



DELTA TAU DELTA

SECRETARY

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INTRODUCTION

Every organization needs some type of system for recording and filing information that is discussed during meetings. Furthermore, every organization needs to maintain a complete and up-to-date roster of its membership, maintain public relation efforts, and organize and archive its important records and files. In Delta Tau Delta, these responsibilities are given to the secretary. The secretary is also tasked with corresponding with Central Office. Each chapter will elect a secretary to serve on its executive board. Overall, the various functions of chapter secretary are vital to the successful operation of any chapter.

GENERAL RESPONSIBILITIES

Your primary duty is to record the minutes of all chapter meetings; however, there are several other areas that you are responsible for overseeing. Besides recording the minutes at both formal and non-formal chapter meetings, executive board meetings and administrative board meetings, you are responsible for maintaining a full and complete record of the membership register (roll book), filling out and submitting suspension and expulsion forms, and creating and implementing a comprehensive public relations strategy. Secretaries may also need to correspond with the Central Office as directed by the chapter president. This includes, but is not limited to, submitting chapter reports to potentially be included in The Rainbow, roster confirmations and updating membership statuses. The FAAR is the Fraternity's way of evaluating chapter performance on a year-to-year basis. As the chief record keeper of the chapter's activities and progress, it is likely the secretary will work in conjunction with the president and vice president of his chapter to compile information for and organize his chapter's FAAR. In addition to these duties, you will organize all the chapter files via DeltsConnect.

CHAPTER CONTINUITY IS FUNDAMENTAL

The continuity of chapter operations depends on your ability to organize the chapter files. When we speak of continuity, we are referring to not only your time in office but also every secretary who follows you. Though it is difficult to maintain continuity from year to year because of the natural turnover that occurs, by keeping your files organized, it will be easier for your successors to maintain a consistent flow of information. How well you do your duties, therefore, will impact the entire chapter. By excelling, you will make a difference in your chapter. An excellent chapter is a well-organized chapter.

MINUTES

It is imperative that the secretary keeps minutes at every chapter meeting, both formal and informal, every executive board meeting, and every administrative board meeting. During the finance board meetings, the assistant treasurer will be tasked with taking meeting minutes and individual committees will choose a member to record committee minutes. In order for the minutes to be easily disseminated and for the sake of legibility, it is highly recommended that minutes be taken electronically. As a permanent record of chapter proceedings, minutes should be complete and as accurate as possible. Once they are completed, they should be stored in a central place. DeltsConnect Docushare is an ideal location for minutes to be deposited. Minutes do not include every word spoken. However, to be complete, they should include these essential elements:

1. The time, place and date of the meeting and name of the presiding officer should be recorded.
2. All topics of discussion should be noted according to offices, committee chairmen or item of business.
3. Action taken or recommended should be fully noted.
4. The main points of committee reports should be included.
5. Names of the persons making and seconding motions should be stated with the exact wording of the motions and the results of votes in the motions.
6. The main points of any guest speaker and the chapter advisor should be recorded.
7. The time of adjournment should be noted.

Many secretaries would take rough notes on their computer during a meeting. Following the meeting, the secretary should translate his notes into a complete and edited draft. The draft should then be presented to the president following a chapter or executive board meeting or the vice president following an administrative board meeting. After the appropriate officer's approval, the minutes should then be posted in the chapter's DeltsConnect Docushare for perpetuity and so members of the chapter can have access to the proceedings. The minutes of one chapter meeting will not be posted to DeltsConnect until after the proceeding meeting when the minutes are approved.

AGENDA

As secretary, you may be asked to help the president set his agenda. Before every chapter meeting, executive board members and committee chairmen should be asked if and why they would like to be on the chapter agenda outside their normal report. Some chapters require officers to submit written reports before any report is given in front of the general body.

All general body meetings of the chapter shall be conducted in the following order:

- I. Opening Ceremonies (If Formal Chapter Meeting)
- II. Call Meeting to Order
- III. Roll Call
- IV. Recite Creed
- V. Introduction of Visiting Members
- VI. Reading and Approval of Minutes of the Previous Meeting
- VII. Reports of Executive Officers
- VIII. Reports of Standing Committee Chairmen
- IX. Unfinished Business
- X. Chapter Advisor Report
- XI. New Business
- XII. Proposals for Membership
- XIII. Suggestions for the Good of the Order
 - Delta Shelter (If Not Formal Chapter Meeting)
 - Closing Ceremonies (If Formal Chapter Meeting)
- XIV. Adjournment

Having an agenda will also make taking minutes easier and give the secretary a better idea of how the meeting will flow.

MEMBER REGISTER (ROLL BOOK)

The proper time for signing the register is at Initiation. Every initiate should print and sign his full name on a numbered page of a bound book. The numbers should run in sequence, corresponding with the initiate's chapter roll number. Later, you should enter his home address, age, date of initiation and any honors the initiate has achieved. To keep the register up-to-date, you should make an appropriate entry each time a member is elected to a campus or chapter office or receives an honor. The membership register is a permanent record of the member's activities and will be helpful in writing press releases, citations for honors, etc. The register is how the chapter should keep track of chapter roll numbers. The roll number on the register should match the number submitted through the officer portal.

AFFILIATING MEMBERS

If a member from another chapter of Delta Tau Delta transfers to your campus and gains two-thirds approval of your chapter to affiliate, please contact the Central Office to report the affiliation of that member. When an initiate of another chapter affiliates with your chapter (which is the affiliating chapter), he should sign your chapter membership register book (roll book). His chapter number would then become an extension of the most recent initiate in YOUR membership register book. (i.e., a, b, c). For example, if his name was Duke Prescott and the last number you used in your membership register book was No.1043, Duke Prescott would then become No. 1043a.

The chapter leadership consultant will want to review the register every time he visits campus. Make sure the register is up-to-date and easily accessible for his visit.

SUSPENSION AND EXPULSION

Another of your responsibilities as secretary is to maintain the records of suspensions and expulsions from your chapter. Full and proper recording of these proceedings are absolutely necessary to the due process afforded to every member. It is your job to take written notes of the proceedings or to record them on tape and prepare them in proper written form as outlined in the Article XI of the Constitution and Bylaws of Delta Tau Delta and then immediately inform the Central Office. The form can be found in Appendix 1 of this document and mailed or scanned and emailed to the Central Office. Additionally, you should notify the Central Office via Officer Portal immediately when any new member is deploeged

In the case of suspensions from membership directed by the finance board, the assistant treasurer will fill out the suspension form. You will want to work with him on filling and submitting the form to the Central Office. As membership status of a member changes, be sure that you update the status in Officer Portal, so the chapter is not overcharged for annual dues.

In cases of expulsion of a member, you must submit the expulsion form to the Central Office before the expelled member can be removed from the rolls of the Fraternity. You will want to refer to the Constitution and Bylaws and the expulsion form located in appendix one for details on how to document the chapter's decision.

WITHDRAWAL

Withdrawal means voluntary forfeiture of membership in the Fraternity. After withdrawal, the former member shall be considered as expelled and not permitted to attend meetings of the Fraternity or any of its chapters, to take part in any Fraternity rite or function, to hold himself out as a member of or in any way to identify himself with the Fraternity through the use of insignia or otherwise, or to have any rights whatsoever in or pertaining to the Fraternity. Withdrawal shall be effective upon a member's written notice of withdrawal delivered to the Central Office of the Fraternity. The member must be in good financial standing to withdraw membership.

In the event of withdrawal, the former member shall immediately surrender to the chapter advisor his Badge of Membership and Certificate of Membership, who shall forward these items to the Central Office. He must also sign the withdrawal form, which can be found in Appendix 2 of this document.

REPORTING

ROSTER CONFIRMATION

During your time in office, you will be responsible for keeping the Central Office informed about your chapter's membership. The secretary will be responsible for conducting roster confirmations in conjunction with the treasurer by Sept. 15 if your school year starts before Sept. 1 or by Oct. 15 if your school year starts after Sept. 1 of each year. It is imperative to complete this task by the deadline to avoid being overcharged for annual dues. Completing the roster confirmation requires determining the membership status of each member of the chapter. At the beginning of each semester, the secretary should review the officer portal roster and make sure the status of each member is correct. This is applicable for men who have returned to good standing from suspended status, men who have graduated and new members who have depledged. As a reminder, member status changes may be reported throughout the year. Please be sure to report changes as they occur.

OFFICER PORTAL – MEMBER REPORTING

Member reporting is completed online at <https://my.delts.org>. Each president, treasurer and secretary should create a username and password to make updates specific to each officer's duties via the Officer Portal. However, you must be the president, treasurer or secretary that the Central Office currently has on file to make changes. When a new president is elected, the outgoing president should update the officer contacts, making sure he updates the position of president last. Once the president contact is updated, the former president will be unable to make any edits.

Remaining undergraduate officers and alumni volunteers may create a username and password to view chapter rosters and chapter officers. However, they cannot make any changes.

REPORTING MEMBER STATUS CHANGES

To update an individual's status, click on "Members," select "Report Member Status Changes" and choose the appropriate new status from the drop down menu. Member Status Change options and descriptions are as follows:

- Alumnus – Initiates In Good Standing or Suspended who have graduated or Initiates who are currently not enrolled and not expected to return to the university.
- Colony Grad – New Members of a colony who have graduated.
- Depledge – New Members of a chapter/colony who quit prior to being initiated.
- Suspended Members Returning to Good Standing – Suspended initiates returning to In Good Standing status.
- For members remaining in good standing no action is necessary.

Upon selecting the status, click on the "Create this Group." Select the members to be changed to the new status and click on "Selection Complete. Next." If there are no members to be changed, click the "Cancel" button, located on the upper right of page. Repeat steps for each status change option group being reported. Upon completing status updates, allow five days for the reported changes to be processed and reflected on the chapter/colony membership list.

Temporarily inactive initiates (due to illness, internship, abroad, etc.) should either be billed annual dues or suspended until they return.

Suspensions, expulsions and withdrawals are reported by completing and submitting the appropriate form to the Central Office via fax, mail or email.

REPORTING NEW MEMBERS

Timely reporting of new members is vital for the Central Office to be able to provide your chapter with the materials required to complete the eight-week new member program. When new members are reported, the Central Office will ship the new member resource manual, new member badge and DTAA information to the chapter within 48 hours. The eight-week timeline begins when a chapter formally pledges a new man into the chapter. This is the date of the formal pledging ceremony, NOT the date the bid is offered.

To report new members, login at <https://my.delts.org>, select "Members" link located to the left of page and click on "Report New Members". Select the "Enter a New Member" button. A New Member Information screen will appear. Be aware all information with red arrows is required. After entering all personal and payment information, click "Save." Repeat for each new member. Once all new members are entered, select "Submit this list of new members to the Central Office." Enter the pledge date and click the button "Submit this new member class to the Central Office." Your new members will NOT be reported to the Central Office without selecting this. Finally, you will be directed to an invoice summarizing the new members and amount owed by the chapter. Be sure to work with the treasurer to ensure payment is to be submitted to the Central Office within 48 hours following the formal ceremony.

If a new member wants to pay via credit card, make sure you work with the treasurer. For credit card payments, do not enter the credit card information until you are ready to submit the report. Officer Portal cc authorizations expire 48 hours after first entered. If submitted after 48 hours, cc information will require re-entering.

Every new member is sent an email after his information is entered into the system. This message will have him verify and/or update his information and accept the policies and procedures of Delta Tau Delta including the binding arbitration provision. This is very important! The process only takes a few minutes. Your new members will not be able to initiate until they have completed this validation process. You may, at any point, send a reminder email with the validation link from the system

REPORTING NEW INITIATES

To report new initiates, log into the Officer Portal and select the "Members" link. Click on "Report Initiates" and enter the date of initiation. Select "Specify Payment Info" in the right column to enter the method of payment for each initiated member. Next, select the box in the "Include in Initiation" column. After selecting each member to be initiated, click the "Initiate the Selected Men" button.

Finally, you will need to assign the roll numbers in the correct order the men went through initiation. Select the member's name and click the "Assign Roll" button. The name and assigned roll number will appear on the right side of screen. (It is your responsibility to put these men in the correct order.) This number should match the number submitted through the officer portal.

After each member has been assigned a roll number, confirm the roll number order is correct and click on "Submit Initiates." The report will then be sent to the Central Office for processing. You will be directed to an invoice. The invoice will summarize the initiated members and the amount due by the chapter.

At this point the report of initiation is complete. The new initiates should receive their badges within two weeks and certificates in 4-6 weeks. Please be sure to submit payment to the Central Office within 48 hours of formal initiation.

REPORTING OFFICERS

If leaving office, remove yourself after completing all other officer changes. Once removed from office, you will no longer be able to update the Officer Portal. To update officers, log into the Officer Portal and select the "Officers" link located to the left of page. To change the officer in the position, click the far right option "Edit" for that officer. Select "Replace this office holder with a new officer holder."

You may select to replace the officer with a new officer or cancel activity and return to previous screen. To replace officer, enter the beginning date for the new officer. Select the new person to hold this office by clicking the radio button to the right of the member name. Click on "Complete Officer Replacement" to finalize the new officer. Review and make any necessary updates to the new officer's information. Select "Save Officer Information" to install the new officer.

UPDATING MEMBER INFORMATION

To update member information, log into the Officer Portal and select the "Members" link. Scroll down to your Membership List. Click the "Select" button to the right of the member's name. The yellow information fields can be updated, i.e., preferred first name, address, email, etc. After making necessary updates, select Save Record. If information that is not accessible needs to be changed, please contact the Central Office at 317-284-0203.

CHAPTER REPORTS

Twice a year you will receive instructions and a special notification on DeltsConnect to complete a chapter report. In your chapter report you should represent your chapter honestly and completely with special attention to news that will interest your alumni and members of other chapters. Topics to cover include community service, recruitment, alumni activities, new officers and members who gain honors or are involved in sports or campus activities. The fall report is due Dec. 1 and the spring report is due May 1.

DELTSCONNECT

Each individual chapter has the ability to utilize Delts exclusive members-only platform upon which to do chapter business. DeltsConnect is a customized private social network which provides tools for chapters to streamline communication with their members, facilitate member dues collections, coordinate events and much more. It is a one stop shop to increase efficiency and effectiveness of chapter communication and organization.

Using DeltsConnect, you are able to easily communicate through email lists, private messages and a blast text messaging hotline. Additionally, because DeltsConnect is connected to officer portal, all member information is automatically synced with DeltsConnect. Thus there is no need to waste time adding and updating member information.

In addition to communicating, chapters have access to a number of useful apps including the ability to collect dues/rent payments, coordinate events and share a calendar, track service hours, share files, and create polls and surveys.

DELTSCONNECT DOCUSHARE

Much of the continuity of chapter operations depends on how well organizational files are maintained. How well you are able to keep the files depends, of course, on how well individual officers and chairmen write reports.

In an undergraduate fraternity chapter, where major changes in management and membership occur annually, there is no area which needs more attention and emphasis than continuity. One of the best methods for a committee chairman to learn his job is to find out what has been done in the past. All information should be maintained in one location--your files. As recorder of the administrative committee, you should have no trouble collecting and filing committee reports.

Some officers or chairmen may choose to keep their own files. It will be important to receive a copy to upload into Docushare to assist with future transitions. In such cases, you must see to it that these officers are keeping adequate records.

All records should be turned in to you along with final reports at the end of the year. Your last task before leaving office will be to file all reports and other useful information in the chapter Docushare in DeltsConnect.

You may be able to add organizational innovations to your records' collection, but the important point to remember is that you can have a great deal of influence on the continuity of your chapter by insisting that information be available for future reference.

PUBLIC RELATIONS

As secretary you are responsible for developing and implementing a comprehensive brand for the chapter. It is important to consider your audience when creating a public relations strategy. While a member would know that the coat of arms, ΔTA and Delts are all associated with the Fraternity, an outsider may not. To maximize the impact your communication has, make sure it is consistent throughout all mediums. You should work with the vice president and the committee chairmen to make sure they are following the public relations strategy and not diluting the chapter's brand.

The secretary will also take on responsibilities with external communication. These responsibilities include running or monitoring social media for the chapter (Facebook, Twitter, Instagram, Deltsconnect.org, etc.), writing thank you cards and/or flowers for sororities and other campus groups who the chapter interacts with, campus relations acts, approving t-shirt designs, and monitoring the Fraternity image on campus. The secretary will work closely with the alumni and parents chairman, the social chairman and the brotherhood chairman to carry out these tasks. Make sure to coordinate social media management with your social media chairman.

FRATERNITY AWARDS AND ACCREDITATION REPORT (FAAR)

In serving his role, the secretary may be asked to assist in the compilation of information, documents and data in creating his chapter's FAAR. The secretary is one of the most important officers in the creation of the FAAR because of his knowledge of chapter activities, access to records, and ability to write efficiently and effectively. In fact, many chapters may task the secretary with leading the chapter's completion of the FAAR. The secretary will need to work with fellow executive committee members and administrative committee members to ensure that these members are properly recording information that is essential to completing the FAAR. It is best to review the FAAR early and delegate tasks to the appropriate officers so you are not scrambling at the last minute to compile all the information.

IMPORTANCE OF BEING A CHAPTER LEADER AS SECRETARY

As a junior member of the executive board, you will be looked up to by members of all classes within your chapter. You have the opportunity to help influence the vision and goals of the chapter on a broader scale as a member of the executive board. In recording notes for the executive board, the administrative board and all chapter meetings, you will be well versed in the happenings of the chapter. The secretary plays a major role in the completion of the FAAR, which is important so your chapter may be properly recognized for its accomplishments. Correspondence with Central Office is also important as it is necessary for the Fraternity to keep accurate membership records. Along the same lines, properly keeping track of membership records and inputting minutes on DeltsConnect is vital to the running of the chapter. Your role in public relations is pivotal in maintaining a positive image in the Greek community, on campus, and in the greater local community. There is nothing very difficult about your job, but being a successful Secretary and chapter leader does require responsibility and conscientious effort.

APPENDIX

EXPULSION REQUIREMENTS

In order for an expulsion to be complete, the following must be submitted to the Central Office:

1. *A brief letter from the President or a completed expulsion form must be delivered to the Central Office, within 48 hours of the hearing, outlining the specific steps taken in the expulsion process.*
2. *There must be proof submitted to the Central Office showing that the individual to be expelled was notified of the allegations against him.*
3. *The numerical vote during the expulsion proceedings must be delivered to the Central Office. EXAMPLE: 61 for/ 30 against/ 91 present*

* All information may be included in the same letter. _____

The procedures outlined in the Constitution and Bylaws are as follows:

- A. A motion for expulsion shall be made and seconded at any regular meeting in which a quorum is present, with said motion to be immediately tabled until the member to be expelled has been given six (6) days oral or written notice of the time and place that the motion will be voted upon. Such time and place shall not be less than six (6) days from the actual notification of the member to be expelled of the time and place of the meeting.
- B. The meeting in which the expulsion is voted upon shall include a full and fair discussion by all chapter members of the charges made against the member proposed to be expelled, all to the end that traditional standards of due process and substantial justice are observed toward the member proposed to be expelled.
- C. After a thorough discussion of the charges against the member to be expelled, the chapter shall vote on the motion. The motion shall be passed and the member expelled if two-thirds (2/3) or more of the undergraduate members attending the meeting vote for the motion to expel the member.
- D. The recording secretary of the chapter voting expulsion of any undergraduate member shall, upon the vote for such expulsion, certify the following to the Arch Chapter:
 1. That written or oral notice of the time and place of the meeting to expel such undergraduate member was delivered to the expelled undergraduate member at least six (6) days prior to the meeting.
 2. That at the meeting to expel, a full and fair consideration of the charges against the expelled member was allowed and that the expelled member had opportunity to present his side of any controversy.
 3. That two-thirds (2/3) or more of the undergraduate members present at the meeting in which the undergraduate member was expelled voted in favor of his expulsion.
 4. That a quorum was present at the undergraduate meeting where the undergraduate member was expelled.



DELTA TAU DELTA

REPORT OF EXPULSION

Date: _____

Chapter: _____

Name of Member to be Expelled: _____

Bill of Complaint Issued:(date) _____

Notice of Hearing: (Written or Oral/ If written, please include documentation/ If Oral, please list notifying officer): _____

- ☐ Reason for Expulsion: (Check One)
- ☐ Presence detrimental to the Chapter
- ☐ Conduct detrimental to the Chapter
- ☐ Violation of Oath or Code of Conduct
- ☐ Violation of rules pertaining to hazing, alcohol and illegal drugs
- ☐ Conduct unbecoming a member
- ☐ Failure to pay current account to an undergraduate chapter

Reasoning to Support Above Determination:

Vote: _____ # For _____ # Against _____ # Present at Trial

Expulsion Finalization Date: _____

President: _____

Date: _____

Recording Secretary: _____

Date: _____



DELTA TAU DELTA

MEMBERSHIP WITHDRAWAL

Date: _____

Chapter: _____

Name of Member: _____

I have read the following section from the Constitution and fully understand the implications of withdrawing my membership.

ARTICLE IV

SECTION 10 - Withdrawal means voluntary forfeiture of membership in the Fraternity. After withdrawal, the former member shall be considered as expelled and not permitted to attend meetings of the Fraternity or any of its chapters, to take part in any Fraternity rite or function, or to hold himself out as a member of, or in any way to identify himself with the Fraternity through the use of insignia or otherwise, or to have any rights whatsoever in or pertaining to the Fraternity. Withdrawal shall be effective upon a member's written notice of withdrawal delivered to the Executive Vice President of the Fraternity, provided that the member requesting withdrawal be in good financial standing.

SECTION 11 - In the event of withdrawal, the former member shall immediately surrender to the chapter advisor or the Executive Vice President of the Fraternity his Badge of Membership and Certificate of Membership, who shall forward these items to the Central Office. The Executive Vice President will notify the Chapter Advisor and House Corporation president that this member has been expelled and that the chapter may remove his name from the chapter's roll.

Member's Signature _____ Name Printed _____

I have collected the Badge of Membership and Certificate from above member.

Chapter Advisor Signature: _____ Name Printed: _____

I verify the above member to be financially current with the chapter.

President/Treasurer Signature: _____ Name Printed: _____

CONCLUSION

Delta Tau Delta is proud of you and your sincere desire to improve your chapter. As a leader of the chapter, your success will be determined by your actions, words and thoughts. The Fraternity expects you to work diligently to build a positive experience for yourself and your brothers. Please take these final thoughts with you as you begin what will be a great year for you and your chapter:

COMMUNICATION IS THE KEY TO SUCCESS:

It will be vital for you to communicate with your brothers and your peer officers. Many of the goals you will set will require you to work with other individuals. If you continue to focus on improving your communication skills throughout your officer term, you will not only be a more effective officer, but you will also be better prepared to lead in the future.

RESOURCES ARE ALWAYS AVAILABLE TO YOU:

There will always be someone willing to help you as you encounter obstacles. This person may be a chapter advisor, a campus advisor, a chapter consultant, an older member of the chapter or even a student in the campus community. It is important to realize all of these people want you to be successful. Please include and utilize these people as often as you can.

THE FRATERNITY WANTS YOU TO ASK QUESTIONS:

This manual will not cover every concern you encounter and each obstacle is different. If you have a question, please do not hesitate to contact any the resources previously mentioned or to the Central Office. The Fraternity wants you to have all of the information you need to be successful.

“AS YOU ADVANCE, REMEMBER OTHERS FOLLOW”:

This concept is so important as a leader. In order for the chapter to be successful for a long period of time, you must recognize your responsibility to be a role model and mentor for members of the chapter. By teaching and encouraging other members to achieve, the chapter will achieve. Do not lose sight that you joined because of the men around you; you should feel a special responsibility to do your best for and with these men.

USE THE VALUES OF DELTA TAU DELTA TO GUIDE YOUR DECISIONS:

Truth, Courage, Faith and Power should be ever present in your decision making as a member of Delta Tau Delta. These values are not exclusive to the *Ritual* of the Fraternity, but they should be embodied in your everyday work as an officer of the chapter to motivate, encourage and lead your brothers.

THE FRATERNITY KNOWS YOU WILL DO MUCH TO BETTER THE CHAPTER AND DELTA TAU DELTA THANKS YOU FOR YOUR TIRELESS EFFORT AND YOUR STEADFAST COMMITMENT. THE FRATERNITY WISHES YOU NOTHING BUT SUCCESS AND HAPPINESS AS YOU LEAD YOUR CHAPTER TO EXCELLENCE.