

KAPPA KAPPA PSI

How to Create Officer Notebooks

To ensure that the new projects and annual projects your chapter does are shared with future generations of brothers be sure to create officer notebooks. Documenting how to do, or not do, officer duties is important to your chapter's continued success.

Officer notebooks are wonderful resources for what your officer duties are and how to accomplish these tasks. Having this information available will save incoming officers time because the resources will be readily available to them in paper and electronic form. Officer notebooks can and should be compiled by all officer and committee chairs in your chapter.

Contents

Clearly laying out the information is important. This is the first thing new officers may see. All officer notebooks should contain:

- Table of Contents.
- Officer and chapter goals for the year.
- A letter from the outgoing officer to the incoming officer explaining what they will find in the document, and challenges and successes that occurring during their term.
- An explanation of which committee this officer chairs or serves on and duties associated with that role.
- Copy of officer duties from your chapter's constitution.
- Copy of officer duties from the most recent National Constitution.
- Copy of officer duties from Section III, Chapter Operations of the *Guide to Membership*.
- An up-to-date copy of your chapter's constitution and/or bylaws.
- Contact information for National Headquarters, National Officers and District Officers.
- A calendar of "must-do" events for the entire year. This provides an overview of known projects and will help new officers manage their time.
- Additional information and resources can be found on the National website, located at www.kkpsi.org.

Officer Specific Information

Different types of offices need to record different information for their office. Below is a listing of items to include for specific offices. This list is not all inclusive because the needs of chapters vary.

President

As someone who oversees all aspects of the chapter, you need an understanding of all of the offices below and should document them in your officer notebook. Specific portions for your officer notebook include:

- Copies of all officer duties.
- A calendar of everyone's "must-do" projects.
- A list of all committees, their chairs and the committee membership.
- Copies of agendas and meeting minutes from the past and current academic year.
- Parliamentary procedure information.
- Copies of all reports sent to National Headquarters during the past two years, including:
 - Chapter Personnel Report
 - Fall Activity Report
 - Chapter Summary Report
- Copies of all National and District forms and a listing of their deadlines.
- A copy of the chapter's and all officer's goals for the coming year.

Vice President

- A copy of the chapter's most recent Membership Education Program.
- How to lead the chapter a membership selection discussion and the chapter's existing Membership Selection Plan with directions on how to update it.
- Documented Recruiting Plan and how to create/update the existing one.
- Documented Teaching Plan and how to update, use and create new lesson plans.
- Documented Continuing Membership Education lessons plans.
- Documented lessons on how to teach the National Policies on Hazing, Discrimination and Substance Abuse to Actives **annually** and Prospective Members **prior to First Degree**
- Information on University Policies for membership intake.
- Initiation Registration information, including when and how to submit this information to National Headquarters and your University.
- Detailed notes on how to prepare for recruitment, teaching, holding retreats, etc.

Service Chair/Vice President

- A write-up on how to do each service project the chapter has done this year. Adding to this every year will create a wealth of knowledge of how to best accomplish service projects for your chapter. Include reports from previously attempted service projects.
- A list of service ideas the chapter has created but has yet to implement.
- Dividing service project into sections based upon the ensembles served can be helpful.

Treasurer

- Past budgets and how to create a budget for your chapter.
- The most recent bank statements.
- Description of how to navigate the banking system your chapter uses.
- A section on how to recreate each fundraiser the chapter has done this year. Adding to this every year will create a wealth of knowledge of how your chapter best fundraises.
- A section on how and when to pay National Dues.
- A section on how to use and not use payment plans for National Dues.
- Balance sheets for the past year which include chapter income, expenditures, and payment records for dues.
- Receipts for all reimbursements during the past year and all forms used by your chapter.

Secretary

This office may be held by one person or divided two or even three separate offices. The information below may be best kept for your chapter in three separate notebooks or one with the ability to separate them if desired.

- Section on Recording Secretary duties including:
 - How to record meeting minutes and a template to follow.
 - How and when to submit paperwork to National Headquarters.
 - How and when to compile and distribute chapter member's contact information.
 - The chapter roster.
 - Copies of all agendas and meeting minutes for the past year.
- Section on Corresponding Secretary duties including:
 - Information on about the chapter's email account(s) and listserv.
 - Explanation of how and why to subscribe to the National and District listservs.
 - Explanation of what type of information to post on listservs and when to do it.
 - Listing of nearby chapters to contact and invite to chapter functions.
- Section on Alumni Secretary duties including:
 - How and when to compile and distribute alumni contact information.
 - How to interact with alumni, such as what chapter functions to invite them to and when/how to distribute those invitations to events.
 - Chapter Roster from National Headquarters that contains contact information and initiation dates for all individuals initiated into your chapter.
 - Alumni records for the chapter.
- A digital copy of your chapter's constitution, information on how/when to update this document. This is generally the Secretary's duty if a chapter does not have a Parliamentarian and/or Sergeant at Arms.

Historian

- A copy of the *National Guide to Chapter Historian's Duties*.
- Additional chapter specific information on how to accomplish the duties listed in the National guide for this office.
- The written history of the chapter.