



Phi Chi Theta

Co-Ed Professional Business & Economics Fraternity



PHI CHI THETA

Be it known that the mission of Phi Chi Theta, a national professional fraternity, is to: Provide an opportunity to develop and practice those professional leadership skills and abilities necessary to succeed in the business community; Provide a local and national network to share resources, ideas and concepts; Instill in its membership those values, codes and creeds which will enable participation in a rapidly changing world: and Enable members to develop the business astuteness necessary to achieve high esteem and success in their chosen fields.

DUTIES OF MEMBERS

It is the responsibility of every officer and member to fulfill the mission of Phi Chi Theta. Members must maintain a copy of the chapter and National bylaws as well as the standing rules of order. Each member should be familiar with these and be willing to abide by them, to be loyal to the ideals and to uphold the standards of Phi Chi Theta.

DUTIES OF OFFICERS

It is the responsibility of every officer to fulfill the mission of Phi Chi Theta by providing leadership, guidance and direction to the general membership of the chapter. The executive board should work as a team, understanding that strong leadership is derived from personal accountability. Each officer should:

1. Be familiar with their responsibilities and uphold them in the highest standard when enacting in their leadership position.
2. Familiarize themselves with the national office, organizational structure, and submission requirements to maintain a positive chapter status.
3. Submit correspondence and paperwork to the national office for their designated role as indicated on the Calendar of Due Dates. Please reference this document on the web for more information.
4. Maintain and update the officer manual for his/her position.
5. Set personal goals for his/her office and work toward his/her accomplishment of such goals.
6. Perform any specific duties that may be provided for in the chapter or national bylaws.

PRESIDENT: The president is chosen by the members to direct the affairs of the organization for the term of office specified in the bylaws. The success of the administration will be measured by the participation and cooperation secured from other officers and members. The president acts as the Executive Head of the chapter. The president:

1. Assumes responsibility for the strategic direction of the chapter and governs all internal and external chapter affairs. In fulfilling these responsibilities, the president shall uphold all university policies and adhere to the highest ethical standards as prescribed by the fraternity.
 - a. Serving as a role model and being proactive, giving counsel as may be necessary to ensure harmony and prosperity of the chapter.



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- b. Encouraging cooperation by establishing positive interaction among members.
Appreciating and respecting other people.
2. Represents Phi Chi Theta with all outside organizations such as the University, the Regional Director and the National office.
3. Facilitates an active relationship between the chapter and advisor.
4. Delegates responsibility, oversees responsibilities, and provides encouragement when necessary.
5. Meets regularly with the Executive Vice President to discuss general operations of the chapter.
6. Maintains and updates the officer manual.
7. Is responsible for understanding and directing chapter and fraternity rituals. Preserves the privacy and legacy of the Rituals. Installs chapter officers. Inducts new members.
8. Calls and presides over the Executive Board Meetings. During the Executive Board meetings, the president will: Prepare an agenda for every; Recognize the importance of pooling ideas and encourage full and free discussion before decisions are made; Maintain communication between officers, facilitate discussions, and form additional committees if necessary; Establish long term strategic goals for the chapter.
9. Presides over active meetings. Calls meetings to order at the designated time. Preserves order throughout the meeting. Conducts meetings using parliamentary authority defined by Robert's Rules of Order.
10. Understands the overall financial management of the chapter. Periodically reviews the chapter's financial obligations with the Treasurer. Reviews incomes and expenses and compares them with the projected budget. May countersign checks or orders issued against the chapter treasury. Ensures that the Treasurer pays all bills promptly.
11. Signs contracts on behalf of the chapter with the approval of the Executive Board. Note: The President is the only chapter officer authorized to sign contracts for the chapter. The president should not sign contracts on behalf of the fraternity as a whole, deferring those to the national office as appropriate.
12. Is the chapter's official delegate to National Meeting in even numbered years and Regional Meeting in odd years.
 - a. Makes a written report to chapter members and advisors of the business and proceedings of the National Meeting and Regional Meeting.
 - b. Disseminates the informational materials distributed at National Meeting and Regional Meeting to the appropriate chapter officers and advisors.
 - c. Ensures that changes in fee structure approved by the National Meeting body are promptly implemented and these changes are promptly reflected in the chapter bylaws.
 - d. In the event the president cannot attend a national or regional meeting, ensures another member of the chapter is identified to represent the chapter in his/her place.
13. Is familiar with all of the operating procedures of the National Office and the national organization. Ensures that all forms and required correspondence are completed by the appropriate officers and board as instructed.
14. Files the IRS ePostcard on behalf of the chapter every year by the tax deadline. This will ensure the chapter maintains ability to hold tax exempt status.
15. Ensures that the chapter files are maintained by the appropriate members of team. Keeps copies of chapter correspondence to national officers and others for at least four years. Keeps copies of completed forms, updates, bylaws, programs, and orders sent by the chapter for at least four years. Files Chapter Minutes which are kept for at least four years.



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EXECUTIVE VICE PRESIDENT: The vice president may be called upon at any time to temporarily assume the place of the president and should make a thorough study of the president's responsibilities. The vice president should be familiar with the interworking of the chapter. The vice president:

1. Acts as the operational leader of the chapter; assumes responsibility for the day-to-day functioning of the chapter; and is responsible for the overall internal operations of the chapter.
2. Is responsible to plan and oversee special activities for the chapter. Responsibilities as listed below may be delegated to Events Directors/Committee Chairpersons/Team Leads. (In some chapters, this means the vice president will delegate responsibilities and serve as Chair of the Executive Committee for the chapter. This committee can be made up of any members who are responsible for planning chapter activities. Even larger chapters may delegate teams for event planning and thus, the committee may be made up of team leads.)
 - a. Plans and implements networking events with other organizations.
 - b. Plans and implements community service and philanthropic events. Coordinates and attends events. Plans chapter activities for National Make A Difference Day and submits report to National Office.
 - c. Plans and implements all programs related to professional development. Speakers, workshops, corporate tours, etc. Ensures professional development activities are included on the chapter's calendar. Presents "Thank You" awards/correspondence to guest professionals for participation.
 - d. Acts as liaison to University and Student Career Services Center. Announcing upcoming mock or real interviews, obtaining internship information, and information on other upcoming professional activities. Distributes personal/professional development articles. Maintains contact with College of Business or Economics to inform chapter of upcoming events. Submits, to the appropriate faculty or staff by the deadline, all necessary applications as required by the University regulations concerning all meetings, social functions, professional functions and use of school facilities.
 - e. Informs public of chapter events. Responsible for chapter press releases to outside organizations. Responsible for documenting chapter events (pictures) and submitting activity summaries to website. Submits articles to the IRIS. Works with other chapter officers and directors in coordinating and implementing marketing plans/campaigns for upcoming events.
 - f. Acts as the chapter liaison to local alumni chapter. Maintains contact with local alumni.
 - g. Responsible for the development and maintenance of the chapter webpage. Keeps website current throughout semester. Advises President on issues related to computer and communication technology and how it can improve chapter operations.
3. Is responsible for the chapter affairs and inter-chapter communication.
4. Reviews bank statements to act as check-and-balance to President and Treasurer signing checks.
5. Receives chapter mailings from the President and circulates them to the appropriate chapter officers and members.
6. Serves in the absence of the President
7. Ensures that the chapter's Charter is properly cared for and displayed.
8. Has main responsibility for scheduling, planning and conducting an Officer Transition Workshop.

TREASURER: The treasurer serves as the chapter chief financial officer and comptroller and assumes responsibility for all aspects of chapter financial management.



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1. Is authorized custodian of the funds of the chapter; receives all monies and disburses them as prescribed in the bylaws, or as authorized by action of the assembly. Ensures chapter maintains sound fiscal and economic policy.
2. Collects all National and chapter dues and fees. Issues receipt for all monies received.
3. Submits books annually for audit and preparation of annual report. To audit the books, the treasurer is required to deliver the books to the auditor, or auditing committee, (a) check book(s), (b) bank book(s) and bank statements, (c) file of bills paid, (d) the treasurer's book, (e) any other material requested by the person or persons auditing the books.
4. Studies carefully all references to dues and finance in National and chapter bylaws, standing rules and instructions.
5. Submits a statement at regular meetings, including total balance on hand at the beginning of the period covered by the report, receipts, disbursements and receives all monies for all accounts.
6. Works with designated individuals on fundraising events to coordinate receipt of money and payment of expenses.
7. Deposits all monies in a bank approved by the chapter and in the name of chapter.
8. Pays out money only by check and as authorized in the manner prescribed.
9. Keeps an accurate and detailed account of all monies received and paid out.
10. Preserves all paid invoices, receipts, bank statements and canceled checks and submits these to the auditor or auditing committee.
11. Delivers to successor all books, papers and correspondence pertaining to the office.

SECRETARY: The secretary is responsible for keeping accurate records of the proceedings of the chapter and conducts the official correspondence of the chapter under the direction of the president. The individual should be prompt and dependable, and should be familiar with the procedures of the chapter.

1. Makes a record of all business transacted at each meeting and presents the minutes for approval at the next meeting.
 - a. Minutes prepared by the secretary should contain records of all action taken by the group, including the exact working of every motion, the name of the member who introduced the motion, and the action taken on the motion. Personal opinion and discussion are not included in the minutes. The secretary may request the maker of the motion to put it in writing if the motion is long and complicated.
 - b. The minutes should be as brief as possible and should be reported in the order in which the business is presented at the meeting. What is done by the organization, not what is said by the members, is recorded.
 - c. The minutes should be entered in a bound book, which has numbered pages. It is from this book that the secretary reads, at the opening of each meeting, the minutes in their final form for approval. The word "Approved" and the date of approval should be written at the end of the minutes, which are signed by the secretary.
 - d. Notes are recorded by the secretary during the meeting, then compiled into the final form of the minutes in the bound book. Corrections are always made by notation in the margin of the book, preferable in red – never by erasure.
2. Prepares for the use of the presiding officer a statement of the unfinished business to come before each meeting.
3. Has on hand for reference at each meeting a copy of both National and chapter bylaws, the parliamentary authority, standing rules, accepted order of business, minutes of previous meetings,



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- a list of all standing committees and such special committees as are in existence at the time, and paper ballots should they be needed.
- Counts the rising vote when requested by the presiding officer.
 - Calls the meeting to order in the absence of the president and vice president and presides until a chairman pro-term is elected.
 - Acts as custodian of all records except those assigned to others.
 - Calls roll at meetings and keeps a record of attendance. Reports unexcused absences to the Executive Vice President at the end of each official event for follow up.
 - Maintains a database of Actives, Pledges and prospective members and update as needed. Prepares list of all active members each semester.
 - Notifies National office immediately of change in status of member- inactive, death, change in name or address, etc.
 - Notifies officers, committee members and delegates of their election/appointment.
 - Provides chapter members with access to all national policies and procedures, indicating where they can be found on the national web site.
 - Assists and supports other officers in the collection and organization of information needed for all submissions to the national office in accordance with the national office.
 - Responsible for fraternal award form submissions and requests made to the national office.
 - Responsible for promoting and encouraging the submission of applications for the national scholarship program offered through the educational foundation.
 - Sends out notices of board and other meetings.

PLEDGE TRAINER (MASTER): Responsible for the recruitment and new member education activities for the chapter.

- Acts as the recruitment leader for the chapter promoting the philosophy that Recruitment is a 365 day a year process and assumes responsibility for all recruiting, marketing and public relations activities.
- Develops and organizes a year-round recruitment plan with the assistance of recruitment committee. Works with Public Relations Director/Committee to coordinate all marketing activities surrounding recruitment activities. (May be delegated to Rush Committee.)
- Coordinates all rush and pledge activities with chapter calendar. (May be delegated to Rush Committee.)
- Determines Pledge Induction and Initiation location with the Executive Board. Makes arrangements for Initiation event. (May be delegated to Rush Committee.)
- Works with Executive Board to determine the qualifications for entrance into Pledge program above that required by National bylaws.
- Ensures that Initiation requirements have been met and that the proper paperwork has been sent to the National Office prior to Initiation.
- Ensures that there are sufficient materials for the recruitment efforts. Works with Executive Vice President to order supplies (Pledge Pins, Pledge Manuals, etc) from National Office.
- Responsible for the preparation of local information as a supplement for the Pledge Manual.
- Responsible for completing the Pledge List and Initiation List and to forward to the National Office within the required amount of time.
- Works with the Treasurer to collect all Pledge and Initiation dues and fees.



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11. Plans and implements all recruitment activities. Notifies members of such activities. (May be delegated to Rush Committee.)
12. Administers the Big/Little mentorship program.
13. Develops Pledge Education program that encourages the development of future leaders through activities and curriculum conducive to team and individual growth.
14. Works to assimilate Pledges with all aspects of fraternity life.