

# OFFICER GUIDE

---

## CHAPTER PRESIDENT

Address:

Alpha Phi Omega  
1441 East 104th Street, Ste. 105  
Kansas City, MO 64131

---

816.373.8667

[chapter\\_services@apo.org](mailto:chapter_services@apo.org)

[www.apo.org](http://www.apo.org)



# WELCOME TO THE CHAPTER PRESIDENT OFFICER GUIDE

---

Welcome and congratulations on being elected to serve as a chapter officer of Alpha Phi Omega!

As an officer, you have accepted certain responsibilities to help move your chapter forward through strategic thinking and diligent efforts. The Fraternity depends on leaders like yourself and could not succeed without them. It's important to recognize that your service is a significant step that helps the Fraternity reach its potential.

Chapter leaders are at the forefront of positive change in Alpha Phi Omega. From educating members-at-large to participating in legislative procedures, the leaders of this Fraternity are taking groundbreaking steps that foster growth, overcome adversity and improve shared connections that make the world a better place. The Fraternity welcomes you as a stakeholder in the development of servant leaders across the world.

The following guide will provide a foundation of knowledge and responsibility for the role in which you serve. Please utilize it as a supplement to the chapter's officer transition plan.

Thank you for your willingness to dedicate your time, energy and skills to make the world a better place.



# TABLE OF CONTENTS

---

**4.** ABOUT THE CHAPTER PRESIDENT

**5.** THE BASICS OF BECOMING THE CHAPTER PRESIDENT

**6.** CHAPTER OPERATIONS

**7.** REQUIREMENTS OF GOOD STANDING

**8.** REPORTING REQUIREMENTS

**9.** UNDERSTANDING MEMBERSHIP DUES

**10.** CHAPTER MEETINGS

**11.** EXECUTIVE COMMITTEE MEETINGS

**12.** ADVISORY COMMITTEE MEETINGS

**13.** RESOURCES & CONCLUSION

# ABOUT THE CHAPTER PRESIDENT

The chapter president is the face of the chapter and the primary point of contact for all parties that work with the chapter – whether campus administration, the National Office, chapter members or other groups. In this position, it is essential to maintain strong lines of communication and collaborate to reach chapter milestones. Setting goals – individually and as a team – is a way for the chapter to advance programming and overcome adversity. The president should take initiative and be the voice of encouragement for all, taking advantage of APO’s network on a local, sectional, regional and national level. In this role, recognize how exciting and useful networking can be. From campus partners to local volunteers and brothers from other chapters, there is no lack of people to learn from and share APO experiences! Chapter presidents should strive to be the “ideal brother”, leading the chapter through the semester by maintaining order, being a role model, and proudly representing the chapter at all times.

## TRAITS OF BEING A SUCCESSFUL CHAPTER PRESIDENT



CONFLICT MANAGEMENT



DECISION-MAKING



STRATEGIC PLANNING



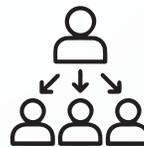
STRONG COMMUNICATOR



MOTIVATIONAL



WILLING TO COLLABORATE



DELEGATION



ADVANCES CHAPTER INITIATIVES



ENTHUSIASTIC



PEER MANAGEMENT

# THE BASICS OF BECOMING THE CHAPTER PRESIDENT

The primary role of chapter president is leading the members of the chapter while managing operations that are key to sustaining a healthy, happy chapter. Although the chapter president is often leading the charge of operations, they are backed by their team which includes chapter officers, committee chairs, advisors, members, and sectional and regional supporters. A chapter is only as strong as the team who supports it. It is the job of the president to ensure the team has the operations and resources needed to properly support the chapter now and in the future.

The chapter president guides and facilitates short-term and long-term planning for the chapter and is responsible for holding members accountable to their duties and responsibilities. Additionally, the chapter president coaches the chapter through goal setting and drives the conversation for achieving the mission of the chapter and the Fraternity. It is the responsibility of chapter officers to plan and implement effective programming to best support the goals of the chapter and meet the needs of members.

As the most visible member of the chapter, the president is a liaison between the chapter and outside people and organizations. This may include chapter advisors, university administrators, sectional and regional staff, community leaders and volunteer organizations. Building connections with these audiences will help diversify and improve the chapter's support system, or team, as well as increase the chapter's opportunities to have a positive impact on the campus and community.

It is vital that the chapter president, and all other officers, recognize that every member and non-member who supports the livelihood of the chapter has a place and purpose through the provision of service.

## TOP FIVE ESSENTIAL JOB FUNCTIONS

- 1. COORDINATE AND COLLABORATE WITH ALL CHAPTER OFFICERS AND THE ADVISORY COMMITTEE TO FACILITATE GOAL SETTING AND ADVANCE CHAPTER INITIATIVES**
- 2. ESTABLISH AND IMPLEMENT AN OFFICER TRANSITION PROGRAM THAT HELPS THE CHAPTER TO OPERATE SMOOTHLY AND EFFECTIVELY AS A TEAM AND ENSURE THE CHAPTER REMAINS IN GOOD STANDING**
- 3. UNDERSTAND AND OVERSEE THE BUSINESS SIDE OF THE CHAPTER INCLUDING MEETING THE FINANCIAL AND REPORTING OBLIGATIONS OF BOTH THE SCHOOL AND THE NATIONAL FRATERNITY IN A TIMELY MANNER**
- 4. ACT AS THE FACE OF THE CHAPTER WHEN WORKING WITH OUTSIDE AUDIENCES SUCH AS CAMPUS ADMINISTRATORS AND COMMUNITY PARTNERS**
- 5. EXEMPLIFY THE CARDINAL PRINCIPLES OF LEADERSHIP, FRIENDSHIP AND SERVICE AT ALL TIMES AND SERVE AS A CAMPUS ROLE MODEL AND LEADER TO THE CHAPTER**

# CHAPTER OPERATIONS

## NATIONAL REQUIREMENTS

The core of chapter operations is comprised of completing campus and fraternity requirements and financial obligations to ensure the chapter's charter remains active and recognized by Alpha Phi Omega and the respective campus. Additionally, the chapter must operate in accordance with the governing documents and policies of both the school and the Fraternity, as well as the chapter's bylaws. The chapter president must become familiar with these requirements and procedures for fulfilling them as the foundation of chapter operations, and, at the same time, hold the chapter accountable to the bylaws and policies of the chapter and fraternity.

Chapters can accomplish so much when they work together and see goals through to the end! It is imperative that chapters and officers understand good standing processes and procedures in order to best direct the chapter towards success.

### ARTICLE X, SECTION 8. CHAPTERS IN GOOD STANDING

A chapter in good standing [with Alpha Phi Omega] meets its yearly financial, administrative and Charter Reaffirmation obligations to the National Fraternity; is not more than 90 days delinquent in its financial accounts with the National Office; has maintained its 501(c)(3) not-for-profit status with the federal government and any appropriate state and local not-for-profit status; has confirmation of submission of a Spring Youth Service Day Report and a National Service Week Report; has at least one Active Member; and has not been declared inactive, suspended, or had its charter revoked, or has not otherwise been deemed in violation of the policies of National Bylaws of Alpha Phi Omega or of the rules, regulations or policies of its school.

It's important for good standing to be maintained for many reasons, including:

- 1. CHAPTERS IN GOOD STANDING HAVE THE PRIVILEGE OF VOTING DURING THE LEGISLATIVE SESSION AT THE NATIONAL CONVENTION EVERY TWO YEARS, WHICH IS A VITAL ROLE IN DETERMINING THE FUTURE OF THE FRATERNITY AND POLICIES THAT APPLY DIRECTLY TO THE CHAPTER.**
- 2. A CHAPTER IN GOOD STANDING IS ELIGIBLE FOR GRANTS SUCH AS THE SERVICE INNOVATION GRANT AND YOUTH SERVICE GRANT.**
- 3. PROPER MANAGEMENT OF REQUIREMENTS ALLOWS OFFICERS TO FOCUS ON MEETING THE NEEDS OF CHAPTER MEMBERS AND BETTER SERVING THE CAMPUS AND COMMUNITY.**

# REQUIREMENTS OF GOOD STANDING

ACTIVITIES CONDUCTED	DATE DUE	DATE AVAILABLE 
 <b>PLEDGES</b> Input new pledges into the Officer Portal and pay \$31 fee (\$25 pledging fee and \$6 insurance fee).	Within 10 business days of the Pledge Ceremony	Available 24/7
 <b>INITIATES</b> Input initiates into the Officer Portal and pay \$35 initiation fee.	Within 10 business days of the Initiation Ceremony	Available 24/7
 <b>CHARTER REAFFIRMATION &amp; AMD</b> Review and complete this form in the Officer Portal each fall and spring. Update the roster and pay Active Membership Dues (AMD) for each member - \$20 per active member (\$14.50 national, \$1.50 regional, \$1 sectional, and \$3 insurance), twice per year.	Fall: Nov. 15 Spring: April 15	Fall: First week in Sept. Spring: First week in Jan.
 <b>NATIONAL SERVICE WEEK</b> Submit the report for your National Service Week project(s) in the Officer Portal.	No later than Nov. 15	Sept. 1
 <b>SPRING YOUTH SERVICE DAY</b> Submit the report for your Spring Youth Service Day project in the Officer Portal.	May 1	Feb. 1
 <b>OUTSTANDING DEBTS</b> Chapters are required to pay any outstanding debts to the National Office. Chapters can determine if they have any debts in the Dashboard area of the Officer Portal.	Nov. 15, April 15, ongoing	Available 24/7
 <b>CHAPTER OFFICERS LIST</b> Update current officer listing in the Officer Portal after elections.	After each election	Available 24/7
 <b>GRADUATING SENIORS LIST</b> Submit list of graduating seniors for fall and spring semesters in the Officer Portal.	June 1	Available 24/7
 <b>ANNUAL FINANCIAL REVIEW</b> Submit verification of review of previous year's financial records if not already completed with Charter Reaffirmation. Form available in the Officer Portal.	July 31	Sept. 1
 <b>MAINTAIN 501(c)(3) NOT-FOR-PROFIT STATUS</b> Chapters must file the 990-N e-Postcard once per year according to IRS Guidelines. Check the Dashboard area in the Officer Portal to determine specific due dates.	By the 15th day of 5th month of chapter's tax year	Available 24/7 on <a href="http://irs.gov">irs.gov</a>
 <b>CHAPTER BYLAWS</b> Submit copy of revised chapter bylaws within the Charter Reaffirmation and upload revisions through the Officer Portal.	Immediately after revision	Available 24/7

# REPORTING REQUIREMENTS

All national requirements of the Fraternity are reported through the Chapter Officer Portal (<https://op.apo.org>), an online chapter reporting platform, designed to allow chapter officers the ability to provide real-time, ongoing maintenance of the chapter membership, officer rosters and other national reporting requirements. The OP is available to all officers on record with Alpha Phi Omega.

The role of the chapter president in Officer Portal is unique. While the president has access to perform all chapter functions on Officer Portal, they are often not the most active user. The primary reporting duty of the chapter president is to complete the fall and spring charter reaffirmation, and ensure all other reporting requirements have been completed and invoices paid by the assigned chapter officer in a timely fashion. It is important for the president to ensure the reporting duties of each officer position are discussed during officer transition so each officer knows what to expect and how to utilize the OP.

More information on how and what to submit through the Chapter Officer Portal can be found in the Chapter Officer Portal User Manual, which is available in the OP Library and the Chapter Officer Resource Area of [www.apo.org](http://www.apo.org).

## OP DUTIES BY OFFICE

BELOW IS A LIST OF ITEMS TO BE SUBMITTED THROUGH THE CHAPTER OFFICER PORTAL, AS WELL AS THE OFFICE POSITION THAT IS TYPICALLY RESPONSIBLE FOR SUBMITTING THAT ITEM. \*INDICATES AN OPTIONAL, THOUGH ENCOURAGED FORM.

- ROSTER CHANGES - Membership VP
- PLEDGE AND INITIATE CLASSES – Membership VP/Pledge or New Member Educator
- DUES AND INVOICE PAYMENTS - Treasurer
- FINANCIAL INSPECTION NOTIFICATION - Treasurer
- FALL/SPRING CHARTER REAFFIRMATION – Submitted by chapter president, reviewed and approved by advisory chair.
- OFFICER CHANGES – Secretary
- SPRING YOUTH SERVICE DAY REPORT – Service VP
- SPRING YOUTH SERVICE DAY PARTICIPATION REPORT – Service VP
- NATIONAL SERVICE WEEK REPORT – Service VP
- NATIONAL SERVICE WEEK PARTICIPATION REPORT – Service VP
- ANNUAL SERVICE HOURS REPORT – Service VP
- CHAPTER ASSESSMENT & PLANNING SESSION REPORTS – Secretary\*
- IRS 990 RECEIPT SUBMISSION - Treasurer
- YOUTH SERVICE GRANT APPLICATION/REPORT - Service VP \*
- SERVICE INNOVATION GRANT APPLICATION/REPORT – Service VP \*
- CHAPTER OF EXCELLENCE APPLICATION - President \*
- PLEDGE PROGRAM OF EXCELLENCE APPLICATION - President \*
- ANNUAL CHAPTER EVALUATION - President \*
- H. ROE BARTLE AWARD APPLICATION - Secretary \*

# UNDERSTANDING MEMBERSHIP DUES

## PLEDGE OR NEW MEMBERS

Due within 10 business days of the pledge or new member ceremony

- Total Due: \$31 (\$25 Pledge Fee and \$6 Insurance Fee)

## INITIATES

Due within 10 business days of the initiation ceremony

- Total Due: \$35

## ACTIVE MEMBERS

Fall Semester (Due November 15)

- Total Due: \$20 (\$14.50 Active Dues, \$1.50 Region Dues, \$1 Section Dues, \$3 Insurance Fee)

Spring Semester (Due April 15)

- Total Due: \$20 (\$14.50 Active Dues, \$1.50 Region Dues, \$1 Section Dues, \$3 Insurance Fee)

NOTE: Students who pledge and initiate in the fall semester will not be charged for insurance at the time of the spring charter reaffirmation since an insurance fee would have already been paid for the year. Per the National Bylaws, the insurance fee is set each year by the Board of Directors on or before August 1, not to exceed \$7 per year, per student.

## ASSOCIATE MEMBERS

Fall Semester (Due November 15)

- Total Due: \$3 Insurance Fee

Spring Semester (Due April 15)

- Total Due: \$3 Insurance Fee

## RETURNING ASSOCIATES

- Total Due: \$17 (\$14.50 Active Dues, \$1.50 Region Dues, \$1 Section Dues)

## RETURNING ALUMNI

- Total Due: \$20 (\$14.50 Active Dues, \$1.50 Region Dues, \$1 Section Dues, \$3 Insurance Fee)

# CHAPTER MEETINGS

The role of chapter president also includes planning and facilitating meetings of all types to keep members and officers in-the-know with the details of chapter happenings. These meetings are a critical part of chapter operations – without clear communication and transparency, members may feel a lack of motivation or may not feel welcome to join the conversation as they should. Delivering effective meetings is a life skill that will support members in their professional lives as well. The three most common meetings that take place are the chapter, executive committee and advisory committee meetings.

Chapter meetings are an essential aspect of chapter operations since they keep everyone on the same page. The executive committee will organize and help facilitate this meeting for all other audiences. Chapter meetings should rarely run longer than two hours. The ideal length of a chapter meeting is an hour to an hour and a half, which allows enough time for chapter business without exhausting so much time that members grow bored and inattentive. Utilizing Robert’s Rules of Order or another form of parliamentary procedure will help keep the meeting on track and efficient.

## SETTING UP THE MEETING

Chapter presidents often begin a meeting with a brief call to order or by banging the gavel three times to signify the three Cardinal Principles of Leadership, Fellowship and Service. Following any introduction comes the meeting itself – a time for members to connect with each other, hear updates from officers or committees and learn about upcoming chapter events. The chapter president will want to ensure the minutes of the meeting are being kept, often by the chapter secretary.

The agenda of a chapter meeting is up to the discretion of the chapter. They often include the following items:

- Call to order
- Officer and Committee updates
- Upcoming events & planning
- Debrief of past events
- Fellowship Activities
- Advisor comments
- Strategic discussions
- Open forum

## TAKE TIME FOR FAMILY

How says chapter meetings have to be all business? Be sure to include fellowship activities to give members a chance to come together as brothers and have a little fun while strengthening the culture of the chapter. Below is a small sampling of some activities that chapters utilize to make meetings enjoyable and meaningful, as well as space to add other ideas.

- Brother or New Member of the Week
- Kudos or Snaps
- Two Truths and a Lie
- Family, lineage or Big/Little games
- “Would You Rather” questions

OTHER IDEAS:

---

---

---

# EXECUTIVE COMMITTEE MEETINGS

---

Executive committee meeting time is best utilized as a time to plan or take action on chapter programming and operations. In addition to the business that takes place at this meeting, check-in with chapter officers. Officer burnout can happen when an officer feels overwhelmed, overloaded and unsupported in the work they're doing.

To be sure this meeting is impactful and productive, create an agenda with topics each officer will cover, including time expectations. Start with individual officer reports, then dive into more complex subjects, and wrap up with an officer check-in or moments to look forward to.

Be sure attending officers come prepared with resources that help promote discussion or clarify a point of conversation. That may include a calendar of upcoming events to continue planning, membership data for a conversation about recruitment and retention goals, or a list of potential projects that have yet to be built out.

The agenda of an executive committee meeting will vary depending on the goals of the chapter, however often includes the following:

- Officer updates and feedback from committees
- Upcoming events and potential new projects
- Status of goals (individual, team and chapter)
- Evaluation of past events
- Agenda and structure of the next chapter or executive committee meeting

## NEXT LEVEL SUGGESTION

---

Does the chapter's executive committee struggle to compromise, delegate or otherwise find it hard to communicate and work together? Consider hosting an executive committee retreat at the beginning of the term or following the election of the new executive officers! A retreat could range from a potluck at someone's apartment to a day dedicated to the development of the executive committee team. Regardless of the setting, a retreat should be a specific time for officers to understand how to effectively and efficiently work together as chapter leaders and establish a framework for the year ahead.

# ADVISORY COMMITTEE MEETINGS

The advisory committee is an integral part of a chapter's support system and meeting regularly with them will benefit the chapter and will be reflected through the decisions and direction of the chapter. The National Bylaws (Article X, Section 2) require that each chapter have four or more advisors including, at minimum, two advisors from the faculty, administration or staff of this educational institution, one advisor representing scouting or other youth services, and one advisor from the community.

Chapter presidents should work with the advisory chair to connect with the full advisory committee face-to-face at least twice per academic term - once in the beginning and once at the end - in order to discuss the chapter's status, goals and expectations. Expectations go both ways, so it's important to dedicate time to establish concrete expectations for the advisory committee and to understand what advisors need in order to support the chapter as best as they can.

Every chapter utilizes advisors in their own unique way. Be mindful that as the culture of the chapter may naturally ebb and flow, the chapter's advisor expectations may transition too. Transparency and communication between the chapter and all advisors make tough conversations easier, and the easy conversations fun!

The agenda of an advisory committee meeting will vary depending on the expectations of the chapter, however often includes the following:

- Officer updates
- Questions, comments or concerns about the chapter's status
- On-going goals (individual, team and chapter)
- Upcoming dates and deadlines for reporting or events
- Advisor updates

## **(ADVISORY) COMMITTEE CONNECTIONS**

As chapter president, meet with the chapter advisory chair regularly in order to keep them informed of chapter operations. Time spent together can also be spent discussing chapter goal and expectations – transparency will help both the advisors and president understand where the chapter sees itself in the future and what steps will be required to get there. Keep in mind, a healthy chapter needs advisors that feel supported and wholesome in their efforts to serve. The advisory chair should serve the chapter as a mentor, providing training, motivation, coaching and support.

# RESOURCES & CONCLUSION

There are many resources - both people and material items - within reach to help chapter presidents better understand their role and the role of other officer positions. Below are a few of these resources. For more information on resources relevant to the chapter officer experience, visit the [Chapter Officer Resource Area of www.apo.org](http://www.apo.org).

- The [National Bylaws](#) are all-encompassing since they apply to the entire Fraternity. They outline membership types, dues, National Convention and the boundaries in which a chapter must operate.
- Chapter bylaws include more specific information about chapter programming and operations, officers and their duties and membership requirements and expectations. Refer to the [Guide to Writing Chapter Bylaws](#) for help!
- The [Chapter Same Page Guide](#) outlines the reporting requirements of APO Chapters and provides a checklist for pursuing Chapter of Excellence and Pledge Program of Excellence recognition.
- A Chapter calendar is a great resource for all chapter members to stay on track and on time. Refer to the [2019-20 Chapter Calendar Template](#) to create your chapter's calendar!
- On-campus administrators, often in Greek Life or Student Affairs, can help explain campus requirements, point the chapter towards extra funding, or recommend on-campus initiatives for the chapter to support through servant leadership. They also help navigate campus policies and procedures, educational resources and much more.
- Sectional and regional staff provide support to operations, including connecting the chapter to other members, officers and alumni in the area. Visit the Officer Tab in the Chapter Officer Portal for contact information for the regional chair and sectional chair who support the chapter.

## CONCLUSION

The role of chapter president is one that should be taken up eagerly, with an earnest desire to work towards the fulfillment of chapter goals and expectations. Above all, the chapter president should be the most enthusiastic supporter of chapter members and ongoing operations! Being a role model for brothers means demonstrating excitement and a willingness to go above and beyond to support the chapter and its initiatives. This excitement should extend beyond the chapter as well, through participation in sectional and regional conferences or National Convention and more! Being an advocate for Alpha Phi Omega means you are an advocate for positive change, servant leadership and making the world a better place. The impact of Alpha Phi Omega spans beyond chapter meetings and service events, and it's up to you to help make shared connections that make the world a better place through Leadership, Friendship and Service.

Since this position allows for the oversight of the chapter business, the chapter president is cognizant of the chapter's current and upcoming projects. Chapter presidents can share in the chapter's success by encouraging all brothers to be engaged and celebrating that involvement. With support from sectional and regional staff, chapter advisors and brothers, the chapter president will make strides to bring about long-term chapter success.

Enjoy this amazing leadership development journey as chapter president!