional information.

# WORKING WITH OTHERS

## ORGANIZATION

Delta Tau Delta Fraternity is organized in two ways; undergraduate chapters and the alumni volunteer system, which provides continuity and assures continued success. The *Creed, Ritual* and mission of Committed to Lives of Excellence supports a true democratic model within the collegiate environment.

Structurally, Delta Tau Delta is organized into four major arms: legislative, judicial, executive and administrative. The legislative work of the Fraternity is performed through the biennial convention, the Karnea. Judicially, the International President serves in this role by presiding over the Arch Chapter and Undergraduate Council as well as ruling on any constitutional questions. The executive arm resides in the Arch Chapter and Undergraduate Council who vote equally on matters which do not require the vote of the Karnea. Finally, the administrative work is channeled through the Central Office. The Executive Vice President reports to the Board of Directors and is directly responsible for the staffing of the office.

# WORKING WITH OTHERS

## YOUR CHAPTER CONSULTANT

At least twice each year your chapter will be visited by a chapter consultant. He is a member of the Fraternity's Central Office staff who travels to Delta chapters throughout the school year.

Approximately two weeks before the scheduled visit of a chapter consultant, the chapter will receive a letter concerning the purpose of his visit. A copy of this letter is sent to the chapter advisor and you should work in conjunction with the president to make sure the appropriate arrangements and appointments are made prior to his arrival. A chapter self-evaluation checklist is also included with the president's letter and you should make sure that it is completed and made available to the consultant when he arrives.

In the course of a normal visit, a chapter consultant is expected to accomplish many things in a short period of time. He is required to have a personal meeting with each officer and campus Greek Advisor. He usually attends chapter meetings and conducts workshops on topics such as recruitment, risk management, or The Road. If you believe your chapter is in need of a workshop in one area, have your consultant perform a presentation at his next scheduled visit. Advance notice and communication is crucial if proper preparation is to take place for a workshop.

# WORKING WITH OTHERS

## YOUR CHAPTER CONSULTANT

### A Chapter Consultant is ...

A vital resource provided by the Fraternity to your chapter and he can help influence the advisor's message.

He has undergone extensive training in every area of chapter management and stands ready to assist the chapter advisor in working with his chapter. In addition, he has been professionally trained to assist you in better understanding your responsibilities as chapter advisor.

An important ingredient to a chapter consultant's effectiveness is the honesty with which you describe the chapter's current status. Often as chapter advisor you will be more thorough and objective in evaluating the chapter than the undergraduate officers and this will be crucial if the chapter consultant is to use his time effectively.

Your meeting with the consultant may vary in terms of the beginning or end of his visit. An early meeting can help him identify weaknesses ahead of time; a later visit gives the advisor and the consultant a chance to work together to develop solutions.

The consultant is also available throughout the year via phone/email in case questions arise outside of his visit. It is important to keep in mind that a consultant is only in town for a visit twice a year and the advisor should not expect him to shoulder day-to-day advising for the chapter.

A chapter consultant can often be used as a catalyst for change, which might not otherwise take place within the chapter. While he is on site it is important to take advantage of the consultant's skills, knowledge and experience in whatever means possible.

# WORKING WITH OTHERS

## VOLUNTEER AND ALUMNI JOB DESCRIPTIONS

### Chapter Advisor

This alumnus serves as the chairman of the Alumni Advisory Team. He is the “quarterback” of the alumni volunteers. He must be a Delt in good standing.

### Volunteer Advisory Team

This group of alumni oversees the operations of the chapter and provides counsel to the undergraduate men. Each alumnus serves as a specific subject matter expert.

### House Corporation

These men provide for the physical structure and ensure that proper rent payments are established with the chapter to maintain the facility for future generations of Delts. House Corporations typically coordinate the collection and payment to the Fraternity of all property and liability insurance fees due to the importance of maintaining proper coverage.

### Faculty Academic Advisor

Any faculty member is eligible to serve as a college/university resource for services. This person serves as the academic resource for the chapter.

### Division Vice President (DVP)

The primary role of a DVP is supporting the Chapter Advisors and Division Presidents by recruiting alumni to serve as members of the volunteer advisory team. A DVP also serves as a sounding board for the alumni of the chapters to which he is assigned. He must be a Delt in good standing.

### Division Presidents

The five alumni elected division presidents preside over their volunteer appointees as well as the undergraduate chapters. Important roles include division vice president and chapter advisor appointments. He must be a Delt in good standing.

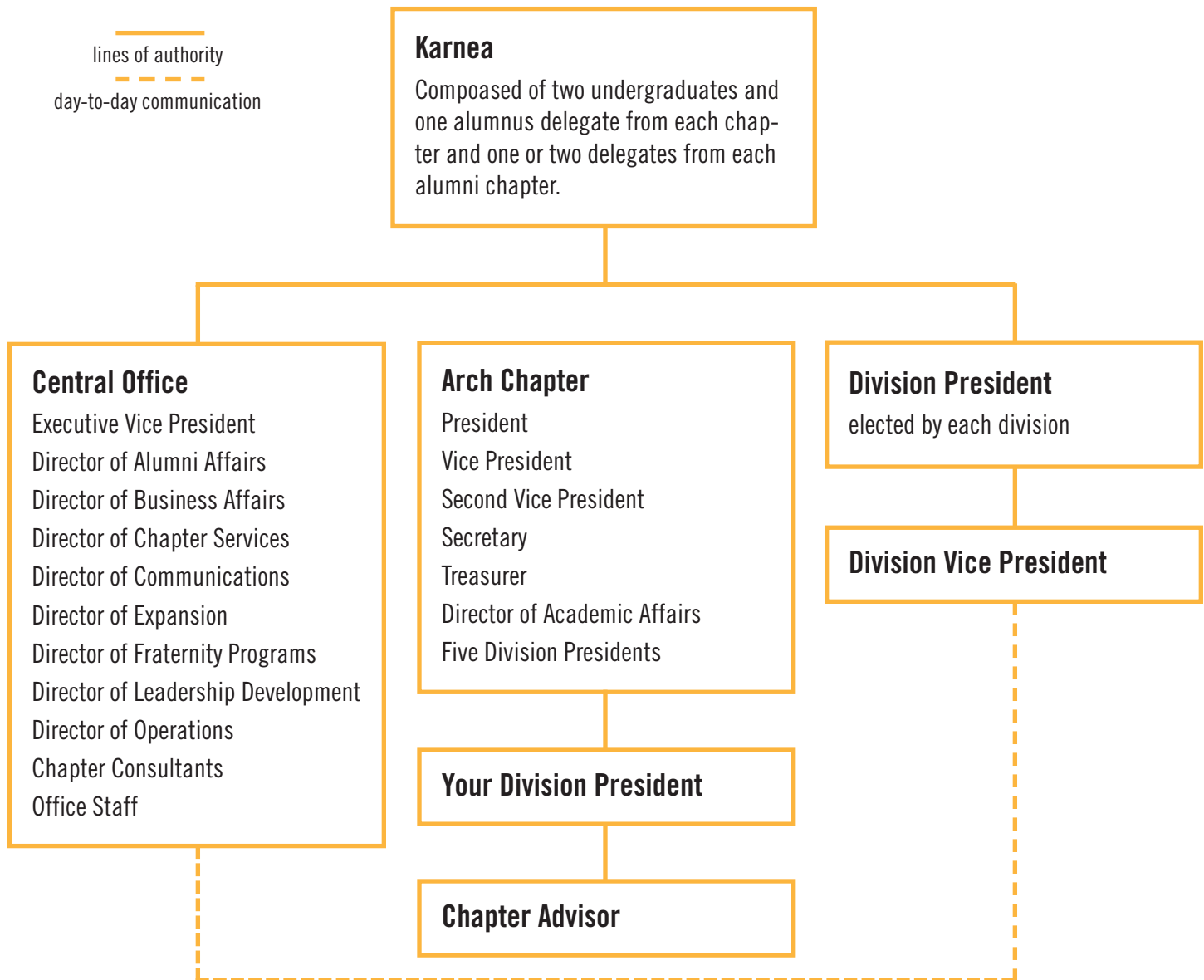
### Arch Chapter

The five Division Presidents, Director of Academic Affairs, and a five man Board of Directors comprise the Arch Chapter. These 11 alumni are charged with the vision and strategic planning of the Fraternity. They must be Delts in good standing.

# WORKING WITH OTHERS

## PATH OF COMMUNICATION

So where do you fit into this hierarchy? Who do you call when you need a question answered? It can sometimes be confusing as to whom you are responsible and where you can turn for help. For that reason, we have provided an abbreviated organizational chart showing where you fit in and who are your resource people. (For additional information on the formation, development and duties of the Arch Chapter see Article I of the Fraternity's *Bylaws*, as well as The Fraternity Section of the Chapter Leadership Guide.)





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**LEADERSHIP CONFERENCES**

# LEADERSHIP CONFERENCES

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These Delt gatherings can provide members of a chapter with some of the most valuable tools that will enable them to improve the quality of their Fraternity experience. There are different types of leadership conferences offered by Delta Tau Delta and attendance at each by a delegation from your chapter is required.

**Division Conferences** are scheduled in the late winter or early spring of every year. Every chapter in the division attends this conference and conducts business pertinent to the division, including changes to the *Division Constitution* and election of the Division President. Extensive workshops are conducted at this conference for officers and committee chairmen, but younger members should also be encouraged to attend.

**Karnea** is the greatest of all Delt experiences. Held in August of every even-numbered year, each chapter in the Fraternity is represented at the international convention. Karnea is composed of two undergraduates and one alumnus delegate from each chapter and one or two delegates from each alumni chapter. Although a chapter delegation may range from one to 20, each chapter has an equal say in governing the Fraternity. During the convention chapter delegations will elect officers to the Arch Chapter, review the state of the Fraternity, discuss changes to the *Constitution* and *Ritual*, and share common goals and mutual concerns.

Extensive leadership training takes place at each of these conferences, not only for undergraduates, but for chapter advisors as well. Although your attendance at conferences is not mandatory, your training and knowledge as a chapter advisor will never be complete until you experience one of these Delt gatherings.



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**VOLUNTEER GUIDE/CALENDAR**

# VOLUNTEER GUIDE

## AUGUST/SEPTEMBER

### Chapter Planning Retreat

**A chapters' operations and programs reflect the commitment to excellence.**

- Ensure a chapter planning retreat has been scheduled at the beginning of the school year and led by a qualified facilitator.
- Take the time to invite ,recommit, and introduce each member of the Volunteer Advisory Team in the first month back to school.
- It is important the Volunteer Advisory Team be present to know the colony or chapter goals in detail.
- Ask for these goals to be posted at chapter and distributed to all members including current members, Volunteer Advisory Team and housing. This way everyone is on the same page.
- Build a calendar, introduce volunteers, and send goals to all volunteers and active members.

Facilitator: \_\_\_\_\_ Title: \_\_\_\_\_

Volunteers attended:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Place three phone calls to those advisors that did not attend and recommit those volunteers limited on time to keep them involved. Look around to see who in your community, friends or other organizations you could call on for to help with advising.

# VOLUNTEER GUIDE

AUGUST/SEPTEMBER

## Chapter Planning Retreat (Cont.)

Review

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Positives

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Negatives

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# VOLUNTEER GUIDE

## AUGUST/SEPTEMBER

### Attend a recruitment event

#### We are a growing organization.

- Attend a recruitment event and share with prospective members the lifelong benefits of Greek membership in general and Delta Tau Delta in particular.
- Encourage the recruitment chairman or prospective members to use you as a resource if parents have questions about membership.
- Model appropriate behavior to chapter members and help them fulfill their responsibility to recruit qualified men who reflect the values of Delta Tau Delta.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Positives:

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Negatives:

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Next Meeting: \_\_\_\_\_

# VOLUNTEER GUIDE

## AUGUST/SEPTEMBER

### Review the Member Responsibility Guidelines (MRG)

#### Integrity is essential.

- Attend a chapter meeting and review the Member Responsibility Guidelines.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

### Have dinner with the president

#### Brotherhood sustains us.

- The meal/meeting should be at a site other than the shelter.
- Get to know the president and ask questions pertaining to the current operations, mood and challenges of the chapter. Work to build bridges and help him understand your role as the chapter's advocate.
- Ask for his opinion on who are the chapter's rising leaders; elections aren't that far away .How will those men be groomed to assume positions of chapter leadership?

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

# VOLUNTEER GUIDE

## AUGUST/SEPTEMBER

### Attend a Chapter Finance Committee Meeting

#### We are a financially vital organization

- Review the annual/semester budget.
- Discuss the status of accounts receivable and accounts payable.
- Confirm the collection and submission of new member/Initiation dues to the Central Office is current.
- Discuss procedures to ensure funds are mailed to the Central Office within 48 hours of each ceremony.
- Discuss the billing/collection of annual dues and insurance payments. In the majority of chapters, the house corporation handles the premium insurance payment. However, in some cases the responsibility is divided or done entirely by the undergraduates.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Positives:

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Negatives:

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### Meet with New Members

#### Brotherhood sustains us.

- Welcome them into Delta Tau Delta Fraternity.
- Review the Member Responsibility Guidelines with new members.
- Discuss new member activities to date and scheduled activities. Are they useful?
- Avoid “back in my day” stories.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

# VOLUNTEER GUIDE

## AUGUST/SEPTEMBER

### Meet with the Academic Affairs Chairman

**We are an academic leader in the fraternity world.**

- Discuss the chapter's academic programs.
- Review the Delt Grade Report.
- Discuss the chapter system for identifying and assisting members in maintaining academic standards.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Positives:

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Negatives:

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Next Meeting: \_\_\_\_\_

# VOLUNTEER GUIDE

## AUGUST/SEPTEMBER

### Attend a Recruitment Committee Meeting

**We are a growing organization.**

- Discuss the chapter's plans regarding recruitment of quality men.
- Facilitate the development of a timeline of events and due dates for actions to be taken.
- Ensure someone is accountable for reviewing the plan with the entire chapter.
- Ensure someone is accountable for obtaining a list of prospective recruits.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Positives:

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Negatives:

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Next Meeting: \_\_\_\_\_

# VOLUNTEER GUIDE

## OCTOBER/NOVEMBER

### Attend an Academic Affairs Committee Meeting

**We are an academic leader in the fraternity world.**

- Discuss how the chapter informs new members on the importance of having good grades and available assistance.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Positives:

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Negatives:

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Next Meeting: \_\_\_\_\_

# VOLUNTEER GUIDE

## OCTOBER/NOVEMBER

### Meet with the Executive Committee

#### Brotherhood sustains us.

- Review the intended results/goals of the executive committee.
- Has the chapter made progress toward these intended results? Where are the holes? What needs to happen to reach the intended results?

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Positives:

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Negatives:

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Next Meeting: \_\_\_\_\_

### Attend a Chapter Meeting

#### We are a seamless organization.

- Attend a chapter meeting and tell a story or share your expertise to build relationships.
- Stay for the entire meeting and be prepared for questions afterward.
- Ask the chapter if it has issued an alumni newsletter lately. Obtain a copy of the most recent issue.

# VOLUNTEER GUIDE

## OCTOBER/NOVEMBER

### Attend a Finance Committee Meeting

**We are a financially vital organization.**

- Make sure the chapter is collecting receivables and has no significant outstanding payables.
- Ensure the finance committee addresses past due receivables monthly and has systems and/or policies the entire chapter is aware of regarding receivables.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Positives:

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Negatives:

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Next Meeting: \_\_\_\_\_

# VOLUNTEER GUIDE

## OCTOBER/NOVEMBER

### Meet with the president to prepare for elections and officer transition

**We create opportunities for our members to learn and live lives of excellence.**

- Identify the chapter's rising leaders and ask what is being done to groom these men.
- Encourage the president to have at least two qualified candidates to run for each elected position.
- Help with officer transitions. Set a date for a transition planning meeting to reaffirm goals or set new ones.
- Remind the secretary of the December chapter report due to the Central Office.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Positives:

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Negatives:

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Next Meeting: \_\_\_\_\_

### FAAR Due November 1st

Accountability is fundamental to all commitments.

- Meet with the executive committee to review and complete the FAAR.

# VOLUNTEER GUIDE

OCTOBER/NOVEMBER

## Meet with the *Ritual* Team

**Truth, courage, faith and power are our foundation.**

- Who is in charge of planning for the conclusion of the new member period? Review those plans to ensure they are within the integrity of the Member Responsibilities Guidelines and the *Ritual*.
- What is the condition of our *Ritual* equipment? Are improvements necessary prior to the ceremony?
- Where is the Initiation for the fall new member class going to be, at what time, and on what date?
- Will the *Ritual* be practiced to ensure performance quality?
- Will we invite any alumni? Are any members of the new member class Delt legacies? Those alumni should be contacted and invited to attend well in advance.
- How will we ensure all dues are sent to the Central Office within 48 hours? The chapter advisor must review each prospective initiate's academic eligibility and sign the initiation card.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Positives:

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Negatives:

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Next Meeting: \_\_\_\_\_

# VOLUNTEER GUIDE

OCTOBER/NOVEMBER

## Chapter Activity

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## Road Activity

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### End of semester: winter break begins

- Make sure the shelter is secured for the school break and all shelter management issues are addressed.

# VOLUNTEER GUIDE

## JANUARY

### Share a meal with the new executive committee

#### Truth, courage, faith and power are our foundation.

- The meal/meeting should be at a site other than the shelter.
- Explain your expectations of truth, integrity and open communication to the committee and encourage the men to take advantage of this opportunity to grow as Delts and as leaders.
- Encourage the committee members to share their expectations of you.
- Emphasize your role is to serve as advisor and counselor. Work to build bridges and help them understand the chapter's direction rests in their hands.

# VOLUNTEER GUIDE

## JANUARY

### Attend a Finance Committee Meeting

**We are a financially vital organization.**

- Review the annual/semester budget.
- Review the progress of accounts receivable and accounts payable.
- Determine if a smooth officer transition has taken place. Is the new finance committee aware of receivables, payables and policies?

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Positives:

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Negatives:

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Next Meeting: \_\_\_\_\_

# VOLUNTEER GUIDE

## JANUARY

### Meet with new members

#### Brotherhood sustains us.

- Welcome to Delta Tau Delta Fraternity.
- Review the Member Responsibility Guidelines (MRG) with new member.
- Discuss new member activities to date and scheduled activities. Are they useful?
- Talk about hazing and how it is not tolerated. Give them your phone number or let them know they can call 1-888-NOT-HAZE for absolute confidentiality.

### Review/Approve Academic Affairs Plan

#### We are an academic leader in the fraternity world.

- Discuss chapter assistance to members below a 2.5 GPA for last semester. How are they going to help members move beyond academic probation?

# VOLUNTEER GUIDE

## JANUARY

### Attend a Recruitment Committee Meeting

**We are a growing organization.**

- Discuss the chapter's plans regarding recruiting quality men.
- Facilitate the development of a timeline of events and due dates for actions to be taken.
- Ensure someone is accountable for reviewing the plan with the entire chapter.
- Ensure someone is accountable for obtaining a list of prospective recruits.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Positives:

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Negatives:

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Next Meeting: \_\_\_\_\_

# VOLUNTEER GUIDE

## JANUARY

### Chapter Activity

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### Road Activity

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# VOLUNTEER GUIDE

## FEBRUARY

### Attend a division conference

#### Brotherhood sustains us.

- Encourage chapter officers and as many men as possible to take advantage of the brotherhood opportunities and the training sessions that focus on chapter operations.
- Invite another member of the alumni advisory team or house corporation board to accompany you to the conference.
- Network with other alumni advisors and alumni volunteers to discuss best practices, common issues, and ideas for chapter development.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Learned:

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Action plan:

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# VOLUNTEER GUIDE

## FEBRUARY

### Encourage applications to a Leadership Academy

**We create opportunities for our members to learn and live lives of excellence**

- Reach out to the men you have identified as chapter leaders or future leaders who could benefit by attending a Delta Tau Delta Leadership Academy.
- Admittance is based on academic merit. A written application is required and is submitted online. Applications must be received by March 31.
- Men admitted to the academy are sponsored through the Delta Tau Delta Educational Foundation.
- This is a life-changing event and we encourage you to help your chapter or colony experience leadership from a new perspective.

Road Activity:

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# VOLUNTEER GUIDE

## MARCH/APRIL

### Plan ahead for challenges of spring break

#### Brotherhood sustains us.

- Discuss the opportunities and challenges of the spring break period (before, during and after). Remind the brothers that wearing our letters on the road carries the same obligation as on campus: "What honors you, honors it."
- Bid the men a safe, relaxing week...but challenge them to return from spring break resolved to finish the year on a high note with academic focus, financial integrity and within the scope of the Member Responsibilities Guidelines.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Positives:

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Negatives:

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Next Meeting: \_\_\_\_\_

# VOLUNTEER GUIDE

## MARCH/APRIL

### Attend a Finance Committee Meeting

#### We are a financially vital organization.

- Assure the chapter is collecting its receivables and has no outstanding short-term debt or payables. This is a crucial time to ensure the chapter's financial vitality. We must hold undergraduates accountable for finances of the current school year prior to the end of the term. No chapter should end the year with a deficit.
- Make sure the chapter or colony is paid up before spring break.
- Prepare a draft budget.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Positives:

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Negatives:

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Next Meeting: \_\_\_\_\_

# VOLUNTEER GUIDE

## MARCH/APRIL

### Attend a Recruitment Committee Meeting

#### We are a growing organization.

- Discuss the chapter's plans regarding recruitment of quality men throughout the summer.
- Facilitate the development of a timeline of events and due dates for actions to be taken.
- Ensure someone is accountable for reviewing the plan with the entire chapter.
- Ensure someone is accountable for obtaining a list of prospective recruits.
- Submit chapter recruitment plan to Central Office by April 1.
- Plan a spring chapter retreat.

Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

Positives:

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Negatives:

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Next Meeting: \_\_\_\_\_

# VOLUNTEER GUIDE

## MARCH/APRIL

### Meet with the *Ritual* Team

#### Truth, courage, faith and power are our foundation.

- Who is in charge of planning for the conclusion of the new member period? Review those plans to ensure they are within the integrity of the Member Responsibilities Guidelines and the *Ritual*.
- What is the condition of our *Ritual* equipment? Are improvements necessary prior to the ceremony?
- Where is the Initiation for the spring new member class going to be, at what time, and on what date?
- Will the *Ritual* have practiced to ensure performance quality?
- Will we invite any alumni? Are any members of the new member class Delt legacies? Those alumni should be contacted and invited to attend well in advance.
- How will we ensure all dues are sent to the Central Office within 48 hours? The chapter advisor must review each prospective initiate's academic eligibility.

### Closing the Shelter

#### We are a seamless organization.

- Assure the shelter is secured for the summer break and all house management issues are addressed by the chapter leadership and the house corporation board.

The Road

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# VOLUNTEER GUIDE

MAY/JUNE

## Meet with the Greek Advisor

**Our chapters' operations and programs reflect our commitment to excellence.**

- Summer is an ideal time to schedule a meeting with the school's Greek advisor or student affairs officer when the crush of daily events is reduced for campus personnel.
- Work to establish or continue a partnership with the host institution and affirm our commitment to the school and the community.
- Candidly discuss chapter conduct issues as necessary.
- Work to build common goals and expectations for the chapter.
- Offer your assistance in building a stronger Greek alumni volunteer network.
- Check with the recruiting chairman and president throughout the summer to ensure recruitment is planned for returning to school and prospecting is taking place during the summer.

## Meet with the House Corporation President

**We are a seamless organization.**

- Discuss open housing issues from the schoolyear.
- Provide an assessment of the chapter, particularly your analysis of membership trends that will impact the number of men living in the shelter for the upcoming year and beyond.
- Work together to determine long-term maintenance issues, campus housing trends and the chapter's ability to provide safe and quality housing that enhances its ability to recruit and retain the best men on campus.



**DELTA TAU DELTA**

**Letters of Distinction.  
Lives of Excellence.**