
The Alpha University

“College of Friendship, University of Brotherly Love, School for the Better Making of Men”

Chapter and Officer Development

A Training Program for Members of Alpha Phi Alpha Fraternity, Inc.

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Alpha Phi Alpha Fraternity, Inc.
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SECTION I. NATIONAL POLICY GOVERNING OFFICER AND CHAPTER DEVELOPMENT

A. Alpha Phi Alpha Fraternity, Inc. Motto

“First of All, Servants of All, We Shall Transcend All”

B. Alpha Phi Alpha Fraternity, Inc. Mission Statement

Alpha Phi Alpha Fraternity, Inc. develops leaders, promotes brotherhood and academic excellence, while providing service and advocacy for our communities.

C. Alpha Phi Alpha Fraternity, Inc. Vision Statement

The objectives of this Fraternity shall be: to stimulate the ambition of its members; to prepare them for the greatest usefulness in the causes of humanity, freedom, and dignity of the individual; to encourage the highest and noblest form of manhood; and to aid down-trodden humanity in its efforts to achieve higher social, economic and intellectual status.

D Alpha University (Training and Development)

The Mission of the Training and Development is to develop effective training for all methods and procedures of Alpha Phi Alpha Fraternity, Inc

E. College of Chapter and Officer Development Mission Statement

The College of Chapter and Officer Development believes that chapters are the lifeline of Alpha Phi Alpha Fraternity, Incorporated; and therefore, each must function with the utmost effectiveness in performing various services for the community and personal development of its members. We are committed to excellence in training chapters and officers in the fundamental skills necessary to run an effective unit (chapter) within the Alpha Phi Alpha Fraternity, Inc.

We believe that by clearly identifying and understanding the roles and responsibilities of each chapter officer that the member will be able to perform his duties and responsibilities to best of his ability in service and leadership. We further believe that providing the necessary resources for planning, implementing, and evaluating chapter programs that our community outreach and personal development will be enhanced and uplifting.

F. The Conceptual Framework Map for Effective Alpha Chapters and Officers

Targeted Goal Areas	Specific Objectives Areas	Sample Indicators
Chapter Development	Developing A Chapter Program	<ul style="list-style-type: none"> -Advisors and officers develops ensuing years program of activities -National programs are scheduled -Community service programs identified
	Running An Effective Meeting	<ul style="list-style-type: none"> -Executive board meets prior to regular or call meetings -Agenda is established -Regular date and time established -Follow Parliamentary Procedure
	Establishing A Chapter Budget	<ul style="list-style-type: none"> -Programs and activities are identified -Complete current year budget -Assess chapter dues -Expend funds as necessary -Audit chapter's financial records
	Membership Intake Process	<ul style="list-style-type: none"> -Membership is oriented to the process -Members are risk management certified -Members know their roles -Members are highly selective in sponsorships -Constitution and Standing Orders are used -Lead by Regional and District Pharaoh's Council
Officer Development	Constitutionally Obligated Officers	<ul style="list-style-type: none"> -All constitutionally mandated officers are elected at appropriate time -All are Risk management certified and bonded as needed -Know roles, responsibilities and duties
	Duties and Responsibilities	<ul style="list-style-type: none"> -Read and internalized each responsibility -Develop a plan of action for meeting obligations of office

	Risk Management Certification	-Pass the risk management certification examination 90% mastery -Renewed as required
Leadership Skills	Basic Parliamentary Procedure	-Role play in learning activity -Copies of Robert's Rules of Order -Officers are trained in basic and advanced parliamentary procedures
	Leadership Skills	-Know roles and various styles -Participate in leadership gatherings -Organize public service events
	Group Facilitation Skills	-Conduct chapter meetings -Participate in community programs -Conduct national programs -Serve as participants

G. Resources

Required Documents:

National 2007-2997 Strategic Plan of Alpha Phi Alpha Fraternity, Inc.



2007-2007StrategicPlan.pdf

Chapter Operations Guide



ChapterOperationsPlanv1-3-19-07.pdf

SECTION I. ORGANIZATIONAL MANAGEMENT

A. Overview: Chapter and Officer Development

1. Vision Statement

- a. In Alpha Phi Alpha Fraternity, we will stimulate the mind, body, and spirit of each Brother through purposeful, personal, and professional development training in initiatives that are embedded in our fraternal culture. Our brothers, the organization's most valued competitive advantage, will have knowledge and skills necessary to continuously bring higher level of value to our internal customers, our shareholders and the communities in which we serve. To that end, we will create an environment where learning is supported, promoted, and rewards at the individual, chapter/group, and organizational levels. Further, all Brothers, from members of the Board of directors to the chapter Brothers, will embrace their collective roles as learners and teachers, players, and coaches.

2. Rationale

- a. Chapters of Alpha Phi Alpha Fraternity, Inc. (as collective units of members) are the lifeline of the organization and therefore must function with utmost effectiveness in performing various services for the community and personal development. The chapter officers serve the brotherhood in leadership roles developing a strategic plan to implement national programs, regional, district, and local chapters projects.
- b. An important requirement of a successful chapter is a well-qualified and dependable set of officers. With capable leaders, the business will be conducted in accepted parliamentary fashion. Additionally, the minutes and financial records of the chapter will be well organized and well kept, publicity of the right type will be forthcoming, and an effective program of activities in which all members participate will be maintained, and every member will be interested.

3. Description

- a. The intent of this training module for chapter and officer development has three major focal points. First the course focuses on **chapter officers development** - qualifications, duties and responsibilities, and nomination and selection of chapter officers. The second focal point is **chapter development** – administrative processes, program of activities, and budgeting process.
- b. Additionally, this section identifies the role, duties and responsibilities of the chapter advisors; risk management certification; and the membership intake process (MIP). The third emphasis is on conducting **effective chapter meetings** – employing leadership techniques and tools, using parliamentary procedure, practicing group dynamics skills, and understanding Fraternity's Constitution and By-laws.

4. Specific Objectives

a. Chapter Officer Development

- i. Upon the completion of this course, the chapter officer will be able:
 - (a). To describe the qualifications, duties, and responsibilities his office with 100% accuracy;
 - (b). To follow the administrative processes for reporting new officers to the national, regional, and district levels;
 - (c). To discuss why it is necessary for chapter officers to be risk management certified; and

(d). To explain the organization structure of the chapter and its relationship to the cluster, district, regional, and national units of the Fraternity.

b. Chapter Development

- i. Upon the completion of this course, chapter officers and members will be able:
 - (a). To develop a plan for carrying out a meaningful chapter program of activities or business plan;
 - (b). To develop a budget to support the program of activities for the chapter;
 - (c). To identify the section of Fraternity's Constitution and By-laws that relates to chapters –establishment, officers election, etc.;
 - (d). To utilize the Chapter Administrative guide as a major resource tool for the Fraternity;
 - (e). To state when, how, and where the risk management certification process is implemented; and
 - (f). To discuss the membership intake process for Alpha Phi Alpha Fraternity, Inc.

c. Effective Chapter Meetings:

- i. Upon completion of this course, chapter officers, brothers and advisors, will be able:
 - (a). To identify leadership qualities and patterns of behavior;
 - (b). To use parliamentary procedure appropriately in facilitating a chapter meeting;
 - (c). To develop proficiency in the skills necessary to run an efficient and effective business meeting;
 - (d). To develop an agenda for Chapter meeting; and
 - (e). To implement group facilitation skills in conducting Chapter meetings.

5. Resources

- a. Required Documents:
 - i. *Chapter and Officer Development Training Manual*
 - ii. *Chapter Administration Guide*
 - iii. *Risk Management Manual*
 - iv. *Membership Intake Process Manual*
 - v. *The Constitution and By-laws of Alpha Phi Alpha Fraternity, Inc.*

6. Optional Resources:

- a. Robert's Rules of Order (Roberts)
- b. Seven Habits of Highly Effective People (S.Covey)
- c. Manual- *The Making of A Good Meeting* (Kevin Wolf)

B. Chapter Officer Development

1. Learning Objectives:

- a. Upon the completion of this section of the module, the chapter officer will be able:
- b. To state the role and responsibilities of each chapter officer with 90% accuracy;
- c. To describe the duties and responsibilities of each officer;
- d. To, in conjunction with chapter advisor, develop a chapter officer development program implementing one or more of the recommended activities; and
- e. To develop a program of activities (or business plan) for the ensuing fraternal year.

2. Chapter Officers: Required, Duties and Responsibilities; and Roles

- a. There are nine chapter officers that are required by the Fraternity in order to be in “good standing.” They are:
 - i. president,
 - ii. vice president,
 - iii. secretary, treasurer,
 - iv. associate editor of *The Sphinx*TM,
 - v. chaplain,
 - vi. historian,
 - vii. director of educational activities,
 - viii. and membership intake officer. (See *Chapter Administrative Guide*, <http://www.alphaphialpha.net/Page.php?id=134>).
- b. Occasionally, other officers are added as established by local chapter constitutions – corresponding secretary, financial secretary, parliamentarian, Sgt.-at-Arms, etc.
- c. Duties of Officers
 - i. The **chapter president** is the chief administration officer for the chapter. He provides leadership, direction, and vision for the chapter. He organizes and facilitates the National Program process while maintaining a positive impact on chapter membership. He oversees the financial and community welfare of the chapter. The president chairs the executive committee meetings and directs all standing committees as an ex-officio member. Additionally, the president breaks voting ties when necessary and appoints committee chairs and other leaders as necessary. He works with officers and committee chairs to develop their growth; requests chapter reports as necessary; and attends cluster, district, regional, and national conventions.
 - ii. The **chapter vice president** reports to the chapter president and Executive Committee. He is Co-chief administration officer for the chapter and presides over meetings when the president is absent from the chair. Additionally, he assists the president with leadership direction and vision.
 - iii. The **chapter secretary** reports to the chapter president and executive committee. His main duties are to records official meeting minutes. He maintains chapter records and permanent files. He reads the minutes at each regular or called meeting and attends the executive committee meetings. The secretary maintains the chapter’s constitution and by-laws and the roll or register of chapter members. Additionally, he works closely with the president; reads correspondence when the corresponding secretary is absent; writes and sends correspondence for the corresponding secretary if needed; and performs other duties as assigned. He attends cluster, district, regional and national convention.
 - iv. The **chapter corresponding secretary** reports to the chapter president and Executive Committee. He collects and prepares chapter correspondence for meetings. He maintains the chapter post office box (and renewals). He writes and mails chapter correspondences upon the request of the chapter president. He picks up chapter mail from post box regularly and reads incoming correspondence at chapter regular and/or executive meetings. His role may change to recording secretary in the absence of the chapter secretary.
 - v. The **associate-editor-to-the *Sphinx*TM** writes and edits stories and information to be submitted for publication in the Fraternity’s journal, *The Sphinx*TM. He coordinates the chapter’s public relation activities.

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- Additionally, he covers chapter events and submits copies to the secretary for permanent files and solicits materials for articles from the members.
- vi. The **chapter treasurer** reports to the chapter president and Executive Committee. He is the chief financial officer for the chapter and maintains all financial records of checking, savings and investment accounts. He makes monthly reports of finances at Executive Committee and regular chapter meetings. The treasurer works with the budget and finance committee to prepare a chapter budget for review and adoption.
 - vii. The **chapter financial secretary** reports to the chapter president and Executive Committee. He is the Co-chief financial officer for the chapter who assists the chapter treasurer in maintaining all financial records and files. He keeps record/roll of all financial members and submits funds collected to treasurer for deposit. Additionally, he makes monthly updates to the financial members' roll and promotes reclamation and life membership activities for the chapter. He assists treasurer in preparing chapter budget for review and adoption.
 - viii. The **director of educational activities** reports to the chapter president and Executive Committee. His main role is to coordinate all educational activities for the chapter. He develops and publishes a report of educational programs for the fraternal year. He coordinates the scholarship program, risk management seminars, and Omega Services. Additionally, he works closely with the Pharaoh's Council to assist with the intensified educational program during the membership intake process.
 - ix. The chapter **membership intake officer** (or intake coordinator) reports to the chapter president and Executive Committee. He manages intake activities for the chapter as established by national Membership Intake Process via the Standing Orders) and serves on the Pharaoh's Council for his area. He assists with the requisition for and coordination of Alpha Awareness Seminars (or Informational Seminars), programs, and ceremonies for intake. He must be Risk Management and Pharaoh's Council certified.
 - x. The **chapter parliamentarian** reports to the chapter president and Executive Committee. He provides precedent and order for the chapter. He upholds parliamentary procedure to assure that all members are heard – the minority as well as the majority. The parliamentarian must be thoroughly familiar with Robert's Rules of Parliamentary Law. He interprets constitutional issues during debate and works closely with the Sergeant-at-Arms, if one is appointed.
 - xi. The **sergeant-at-arms** reports to the chapter president and Executive Committee. He oversees rules and regulations the chapter. He is responsible for securing the meeting space and establishes whether a quorum has been met.
 - xii. The **historian** reports to the chapter president and Executive Committee. He keeps accurate records of all events and teaches chapter and national fraternity history to the members. He reviews newspapers, magazines, etc. for interest articles of chapter members; maintains chapter scrapbook and keeps it updated with programs each year; works closely with the recording and corresponding secretaries. Additionally, he works closely with the Associate Editor to *The Sphinx*TM.

xiii. The **chaplain** presides as chaplain for chapter functions. He provides consolation to members and families as necessary. Additional responsibilities include delivering meaningful and inspirational invocations at chapter meetings and official services; and acts on moral issues regarding the chapter or brothers. Also, the chaplain assists with preparation of the Omega Services.

xiv. The **committee chairman** reports to the chapter president, executive committee, and committee members. His basic responsibilities include planning and managing projects and /or programs as assigned; establishing budget for the activity; and overseeing the project through completion.

d. Guides for Chapter Officers: Specific Duties and Responsibilities

i. Section C below contains a Guide for each Chapter Officer.

(a). Each “Guide” is designed to give the chapter officer more information the specific responsibilities and duties that each must perform in order to have a successful fraternal year.

(b). Each officer should study the “Guide” thoroughly and incorporate the recommended practices as appropriate.

(c). These are guides and not mandates.

C. A Guide for the Chapter President

1. Duties

- a. Preside over and conduct meetings according to accepted parliamentary procedure.
- b. Call special meetings of the Chapter
- c. Keep members on the subject and within the time limit allotted.
- d. Appoint committees as needed or mandated and serve as ex-officio member.
- e. Represent the organization and speak on occasion on behalf of the Chapter.
- f. Coordinate organization efforts and check on progress.
- g. Keep order.

2. Preparing to carry out these duties.

- a. Become familiar with procedures of conducting meetings.
- b. Types of meetings
 - i. Regular - scheduled and follows outlined procedures.
 - ii. Special - does not follow outline procedure and handles urgent matters as necessary
- c. Characteristics of satisfactory regular meetings
 - i. Carefully planned in advance by the executive committee and chapter advisor.
 - ii. Start and close on time.
 - iii. Proceed according to an established order of business.
 - iv. Conducted according to an accepted parliamentary procedure. Officers become very familiar with parliamentary procedure. It may be appropriate to have a parliamentarian.
 - v. Officers check committee reports and see that the chairs are prepared to give reports before meetings begin.
 - vi. Good meetings combine good business and fun.
 - (a). Keep order
 - (b). Be firm - especially when ideals and principles are at stake, but try not to give offense.
 - vii. Command respect at all meetings by holding firm to methods of addressing the chair and discussing motions. Members will respect you for it - if fully

carried out. They like to see if you are a leader of the type that can be pushed around.

3. Know the organization's constitution and by-laws.

- a. Examples of things often included in by-laws:
 - i. Use of Chapter funds.
 - ii. Use of organization equipment or facilities (if applicable).
 - iii. Organizational dues structure.
 - iv. Officer's specific responsibilities.
 - v. Regular meeting schedule: time, date, place, hosts, and other specifics related to conducting the Chapter meeting

4. Know and follow the chapter's program of activities (or business plan)

- a. Have members volunteer for committees found on program of activities.
- b. Appoint members that are interested.
- c. Make clear to committee members what they are to accomplish.
- d. Recognize efforts and success of those serving on committees.
- e. Vice-president should be responsible for committees and have them give periodic reports.

5. Develop good personal habits and characteristics

- a. Some pointers to follow:
 - i. Be friends to all - keep them in good confidence (students, teachers, etc).
 - ii. Admit mistakes and avoid alibis.
 - iii. Refrain from hurting others.
 - iv. Discover personal strengths and areas for improvement.
 - v. Develop good judgment (have facts before making statements or coming to conclusions).
 - vi. Be a good listener - don't try to dominate in conversations.
 - vii. Be a living example to others as to ideals, aims and moral character.
 - viii. Be prepared.
 - ix. Plan for success.
 - x. Improve and have good speech; speak clearly and with strength.
 - xi. Be tactful.
 - xii. Show partiality to no one. (Be a referee), be fair.
 - xiii. Hide unpleasant feelings. (Hold temper.)
 - xiv. Don't be discouraged easily. (Go talk it over with the advisor.)
 - xv. Keep grades in good shape.
 - xvi. Develop a respectable program as per the organization expectations.
 - xvii. Be a real person - Avoid the "big head."

6. Some points to remember

- a. President's responsibility for the total program of the organization.
- b. The president is the one the members have selected to lead them and they will be looking to that person for direction.
- c. The president will need the help of all members.
- d. The president should not try to do it all alone.
- e. Delegate others to do the work, but encourage and help them with suggestions and methods of accomplishments.
- f. Don't use the friendship and favor system when asking a member to do a job; don't tell them that "you, you and you" are to do the job.
- g. Always ask for volunteers first, don't use the draft system if it can be avoided.
- h. Give praise and honor for a job well done by those appointed.

-
- i. Work closely with the Chapter Advisor.
 - j. Give the other officers a share of the responsibility.
- 7. The President and the Program of Activities**
- a. Remember! ...The chapter should have a challenging, outlined program of activities if it is to be successful.
 - b. Don't leave it up to the advisor to make up the program of activities for the members.
 - c. Get the advisor's help and suggestions, but most important of all, get the things on the program that the members want.
 - d. Help keep goals within reasonable reach or attainment. Check closely with the advisor.
 - e. Check organization materials for methods of building and carrying out a chapter program of activities.
- 8. The President and Public Relations**
- a. The chapter president is generally considered as official spokesman in the community.
 - b. Be proud of the position and represent it well.
 - c. Don't pass up opportunities to present the purposes of the organization to the public.
 - d. Don't pass up opportunities to give help community drives and programs.
- 9. Building and Keeping Standards of Performance**
- a. Keep and/or improve the standards of performance.
 - b. Some standards which need to be remembered:
 - i. Knowing individual parts in ceremonies.
 - ii. Using good parliamentary procedure.
 - iii. Starting and ending meetings on time.
 - iv. Good conduct at functions (set a good example).
- 10. The President and Committee Work**
- a. Put all members on committees.
 - b. Have the vice president responsible for checking with all committee chairs.
- 11. Adequate Financing**
- a. The organization cannot operate successfully on members' dues alone.
 - b. Be sure to plan moneymaking activities for the year.
 - c. Put a good person in charge of those activities.
 - d. Plan them well in advance, so good publicity can be given.

D. A Guide for Chapter Vice Presidents

1. Duties

- a. Preside over and conduct meetings according to accepted parliamentary procedure in the absence of the president.
 - b. Call special meetings.
 - c. Keep members on the subject and within the time limit.
 - d. Appoint committees and serve as ex-officio member.
 - e. Represent the organization and speak on occasion.
 - f. Coordinate organization efforts and check on progress.
 - g. Keep order.
 - h. Oversee all committee work.
 - i. Preside over the executive committee meetings.
- 2. Preparing Yourself to Carry Out These Duties**
- a. Become familiar with procedures of conducting meetings.

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- b. Types of meetings:
 - i. Regular - scheduled and follows outline procedure.
 - ii. Special - does not follow outline procedure and handles urgent matters.
 - c. Characteristics of satisfactory regular meetings:
 - i. Planned in advance by the executive committee and chapter advisor,
 - ii. Start and close on time,
 - iii. Proceed according to an established order of business,
 - iv. Conducted according to an accepted parliamentary procedure.
 - v. Check committee reports and see that the chairs are prepared to give reports before meetings begins,
 - vi. Take care business and have fun, and
 - vii. Keep order.
 - (a). Be firm - especially when fraternal ideals and principles are at stake, but try not to give offense.
 - (b). Command respect at all meetings by holding firm to methods of addressing the chair and discussing motions. Members will respect you for it - if fully carried out. They like to see if you are a leader of the type that can be pushed around.

3. Guides to Committee Work

- a. What number should be on a committee?
 - i. This should be determined by the size of the job to be done.
 - ii. Some committees may require a large number of members with several different subcommittees; whereas other committees may require only a few members.
- b. How should committee members be selected?
 - i. Membership should be voluntary.
 - ii. Members in good standing.
 - iii. Active in chapter affairs.
 - iv. Having experience with committee work from the previous year is desirable, particularly for the chair.
- c. What are the duties of the committee chair?
 - i. To get the members on the committee to function and cooperate.
 - ii. Seek outside help if needed.
 - iii. Help the members with the work.
 - iv. Share the responsibilities.
 - v. Give a report of accomplishments to the chapter.
 - vi. Give credit to members on committee for work done.
 - vii. Attend the appropriate executive committee meetings.
 - viii. Prepare a written report of the committee's activities.
- d. What are the responsibilities of the committee?
 - i. Perform assignment that is given.
 - ii. Inform group as to results.
 - iii. Reports expected
 - iv. Give a progress report - keep group informed on what is being done.
 - v. Give a final report.
 - vi. What was done.
 - vii. How it was done.
 - viii. Who performed the work.

4. Some Things That Every Chairperson Should Know

- a. Never starts a meeting without an agenda - a list of things to be covered by the meeting. An agenda saves time. An agenda keeps a meeting on the beam.
- b. State the purpose of the meeting at the beginning and read the agenda aloud. Odd as it may seem, members of a meeting do not always know why they are there. Informing them of the purposes helps them concentrate on what the meeting is to accomplish. Also, it helps direct their thinking.
- c. Keeps the meeting moving. Just as a meeting is seldom any better than its chair, so it is seldom any more productive than the interest of its participating members. Interest tags when action tags. While chairing a meeting, keeps it moving.
- d. Speak clearly. The chair has the agenda and knows what it's all about. If the chair can't be heard, it will be necessary to exercise control. It may be necessary to use the gavel by rapping for silence.
- e. Prevent general hubbub-when everybody talks at once, no one can be heard...when no one can be heard, nothing can be accomplished. Insist on order.
- f. Avoid talking to individuals without talking to the group. Side conversations between the chair and individual members disrupt a meeting.
- g. Keep the speaker talking clearly and audibly. If a member asks for the floor and is given it, it is up to the chair to see that proper use is made of it.
- h. Sum up what the speaker has said and state a decision. Not all members will be good at expressing themselves. It is up to the presiding officer to determine what they have said and whether or not it has been understood -and get the decision of all members on the topic.
- i. Stop aimless discussion by recommending committee study. Occasionally subjects are discussed on which general agreement at the time cannot be reached. On such occasions submit the matter to further study by a committee--which may be appointed.
- j. Keep control of the meeting at all times without stifling free comment. Invite criticism and even disagreement. Also ask for support and clarification of issues.
- k. Don't argue with the speaker. Ask questions if necessary. But remember--the chair is supposed to be neutral. No matter how ardent the feelings, let the group make the decision. The chair is conducting a symphony, not a solo.
- l. Be aware of the participants' comfort - temperature wise, thirst wise, etc. Check at the end of the meeting to see if every member feels particular subjects have been adequately covered. It is the duty of the chair to see that sound and just decisions are reached.

E. A Guide for Chapter Secretaries

1. Duties

- a. The secretary's position is one of great importance to the organization. The job means work if it is done correctly. However, to increase the progress of an organization, a good secretary is of equal or more importance than a good president. Therefore, secretaries should strive to do the best job possible.
- b. Chapter records are often all that is available to show the activities for the year. Secretaries must remember that the minutes and notes taken and left in the record file will be the only permanent record of the chapter's activities for the year. Make sure that complete and accurate minutes of the meetings are kept. It is also important that the secretary secures and uses the appropriate secretary's record book. The secretary should study the record book and learn to use it.

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- c. The secretary ranks next to the vice president and presides over meetings if both the president and vice president are absent. The secretary should read and study the local chapter, district, regional, and national constitutions.
 - d. The secretary's records belong to the chapter and when completed for the year, should be filed as part of the permanent records for the chapter.
 - e. The secretary, should take over the previous year's records in order to get ideas that will help him keep better, more accurate records during their term of office. The secretary should strive to keep the best records that have ever been kept in the organization.
- 2. Before Each Meeting**
- a. Check with the president and arrange the "orders of the day" (agenda) or items of business to be taken up in the meeting if this has not been done in an executive meeting. (Remind the president and vice president to hold these meetings.)
 - b. Have on hand for the meeting the following information or materials:
 - c. Lists of committees and any committee reports that should be given.
 - d. Secretary's books and minutes of the previous meeting. (Be sure the minutes are ready to be read.)
 - e. Copy of the local program of activities.
 - f. Copy of other official records/documents.
 - g. Pencil or pen, notebook for notes, letters, announcements, etc.
 - h. Regular calendar and calendars of chapter and school activities.
- 3. During Each Meeting**
- a. Take roll and report attendance.
 - b. Read minutes of previous meeting.
 - c. Keep minutes of all proceedings. (Doing this in outline form often helps the secretary keep up on all happenings in a fast-moving meeting.)
 - d. Assist the president wherever needed. (Suggest next order of business, read any letters, reports or records, as needed.)
 - e. Help keep the meeting running according to correct parliamentary procedure and in time with the constitution and bylaws.
 - f. Count rising, showing of hand or written ballot votes when taken.
- 4. Duties Between Meetings**
- a. Rewrite minutes as soon after meeting as possible.
 - b. Prepare organization reports, contest forms, etc., and help keep permanent records.
 - c. Send out and post all notices and attend to all official correspondence immediately.
 - d. Attend executive committee meetings and keep minutes of the meetings.
 - e. Inform president of coming events.
 - f. Cooperate with treasurer in keeping an accurate membership roll and issue membership cards.
- 5. Suggestions for Writing Minutes:**
- a. Write the place and date of the meeting at the top of the page.
 - b. Leave an inch of margin at left of page.
 - c. Make a separate paragraph for each item.
 - d. State, in the first paragraph, the name of the organization, the kind of meeting (whether regular or special), place of meeting and the date.
 - e. State whether the meeting was called to order by the president, vice-president, or a temporary chairperson and give the person's name.
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- f. Give the name of the person who was appointed secretary pro tem, if the regular secretary was absent.
 - g. Include a statement as to the number of members present. (A complete attendance record should appear elsewhere in the secretary's book.)
 - h. Use ink in writing the copy of minutes to be presented to the organization, if you do not use a typewriter/word processor.
 - i. Record approval of minutes in this fashion: "Approved as read," or "Approved as corrected." Month Day Year Signature of Secretary
 - j. Write legibly in the third person, use correct grammar and spell all words in full.
 - k. See that all essential facts are included but in brief form accurate.
 - l. Make rough notations in notebook during meeting regarding matters that should appear in the record. Write up the minutes at the first opportunity after the meeting. The final minutes should be clear enough to be fully understood by anyone reading them whether they were present at the meeting or not.
 - m. Do not use loose sheets of paper for taking notes (these sheets are very easily lost.) Use a bound leaf -type of notebook or record book for this purpose.
 - n. Insist on receiving a written record on the report of any committee.

6. Definition: The Secretary

- a. A person who is employed to attend to records, letters, etc., of a private or confidential nature; a confidential clerk.
- b. An officer of a business corporation, or society who has charge of the correspondence, records, etc., and who keeps minutes of meetings.

7. General Duties:

- a. Prepare-and read the minutes of meetings.
- b. Have available for the president the list of business for each meeting.
- c. Attend to official correspondence.
- d. Send out the post notices.
- e. Count and record rising vote when taken.
- f. Prepare chapter records.
- g. Keep the permanent records of the chapter.
- h. Cooperate with the treasurer in keeping an accurate membership roster.
- i. Call meeting to order in the absence of a presiding officer.
- j. Read communications at meetings.
- k. Have on hand, for each meeting, the following:
 - i. Secretary's book and minutes of previous meeting.
 - ii. Lists of committees and committee reports.
 - iii. Copies of local, state and national programs of work.
 - iv. Copies of constitutions and by-laws: Chapter, State, Regional, and National
 - v. Copy of other official records and/or materials.

F. A Guide for Chapter Treasurers

1. Duties

- a. Custodian of chapter funds.
- b. Collect dues and assessments and issue receipts for same.
- c. Keep records accurate.
- d. Prepare financial statement for chapter.
- e. Chairs the budget committee.
- f. Takes part in all ceremonies - attend all meetings.
- g. Keep inventory of all organization equipment.
- h. Get a receipt for all money spent for the organization.

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- i. Be respected as an officer and leader.
 - j. Send in national, state and/or Chapter dues.
 - k. Send in grand tax payment for chapter members.
 - l. Encourage thrift and help build up financial standing of the organization and the members.
- 2. Guide for Preparing an Organization's Financial Statement**
- a. The Treasurer should see [Section V. Fiscal Management](#) for guidelines regarding financial transparency. All chapter reports should be developed using the following forms:
 - i. The National Local Chapter Budget Report Form



AlphaLocalChapterBudgetReportFormat07.

- ii. The National Local Chapter Financial Report Form



AlphaLocalChapterFinancialReportFormat07.xls

G.A Guide for Sergeants-At-Arms

1. Duties:

- a. The sergeant-at-arms should be familiar with the chapter constitution and by-laws and the annual program of activities, and should cooperate with other chapter officers and members at all times. The sergeant-at-arms should own a manual, know his/her part in all ceremonies, and be familiar with parliamentary procedure.
- b. Other Duties
 - i. Set up the meeting room and care for paraphernalia and equipment.
 - ii. Attend the door during meetings and welcome visitors.
 - iii. See that the meeting room is kept comfortable.
 - iv. Take charge of candidates for ceremonies.
 - v. Assist with entertainment features and refreshments.
 - vi. Assist the president as needed.
 - vii. Assist with keeping order during meetings and special functions.

H. A Guide for Associate Editors to The Sphinx™

1. Duties

- a. Inform the public of organization activities.
- b. Write news articles for publication the national journal, *The Sphinx*, local newspapers, and campus/community papers
- c. Take pictures for publication.
- d. Inform the members of organization newsworthy such as unusual accomplishments; competition stories; human interest stories; special projects

2. An Effective News Article

- a. Be timely - report the news immediately after event, or in many cases, before it happens.
- b. Be brief, accurate, and to the point.
- c. Write articles free from personal opinions and persuasiveness.

3. Writing The Story

- a. Make introduction interesting.
- b. Include: Who? What? Where? When? How? Why?
- c. Arrange story so the most important paragraphs are at the beginning. If one or two paragraphs have to be omitted, the story should still make sense (Most important fact; 2nd important fact; 3rd fact; 4th; 5th, Etc.)

4. Suggestions for Preparing Journal Articles

- a. Write stories on 8 1/2 x 11 paper.
- b. Use only one side of the paper leaving three or four inches at the top of first page blank for the editor's title. Allow wide margins at both sides and bottom of all pages. Submit clean, legible copy.
- c. Use a typewriter or word processor.
- d. State the most important thing first since a part of the report may have to be omitted.
- e. Avoid duplications in types of statements.
- f. Double space lines
- g. Check all proper names to avoid error.
- h. Spell all words in full except for abbreviations as: Mr., Mrs., Jr., and Dr.
- i. Use the full name or initials of the person the first time he or she is mentioned; after that, in the same story use the last name preceded by the proper title.
- j. Spell out numbers when they begin sentences; otherwise, express them in figures if more than one digit is involved.
- k. Get the article in early.

5. Suggestions for Writing News Articles

- a. Keep articles short.
- b. Make articles "newsy" and informative.
- c. Do not use technical language.
- d. Keep articles simple.
- e. Use actual quotes when possible.
- f. Use names where possible.
- g. Give credit to as many persons as possible.
- h. Get all news early and on time.
- i. Turn in double-spaced typewritten copy on 8 1/2 x 11.
- j. If more than 1 page, put "more" at bottom of each page and use "short title" in upper left corner of each succeeding page.
- k. Use pictures according to publication's guidelines.
- l. Use as many feature stories as possible.
- m. Become familiar with publishers' situation.
- n. Use wide margins on all copy.
- o. Avoid wording that degrades an individual.
- p. Use a person's full name (John E. Doe) not Mr. Doe when first mentioned.
- q. Include who, what, when, where and how.
- r. Write with a purpose.
- s. Look for opportunities to sell the organization.
- t. Indent paragraphs five spaces
- u. If the release is more than one page, center the word "more" at the bottom of the page; center the symbols "####" at the bottom of the final page.

6. Suggestions for Writing A News Release

a. The Lead:

- i. The most critical stage of the news release.
- ii. Without an effective lead, the editor, like the reader, will read no further.
- iii. A good lead sells the story.
- iv. A lead is usually considered the first paragraph of a news story.
- v. The lead should be the most important and most interesting point in the story.
- vi. Try not to exceed twenty to thirty words in the lead.
- vii. Include who, what, where, why and how.

b. The Body:

- i. The subsequent paragraphs should build on the lead and be organized in order of importance (most important to least important). This is called the inverted pyramid style of writing.
- ii. News stories do not often end with a conclusion.
- iii. Do not be blatantly self-serving or the release will not get printed.
- iv. Keep paragraphs short (Three to five lines should be standard; seven lines maximum.)
- v. Avoid the use of adjectives that sound judgmental.
- vi. Avoid words ending with -ings and -tys--they sound awkward.
- vii. Have one idea to a sentence.
- viii. Avoid any form of the verb "to be." Make "they were driving" into "they drove."
- ix. Put emphatic material at the beginning or end of a paragraph. Either seize the reader at the outset or surprise the reader at the end

c. The Photograph:

- i. Use a good 35mm camera or digital camera
- ii. Provide the editor a black and white photo whenever possible
- iii. Locations should briefly describe the photograph and correctly name each of those pictured from "left to right."
- iv. Try to keep group photos to less than four people.
- v. Try for "natural-appearing" group photos

7. Submitting to *The Sphinx*TM

- a. The official journal of the Alpha Phi Alpha Fraternity, Inc. is *The Sphinx*TM.
 - i. It has been published continuously since 1914.
 - ii. Brother Raymond Cannon was the organizing editor during General President Henry Dickason's tenure.
- b. Editorial mail, *Alpha On the Move*, *Chapter News*, *Omega Chapter* news, other newsworthy articles and changes of address to Alpha Phi Alpha Fraternity, Inc.
- c. Disclaimer:
 - i. The Fraternity assumes no responsibility for return of unsolicited manuscripts or art. Opinions expressed in columns and articles do not necessarily reflect the views and policies of Alpha Phi Alpha Fraternity, Inc.
 - ii. Use of any person name in fiction, semi-fiction, articles or humorous features is to be regarded as a coincidence and not as the responsibility of *The Sphinx*TM and is never done knowingly.
- d. Deadlines for submitting articles to *The Sphinx*TM:
 - i. Spring Issue – December 1
 - ii. Summer Issue – March 1
 - iii. Fall Issue – June 1

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- iv. Winter Issue – September 1
 - e. Address: Editor of *The Sphinx*TM

Alpha Phi Alpha Fraternity, Inc.
2313 St. Paul Street
Baltimore, MD 21218-5234

8. National Communications Management Strategy

- a. Please see [SECTION III, Communications Management](#) for the Fraternity's Communications Management Strategy for additional data.

I. Guide for Membership Intake Officers

1. Requirements:

- a. Must be in “good standing” with the chapter: financially and academically, if applicable,.
- b. Must be risk management certified
- c. Must be Pharaoh's Council trained
- d. Familiarize self with *The Standing Orders* of the Fraternity

2. Duties:

- a. Provide leadership at the chapter level in the implementation of the membership intake process (MIP) according to the rules and guidelines and the supervision of the district's Pharaoh's Council chairman.
- b. Assist chapter members in obtaining the proper credentials for membership intake – requesting risk management certification,
- c. Assist with Alpha Awareness Seminars that have been approved according to guidelines.
- d. Keep members informed of the progress of the intake process.
- e. Assist new members in becoming familiar with the procedures and guidelines of the Fraternity and the college/university
- f. Develop reclamation activities
- g. Market the life membership program
- h. Work closely with Chapter President and Advisor

3. Recommended Additional Duties/Activities

- a. Keep a roster of chapter members
- b. Issue graduating members or relocating members the “Moving Form”
- c. Keep an accurate database of chapter alumni members –
 - i. Name, current address, phone information, occupation, etc.
- d. Assist graduating members with their transition from college to alumni chapters.

J. A Guide for Directors of Educational Activities

1. Duties

- a. Develop a calendar of activities for educational programs
- b. Create opportunities for personal development for members
- c. Oversee the implementation of the national programs and special projects
- d. Coordinate chapter's scholarship program
- e. Organize tutoring and mentoring opportunities for the chapter

2. National Programs Implementation

- a. Be aware of all National Programs
- b. Solicit assistance from other members in coordination the program
- c. Conduct workshops for new members on the National programs – their purpose, impact, and the implementation process.

-
- d. Oversee program implementation and success
 - e. Assist Pharaoh's Council in conducting national program during membership intake.

3. Scholarship Opportunities

- a. Secure a list of scholarship opportunities available to members
- b. Assist members in securing proper form to apply for local alumni and national scholarships.
- c. Coordinate the chapter's community scholarship program

K. Chapter Development

1. Learning Objectives:

- a. Upon completion of this section, the chapter member will be able to:
 - i. Identify activities that could be used by chapter officers and advisors in better preparing the chapter officers in service and leadership roles.
 - ii. Coordinate a successful officer and advisor retreat.
 - iii. Plan a program of activities or business plan for the fraternal year.

2. Chapter Development Activities:

- a. Acquaint total membership through instruction with the organizational structure and function of the chapter, the official accoutrements, parliamentary procedure, and general operating procedures.
- b. Thoroughly review the [Chapter Administration Guide](#).
- c. Conduct routine chapter advisor-officer meetings to discuss activities.
- d. After each regular meeting, conduct individual officer evaluations
- e. Chapter officers meet before each regular meeting to arrange the agenda. Hold executive meetings once at least once a month to plan activities for the month and to evaluate the past month's activities.
- f. President and chapter advisor regularly check the treasurer's and secretary's books.
- g. Hold an orientation session for new chapter officers; chapter advisor utilizes "Guides" for each officer to assist in the orientation.
- h. Past officers discuss duties and responsibilities with each respective new chapter officer.
- i. Invite an important community leader in to discuss the importance of using parliamentary procedure, having good chairing skills, and maintaining proper conduct in business meetings.
- j. Chapter advisor conducts individual conferences with new officers to discuss "Guides" given during the orientation session.
- k. Conduct an officer installation ceremony.
- l. Create, adopt or adapt a formal installation ceremony for your new officers (See example of [Installation Ceremony](#)).
- m. Past and new chapter officers discuss and evaluate past year's activities and shortcomings of past officer development program and offer new suggestions for improvement.
- n. Together, past officers and new chapter officers, complete forms (Chapter Directory and Report, Remittance of Funds form for chapter tax, and other pertinent forms, see [Chapter Administration Guide](#)) for submission to the district, regional, and corporate levels;
- o. Discuss all aspects of chapter officer development, suggest means of involving higher percentage of members in the program; go over again the duties, responsibilities and expectations of chapter officers.

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- p. Attend Cluster and District Leadership Conferences.
 - q. New officers attend leadership sessions for their respective offices.
 - r. Have members who served as observers give their impressions of the District Leadership Conference and the benefits received by attending.
 - s. Conduct second officer-advisor retreat.
 - t. Review and discuss events and sessions that took place at the District Leadership Conference.
 - u. Revise officer and leadership development program to better serve the organization's needs.
 - v. President appoints first slate of assistant officers, if applicable.
 - w. President and vice-president explain the officer and leadership development program to the membership.
 - x. Have new members study the organization and program of activities, and learn the official declarations of the Fraternity.
 - y. Invite personnel from your banking institution as guest speaker to talk on the importance of keeping up-to-date, accurate financial and management records.
 - z. Secretary announces the members on the standing committees and president appoints one of the members in each committee as chair.
 - aa. Have all members review and evaluate old program of activities and offer new suggestions for improvement to the program of activities chair.

3. The Chapter Administrative Guide

- a. The *Chapter Administration Guide* is one of the most essential documents necessary for all chapters, college and alumni, to have a successful, productive, and “good standing” year.
- b. The *Guide* contains information regarding the following areas: address changes, constitutional amendments, chapter constitutions, chapter tax, chapter delegates, elections, Fraternal symbols, fees and taxes, initiation fees, fraternal organizational structure, inactivity, fraternal initiations, hazing policy statement, life membership, chapter insurance, membership intake information, tax status, cost of guides and manuals, jewelry and pins order information, inactive members reactivation information, publications requirements, re-activation of inactive chapters, risk management training and seminars, rules governing awards, clarification of chapter mandates, chapter membership requirements, chapter tax, chapter basic requirements for operation, communication and publications, administrative forms, chapter officers duties and responsibilities, and various other forms.

4. The Balanced Scorecard, Chapter Directory and Report

- a. [The Balanced Scorecard, Chapter Directory & Report Form](#) is required of all chapters.
 - i. It must be filed within ten (10) days after the election of new officers has been conducted.
 - (a). Officers for college chapters are elected in April of each year. The election of alumni chapter officers is conducted in the month of May.
 - (b). Additionally, this form serves to survey Chapters’ implementation of national programs, service activities, and charitable contributions.
- b. A Balanced Scorecard is a tool for measuring an organization’s activities in terms of its mission, vision and strategies.
 - i. It is a management tool that continuously reveals whether an organization and its members achieve the results set forth by the strategy.

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- ii. But it is also a tool that helps the organization express the necessary objectives and initiatives to support the strategies.
 - c. This strategic management system forces members to focus on the important performance metrics that drive success.
 - i. It balances a financial perspective with customer, process, and employee perspectives.
 - (a). Measures are often indicators of future performance.
 - d. Guiding Principles
 - i. The Balanced Scorecard will be integrated into the existing Chapter Directory and Officer Report. Much of the data currently being collected by the Chapter Directory and Officer Report is consistent with the requirements of a Balanced Scorecard.
 - ii. The Balanced Scorecard will mirror the Chapter Operations Plan and support the Alpha Phi Alpha Fraternity, Inc. National Strategic Plan.
 - iii. The Balanced Scorecard will provide a means of allowing the calculation of an overall score to gage a chapter's adherence to the Chapter Operations Plan and the Alpha Phi Alpha Fraternity, Inc. National Strategic Plan.
 - iv. The Balanced Scorecard process should provide a means of enforcement. This will be handled by incorporating the requirements of the Chapter Operations Plan, and thus the Balanced Scorecard, into the National Awards and Achievement Process.
 - v. The Balanced Scorecard process should allow for ease of reporting data. Therefore, AlphaNet will be enhanced to allow chapters to input their report directly into the system. It should also allow for compilation of data on a district, regional and national basis.
 - e. A copy of the Chapter Balanced Scorecard is included in [Appendices and Resource Documents](#)



"Balances Scorecard,
Chapter Directory an

5. Risk Management Handbook

- a. **Overview:**
 - i. The Risk Management Program was adopted at the 80th Anniversary Convention.
 - ii. It targets two basic categories: chapter officers and membership intake participants.
 - iii. All Brothers desiring to serve as a chapter officer must be trained and certified as being capable of discharging the duties and responsibilities of the office.
 - iv. Additionally, if a Brother wishes to participate in the membership intake process, then he must become risk management certified.
 - v. The training will focus on the rules and regulations regarding the process and the basic laws and procedures of the Fraternity.
- b. **Objectives:** (As stated in the *Risk Management Manual*)
 - i. **Membership Intake and Initiation:** To promote an understanding of the roles played by various Fraternity components in the Membership Intake Process, the program activities set forth for the process, and the administrative regulations governing the process.

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- ii. **Risks and Liability:** To provide a general knowledge of Fraternal rules and regulations regarding the possible risks and liabilities of the Fraternity, Chapter and each individual Brother.
 - iii. **Training:** The training process for Risk Management Certification will occur at the regional and district levels. It is conducted by a specially certified and trained Brother.
 - iv. **The Risk Management Handbook is below:**



RiskManagementHandbook.pdf

6. Constitution and By-laws of Alpha Phi Alpha Fraternity, Inc.

- a. The Alpha Phi Alpha Fraternity, Inc. Constitution and By-laws are the official governing documents of the organization.
- b. For the purpose of this training, the section of the *Constitution and By-laws of Alpha Phi Alpha Fraternity, Inc. (1998)* that deals with basic information related to chapters – organizational units, chapter names and designations, chapter constitutions and by-laws, chapter officers, election of officers, college and alumni chapters, jurisdiction, dechartering, property of the National organization, etc. have been included in [Appendices and Resources Documents](#).
- c. The entire constitution should be obtained, read, and adhered to.

L. Basic Parliamentary Procedure

1. Introduction

- a. A conducting effective chapter meeting is dependent upon how well members utilize parliamentary procedure.
- b. The process gives all – majority and minority – voices an equal chance of being heard.
- c. Additionally, regular use of parliamentary procedures within the chapter helps the member in other organized settings – work related situations, community-based groups, professional organizations, or politics.

2. Learning Objectives:

- a. Upon completion of Section 5: Basic Parliamentary Procedure, the chapter officer and member will be able:
 - i. To utilize basic parliamentary procedure in conducting effective meetings.
 - ii. To state the purpose of parliamentary procedure.
 - iii. To obtain the floor and place business on the floor by properly stating a motion.
 - iv. To classify motions according to their type and the order of precedence.
 - v. To understand debatable and non-debatable motions.

3. Purpose of Parliamentary Procedure

- a. The purpose of parliamentary procedure is to provide an organized way to conduct meetings.
- b. It is provided to allow the majority to rule but at the same time protecting the rights of the minority.
- c. Main motions are the mechanism by which nearly all business is conducted and is the primary tool of the majority.
- d. Nearly all other motions are the tools for use by the minority.

4. Role of the Presiding Officer

- a. The chairperson of a meeting is expected to be impartial.
 - i. Therefore, the person chairing a meeting should not enter into debate.

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- ii. However, the chair may vote by secret ballot or to make or break a tie since none of these circumstances violates the chair's neutral position.
 - iii. A good chair is decisive and rules on motions and should not equivocate.
 - iv. For members who believe the chair is incorrect in its decision have parliamentary recourse to deal with their concerns.
 - v. In using the gavel, the chair should use it firmly, not harshly.
 - vi. One tap signals that an item of business has been completed. It also is the signal to be seated.
 - (a). Two taps signals the meeting is to begin.
 - (b). Three taps is the signal to rise.
 - (c). A series of short raps is a signal for order.
 - b. After a motion has been made and seconded, the chair should state the motion for the entire group before any further action is taken such as discussion or a vote.

5. Obtaining the Floor and Stating a Motion

- a. Generally, a person wishing to obtain the right to speak or make a motion simply stands and addresses the chair by stating, "Mr./Madame President (Chairperson).
- b. Once the chair recognizes the individual by name, the person may then offer their statement or motion.
- c. Generally, motions are stated, "I move ..."

6. The Concept of Precedence

- a. Precedence is a method established for determining priority of handling motions which allow the concept of one thing at a time to be in force during a meeting.
- b. Main and unclassified motions are at the bottom of precedence while Privileged motions are highest.
- c. Subsidiary motions are in the middle and Incidental motions are simple handled as they arise.
- d. The subsidiary and privileged motions are listed in order of precedence.

7. Kinds of Motions

a. Main Motion

- i. The major principle of parliamentary procedure is "only one principal or main motion at a time."
- ii. All business is brought before the meeting by a motion or resolution, a report of a committee or a communication.
- iii. The terms motion and question are synonymous; when first stated, it is a motion, and when repeated by the chairperson, it is referred to as a question.

b. Unclassified Motions

- i. There are a few main motions, not classified, which are very much in use in an effort to take up a question again, or to change or undo an action that has been taken.
- ii. In certain situations, some members believe there has been too small an attendance at the meeting or that it has been an unrepresentative one; therefore, they desire a new ruling on the subject.
- iii. These motions have no order of precedence.

c. Subsidiary Motions

- i. The subsidiary motions are the most frequently used motions in parliamentary procedure.
- ii. They are made while a main motion is pending, for the purpose of assisting or modifying it or to delay action or otherwise dispose of the main motion.

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- iii. The subsidiary motion supersedes the main motion for the time being and must be dealt with before action can be taken on the main motion.
 - iv. However, all subsidiary motions must yield to privileged and incidental motions.
 - v. There are only seven subsidiary motions and they have a specific order of precedence.

d. Incidental Motions

- i. Incidental motions are those which arise out of a pending question and must be decided before any other business is taken up; or are something connected with the business of the assembly that must be attended to and which requires a temporary interruption.
- ii. They have no special rank among themselves and yield to privileged motions.
- iii. They are dealt with individually as they arise and take precedence over the subsidiary motions.

e. Privileged Motions

- i. Privileged motions have nothing to do with the pending question or motion, but are of such urgency and importance that they are allowed to interrupt the consideration of other questions, and take precedence over them.
- ii. They are undebatable because of their high rank.
- iii. When privileged motions do not interrupt other business, they are main motions and are without privileges.
- iv. They also have a rank of precedence within this category of motions.

8. Thumb Rules for Motions

- a. What motions require a second?
 - i. Whenever a motion is made by saying "I move. . ." it requires a second.
 - ii. The exception to the rule is the incidental motion "To appeal from the decision of the chair."
- b. What motions are debatable? Most motions by type are not debatable.
 - i. The motions that are debatable are: Main motions; The three R's (Reconsider Rescind and Ratify); The bookends (Postpone indefinitely, to amend, to refer, and postpone definitely)
- c. What motions may be amended?
 - i. Motions that deal with time, sequence or volume are amendable.
- d. What motions may have subsidiary motions applied to them?
 - i. Since to amend is a subsidiary motion, all motions that are amendable qualify.
 - ii. In addition other motions that are debatable but not amendable may have subsidiary motions applied to them.
 - iii. The exception to the rule is the incidental motion "To appeal from the decision of the chair."
- e. What vote is required for passage of motions?
 - i. The chair without taking a vote decides motions that do not begin with "I move. . .". Motions that affect individual rights regarding rules or debating privileges require a 2/3-majority vote.
 - ii. All other motions require a majority vote.
 - iii. The exception to the rule is the incidental motion "To appeal from the decision of the chair."
- f. When may a person interrupt when another person has the floor?
 - i. One may interrupt another if the issue is urgent enough to warrant such action but only with seven (7) specific motions (To raise a question of privilege, To

call for the orders of the day, To raise a point of order, To appeal from the decision of the chair, To call for a division, To make a request, and To reconsider)

M. Conducting Effective Chapter Meetings

1. Introduction

- a. Effective chapter meetings are essential to having a productive chapter.
- b. A good leader knows his members and his own leadership style.
- c. His leadership style will dictate the success of chapter meetings.
- d. The information below is given to assist the member in assessing his leadership skills as well as offering some suggestions on how to carry out an effective chapter meeting.
- e. A sample agenda is presented for use as a guide in developing appropriate agendas for chapter meetings.
- f. The “Makings of A Good Meeting’ manual is to be used as a resource tool for facilitating group meetings.

2. Learning Objectives:

- a. Upon completion of this Section, chapter leaders will be able:
 - i. To understand general responsibilities of a leaders;
 - ii. To identify the various types of leadership behavior patterns;
 - iii. To apply leadership skills and style when conducting chapter meetings
 - iv. To apply skills of group facilitation and agenda planning in order to conduct effective chapter meetings.
 - v. To utilize parliamentary procedure in conduct a meeting

3. General Qualities of A Good Leader

- a. The following list of qualities of a “good leader” was adapted from a list established by a class on leadership development at the University of Arizona. These briefly stated qualities lend themselves to ones understanding of general characteristics and expectations of leaders.
 - i. **WELL PREPARED** - Know leadership takes work as well as practice.
 - ii. **GROUP MINDED** - Regard yourself as a part of the group. Say "we" instead of "I"; don't try to run the crowd. Instead, be guided by the crowd's wishes.
 - iii. **LIKES PEOPLE** - Be understanding and friendly.
 - iv. **POISED** - Don't let irritations bother you.
 - v. **HAS HUMILITY** - Be confident, but not cocky. Don't be afraid to reveal you don't know everything.
 - vi. **IS A HARD WORKER** - Don't ask anyone to do something that you would not be willing to do yourself.
 - vii. **RESPONSIBLE** - Live up to your word and duties.
 - viii. **COOPERATIVE** - Know how to work with others; enjoy working with them.
 - ix. **FUN LOVING** - Enjoy life - the simple things as well as the big.
 - x. **HAS VISION** - Help the persons in your group to learn and grow through the activities.
 - xi. **CLEAR** - Be able to express yourself effectively.
 - xii. **PROUD** - Proud of what you do. Take pride in being a leader, but earn it.
 - xiii. **NEAT** - Always be neat in dress and personal appearance.
 - xiv. **COURTEOUS** - The words "please" and "thank you" pay dividends.

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- xv. **THINKS AHEAD** - Know members' opinions and be ready to meet changing situations.
 - xvi. **SETS GOALS** - Make them high but attainable.
 - xvii. **TAKES ADVICE** - But do your own thinking.
 - xviii. **GETS THE FACTS** - Analyze them before you draw conclusions.

4. Leadership Behavior Patterns

a. Laissez-faire Leader:

- i. I allow complete freedom to the group to formulate its own policies. I maintain a "hands-off " position.
- ii. I offer advice, materials, only when I am asked. I take no part in discussion, or decision-making.
- iii. I take no part in assigning work, or allocating time. I maintain no pressure toward achievement, industry, and enter into disorder only when there is personal danger involved. I believe in freedom.
- iv. I take no judgments of praise or criticism except when asked and then I maintain a sort of passive attitude.

b. Autocratic Leader:

- i. I determine the policies because I am the chosen leader.
- ii. I determine all techniques, procedures and activities one at a time. The future steps are uncertain but I don't want to confuse the group.
- iii. I appoint the committees and determine the work task and the time and place.
- iv. I give my own "personal" praise because I am a benevolent leader and have status as a judge and parent-ideal.

c. Democratic Leader:

- i. I encourage and assist the group to discuss and determine all policies.
- ii. I help the group to formulate its own goals, and determine alternative consequences.
- iii. I supply technical advice or facts when needed but permit group choice.
- iv. I permit members' freedom to work with whom they choose, and to divide the tasks as they see fit. However, I maintain pressure toward achievement, industry, and against disorder. I react as if I was a member of the group.
- v. I try to be "objective" and "fair" in praise and criticism and to not hold myself up as the final judge or "all wise" being.

5. Chapter Meetings

- a. Establish regular meeting date, time, and place
- b. Conduct Executive Committee meeting prior to regular meeting
- c. Have an agenda; make a copy for each member
- d. Be punctual
- e. Set an establish length for meeting (1 to 1-1/2 hour).
- f. Use parliamentary procedure
- g. Be sure to have quorum before starting the meeting
- h. Make committee chairs aware of expected reports
- i. Requests that committee reports be submitted in written form
- j. Respect the rights of all members
- k. Be fair
- l. Have appropriate documents available: constitutions and by-laws; university guidelines for student organizations; etc.
- m. End meetings on time

6. Sample Agenda

- a. Call to Order
- b. Invocation
- c. Present Agenda for Adoption
- d. Roll Call (If needed)
- e. Reading of Minutes of last meeting
- f. Approval/Adoption of Minutes
- g. Presentation of Correspondence
- h. Financial Report
- i. Call for Old Business
- j. Unfinished Business
- k. New Business
 - i. By Proposals
 - ii. From the Floor
- l. President's Remarks
- m. Chapter Advisor Remarks
- n. Plenary: For The Good of The Brotherhood
- o. Adjournment
- p. Fraternity Hymn

7. The Makings of A Good Meeting (K. Wolf, 1998) [See Manual](#)

N. Sample Installation of Chapter Officers Ceremony (Developed by Bruce Crawford)

1. Materials:

- a. Candles for each officer and Matches

2. Presiding Officer:

- a. To the new officers who are about to be installed today, I say unto you that your responsibilities and expectations are great. (*Brief introductory remarks; comments on previous year; and expectations for ensuing year.*)
- b. First of All .. Effective leadership is essential to having a successful chapter; therefore, I call upon your chapter president-elect, Brother _____, to come forth and light this candle to represent leadership with vision and a sense of direction. (*The presiding officer hands an unlit candle to the president-elect. Allows the officer to light the candle from the match or another candle that is already burning.*)
- c. Mr. Vice President, Brother _____, please come forth to light a candle from the president's candle because you will have work closely with him to help in guiding the chapter's programs and activities. In case of his absence from the chair, you will assume the presidency.
- d. Mr. Recording Corresponding Secretary, Brother _____, please come forth to light your candle from the president's candle. Your responsibilities are great and quite essential to the success of the Chapter. Your responsibilities will include keeping accurate records for meeting transactions, completing forms, assisting with meeting agendas, and working closely with the president to ensure a successful fraternal year.
- e. Mr. Corresponding Secretary, Brother _____, please come forth to light your candle from the president's candle. Your responsibilities include sending notices, announcing correspondences received, and working closely with the president to ensure a successful fraternal year.
- f. Mr. Financial Secretary, _____, please come forth to light your candle from

the president's candle. Accurate records of funds received, dues paid, and other financial matters are essential to having a sound budget to accomplish the chapter's goals and mandates.

- g. Mr. Treasurer, Brother _____, please come forth to light your candle from the president's candle. Your responsibilities are equally as great because you will have to manage the budget and issue funds as appropriated and to keep the president and members informed of the total financial receipts and expenditures for the chapter.
- h. Mr. Chaplain, Brother _____, please come forth to light your candle from the president's candle. The members' spiritual nurturing and inspirations from someone greater than they are essential to helping to manage cohesiveness and fraternal love within a brotherly bond.
- i. Mr. Historian, Brother _____, please come forth to light your candle from the president's candle. This symbolizes that the events and occurrences during the year will be recorded for posterity. Your job is important for chapter competitions and displays and maintenance of past documents and records of the chapter.
- j. Mr. Membership Intake Coordinator, Brother _____, please come forth to light your candle from the president's candle. Your job is the key to our future growth of the chapter and this fraternity. It is your responsibility to assist with the appropriate implementation of our national membership intake process and reclamation efforts; thereby, increasing in chapter membership, quality, and character.
- k. Mr. Associate Editor of *The Sphinx*, Brother _____, please come forth to light your candle from the president's candle. Your responsibilities are important to the outward growth of the chapter by informing Alpha brothers and the community about chapter's programs, activities, achievements and services through national and local communications systems.
- l. Mr. Director of Educational Activities, Brother _____, please come forth to light your candle from the president's candle. You have the awesome task of assuring the Fraternity that the national educational programs – Project Alpha, *Go-to-High, Go-to-College, A Voteless People Is A Hopeless People* Campaign and special projects (Big Brothers, Big Sisters and Boy Scouts, and Scholarship programs) - are successfully implemented.
- m. Mr. Sergeant-at-arms, Brother _____, please come forth to light your candle from the president's candle. You are essential because you are responsible for admitting appropriately credential individuals in the meetings and ceremonies; additionally, you are responsible for assisting the president in keeping peace and a harmonious atmosphere in meetings and gatherings.
- n. Mr. Parliamentarian, Brother _____, please come forth to light your candle from the president's candle. You have the awesome responsibility of assisting the president in expediting the meeting and allowing the minority as well as the majority to be heard. You must be abreast of current parliamentary procedure and knowledgeable of the local and national constitutions and by-laws.
- o. Now, Officers, by having lit your candle from the president's candle, you are committing time, effort, energy, enthusiasm, ideas, and constructive criticism and in order to lead the membership to a productive and successful year. (*Ask new officers to raise right hand.*)
- p. Therefore, in order to promote a more perfect union among the brothers of

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- _____ Chapter and Alpha Brothers everywhere; I ask these questions:
- q. Do you accept the position to which you have been elected?
 - r. Will you insist upon brotherly love and a fraternal spirit within the organization?
 - s. Will you abide by and support the constitutions and by-laws of the _____ Chapter and Alpha Phi Alpha Fraternity, Inc.?
 - t. Will you promote a positive image of the Fraternity within the _____ (location) and surrounding communities?
 - u. And, now officers do you pledge your loyalty to this chapter with respect to its members and Alpha Phi Alpha? (*Ask new officers to lower hands and then turn to the members*).
 - v. And now members of _____ Chapter, will you please stand?
 - w. Do you pledge to support and respect the leadership you have elected?
 - x. Do you pledge to continue supporting the constitutions and by-laws of the _____ chapter and Alpha Phi Alpha Fraternity, Inc.? (*Presiding officer now turns to the newly installed officers, and says ...*)
 - y. Finally in the name of the Jewels and in the Spirit of Alpha, you are hereby duly installed as the _____ (year) Chapter officers. Congratulations, Brothers. (*Brothers congratulate new officers.*)

O. The Chapter Administration Guide

1. A copy of the complete Chapter Administration Guide may be obtained by visiting www.alphaphialpha.net

SECTION III. COMMUNICATIONS/PUBLIC RELATIONS AND BRAND MANAGEMENT

A. Internal Communications

1. Purpose

- a. This plan is designed to improve internal communications of Alpha Phi Alpha Fraternity.
- b. This plan identifies strategies, goals, objectives, and activities, which are consistent with established policy and an organizational assessment of the effectiveness of the Fraternity.

2. Seven essential Elements of a Successful internal communications strategy

- a. **Effective member-directed communications must be led from the top**
Effective communications require the active commitment and endorsement of Alpha Phi Alpha leaders, (chapter, area, district, regional and national officers). It is not enough simply to develop a 'vision statement' or formulate in general terms the values by which the organization lives. Behavior is what counts. Alpha leaders must be seen to behave in a manner that is consistent with the ethos they are promoting.
- b. **Successful internal communications owe as much to consistency, careful planning and attention to detail as they do to charisma or natural gifts** We might not all be another Belford Lawson, Ozell Sutton, or a Maynard Jackson. But even such communication 'giants' slip up if they fail to plan, fail to pay attention to detail and fail to project a consistent message.
- c. **Communication via the fraternity's "chain of communication" is most effective.** Communication is an opportunity for brothers, from leader to member, to ask questions and check that they have understood the issues correctly. However, be aware that business urgency and reality may dictate the need, on many occasions, to inform members directly rather than relying entirely on the

cascade process, (though leaders will still need to answer members' questions and listen to their views.)

d. There must be integration between internal and external communications .

There must be a fit between what you are telling your members and what you are telling your community and the general public.

e. Timing is critical. However clearly expressed and well-presented your message may be, if it arrives at the wrong time you might as well not have bothered. Old news is often worse than no news. Consequently, it is important to ensure that the channels you use can really deliver at the time you need them to.

f. Communication is a two-way process. Internal communications are not a one-way information dump. Capturing feedback is of critical importance, and if you are not seen to be listening and acting on what you are told, why should a brother bother telling you?

g. Set your standards and stick to them. Determine which channels should be mandatory and which should be optional; establish quality standards for all channels and review these at least annually.

2. Internal Communication Strategies

a. Most organizations, be they public or private understand the importance of strategic communication with the public. Frequently, communication methodologies for communicating with the public (external communications) are included in strategic planning. However, few organizations address INTERNAL communication in the same way.

b. Determining what should be communicated to staff and members, when it should be communicated, and how it should be communicated is often left up to the decisions of individuals made when there seems to be a need. In other words internal communication strategies are developed, reactively, when there is a crisis or major event that clearly requires addressing communication issues.

c. Where communication is planned out, it is often around upheavals like major organization change, layoffs and downsizing, and technological change. However, once the initiating focus has been eliminated, communication tends to go back to an unorganized incoherent process.

d. Nevertheless, there is no question that strategic internal communication planning can be a proactive approach to building a better, more directed and efficient organization.

3. Advantages and Benefits of Strategic Internal Communication

a. The intent of creating an Internal Communications Process is not to dominate or control Alpha Phi Alpha members, but to steer them in a direction of a set of common goals on which they can act every day.

b. This brings coherence to the fraternity, and allows better coordinated action. By clearing up ambiguity in the what's, how's, and why's, the common culture permits brothers to act with empowerment.

c. When we have a brotherhood that understands the basic values and purposes of the organization, we give them the opportunity to make decisions that fall within those parameters.

d. That means, for example, that more decisions can be made at the rank-and-file level, reducing micro-managing from the General Office.

e. The advantages and benefits are:

i. Permits brothers to make more decisions online since they have the tools and knowledge needed to make the "right" decisions.

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- ii. Encourages a sense of identification, on the part of staff and members, with the goals, mission and procedures of the organization, which can result in a sense of "making a difference". This can have direct impact on effort and efficiency.
 - iii. The potential for reducing day-to-day conflict. Much conflict is generated by conflicting ideas on what is important to the organization...often an indicator that the members involved do not share a common vision or understanding.
 - iv. Simply put, if we want to create a fraternity that is populated by men who are working towards the same goals, and by the same rules, internal communication, in its broadest sense, is the key to bringing that about.

4. Implementation of the Internal Communication Plan (ICP) Process

- a. First, we need to understand that we plan for internal communication for a long term time period, not in the "short term."
 - i. Since the effects of communication exert themselves over an extended period, we need to look at an approach that will extend over years.
 - ii. While event based tactical communication planning is reactive and short term, strategic ICP is by its nature, longer term and proactive.
- b. Alpha Phi Alpha must consider a very broad approach to communication.
 - i. Often, even organizations who address internal communication fail because they understand the organization communication process as a limited process-one that includes only what we normally think of as communication methods.
 - ii. For example, they formulate a vision statement, or statement of principles, and plaster it all over the organization, without considering that the behavior of managers and the decisions that are made in the organization are the "real communication tools."

5. Key elements

- a. Long-term focus Clear values, goals
- b. Comprehensive, pervasive methods
- c. Consistent messages

6. Outline of ICP Steps

- a. In a large organization, such as Alpha Phi Alpha Fraternity, internal communication strategies need to include many players, such as chapter officers, area, district, and regional officers, etc.).
- b. **Identify the common culture needed/wanted** - We make the distinction between what is needed and what is wanted because the culture we seek to create should somehow enable the fraternity to better achieve the goals, role and mission it has designated for it. The parallel here is to the visioning process that occurs in strategic planning, except it answers the question: "What values, principles, procedures and behaviors must we create so that we can achieve our mission?" In practical terms, this step can result in a set of goals.
- c. **Identify the available communication tools** ~ Since we consider internal communication in a broad sense, we need to identify the means by which we can affect culture in the direction we want to go. Below are some examples of communication tools to consider, but there may be others.
 - i. *Print*: Memos (internal correspondence), newsletter, brochures, performance appraisal documents, slogans.
 - ii. *Oral*: General conventions, chapter, area, district and regional meetings, speeches and addresses, one-on-one (face to face) leader-to-member communication.

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- iii. *Electronic*: E-mail, Web sites and intranets (Alphanet).
 - iv. *Management Behavior*: Any and all management/executive behavior that sends messages, either intentionally or unintentionally about the values, principles, purposes of the organization.
 - v. *Fraternity Forums*: Surveys, other forums such as fraternity staff and chapter meetings, special forums, individual meetings etc.
 - vi. *Policies & Procedures*: Policies and procedures need to reinforce and be consistent with the messages being sent by other "channels."
- d. **Determine what tools are suited to which goals** ~ We need to match the tools we have at our disposal to the goals that we identified in Step 1. Some tools are best suited to certain types of goals and not to others. In general, though we want to aim ALL of our available communication tools at the achievement of our goals.
 - e. **Develop a description of how each tool will be used** ~ People "in charge" of the communication tools need to know both generally and specifically how their tool fits into the larger context. For example, Alpha Phi Alpha leaders (officers as mentioned above) need to understand the tone and approach to writing internal memos that will be consistent with the "internal communication" goals matched to that tool. Or more obviously, a chapter/regional newsletter editor must be aware of the primary values, and information that needs to be conveyed to the brotherhood so the newsletter supports the creation of the desired culture.
 - f. **Plan for remediation** ~ Since the ICP process is comprehensive in nature, we may end up asking brothers in the fraternity to behave and communicate differently. That may mean we will need to help brothers develop the skills needed to fulfill these new expectations. For example, a officer might need to learn how to rephrase memos, or conduct cooperative performance appraisals so they are consistent with the desired culture.
 - g. **Plan for Implementation** ~ At this point we should know what we need to communicate, how we are going to do it, etc. We may want to flesh this out a bit by determining who will do what, and when it will be done. Let's remember that this is NOT a project, but an ongoing process...we want to change communication approaches over the long term, as necessary.
- 7. Implement Strategies**
- a. Some implementation ideas may include:
 - i. Internal Newsletter ~ An internal newsletter that will be mailed to all financial members. This newsletter could also be utilized as a reclamation tool by sending it regularly or periodically to inactive brothers
 - ii. Web Site ~ The Chapter website can be utilized to communicate with brothers. A brothers-only portal can be established to provide chapter specific information such as chapter directory, committee reports, minutes, etc. Such a portal can be pass word protected for privacy and to encourage brothers to become financial in order to view data.
 - iii. Listening Committee ~ Chapters may appoint a Listening Committee to monitor the "wind" of the chapter and report back to the board. Such a committee can be charged to randomly interview six or seven brothers each month and report back to the Executive Committee.
 - iv. Listening Session ~ Chapters may conduct periodic listening sessions in order to allow the brothers to vent. Such sessions should be facilitated by a professional facilitator who can a) help keep the group on target, time and

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- direction, b) make sure everyone is working on the same problem with the same approach, c) make sure everyone participates, d) assure “Healthy Confrontation”, and e) Keep a running group memory of the session.
 - v. Open Door Policy ~ The president and the executive committee must make it clear that they are open for communication for any member at any time. They should be charged to keep their ears and eyes open for any possible area of misunderstanding or controversy.
 - vi. Chapter Operating Guide ~ A standard Chapter Operating Guide that will include a directory, the chapter constitution and bylaws, description of all entities, list of committees, etc. This provides brothers with the information they will need to make informed decisions
 - vii. Official Fraternity Forums ~ Provide incentives for brothers to attend district, regional and national conventions, meeting, workshops and forums. Always provide a neophyte the opportunity to serve as a delegate, if possible. Assure that the chapter does not send the same delegates to each convention. The forums provide members with first hand up to date information on the inner working of the fraternity. Also assure that delegate provide a written report that is available to all members.
 - viii. Continuously monitor and revise ~ Over time, new communication tools may become more obvious, or we may find that some tools are ineffective. So consistent with a continuous improvement approach we need to assess the effects of what we are doing, and retool as needed. This can be achieved by annual surveys to assess whether progress is being made, and solicit additional ideas.

B. Public Relations Planning

1. What is Public Relations

- a. Public relations is the act of communicating what you are to the public. This is not to be confused with publicity, which is just one of the methods used in communicating the image.
- b. Public relations creates awareness and support among an organization's constituents for its products, services, management views, intellectual capital and its distinct approach to doing business. It helps build credibility, manage risk, establish reputations and drive support. As we practice it, public relations employs multiple marketing techniques: media relations, printed materials, speeches and seminars, surveys, CDs and DVDs, Internet-based strategies, direct response and special events.
- c. From the receptionist in the Corporate Headquarters to the brother in a local chapter, everyone carries a message that impacts the reputation of Alpha Phi Alpha. Therefore, all brothers must recognize that the General President of Alpha Phi Alpha (or his designee) is the official representative of the fraternity.

2. Alpha Phi Alpha Fraternity, Inc. Public Relations Guidelines

- a. No chapter or brothers should represent Alpha Phi Alpha Fraternity in any media (television, radio, movie, etc.) without the expressed written permission of the General Organization. This includes interviews, personal appearances, step shows, etc. In addition, no chapter or brothers shall participate in a **TV shows, movie or video** unless it cleared by the General Organization.
- b. No one should audition, serve as an extra or participate in a show where the wearing of the Insignia of Alpha Phi Alpha Fraternity or representation in the

name of the fraternity is a requirement without expressed written consent from the General Organization.

- c. In addition, no brother or chapter should authorize the use of any symbol of Alpha Phi Alpha Fraternity, Inc. in any public/media appearance without the expressed written permission of the General Organization.
- d. A Form to request approval from the Executive Director is below:



Public-MediaAppearanceApprovalForm.doc

- e. Additional guidelines regarding Alpha Phi Alpha branding policies are included in the National Alpha Phi Alpha Fraternity, Inc. Protocol Manual
- f. As per the National Chapter Operations Plan, each chapter is to develop a comprehensive Public Relations plan consistent with the plan developed by Alpha Phi Alpha Fraternity, Inc.

3. Sample Outline of PR Plan

a. Media Kit

- i. Each Chapter Must Develop a Media Kit
- ii. A Media Kit is a well-planned promotional materials, such as press releases, flyers, letters, and reviews used for announcing and circulating information about an organization or promotion.
- iii. Please visit <http://www.surepayroll.com/spsite/resources/articles/starting/starting6.asp> to review the How To's of developing a Media Kit.
- iv. The Chapter Media Kit should include:
 - (a). News Releases
 - (i). A news release or press release is a written or recorded communication directed at members of the news media for the purpose of announcing something claimed as having news value. Typically, it is mailed or faxed to assignment editors at newspapers, magazines, radio stations, television stations, and/or television networks. Commercial newswire services are also used to distribute news releases. Sometimes news releases are sent for the purpose of announcing news conferences.
 - (ii). Please visit <http://www.alpha-phi-alpha.org/PressNewsList.php?newsCat=Press%20Release> for examples of press releases.
 - (iii). All press releases must be approved by the General Organization.
 - (b). Public Service Announcements (PSA)
 - (i). A PSA is an announcement on television or radio serving the public interest and run by the media at no charge. For example, a utility company might do a series of PSA's on the subject of saving energy in the home. Each one would feature the company's name.
 - (ii). Please visit <http://www.americanheart.org/presenter.jhtml?identifier=3382> for examples of various types of PSAs.
 - (iii). In placing utilizing the official symbols of Alpha Phi Alpha Fraternity, Inc. chapters should be careful to follow the guidelines outlined in the National Protocol Manual (under development)

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- (iv). All PSAs must be approved by the General Organization.
 - v. Bios of participants of event(s)
 - (a). A bio is a sentence or short paragraph containing personal information about an individual of interest.
 - (b). Please visit <http://www.alpha-phi-alpha.org/Page.php?id=136> for an example of a bio.
 - vi. History of Alpha Phi Alpha
 - (a). Chapters should consider utilizing the standard “History of Alpha Phi Alpha” in ii. below
 - (i). Founded on December 4, 1906 at Cornell University in Ithaca, New York, Alpha Phi Alpha Fraternity, Inc. has continued to supply voice and vision to the struggle of African Americans and people of color around the world. The Fraternity has long stood at the forefront of the African-American community's fight for civil rights, through Alpha men such as Martin Luther King Jr., Adam Clayton Powell, Thurgood Marshall, Andrew Young, and Cornel West among others that include members of the 110th Congress including: Emanuel Cleaver, II (MO), Charles B. Rangel (NY), Danny K. Davis (IL), Chaka Fattah (PA), Al Green (TX), Gregory Meeks (NY), David Scott (GA), Robert C. Scott (VA). The fraternity through its college and alumni chapters serves the community through nearly a thousand chapters in the United States, Europe and the Caribbean.
 - (b). The history of the organization should be placed at the bottom of each press release.
 - vii. History of Chapter
 - (a). Each chapter should develop a brief standard history as illustrated below:
 - (i). Beta Beta Lambda Chapter of Alpha Phi Alpha Fraternity, Inc. has been an active part of the greater Miami community since its inception in 1937, providing leadership through its many service activities such as Alpha Outreach, Project Alpha, Alpha-Dade Youth Sports Program, Sankofa Project, Knights of Gold, Boy Scouts Troop 1906, Alpha/Head Start Partnership, Voter Education Project, and Scholarship Award Program. For its effort during the last six decades, Beta Beta Lambda Chapter has been honored three times as Alpha Phi Alpha Fraternity's National Alumni Chapter of the Year. In addition, the Beta Beta Lambda has been a consistent winner of the Florida Federation of Alpha Chapter's District Chapter of the Year Award for more than 25 years.
 - viii. Timeline of event(s)
 - (a). This timeline should be developed during the annual chapter retreat.
- b. Media Relations Manual**
- i. Each Chapter/District/Region Should Develop and Maintain a Media Relations Manual. This manual should include:
 - ii. Listings of local and regional media (Print/Interactive/Broadcast and Cable)
 - iii. Each chapter should maintain a list of local and regional media contacts in their region.
 - iv. Efforts should be made to identify members of Alpha Phi Alpha who are represented in these outlets.
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c. News Conference Guidelines

- i. A news conference or press conference is a media event staged by an individual or group wishing to attract media coverage for something claimed to have news value. Television stations and networks especially value news conferences: because today's TV news programs air for hours at a time, or even continuously, assignment editors have a steady appetite for ever-larger quantities of "news" footage.
- ii. Please visit http://www.ncsu.edu/news/geninfo/crisis_guidelines_reminders.htm for a list of News Conference Guidelines.

d. Do's and Don'ts with Reporters

- i. Please visit <http://advertising.about.com/od/mediarelations/a/guestpress.htm> and for a list of Do's and Don'ts

e. Getting Prepared for the Interview

- i. Please visit <http://www.entrepreneur.com/marketing/publicrelations/prcolumnist/article168866.html> for tips on preparing for an interview.
- f. Other resourceful information and tools for media relations manual are readily available on the web.)

C. Marketing/Advertising Planning

1. What is Marketing/Advertising

- a. Alpha Phi Alpha Fraternity, Inc. has established itself in the press and general public as a reputable, informed and concerned service organization. As a general organization we are concerned with how we are perceived in the communities we serve and within our own Brotherhood.
- b. Alpha Phi Alpha is a fraternal society that consists of rituals known only to its members. Because of this, the fraternity must contend with the perception of elitism and exclusivity often associated with an organization such as this. Furthermore, the issue of hazing and underground pledging strongly negates and overshadows our efforts to define the organization by its national programs and other noteworthy accomplishments.
- c. Whenever possible, each and every chapter must take advantage of our good standing and notoriety to grow and market Alpha Phi Alpha Fraternity, Inc. and our events in a positive framework.
- d. As per the Chapter Operations Plan, each chapter is to develop a comprehensive Marketing Plan consistent with the plan developed by Alpha Phi Alpha Fraternity, Inc. The plan should be a part of the PR Plan.

2. Objectives

- a. To continue Alpha Phi Alpha's eternal commitment to service by effectively presenting our initiatives to our communities at all levels of the fraternity.
- b. To provide the highest quality of service to our communities.
- c. To improve and maintain a high level of enthusiasm within the Brotherhood and reclaim inactive brothers.
- d. To conduct our marketing activities in accordance to our Mission Statement:
 - i. *Alpha Phi Alpha Fraternity, Inc. promotes brotherhood and academic excellence, while providing service and advocacy for our communities.*

3. Strengths & Weaknesses

- a. Strengths
 - i. Dedication of brothers

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- ii. Brothers are highly educated and accomplished in areas of expertise
 - iii. A cooperative community who appreciates the fraternity effort
 - b. Weaknesses
 - i. Lack of brotherhood participation
 - ii. Inefficient use of resource materials
 - iii. Limited financial resources
 - iv. Illegal pledge activities

4. Marketing Tactics

a. Advertising/Publicity

- i. Advertising is key to any successful event. Effective advertising will generate increase sales and participation at your events. In electronic or print advertisements, ensure the following:
 - ii. Name and purpose of event is clearly understood
 - iii. The fraternity and chapter name are clearly identifiable
 - iv. As appropriate, use the Coat of Arms on advertising literature (DO NOT use the Fraternity Shield. See guideline for use in the National Protocol Manual – under development)
 - v. Include Web site address
 - vi. There MUST be a point of contact on all publicity materials for your event
 - vii. DO NOT use branding or other informal chapter identities that portray the fraternity negatively (i.e. – bloody, death, deadly, etc.)
 - viii. Submit event details to local newspapers, community newspapers, local television & radio
 - ix. If appropriate, post events on community boards and other areas where there is high public traffic.
 - x. Develop e-flyers or promotional emails for Brothers to distribute to the friends and associates. Additionally, the chapter should establish a distribution list of emails for mass notification and promotion of events.

b. Association Contacts, Internal & External

- i. Chapters must be careful not to promote their events in a vacuum. Develop relationships outside of the chapter that can help you further promote the fraternity and your chapter events. Your Chapter President, Associate Editor to the Sphinx or public spokesman should establish contacts with the following:
 - (a). All local media (radio, television & print)
 - (b). Other Alpha chapters in the area
 - (c). Other Greek letter organizations
- ii. Other service organizations

c. Newsletter

- i. A periodic newsletter is a great tool for routinely communicating the activities of the chapter. Each chapter should establish a newsletter to be distributed to all chapter Brothers, respective Area & District Directors and other area Alpha chapters. For college chapters, your newsletter should also be sent to your college alumni Brothers to keep them abreast of the chapter activities.

d. Web site

- i. Each chapter should establish a Web site. The Web site should highlight the fraternity's history, the chapter's history and the accomplishments of the chapter Brother's. You should also have an area to promote your events and

at least one contact person should be listed. All chapter website must be approved by the National Information Management Committee.

e. Promotional Displays

- i. Take full advantage of the opportunities to set up chapter displays that highlight the activities of the chapter. Public forums, festivals, etc. provide an ideal setting to present your chapter to the communities you serve.

f. Develop Action Plan & Budget

- i. Each chapter should develop an action plan for marketing an event. The plan is a timeline of action items, with a completion target date and, if necessary, a Brother assigned to each action item.
- ii. The budget is an itemization of all the elements needed to market your event along with a projected cost for each item.

5. Implementation

- a. The Associate Editor to the Sphinx serves as the Chapter PR committee chairman (12/07)
- b. Each Chapter should develop a Public Relations Plan and a Media Kit (1/08)
The Chapter Marketing Plan must be submitted to the Chapter's Executive Committee (1/08)
- c. The Chapter Marketing Plan must be submitted to the Chapter for Approval (2/08)

D. Brand Management

1. What is Brand Management

- a. Brand management is the application of marketing techniques to a specific product, product line, or brand.
 - i. A brand includes a name, fonts, color schemes, symbols, and sound logo, and/or design scheme associated with a product or service which may be developed to represent implicit values, ideas, and even personality.
 - ii. Brand recognition and other reactions are created by the use of the product or service and through the influence of advertising, design, and media commentary.
 - iii. A brand is a symbolic embodiment of all the information connected to the product and serves to create associations and expectations around it.
- b. Brand Management is Tangible and Intangible Results
 - i. Brand Management involves managing the tangible and intangible aspects of the brand. For product brands the tangibles are the product itself, the packaging, the price, etc.
 - ii. For service brands the tangibles are to do with the customer experience - the retail environment, interface with salespeople, overall satisfaction, etc. For product, service and corporate brands, the intangibles are the same and refer to the emotional connections derived as a result of experience, identity, communication and people.
 - iii. Intangibles are therefore managed via the manipulation of identity, communication and people skills.
- c. Brand Management is essential to effectively promoting Alpha Phi Alpha Fraternity, Inc. at its various organizational levels (national, regional, district, area and local chapter).
 - i. Maintaining the value of our brand reflects how our name is perceived in the public, as well as, within our own membership.

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- ii. Effective brand management increases our equity in the communities we service. If done successfully, a strong brand will be long-standing.
 - iii. It should embody our history, our members and our accomplishments.
 - iv. Successful branding will present an expected high level of quality, commitment and strong reputation among the brotherhood and our respective communities.

2. Implementation

- a. As per the Chapter Operations Plan, each chapter is to develop a comprehensive Public Relations plan consistent with the plan developed by Alpha Phi Alpha Fraternity, Inc. The chapter's Brand Management strategy should be a part of this plan.

3. Components of an Alpha Phi Alpha Fraternity, Inc. Brand

- a. The components of the Alpha Phi Alpha Brand include:
 - i. The Name (including Greek letters)
 - ii. The Colors
 - iii. The Fraternal Shield
 - iv. The Coat of Arms
 - v. The Seal
 - vi. The General President
 - vii. The Brothers of Alpha Phi Alpha
 - viii. History & Legacy
 - ix. Etc.

4. Alpha Phi Alpha Fraternity, Inc. Brand Guidelines

- a. The Name of Alpha Phi Alpha and the Greek letters "ΑΦΑ" and its various symbols are [registered and trademarked](#) symbols of the National Organization.



RegisteredTrademarks
.doc

- b. Only duly initiated brothers of Alpha Phi Alpha Fraternity are authorized to wear the symbols of Alpha Phi Alpha Fraternity, Inc. These symbols cannot be added to any object that will be worn by a non-Alpha. These symbols cannot be combined with other paraphernalia that may be worn by a non-Alpha, e.g. intramural competition tee shirts. Where it is appropriate to represent Alpha Phi Alpha in these cases, the Chapter should consider utilizing the word "Alpha", "Alpha South", "Alpha East", etc.
- c. When utilized with the Name, Alpha Phi Alpha, the chapter designation (i.e. Iota Chapter of Alpha Phi Alpha Fraternity, Inc.) belongs to Alpha Phi Alpha Fraternity, Inc. and not the local chapter.
- d. An official chapter of Alpha Phi Alpha Fraternity, Inc. shall not utilize any prefix in front of or behind their designation that will defame the Name of Alpha Phi Alpha. Prefixes such as "Bloody", "Gangster", "Merciless", "Notorious", "Big Bad", etc., shall not be added to the description of any chapter designation. Such a practice can be misinterpreted in cases of legal action
- e. The chapter designation shall never be displayed in "red" or in local school colors on articles of clothing, in print or on the web. Such a practice can be interpreted as meaning "bloody" and can be misinterpreted in cases of legal action.
- f. The symbols of Alpha Phi Alpha Fraternity, Inc. shall not be displayed on the body of a brother through physical branding, tattoos, etc.

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- g. A complete protocol associated with the use of the Alpha brand will be included in the National Protocol Manual (under development)
- 5. Relationships**
- a. Brand management begins with understanding the relationships that are important to target. For Alpha Phi Alpha there are four (4) primary relationships:
 - b. Alpha Phi Alpha (General Organization) to its members
 - c. The members of Alpha Phi Alpha to the General Public
 - d. Alpha Phi Alpha (General Organization) to the General Public
 - e. Alpha Phi Alpha (General Organization & members) to the Black Greek Community
 - f. These relationships will be spelled out in the National Protocol Manual (under development)
- 6. Opportunities to Support our Brand**
- a. Chapters should utilize the following opportunities to support the brand of Alpha Phi Alpha Fraternity, Inc.
 - i. Mission Statement
 - ii. Press Releases
 - iii. Publications
 - iv. Web sites
 - v. Media Relations
 - vi. National Programs
 - vii. Community Service
 - viii. District, Regional & General Conventions
 - ix. Galas & Celebrations
- 7. Areas Affected**
- a. Proper use of the brand of Alpha Phi Alpha Fraternity, Inc. will affect the following areas:
 - i. Community Perception
 - ii. Intake (quality of candidates seeking membership)
 - iii. Reclamation
 - iv. Internal Development
 - v. Media Relations
 - vi. Brotherhood Morale
 - vii. Pan-Hellenic Community Perception
- 8. Planning**
- a. To strengthen the Alpha Phi Alpha brand each chapter should:
 - i. Focus on National Programs at all levels
 - (a). When appropriate, wear the fraternity's name or symbols
 - (b). Use chapter banners at events
 - ii. When appropriate, release public statements (National & Local); Avoid political posturing
 - b. Increase visibility & awareness of General President
 - c. Establish Public Spokesmen at all levels
 - d. Develop Media Kit to include:
 - i. Statement about Fraternity and Chapter History
 - ii. List on Chapter officers
 - iii. List and Description of National Programs and the Chapter's specific contributions
 - iv. Any other community service & chapter activities
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- v. Name of point of contact or public spokesman for the chapter
 - e. Develop key issues that will always support the brand
 - i. Reiterate the Fraternity's Mission Statement
 - ii. Tie present day fraternal programs to Fraternity's history of service
 - iii. Chapter level – Reaffirm commitment to community or campus
 - f. Develop & sustain partnerships
 - i. Other organization, foundations, etc. (i.e. – MLK Memorial)
 - ii. Pan-Hellenic community
 - (a). Designate a Pan-Hellenic representative for every chapter
 - g. Develop marketing plan that will support brand
 - i. Establish communications plan for events
 - (a). Press Releases
 - (b). Online
 - (c). Person to person communication
 - ii. Develop list of media contacts for all local television, radio and newspapers
 - iii. Establish contacts with national, state and local public officials as appropriate
 - h. Create and maintain an image that will support the brand objectives
 - i. Showcase the accomplishments of Brothers at all levels
 - i. Develop Web sites at all levels of the organization that supports the brand objectives. All Web sites should contain:
 - i. Fraternity's mission statement
 - ii. Area exclusively for the fraternity's history
 - iii. Area exclusively designed for national programs
 - iv. Archive area for all press releases and public statements
 - v. Area highlighting Brothers accomplishments and activities in the name of Alpha
 - vi. Chapter Web sites should include:
 - (a). Chapter history
 - (b). Contact person for reclamation
 - vii. NOTE: All chapter web sites must be approved by the National Management Information Systems Committee
 - j. Protect the Brand
 - i. Prohibit all inappropriate or unauthorized use of the name Alpha Phi Alpha and associated symbols. See National Protocol Manual (under development) for specific uses and restrictions associated with the brand.
 - ii. Avoid associating the brand with activities outside the mission & motto of the fraternity
 - iii. Assure that all brothers in the chapter are trained on the National Protocol Manual (under development)

E. Risk Management Handbook

1. A copy of the complete Risk Management Handbook may be obtained by visiting www.alphaphialpha.net



RiskManagementHandbook.pdf

F. Crisis Management

1. What is A Crisis

- a. A crisis is defined as any critical incident that involves death, serious injury, or threat to people; damage to environment, animals, property and/or data;

disruption of operations; threat to the ability to carry out mission; and/or, threat to the financial welfare and image of a person or organization.

- b. It is an adverse incident or series of events that has the potential to seriously damage the organization's people, operations, finance and/or reputation.
- c. An Alpha Crisis is the above as well as unforeseen situations that can occur within or around an Alpha event that has the potential to pose a crisis such as an accident or incident involving a member, aspirant or attendee.

2. What is Crisis Management

- a. Crisis management involves identifying a crisis, planning a response to the crisis and confronting and resolving the crisis.
- b. Since a crisis can be a defining moment for an organization's reputation and often strikes when an organization seems least prepared, certain preliminary measures need to be taken to prevent and deal with a crisis.
- c. Organizations should always plan ahead and project likely outcomes. They should avoid decisions that have the potential to turn into a crisis. They should know their "worst case scenarios" and have a contingency plan for it.
- d. The Alpha Phi Alpha Fraternity, Inc. Risk Management Handbook is designed to address such contingency planning. The purpose of a Crisis Management Plan is to deal with a situation once it occurs.

3. Implementation Requirements

- a. As per the Chapter Operations Plan, each chapter is to develop a comprehensive Public Relations plan consistent with the plan developed by Alpha Phi Alpha Fraternity, Inc.
- b. The Chapter's Crisis Management Plan should be a part of this plan.

4. Outline of Crisis Management Plan

a. Who in Coordinates the Plan?

- i. The Chapter's Executive Team is responsible for coordinating the Chapter's Crisis Management Plan.
- ii. The Chapter President is responsible for the plan.

b. Definition of a Crisis

- i. A crisis is a turning point or decisive moment in events.
- ii. Typically, it is a term meaning 'a testing time' or 'emergency event'.
- iii. It can be further defined as an adverse incident or series of events that has the potential to seriously damage the organization's people, operations, finance and/or reputation.

c. Examples of a Crisis:

- i. sudden illness of a member, aspirant or guest (this should be the concern of alumni chapters with a large number of senior brothers);
- ii. death or injury of a member, aspirant or guest;
- iii. fire in the chapter house or property;
- iv. an injury or accident involving alcohol or fire arm at or around social events;
- v. an injury or accident involving a member, aspirant and/or a non-member at, during or around a chapter event or on chapter property; or
- vi. a news story or media event that could potentially destroy the credibility of the organization, i.e. allegations of hazing, unruly conduct, misappropriation of funds, etc.

d. Who is in Charge During a Crisis?

- i. Be certain that each person in your chapter knows that the chapter president is in command of every emergency situation, including serious injury or death.

In the event the chapter president is absent, control will follow the chain of command per the constitution. Though the president may choose to consult with other members who have some expertise or insight, final authority should rest with the president or a higher duly elected Alpha Phi Alpha official.

- ii. The entire chapter Executive Board should review the chapter's crisis management procedures and be familiar with important concepts of handling a crisis. Every chapter officer should have a copy of these procedures.
 - iii. All members must know who is in charge and be prepared to follow instructions.
- e. Emergency Phone Calls to Make – And Numbers?**
- i. You need to make several phone calls immediately.
 - ii. In nearly all situations, the president's first call will be to the 911 emergency number. Briefly and calmly explain the situation so that the appropriate emergency personnel can respond.
 - iii. In the case of a college chapter, contact your chapter's advisors (staff, faculty, alumni, etc.) and inform him/her of the situation. Ask him/her to come to the incident location immediately in order to consult with chapter officers and university officials.
 - iv. Call your Area Director who will in turn inform the following Alpha Phi Alpha officers in the following order, a) The District Director, b) The Regional Vice President, c) The General President
 - v. In the case of college chapters, contact University officials. During business hours (8:00 a.m. - 5:00 p.m., Monday - Friday) contact the office that oversees your chapter (at most universities this would be Student Services or Greek Life). Tell the person answering the phone that this is an emergency call and ask for further instructions. If the university's administrative offices are not open, contact the campus police at your University. Inform the dispatcher of the nature and location of the emergency and tell him or her that you have already contacted 911 emergency personnel. Campus police will then contact the necessary university personnel.
- f. Informing Members; Making Public Statements**
- i. Assemble your members in a group. Explain that there has been an emergency.
 - ii. It is important that all members remain calm during the crisis. Emphasize the need to remain calm and assure chapter members that everything is under control.
 - iii. Do not discuss the situation until the Greek advisor, chapter advisor, police or chapter president arrives. Instruct your members to make no statements to anyone other than school, police or fraternity officials.
 - iv. Only the designated spokesperson (the chapter president, chapter advisor or higher Alpha official) should speak for the chapter. With the assistance of national president, legal counsel, the chapter advisor and/or university officials, the chapter should carefully prepare a formal statement to be issued to the media.
 - v. Instead of "No comment", try an initial statement such as:
 - (a). " We can confirm that (describe incident briefly) occurred on (day) at (time) at (location). We will do all we can to provide information as it becomes available. Currently, we are working with the authorities. Subsequent comments will be made when we are certain of all the facts. In

the interim, feel free to call me or give us your name and phone number – we will forward information as soon as we have more details available.”

- g. When a Member or Aspirant is Injured, Becomes Seriously Ill, or Dies**
 - i.** Do not notify parents or next of kin. In the event of a serious accident or illness, the medical personnel will notify next of kin and advise them of the patient’s physical condition.
 - ii.** In the event of a death, the appropriate school or fraternity official should notify next of kin.
 - iii.** In the case of the death of a member, the Chapter President or Chapter Advisor should offer to conduct an Omega Service. These procedures will be outlined in the National Protocol Manual (under development)
 - iv.** It is, of course, proper to send sympathy cards and notes, flowers, etc. If a funeral were not too distant, it would mean a great deal to parents for some of the members to attend.
- h. How to Cope**
 - i.** Remember that University officials are always available for counseling and other assistance in the case of college chapters.
 - ii.** Do not hesitate to call your University Counseling Center for assistance. Individual and group counseling is strongly recommended following any crisis situation.
 - iii.** No matter how well things appear to be going, counseling and other support services are both wise and appropriate.
- i. Assessment**
 - i.** After the crisis, the following five steps will assist in preventing the reoccurrence of any crisis situation
 - (a).** Do an objective assessment of the cause(s) of the crisis.
 - (b).** Determine whether the cause(s) will have a long term effect or whether it will be a short term phenomena.
 - (c).** Project the most likely course of events.
 - (d).** Focus all the most capable people (including yourself) on activities that will mitigate or eliminate the problem.
 - (e).** Look for opportunities - there could be a "silver lining".

SECTION VI. LEADERSHIP MANAGEMENT

A. Membership Intake Procedures Manual

1. Overview:

- a.** The *Membership Intake Procedures Manual* explains the purpose, responsibilities, and make-up of the Pharaoh’s Council.
- b.** It has the Fraternity’s official “Statement Against Hazing,” an overview of the “8 Steps” of the Fraternity’s membership intake process (MIP).
- c.** The Intake Procedures Manual outlines the process for cluster participation in *Leadership Weekend* and *Membership Weekend*.

2. Pharaoh’s Council:

- a.** The official overseer of all intake activities in each area/cluster. Regional, district, and local representation make up the council.
- b.** All members must be in “good standing” at all levels of the Fraternity; Risk Management certified, and attendees of district, regional, and national meetings.
- c.** It is their responsibility to ensure that the Fraternity’s membership intake process is implemented according to guidelines and mandates.

3. Training:

- a. The training for members of the Pharaoh's Council will occur at regional and district levels.

B. Reclamation Planning Ideas Procedures Manual

1. Overview:

- a. In planning and implementing strategies and activities to reclaim inactive Brothers, chapters should give consideration to strategies that involve three areas of focus: Planning, Implementation and Follow-Up.
- b. Examples of strategies and activities that should be considered under each area of focus are identified below. Chapters are encouraged to choose from among these or to consider other approaches that might be successful in bringing inactive brothers back into the fold.
- c. The Operations Plan for each alumni chapter should include specific steps and a plan for reclaiming brothers.

2. Strategies for Planning an Effective Reclamation Program

a. Planning

- i. Identify a chapter member to provide leadership for the chapter's reclamation activities. Some chapters designate this responsibility to the Intake Coordinator or a Membership Chairman but could also identify (or the chapter president could appoint) a Brother to serve in that role. The reclamation chair should coordinate his plans and activities with the Intake coordinator/Membership chairman.
 - (a). Set a reclamation goal.
- ii. Identify inactive brothers in the area. The fraternity's Membership Directory has information on Brothers living in the various cities and can serve as a quick, handy reference to the names of Brothers living in your area. If other alumni chapters are not near by, also check adjacent cities and towns to identify Brothers to be contacted by your chapter.
- iii. Identify life members who live in your area but are not active with your chapter.
- iv. Develop a chapter brochure and business cards with information on the chapter that can be presented to new Brothers when you meet them.
- v. Invite Brothers to chapter meetings and other chapter events using various media including local listservs, city and community newspapers, and other no cost applications.
- vi. Invite new Brothers as complementary guests to Black and Gold Balls, chapter Founder's Day dinners, etc.

b. Program Implementation

- i. Make contact with them via letter, by email, phone or in person.
- ii. Invite inactive Brothers to your chapter meetings and other events.
- iii. Recognize new, visiting and returning Brothers at chapter meetings.
- iv. Be sensitive in recognizing Brothers who have not been seen for a while.
- v. Collect contact information for new, visiting and returning Brothers.
- vi. Send a letter or email acknowledging a new, visiting and returning Brothers visit to a chapter meeting.
- vii. After making several initial contacts with Brothers living in your area who are not financial, send an invoice as a reminder after the Brother shows up for a couple of meetings.

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- viii. Provide tokens as incentives for reactivating such as a chapter shirt or hat or a new members chapter tax discount.
 - ix. Provide a mini orientation for Brothers who have been inactive for more than three years so that they become familiar with the fraternity's current national, regional and district leadership, national programs and special projects, etc.
 - x. Establish a point of contact in the chapter for reclaimed Brothers to answer questions a new Brother might have.
 - xi. Give the reclaimed Brother something to do so he starts to connect with the work of the chapter.
 - xii. Think of activities and actions that make a Brother feel welcome and a part of the chapter (nurturance).
 - xiii. Designate a Day of Reclamation annually within the chapter around a chapter or holiday event, such as Super Bowl Sunday.
 - xiv. Connect senior Brothers to reclaimed Brothers through the Courtesy or Amenities Committees.
- c. Follow-Up**
- i. Evaluate the chapter's success in reclaiming Brothers by comparing the actual number of Brothers reclaimed against the reclamation target set for the fraternal year.
 - ii. What programs and activities implemented worked the best? Determine strengths and weaknesses and revise plans for the next year to promote effectiveness.
 - iii. Identify the ages, marital status and careers of the Brothers who have been reclaimed to determine if any patterns exist that should be considered in making program plans, social activities, etc. For example, if you notice that 50% of the Brothers reclaimed are between the ages of 40 and 46, consider programming and social activities that appeal to that age group.
 - iv. Consider the cost/benefits of dues discounts (reclaimed member discount, college to alumni chapter discounts and other prorated dues) and pay as you go plans (dues in installments) on chapter program and operations.
- d. Implementation**
- i. The strategies listed above are but a few of the strategies and activities that a chapter should consider in identifying and reclaiming Brothers and keeping them active after they start attending chapter meetings.
 - ii. Each Chapter should develop a plan to implement the plan to retain and reclaim brothers

SECTION V. FISCAL MANAGEMENT

A. Financial management

1. Learning Objectives:

- a. Upon the completion of *Section 4.0 Establishing a Budget*, the chapter will be able:
 - i. To develop a program of activities or business plan;
 - ii. To develop a budget for each activity in the program of activities or business plan; and
 - iii. To develop a budget to meet the financial requirements of a successful chapter.
 - iv. To develop a process of financial transparency for the chapter

2. Program of Activities (Annual Chapter Operations/Business Plan)

- a.** The program of activities is the basic means through which the objectives are accomplished for the chapter.
 - i.** It is a calendar of activities and events that the Chapter's members plan to accomplish for the fraternal year.
 - ii.** Activities need to be planned and conducted in terms of their contribution in developing those interests, attitudes, and abilities that are desirable.
 - iii.** The Chapter Operations Plan requires all chapters to develop an Annual Chapter Operations/Business Plan each year.
 - iv.** This planning is normally conducted at the Annual Chapter Planning Retreat.
- b.** There is no one best way to plan the program; however, the following steps may be utilized:
 - i.** Review last year's program. (If you don't have one, then list the activities, programs, and services rendered during the previous.)
 - ii.** Review programs of other chapters and organizations.
 - iii.** Assure that the program conforms to the National Chapter Operations Plan and the National Alpha Phi Alpha Fraternity, Inc. Strategic Plan.
 - iv.** Keep the state and national programs, mandates, and requirements in mind.
 - v.** Develop goals and select appropriate ways and means by which to obtain them.
 - vi.** Be sure the program can be financed via chapter dues and special fund-raising efforts. Establish a budgetary amount needed to complete the project. Be sure to give a copy to the budgeting committee.
 - vii.** Involve all members in developing the program; select a group for overall responsibility for the program of activities.
 - viii.** Secure support from alumni members – programmatic ideas, finances, and/or directives on how to obtain funding from various sources.
 - ix.** Schedule the activities throughout the calendar, academic, or fraternal year
 - x.** Make copies of the program of activities for chapter officers, members, and advisor
 - xi.** Establish a process for evaluating each chapter activity for effectiveness, revisions, and reallocation of funds.

3. Developing a Chapter Budget Chapter Budget

a. How To Prepare A Budget

- i.** Annual program of work is first adopted.
- ii.** Estimated income is listed – Chapter dues and funds-raising activities
- iii.** Estimated expenditures are listed according to planned and unplanned events.
- iv.** Approved by budget committee.

b. Deciding on Fund-Raising Activities

- i.** What risk and liability factors are involved?
- ii.** Does it require initial outlay of capital to successfully conduct the activity?
- iii.** Does the activity provide opportunity for several members of the organization to participate?
- iv.** Does it provide reasonable financial returns for the time and effort spent?
- v.** Does it involve a great amount of financial risk?
- vi.** Will it meet the approval of the constituents of the chapter?
- vii.** Will it make a contribution to the objectives of the Chapter?
- viii.** Does it provide an opportunity to teach as well as to raise money?
- ix.** Will it make a contribution to the community?

x. Will the persons who spend their money get their money's worth?

c. Guide for Preparing a Chapter Budget

- i. When the annual program of activities has been adopted, an estimate should be made of the total funds necessary to carry it to completion.
- ii. A written budget consisting of estimated income and estimated expenditures can then be made.
- iii. Under the estimated expenditures in the budget should be listed the various items in the program of activities, broken down as is necessary to get at the financial picture.
- iv. Opposite each item, there should be written the estimated expense involved.
- v. To this list should be added all other organization expenses which are not derived from the program of activities – chapter tax, district, regional, and national meetings; membership fees in NPHC; etc.
- vi. The total will reveal the estimated amount of money necessary for the year's work.
- vii. The budget should be planned with a margin of safety so that, if possible, an unspent balance will be left in the treasury at the end of the year.
- viii. Each standing committee can make up a small budget of their own which can be combined with the chapter budget.
- ix. The chapter budget must be recorded on the the National Local Chapter Budget Report . See Section 11.6 The National Local Chapter Budget Report.



AlphaLocalChapterBudgetReportFormat07.

B. Financial Transparency Plan

1. What Is Financial Transparency?

- a. Financial transparency involves the production, testing, dissemination and use of information related to an organization's financial performance.
- b. Beginning with an organization's gathering and reporting accurate information, the sequence extends to verifying the information, then to analyzing, comparing, and judging the performance described by that information, and finally to supervising the financial management organization to ensure that it complies with applicable standards.

2. Why is Transparency Important?

- a. Transparency is essential if the organization is to remain credible with members, donors and constituents. In addition, transparency makes it easier for auditors and supervisors to oversee the safety of the financial system, which in turn gives additional confidence to stakeholders.

3. Alpha Phi Alpha Requirements?

- a. As per the Chapter Operations Plan, each chapter is to develop financial controls and policies and procedures that reflect transparency in chapter fiscal operations.

4. Outline of Financial Transparency Plan

- a. **Each Chapter Must Have a Process for Gathering and Reporting Accurate Information**
 - i. Each Chapter must develop an Annual Budget as outlined in Section 4.3 above. The budget must be recorded on the Alpha Local Chapter Budget Report Format in Section 11.6 . This budget should be developed in the

chapter's Annual Planning Retreat and should be presented to chapter members at the September Chapter Meeting for approval.

- ii. Each Chapter must submit a report of revenue and expenses at each chapter meeting. This report must be on the Alpha Local Chapter Financial Report Form in Section 11.7.



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- iii. A separate Alpha Local Chapter Financial Report shall be maintained and reported on for each separate entity of the chapter, i.e., if the chapter has a 501(c3), there should be a separate report.

- iv. Each Chapter should assure that chapter funds and 501 (c3) funds are kept separate.

b. Each Chapter Must Have a Process for Internal Controls

- i. In chapters with expected revenue or expense exceeding \$5,000 a year, the Executive Committee shall require that the Treasurer, as an expressed condition precedent to his office, execute a bond with corporate surety payable to the fraternity.
- ii. In chapters with expected revenue or expense exceeding \$5,000 a year, the Executive Committee shall require that the Financial Secretary, as an expressed condition precedent to his office, execute a bond with corporate surety payable to the fraternity.
- iii. The Treasurer shall be required to deposit in an approved bank all funds of the chapter received by him within five business day of receipt.
- iv. Each Chapter shall have a form for members to request reimbursements.



RequestForReimbursementForm-V1~8-4

- v. The chapter reimbursement form must be signed by the requestor, the committee chair and the Financial Secretary.
- vi. All reimbursements must be authorized by the Financial Secretary before a check can be issued by the Treasurer.
- vii. All checks written on Chapter accounts must carry the signature of two individuals, preferably the Financial Secretary and the Treasurer. NOTE: The Chapter President should not be authorized to sign checks.
- viii. The chapter shall not create, maintain, endorse, or otherwise sanction any corporate, foundation, limited liability company, partnership, or any other entity whether for profit or non-for-profit that abridges the rights of its members to vote on ultimate issues such as amendments to bylaws, election of directors, or the right of the members to receive annual report of any and all such entity

c. Each Chapter Must Have an Internal Audit Process

- i. Each Chapter must establish an Audit Committee.
- ii. Members of the Audit Committee cannot be financial officers of the chapter or members of the financial committee.
- iii. Each Chapter must have their books audited by August 31st of each year.




d. Each Chapter Must Have a Process for Full Financial Statement Disclosures

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- i. Each Chapter must make its books available for review by any member of the chapter at any time, upon request
 - ii. The books of the Chapter must be available upon request of any district, regional or national officer of Alpha Phi Alpha Fraternity, Inc.

SECTION IV. PROGRAM MANAGEMENT

A. National Programs Implementation Guidelines

1. A copy of the following National Programs Implementation Guidelines may be obtained by visiting www.alphaphialpha.net:

- i.  Alpha Phi Alpha - BBBSA Implementation Guide
-  Go-To-High-School/ College Curriculum
-  Go-To-High-School/ College Guide
-  Leadership Development Institute Curriculum
-  Project Alpha Curriculum Guide
-  Project Alpha - Pre maturity module
-  Project Alpha Evaluation/Conf. Summary Form
-  Project Alpha Implementation Guide
-  Voteless / Hopeless Curriculum
-  Voteless / Hopeless Implementation Guide

SECTION VI. Appendices and Resource Documents

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B. Scholarship Application

1. Click below to view the Alpha Phi Alpha Education Foundation .Scholarship Application



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2. A copy is also stored at <http://www.alphaphialpha.net/Page.php?id=134>

C. MLK Memorial Form

D. Balanced Scorecard, Chapter Directory and Chapter Report

1. Click on the Icon below to view a copy of the Balanced Scorecard, Chapter Directory and Chapter Report



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E. Constitution and By-laws of Alpha Phi Alpha Fraternity, Inc. (1998)

1. Please click on the Icon below to view the Article IV of the National Constitution and By-laws.



ArticleIVConstitution.
doc

F. The National Local Chapter Budget Report

1. Please click on the Icon below to view the National Local Chapter Budget Report



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G. The National Local Chapter Financial Report Form

1. Please click on the Icon below to review a copy of the National Local Chapter Financial Report Form



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H. The Making of A Chapter Meeting (Article by Kevin Wolf)

1. Please click on the Icon below to review a copy of the Article, “*The Makings of a Good Meeting*” by Kevin Wolf



THE MAKINGS OF A
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