

# ALPHA ZETA ADVISER MANUAL

Last Updated August 2019

## **Advising Foreword**

Whether you are a current adviser, or are interested in becoming one, welcome! This handbook has been created to provide advisers with an overview of their role. It won't provide answers for every situation, but we hope it will provide a framework for a successful adviser/chapter relationship.

Advisers can have a tremendous impact on a chapter. They serve as a valuable resource, advocate, role model, and historian. Advisers bring continuity to the chapter, helping with organizational development, institution regulations, and policies and financial concerns. They serve as liaisons between the chapter and the National Office and must be knowledgeable about the Fraternity's ideals, history and programs. Alpha Zeta chapters are required to have a Faculty Advisory Committee consisting of at least two (2) college or university faculty members holding alumni or associate membership in the fraternity.

There are usually two types of advisers: alumni advisers and faculty advisers. While both advisers are there to guide chapter members, the roles may vary slightly. Alumni advisers typically help with chapter or fraternity-specific questions while faculty advisers assist on campus. Please note, however, that all chapters may not have alumni advisers and may lean on your experience to fill that role as well.

We are here to help, so please don't hesitate to reach out to the National Office with any questions, comments, or concerns.

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# Overview of the Fraternity

Alpha Zeta is an honorary, professional society for students and industry professionals in the agriculture and natural resources fields. Founded in 1897 at Ohio State University, Alpha Zeta is the first and oldest collegiate society for agriculture. Today, Alpha Zeta has more than 125,000 alumni and more than 2,000 student members from chapters at 74 universities. Join Alpha Zeta or learn about Starting an Alpha Zeta Chapter on your campus.

Members include several former secretaries of agriculture; a Nobel Laureate; several U.S. Senators and Congressmen; prominent leaders throughout national, state and local government; CEOs of major agricultural companies; cutting edge researchers and more. The Centennial Honor Roll, named in 1997, recognizes many of Alpha Zeta's most respected alumni.

## Mission

Alpha Zeta is the professional agricultural and natural resources organization dedicated to the highest levels of scholarship, leadership, integrity and service.

## Vision

Alpha Zeta is a global network of diverse agricultural and natural resources professionals recognizing, developing and promoting leaders with common values and integrity.

## 2019-2021 High Council

The Fraternity is governed by a High Council who consists of seven members (six alumni and one student representative). This is the executive body of the Fraternity. The Student and Alumni Representatives are elected every two-years. The term of the remaining directors is four years.

- High Chancellor - Kayla Hurst
- High Censor – Ricki Schroeder
- High Treasurer - Kellen Habib
- High Scribe - Cassandra Hiner
- High Chronicler - Lauren Fessler
- Student Representative – Allyson Wentworth
- Alumni Representative – Steven Baringer

High Council members volunteer their time to the Fraternity. They typically meet once a year in person and have monthly phone calls. The High Council has the authority to interpret the Constitution, Bylaws, and actions taken by Conclaves subject to review and/or appeal by subsequent Conclaves.

## National Office

The Alpha Zeta National Office is located in Lexington, Kentucky. Some of the duties and services of the National Office are listed below.

- Maintains all fraternity membership records
- Issues membership certificates and pins
- Coordinates the orders of all chapter supplies and jewelry
- Edits and distributes all national fraternity publications
- Maintains financial records of the Fraternity and the Foundation
- Handles all general correspondence regarding general fraternity business
- Collects annual reports from each chapter
- Processes applications for awards and scholarships
- Performs the directives of the High Council

## History of the Fraternity

Charles W. Burkett and John F. Cunningham founded the Fraternity of Alpha Zeta on November 4, 1897, at The Ohio State University.

Brothers Burkett and Cunningham were roommates while studying in the College of Agriculture at Ohio State. They realized the need for fellowship among students dedicated to the cause of agriculture.

At the time, agricultural education was of low standing at the University. Similarly, there was little regard for the few students enrolled in agriculture courses. Burkett and Cunningham wanted an organized way to promote agriculture openly and cooperatively and to gain respect for agriculture students.

It was three years between the first planning and the actual organization of the Fraternity. In June 1897, Brother Burkett and Brother Cunningham took the following oath, "The Fraternity of Alpha Zeta begins its work. Its spirit will be: To give, not to receive; to serve, not ourselves only, but the agricultural body, the whole cause of higher education, and in every way possible all people engaged in the profession of agriculture. May the Fraternity live forever."

Ten other men were included in the plans and ideas. These twelve men became the charter members of the first, and therefore the oldest, agricultural fraternity in America. The members that made up the group of twelve were:

Charles W. Burkett  
 John F. Cunningham  
 Arthur G. Abbott  
 Clarence Clawson  
 Vernon H. Davis  
 Donnelley H. Duncan

Oscar Erf  
 Marion Imes  
 Arthur G. McCall  
 Carl J. Miller  
 Charles B. Stewart  
 Leonard C Warden

In Brother Burkett's own words, "Alpha Zeta was to be a professional fraternity - to foster leadership in the college of agriculture, to promote scholarship, to chose manly, personable young men of high character and integrity and unite them in to an elite body with a fraternity bond encircling them. It was not a body to show favor but to serve; it was not a body to give honor to anyone but one where its members could be of help to others. In other words, it was not intended as an honorary fraternity but a fraternity to help all, in its reach, in the cause of agriculture."

Burkett and Cunningham were not only dedicated, devoted, and determined men, proud of their places in agriculture, they were also men of vision who took an active role in the fraternity's development.

Alpha Zeta grew quickly. The founding principles appealed to university students on the forefront of agriculture. Chapters sprung up across the nation at colleges and universities with programs in agriculture.

However, the Fraternity was not without controversy. Alpha Zeta remained an all white male organization for its first 55 years of its existence. A proposal was made that the word 'white' be stricken from the constitution at the 1940 Conclave, but it would be another 12 years before this amendment was passed. The issue of deleting the word 'white' was brought up at every conclave from 1940 to 1952.

Finally, a committee of Alpha Zeta alumni was appointed to investigate and report on segregation in the fraternity. The committee found sentiment strongly in favor of amending the constitution to eliminate any restriction based on color. The 1950 Conclave approved the report and agreed to the amendment, "Any male student..."

Thus, the amendment was completed at the 1952 conclave.

The next membership issue to face the Fraternity was the admission of women. The issue was first presented at the 1952 Conclave, but the proposal to admit women failed with a tie vote of 24 to 24. At the time, Alpha Zeta awarded women in agriculture recognition certificates for their activities, scholarship or contributions to the college. In 1972, the Conclave voted to strike the word male from the constitution, allowing chapters to initiate women.

Since then the Fraternity has continued its mission to promote agriculture and recognize scholarship, leadership and character. The next major event for Alpha Zeta occurred in 1994. After more than 20 years headquartered in Lafayette, Ind., management of the Fraternity moved to St. Louis, MO. The Fraternity of Alpha Zeta and the Alpha Zeta Foundation, Inc. became the first client of Drake & Company, an association management company owned and operated by Townshend alumnus Steve Drake. In 2013, the Fraternity and Foundation became clients of AMR Management Services in Lexington, Kentucky, and in 2017, the national office relocated to Lexington.

Today more than 125,000 men and women have been initiated into the 74 historical chapters of the Fraternity of Alpha Zeta. Fraternity students and alumni work in all types of agriculture-related careers ranging from production farming to politics and agronomy to veterinary medicine.

Through the inspiration, guidance and founding principles constructed by Charles W. Burkett and John F. Cunningham, the Fraternity has become a powerful professional organization striving to further agriculture by promoting scholarship, molding young leaders of character and encouraging fellowship among like-minded students and alumni.

### **National Agricultural Leadership Conference**

Alpha Zeta students and alumni from chapters across the country come together each March for the National Agricultural Leadership Conference (NALC). All dues-paying student members, advisers,

alumni, associate and honorary members are invited and strongly encouraged to attend the conference. Guests and students from universities wishing to start AZ chapters are also welcome.

Activities include agricultural tours, service activities, and workshops centered on leadership. Past agricultural tours have included orchards, ranches, stockyards, garden centers, equine hospitals, and more. Workshops have included topics such as member engagement, fundraising, interviewing strategies, and leadership challenges. The last evening of the event, Alpha Zeta annually recognizes outstanding officers, advisers and alumni nominated by their peers as well as AZ Foundation scholarship winners at the annual banquet,

Some unique traditions of NALC are the banner contest, where chapters design and create a chapter banner incorporating the conference theme, principles of Alpha Zeta and elements from their chapter. As an ice breaker, a t-shirt exchange is also held; attendees are asked to bring a t-shirt from their chapter, AZ event, or university to trade with other members.

The National Office facilitates planning and execution of NALC, with guidance from a planning committee.

### **Biennial Conclave at NALC**

Every other year at NALC, the Fraternity delegation meets to conduct business. The official body of the Conclave consists of the members of the High Council and one accredited delegate from each chartered chapter or alumni association of the Fraternity.

In order to be accredited to vote, each Conclave delegate shall have met the following requirements at least fifteen (15) days prior to the first day of the Biennial Conclave:

- The Chapter has appointed him or her as its delegate by an authorization in the form prescribed by the National Office and signed by the Chapter Chancellor and the Chapter Scribe.
- The Chapter has continued to operate in accordance with the requirements of the Corporation, as outlined in the Affiliate Agreement Form.
- The Chapter is not then delinquent on the payment of any dues or fees to the Corporation.
- The Chapter has submitted all required biennium reports to the National Office

### **Chapter Officer Positions**

Each chapter has the following officers which make up the Executive Board:

Chancellor – The Chancellor presides at all meetings, coordinate the activities of the chapter, appoints chairman of ad hoc and standing committees, serves as an ex-officio member of all committees, and represents the fraternity whenever the occasion arises.

Censor – The Censor assumes the duties of the Chancellor if it becomes necessary; supervises all committees; works closely with the Chancellor in coordinating chapter activities; contacts all eligible students about Alpha Zeta membership; plans and coordinates recruitment events, prospective member

meetings, and initiation (if there is no Member Education Coordinator); acts as a liaison between the prospective members and the chapter; and censures inappropriate action or conduct of any member of the chapter.

Scribe – The Scribe prepares an agenda for each meeting, prepares and presents the minutes of each meeting, attends to chapter correspondence, and keeps attendance.

Treasurer – The Treasurer receives and deposit all funds, maintains neat financial records, prepares treasurer reports for each meeting, and initiates and helps manage fundraisers. He/she also ensures each active member pays annual dues and ensures payment for new student initiates is submitted to the National Office.

Chronicler – The Chronicler documents all chapter happenings through photography, maintains chapter websites and social media pages, and posts to the chapter activity blog on alphazeta.org a minimum of three times annually.

Larger chapters may have additional positions, such as a Sergeant-at-Arms, New Member Educator, Social Chair, or Service Chair. The chapter has flexibility to create additional elected positions as needed.

## **Affiliate Agreement**

The National Fraternity developed an “Affiliate Agreement” to help both student chapters and the national fraternity more easily comply with federal guidelines and regulations. Since all chapters must abide by the federal regulations for nonprofit organizations, chapters often find this information very helpful. Should you need a copy of your chapter’s affiliate agreement, please contact the National Office.

## **Yearly Requirements for Chapters**

Below are the yearly requirements for each chapter. As an adviser, you can assist the chapter by ensuring these are completed. These are pulled directly from the Affiliate Agreement each chapter has signed.

### **I. Affiliate Operations**

- A. Chapters shall maintain up-to-date Bylaws and review them at least every three (3) years. Affiliate bylaws shall comply with the Model Affiliate Bylaws (see Attachment 8 in the Affiliate Agreement). A copy of the current Affiliate Bylaws shall be maintained at Fraternity Headquarters.
- B. The historical documents of the chapter, including Fraternity Affiliation Agreement, Affiliate Bylaws with all amendments, Incorporation papers, and meeting minutes, shall be contained together and shall reside with the current Affiliate Advisor. In addition, a copy of the Incorporation papers, and Bylaws with all amendments shall be on file at Fraternity Headquarters.

- C. Affiliates shall complete the nomination and election process within thirty (30) days of Colony approval by the Fraternity High Council. Affiliate shall elect a chapter Chancellor (President), Censor (Vice President), Treasurer and Scribe (Secretary). Affiliates shall submit a copy of its current Officers and Advisors to the Fraternity on or before October 1 of each year. The Affiliate's Officers shall be members in good standing. Election results shall be forwarded to Fraternity Headquarters when the process is complete.
- D. Affiliates shall file the IRS 990 Series return (Form 990, 990EZ or the 990N (postcard)) and shall provide proof of such filing to Fraternity on or before October 1 of each year.
- E. Affiliates shall maintain their legal status within their home state by filing all required state reports.
- F. Affiliates shall comply with published Fraternity guidelines for use of Fraternity's name, logo, etc. (See Attachment 5 in the Affiliate Agreement).

## **II. Affiliate Administration**

- A. Affiliates shall hold a minimum of two (2) meetings per school semester.
- B. In order to receive a charter, a new chapter shall have a minimum of five (5) members and be expected to maintain a minimum of five (5) members.
- C. Affiliate shall arrange for Affiliate representation at the Biennial Conclave.
- D. Each Affiliate shall establish a Faculty Advisory Committee consisting of a minimum of two (2) college or university faculty members holding alumni or associate memberships in the Fraternity to assist and provide guidance to the Chapter in fulfilling its obligations to the Fraternity.
- E. All candidates for student membership shall be initiated in strict conformity with the Ritual of The Fraternity of Alpha Zeta. Such Ritual shall not be disclosed or used in any manner other than in connection with the initiation of candidates for student membership. No initiation of members shall take place during any period of time in which the Charter of the Chapter is either suspended or revoked.
- F. No Affiliate shall own or enter into a contract for the purchase or other acquisition of real estate for use as, or in connection with the construction or occupancy of, a chapter house by such Chapter without having first secured the affirmative vote of two-thirds of the High Council and two-thirds (2/3) of the remaining voting members of the Corporation.
- G. Affiliates may establish an Alumni Advisory Board consisting of a minimum of three (3) alumni members of the Affiliate Chapter. The Alumni Advisory Board shall maintain a record of Affiliate Chapter alumni and provide guidance and financial support to the Affiliate Chapter where needed.

## **III. Member Services**

- A. Affiliates shall conduct at least two (2) educational programs each year.
- B. Affiliate shall organize and/or sponsor at least one (1) service or philanthropy event each year that provides a valuable service to its Institution or local community.
- C. Affiliate shall provide a current Membership Roster to Fraternity by October 1 of each year.
- D. Chapters shall offer a new member orientation in conjunction with their new member initiation.
- E. Chapters shall provide at least three (3) Chapter Activity reports to Fraternity each year.
- F. Chapters may create an individual Website which may be linked to the Fraternity Website.

#### **IV. Individual Membership Responsibility and Privileges**

- A. New members must submit an application form prior to their initiation with the required application fee.
- B. Members should attend a minimum of 2 meetings/events per semester.
- C. All members should be granted access to the current chapter membership database.
- D. Chapters shall provide at least three (3) Chapter Activity reports to Fraternity each year.

#### **V. Dues and Fees**

- A. Each member shall pay an initiation fee with the application. Further, each member shall submit dues to Fraternity on an annual basis.
- B. Affiliates may also establish chapter dues to be billed and collected directly by the Affiliate.

### **AZ Network Powered by Greek Track**

In September 2018, the Fraternity launched [aznetwork.org](http://aznetwork.org), a chapter management system designed to assist AZ chapters with managing membership, events, finances, and more!

Each chapter gets a members-only website to help chapters collect dues, manage event sign-ups, compete on leaderboards for achievements, etc. All individual members in the chapter have an account to log into. New student initiates can be added to the system by officers, and the National Office will invoice new student initiates accordingly. This allows for a more streamlined system that is easier for officers, advisers, and the National Office.

On [AZnetwork.org](http://AZnetwork.org), officers can view chapter-wide reports, including event and attendance history, chapter progress reports, and more. Chancellors are responsible for ensuring they transfer the correct privileges to subsequent officers.

For more information about [AZnetwork.org](http://AZnetwork.org) or training, please contact the National Office.

### **How the National Office and the High Council Can Help You**

We know the role of an adviser is often a challenging one, and we are grateful that you are utilizing your time and talents to advise our student members. We are committed to ensuring advisers have the tools and training they need to feel confident in their role as an adviser. The National Office can assist by:

- Providing onboarding training to new advisers
- Writing letters of support to your dean
- Providing guidance in difficult situations
- Outlining recommendations for chapter growth
- Succession planning for advisers
- Providing sample recruitment letters or talking points to recruit new advisers

Please don't hesitate to reach out to the National Office anytime for assistance.

# Advising AZ Chapters 101

## Characteristics of a Successful Adviser

- The adviser is genuinely dedicated to the Fraternity's vision and mission and committed to helping the chapter meet and exceed the Fraternity's policies and expectations.
- The adviser understands the importance of advising and mentoring, not managing or directing; he or she understands that failure and learning from mistakes is as important to the fraternity experience as is success and winning. The chapter is committed to success, the members understand that they are solely accountable for their actions and that failure to heed the lessons of their failures will jeopardize the adviser – chapter relationship.
- The adviser is accessible and has contact with the chapter leaders at least weekly; he or she is willing to reach out and partner with the National Office; he or she attends the annual National Agricultural Leadership Conference (NALC). The chapter respects the limited amount of time available from the adviser; the chapter leaders assist in the development and support of a Faculty Advisory Committee.

## Expectations for Advisers

Advisers will proactively work to:

### Understand the National Fraternity, Chapter, and University

- Review the Chapter Best Practices Manual, Affiliate Agreement, chapter and national bylaws, Alpha Zeta Risk Management policy, and other resources upon appointment.
- Attend the National Agricultural Leadership Conference (NALC) if possible, or at least ensure one representative from the chapter is present.
- Respond to all inquiries from the National Office.
- Ensure officers are keeping track of membership and paying appropriate invoices in the AZ Network system.
- See the continuity of the organization is preserved through Chapter Bylaws, minutes, and files.
- Encourage that the Chapter is run in an orderly, efficient manner.
- Articulate campus policies and procedures and help chapters cut through the “red tape” when necessary and consult with other departments when problems arise.
- Be a facilitator both among Officers and between Officers and Members.
- Be familiar with structure and services of the National Fraternity.
- Consult on programs and program planning.
- Consult with individual students, when necessary.
- Be generally available to assist the organization.
- Maintain a close relationship with the Executive Board and attempt to meet as many members as possible.
- Mediate interpersonal conflicts that arise, when necessary.

- Ensure that Officers know and understand the obligations of their position and that they are working to fulfill those obligations.
- Assist the transition of officers and assist in new officer training and leadership development.
- Function as a liaison between the organization and campus administration and assist the chapter in developing an ongoing beneficial relationship with the university.
- Ensure a smooth transition to the next adviser should they no longer be able to serve

### **Maintain Core Values & Model Appropriate Behavior**

- Abide by the Fraternity's Bylaws
- Abide by the Fraternity's Risk Management Policy
- Refrain from purchasing for or providing alcohol to student members
- Refrain from facilitating the consumption of alcohol by student members
- Refrain from using illegal drugs or other controlled substances
- Refrain from engaging in romantic and/or sexual relationships with student members

### **Risk Management and Alpha Zeta's Policies**

Risk management is responsible behavior, the willingness of Alpha Zeta members to provide a safe fraternal experience, taking care of one another at all times, taking care of guests at all times, planning carefully the events of the chapter, abiding by the laws of the land, and being mindful of and abiding by the principles found in our ritual. In short, it's basic respect for the Fraternity, people, property and laws.

Brotherhood, human dignity and respect play the key roles in risk management. As Chapter officers plan events, they should be aware of this at all times and be willing to communicate this to the membership when tough decisions have to be made.

The Alpha Zeta Fraternity High Council will investigate all allegations of actions that fall under this risk management policy and will determine the appropriate course of action, which may include probation or termination of membership of either an individual or a chapter. Allegations can be reported to [info@alphazeta.org](mailto:info@alphazeta.org).

### **Hazing**

No chapter, colony, student (pledge or member), alumnus or advisor shall conduct nor condone hazing activities. Hazing activities are defined as:

Any action taken or situation created, intentionally, or unintentionally whether on or off Fraternity premises, to produce or cause mental or physical discomfort, embarrassment, harassment, or ridicule. Such activities may include but are not limited to the following: use of alcohol; paddling in any form; creation of excessive fatigue; physical and psychological shock; quests, treasure hunts, scavenger hunts, road trips or any other such activities carried on outside or inside the confines of the chapter house or meeting place; kidnappings, whether by pledges or active members; wearing of public apparel which is conspicuous and not normally in good taste; engaging in public stunts and

buffoonery; morally degrading or humiliating games and activities; and any other such activities that are not consistent with academic achievement, fraternal law, ritual or policy, or the regulations and policies of the educational institution, or applicable state law.

While we are familiar with violent or harassment acts of hazing, where most chapters find themselves in trouble for is subtle hazing. Subtle hazing is behavior that emphasizes a power imbalance between new members/rookies and other members of the group or team. It is called “subtle hazing” because these types of hazing are often taken for granted or accepted as “harmless” or meaningless.

Subtle hazing typically involves activities or attitudes that breach reasonable standards of mutual respect and place new members/rookies on the receiving end of ridicule, embarrassment, and/or humiliation tactics. New members/rookies often feel the need to endure subtle hazing to feel like part of the group or team. Many chapter members (and even advisers!) assume that if they make an event optional, that means it is not considered hazing. That is incorrect; by making it optional, a chapter indicates that they know it may raise questions – and that it’s likely wrong.

Some examples of subtle hazing might be:

- Requiring new members to perform duties not assigned to other members, like staying to clean up after a meeting or having to get a certain number of study hours.
- Requiring new members/rookies to refer to other members with titles (e.g. “Mr.,” “Miss”) while they are identified with demeaning terms
- Deprivation of privileges granted to other members
- Trying to instill fear into new members about initiation, even as a joke
- Trying to instill fear or discomfort in a member, even as a joke, like kidnapping Little Brothers and driving them to their favorite restaurant for a meal
- Mandating formal dress wear for only new members
- Requiring new members to carry handbooks and obtain signatures of members or others

This list is not comprehensive but meant to illustrate that impact is more important than the intent of a chapter’s actions. As an adviser, you may need to step in and ensure that a chapter does not violate the policy. If there is ever doubt about whether an activity is permissible, err on the side of caution and do not include it, or contact your Office of Fraternity and Sorority Affairs to ask them.

## **Alcohol**

The Fraternity will take responsible and good faith measures to assure that our members abide by law and policy and that our actions reflect in a positive way on ourselves and on Alpha Zeta. None of these actions can provide an adequate substitute for personal responsibility for risk on the part of those who opt to consume or to provide alcoholic beverages.

The possession, use and/or consumption of alcoholic beverages, while at any Fraternity event, whether local, regional, national or international in scope; or in any situation sponsored or endorsed by any chapter or by the Fraternity or at any event an observer would associate with the Fraternity must be in compliance with any and all applicable laws of the country, state, county, city or school.

The following general provisions apply:

- a. No member individually or collectively, shall purchase for, serve to, or sell alcoholic beverages to any minor (those under the legal drinking age).
- b. Reasonable precautions will be taken by the alcohol service providers and host chapters to prevent the excessive consumption of alcohol and to prevent the service of alcohol to underage persons by anyone.
- c. Members or guests who arrive at an event in an intoxicated state will not be permitted to attend.
- d. At each event, there shall be designated non-drinking members.
- e. Ample non-alcoholic beverages shall be provided at each event.
- f. The service of alcoholic beverages shall end at a specific time which shall be established and clearly published in advance of the event.
- g. No "drinking games" shall be permitted.

### **Illegal Substances and Abuse of Controlled Substances**

Chapters and members should abide by all federal, state, local and university laws and regulations regarding controlled substances and illegal substances.

### **Sexual Harassment, Abuse, or Misconduct**

The Fraternity does not condone nor will it tolerate any form of sexist or sexually abusive behavior such as sexual harassment, abusive behavior or misconduct on the part of its chapters or members whether physical, mental or emotional. This includes but is not limited to any actions which are demeaning to women including without limitation date rape, or verbal harassment by individuals or members acting together.

### **Automobiles and Transportation**

Any individual who drives or provides transportation in conjunction with Fraternity activities shall obey all applicable motor vehicle laws, including but not limited to, those concerning vehicle safety, vehicle operation, financial responsibility and/or insurance, and the transportation and consumption of alcoholic beverages. Operators shall ensure that vehicles are properly maintained, not overloaded, and operated in a safe manner. Rental vehicles shall be operated in accordance with rental contracts. Use of personal vehicles shall be strictly voluntary and the sole responsibility of the vehicle owner/operator. Financial responsibility laws generally impose responsibility for accidents on the Driver or Owner of vehicles. The Fraternity assumes no responsibility or liability and provides no insurance to Drivers or Owners of vehicles for accidents or injuries or for any damages to vehicles not owned by the Fraternity that may be used in conjunction with Fraternity activities.

## Common Issues in Chapters

Advisers are in a great position to judge how the chapter is doing because they attend meetings and work with the Executive Board but are somewhat removed from the daily operations. You can provide an informed, yet objective, review of the chapter.

Unfortunately, it is easy for even the best of chapters to falter from time to time. So, what type of "warning signals" should you look for? Briefly, these are some of the general symptoms:

**Lack of Strong Leadership** – Elections turn into popularity contests. Officers are elected but are unorganized and do not lead. Once in office, these officers try to keep everyone happy and not "rock the boat" by following up with members on issues that need to be addressed.

**Disciplinary Issues/Conflict** – Signals include lengthy chapter meetings or constant disciplinary problems with the university or community that go unresolved at the chapter level. Does the chapter provide consequences to its members, or are they willing to brush aside indiscretions?

**Lack of Member Engagement** – Because AZ members are high-achieving students that are involved in many different activities, it can be challenging to engage all members. However, emotionally solid relationships among members and clear expectations of membership will help members put Alpha Zeta near the top of their must-participate list. If only a few are carrying the load of the whole chapter, there could be an issue.

**Breakdown in Communications** – Do the chapter officers command the respect of the chapter? Are they trusted to make good decisions in Executive Committee meetings, or are all decisions brought before the chapter for vote? How often are advisers contacted and informed of chapter activities?

## Warning Signs

There are also a number of specific items that can be regarded as "warning signals":

**Financial Shortages** – This typically reflects weak leadership and a poor understanding of the financial operations of the chapter. The end result is typically massive year-end financial shortages or a lack of social activities, deferring payment of national dues and initiation fees, etc., which only prolongs the problem and destroys chapter morale. Has the chapter taken action against members for non-payment of dues?

**Not Paying National Dues** – The Executive Board, along with the adviser(s), should ensure that all New Members and initiates are reported to the National Office promptly and that all are fees paid. National dues are \$30 per member and are required yearly. It is up to the chapter to ensure these get paid each and every year. Misappropriation of the fees paid by members will cause prolonged problems for the chapter, both financially and in terms of chapter morale. Are the funds collected for payment of these fees being used to pay for socials, etc?

**Poor Record Keeping** – The chapter has lost track of all manuals, report forms, previous correspondence, etc. Financial records have been misplaced, or do not exist. The chapter has no record of previous initiates or members, having lost the chapter register. If the chapter is constantly

complaining that it does not have the necessary report forms, or if the officers say, "I didn't know I had to do that," the chapter may need your help in organizing a proper record keeping system and/or assistance in completing the various reports required by the National Office.

**Social Activities** – Does the chapter comply with the provisions of the Fraternity's risk management policies? Is the chapter violating this policy? Much can be learned by merely paying attention to the topics discussed in casual conversation between chapter members.

**New Member Retention** – If the chapter initiates less than 75% of its new members, there may be problems in the recruitment and/or New Member education programs. It may also be an early warning signal of perhaps a deeper problem such as poor chapter morale, or a poor fraternity experience after initiation.

**Scholarship** – This should be the first priority for each student but is often one of the lowest priorities in the chapter. Does the chapter ensure they are not over-programming the schedule? Are chapter members aware of scholarships available through the Alpha Zeta Foundation?

**Campus and Community Relations** – Ask around campus and in the community to see what the image of Alpha Zeta is. Do chapter members wear the AZ letters on campus to promote their chapter? What image does the chapter present to other organizations?

Obviously, it is impossible to list all of the symptoms that may alert you to problems in the chapter. However, if an adviser is quick to address these issues, the potential for long-term damage to the chapter is minimized.

## Officer Transitions

One of the biggest ways you can help both the chapter and the National Office is to help facilitate officer transitions. A successful yearly transition from outgoing to incoming officers is key to creating and sustaining a productive, effective organization. This is where we see the biggest opportunity for growth with our chapters – as officers transition, knowledge and duties do not get passed along, and we can quickly see a thriving chapter lose their way or fall apart entirely.

Why is the transition process important?

- To provide for the transfer of important organizational knowledge/information
- To inform and prepare incoming officers for their new positions
- To provide a sense of accomplishment and closure for the outgoing officers
- To capitalize on the valuable contributions of experienced leaders
- To increase the knowledge and confidence of the new leadership
- To minimize the loss of momentum the group has at the end of the year
- To provide a sense of community among the leadership and membership

## **Elections**

The National Office advises against holding elections at the end of the school year. By holding them in early spring (or another time of year entirely), this allows for a transition time, where outgoing officers (many of whom are graduating seniors who have additional priorities) are still around to answer questions for incoming officers. This also prevents you having to step in and essentially train each officer every year.

## **Outgoing Officers**

Each outgoing officer should maintain records of meetings, receipts and/or events that took place within the past year. This information can be kept in a binder, in Google Docs or other online shared drive, or both, and should be organized in a way that is useful to each position. Suggested topics/information include:

### *Governing Documents*

- Constitution/Bylaws
- Organizational rules/policies
- Organizational goals/objectives
- Position descriptions
- Reflection document
  - What do you wish you had been told before taking this position?
  - What were your major challenges and accomplishments in your position?
  - What are ideas that you tried and did not work? Why did they not work?
  - What do you recommend the next officer try? Why?
  - What is the most rewarding aspect of this position?
  - What projects did you start, but found you were unable to complete? What are the steps the incoming officer could take to accomplish this project?

### *Key Contacts/Resources*

- List of university resources and contact information (Student Activities staff, organization advisor, etc.)
- List of community resources and contact information (vendors for events, sponsors/donors, etc.)

### *Calendar/Timeline of Events*

- Calendar of events and activities for last year
- Records of past year's activities
- List of events, tasks, deadlines for particular position (i.e. treasurer completing the 990, chancellor completing Officer and Adviser reports to the National Office, etc.)

### *Additional Information*

- Copies of significant correspondence

- Previous meeting minutes/reports
- Budget information

### **Incoming Officers**

Incoming officers should also come to the transition meeting prepared with ideas and questions for the outgoing officer.

Below are some ideas:

- What do you want to accomplish during your term?
- What ideas do you have for your position?
- What do you want to take away from this position?
- How do you see this position aligning with your personal goals?
- What skills will you need to be successful in this position?
- Questions for the outgoing officer:
  - What are specific things about the position I should know about?
  - What should I do first? What are the most important priorities of this position?
  - What did you try that did not work? Why?
  - What do you wish you had done, but did not?

### **Facilitating an Officer Transition/Retreat**

While binders and informal information sharing is important, it is crucial for the outgoing and incoming officers to meet formally and discuss ideas and answer questions. This can be done in a retreat format or a meeting. Below are some ideas of topics to cover in that transition retreat or meeting.

I. Introductions/Overview of Agenda

II. Icebreakers/Team Builders to allow officers to get to know each other better

III. Review of Responsibilities for the entire officer board (university policies, organization expectations, organization goals, etc.)

IV. Individual Meeting time for outgoing and incoming officers

- Review of position
- Review of binder/documents
- Advice/tips for incoming officer based on end of semester report
- Question and Answer session for incoming officer to ask specific questions
- Goal-setting for next year

V. \*Goal-Setting Conversation for the larger group

- Small groups can report back what they discussed in individual meetings about goals for next year
- Begin developing an action plan for achieving goals

VI. \*Roundtable Discussion for the whole group

- Discuss any thoughts/feelings about the activities
- Ask for any final pieces of advice from outgoing officers
- Ask for any final questions/concerns from the incoming officers

VII. \*Next Steps: Set a meeting time for the incoming officers to meet again to continue with goal-setting and action planning

*\*You may choose to conduct these sessions with just the incoming officers.*