



Leading Your Chapter

Core Officer Training

- Living Into The Mission
- Understanding National/Chapter Policies
- Strategic Planning
- Budgeting
- Meeting Minutes
- Using Parli Pro
- Event Planning
- Officer Transitions



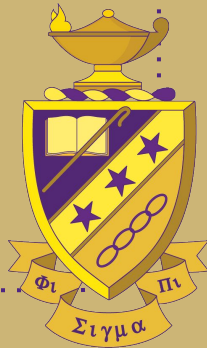


Living The Mission

Leading Your Chapter



*Phi Sigma Pi National Honor Fraternity is a gender-inclusive organization dedicated to: promoting lifelong learning, inspiring Members to lead, and cultivating lasting fraternal bonds, while always conducting our lives **with honor**. We consecrate ourselves to a life of social service with the goal of **improving humanity** through our principles: **Scholarship, Leadership, and Fellowship**.*





Game 1: Mission

Using the paper slips inside your envelopes, put the Phi Sigma Pi Mission Statement in order.

When you have it in order, raise your hand.



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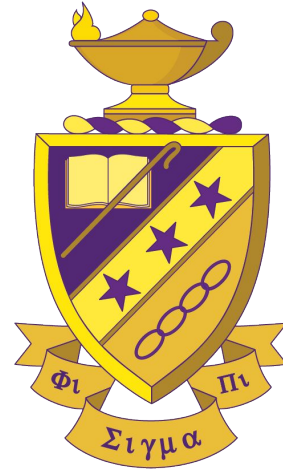


Understanding Policies & Bylaws

Leading Your Chapter

National Key Policies

1. Anti-Hazing Policy
2. Alcohol & Illegal Substance Abuse
3. Non-Discrimination
4. Sexual Assault & Harassment

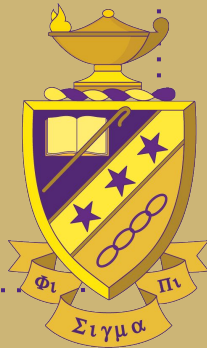




Anti-Hazing Policy

Phi Sigma Pi National Honor Fraternity neither approves of nor shall be responsible for actions of Members which may result in injury to persons or damage to property (i.e., "hazing").

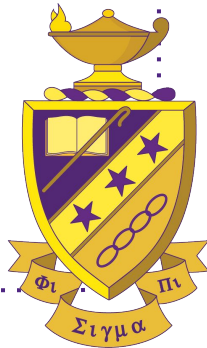
Hazing shall be defined as any action or situation that recklessly or intentionally endangers the mental, physical or emotional health or safety of any individual, regardless of the person's willingness to participate.





Alcohol & Illegal Substance Policy

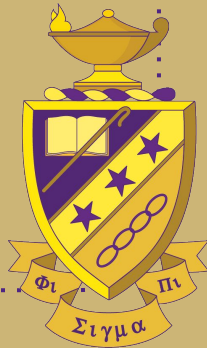
Phi Sigma Pi National Honor Fraternity discourages but does not prohibit, the use of alcoholic beverages at any Phi Sigma Pi sponsored event, function, or meeting. Illicit use of controlled substances as defined by state and federal law at any Phi Sigma Pi sponsored event, function or meeting is prohibited.





Non-Discrimination Policy

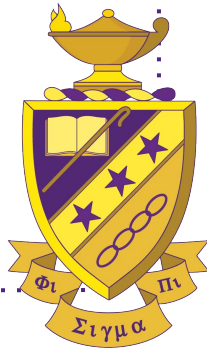
Phi Sigma Pi shall not discriminate on the basis of race, color, religion, National origin, ancestry, sex, gender identity or expression, sexual orientation, age or disability status in admission to, access to, treatment of or employment in Phi Sigma Pi's programs and activities.





Sexual Assault & Harassment Policy

Sexual assault and harassment is illegal and any Member or Initiate who sexually assaults or harasses another Member, Initiate, or guest of the Fraternity is criminally and personally liable for their own actions.





Understanding Policies & Bylaws

Leading Your Chapter

Chapter Policies

Chapter Bylaws

- Big picture on how the Chapter should be run
- Framework for the Chapter to run consistently over time
- Chapter name/associations
- Meeting frequency
- Chapter requirements
- Definition of membership types
- Parliamentary procedure information

Chapter's Operating Policies

- Specifics for daily operations
- Step by step on how to complete various tasks
- Disciplinary action
- Event planning
- Financial policies

Game 2: Which one?

Choose if the information read to you is either part of a Chapter Bylaw or Chapter Operating Policy.

Pick either “**Chapter Bylaw**” or “**Chapter Operating Policies**” with the paper in front of you.



Game 2: Which one?

Choose if the information read to you is either part of a Chapter Bylaw or Chapter Operating Policy.

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Strategic Planning

Leading Your Chapter

Strategic Planning

1. Determine where you are
2. Identify what's important
3. Define what you must achieve
4. Determine who is accountable
5. Review



Game 3: Choosing SMART

Write the number 1, 2 or 3 on the whiteboard in front of you that is a SMART goal.

Choosing SMART



Specific, Measurable, Attainable, Relevant and Timely

1. I want to work on my storytelling and meet with other Members of my Chapter so I can share with Potential New Members how much Phi Sigma Pi has touched my life.
2. I want to complete the Leadership in Action Module Strategic Planning- The Perfect Pitch and then take an improv class on campus every Monday for 6 weeks to better engage with Potential New Members throughout the year.
3. I want to have better social skills and smile more so I can engage and be more welcoming to Potential New Members at Invitational Meetings and Recruitment events.

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Budgeting

Leading Your Chapter



Budget

The money collected from Members, in form of local dues, and how that money is divided amongst the needs of the Chapter.



Why Budgeting Is Important

1. “Real picture” of the Chapter’s financial standing
2. Plan ahead to determine what you will be able to accomplish
3. Equips decision-makers with valuable information to make changes or shift priorities
4. Holds Chapters leaders accountable
5. Sharpens the Chapter’s understanding of its long-term goals
6. Engages the entire Chapter in open discussion of the financial realities
7. Motivates creativity in identifying solutions to financial challenges
8. Fulfills the need for required information for reports to the National Office



Budget Template

1. Lines for each Officer
2. Lines for each Committee Chair
3. Chapter income: dues, fines, fundraising, donations and school funding
4. Miscellaneous expenses: dues, fees/fines, donations and National event registrations
5. Budget summary: starting balance, total income, total expenses and projected ending balance

Chapter Budget			
Starting Balance	\$0.00		
Number of Members	0		
National Dues per Member	\$0.00		
Local Dues per Member	\$0.00		
Number of Initiates	0		
National Dues per Initiate	\$0.00		
Local Dues per Initiate	\$0.00		
Expenses			
Executive Board	Budget	Actual	Difference
President	\$0.00	\$0.00	\$0.00
Vice President	\$0.00	\$0.00	\$0.00
Secretary	\$0.00	\$0.00	\$0.00
Treasurer	\$0.00	\$0.00	\$0.00
Initiate Advisor	\$0.00	\$0.00	\$0.00
Historian	\$0.00	\$0.00	\$0.00
Parliamentarian	\$0.00	\$0.00	\$0.00
Executive Council			
Scholarship	\$0.00	\$0.00	\$0.00
Leadership	\$0.00	\$0.00	\$0.00
Fellowship	\$0.00	\$0.00	\$0.00

Game 4: Income or Expense?

Choose if the item read to you is either “income” or an “expense.”

Pick either “**Income**” or “**Expense**” with the paper in front of you.

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1:00



Meeting Minutes

Leading Your Chapter



Meeting Minutes

Meeting Minutes are official records, meaning they could be pulled into any legal investigation. Be practical about what is included.

What's in:

- Chapter name
- Meeting date, time and venue
- Names of those in attendance
- Agenda

Follow the agenda's order

Vague, summary sentences

Votes included

“Action- motion made, seconded and carried.”

Meeting Minutes

1. Call to order
2. Roll call of Members present
3. Reading of minutes of last meeting
4. Officer reports
5. Committee reports
6. Unfinished business
7. New business
8. Announcements
9. Open forum
10. Adjournment



[CHAPTER NAME] Chapter Business Meeting Meeting Minutes

Call to Order

The regularly scheduled meeting of the [CHAPTER NAME] Chapter of Phi Sigma Pi National Honor Fraternity was called to order on [DAY], [MONTH] [DATE], [YEAR] at [TIME] [AM/PM] by [TITLE OF PRESIDING OFFICER] [NAME]. The meeting was held in [LOCATION] at [COLLEGE/UNIVERSITY].

Following the Call to Order, the Meeting Commencement Ceremony was led by President [PRESIDENT'S FULL NAME].

Roll Call

Attendance was taken by roll call with the Secretary recording the absence of the following Members: [LIST NAMES OF MEMBERS NOT IN ATTENDANCE BY FIRST INITIAL AND LAST NAME]. Quorum [WAS/WAS NOT] met.

Approval of Minutes

The previous meeting's Minutes were [APPROVED/APPROVED AS CORRECTED].

Officer Reports

Vice President - [NAME]

Secretary - [NAME]

Treasurer - [NAME]

Historian - [NAME]

Parliamentarian - [NAME]

President - [NAME]

Committee Chair Reports

Fellowship Committee - [NAME]

Scholarship Committee - [NAME]

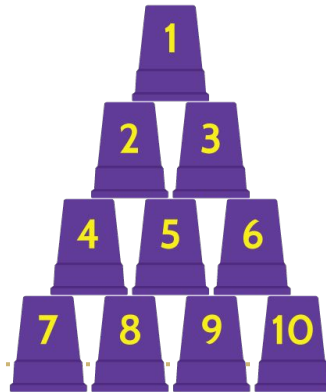
Service Committee - [NAME]

Fundraising Committee - [NAME]

Public Relations Committee - [NAME]

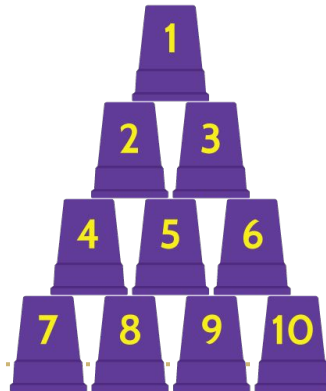
Game 5: Stack It Up

Using the 10 cups in front of you, stack the cups in order of the business meeting agenda.



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Using Parli Pro

Leading Your Chapter

Basic Principles of Parli Pro

1. Facilitates the transaction of business and promotes cooperation and harmony
2. Members have equal rights, privileges and obligations
3. The will of the majority must be carried out, and the rights of the minority must be preserved
4. A quorum must be present for the Chapter to act
5. Full and free discussion of every motion is a basic right
6. Only one question can be considered at any given time
7. The Chair should be strictly neutral



TRUST!

Proper Execution of Parli Pro

What you want to do	What you say	Interrupt Speaker	Second Needed	Debatable	Amendable	Vote Needed
Amend a Motion	"I move that this motion be amended by..."	No	Yes	Yes	Yes	Majority
Request Information	"Point of information."	Yes	No	No	No	None

Game 6: Let's Make A Motion

Using your slip of paper, find the other two parts of your motion:

- The name of a motion
- The description of that motion
- A “yes” or “no” to indicate if you can interrupt the speaker

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1:00



Event Planning

Leading Your Chapter

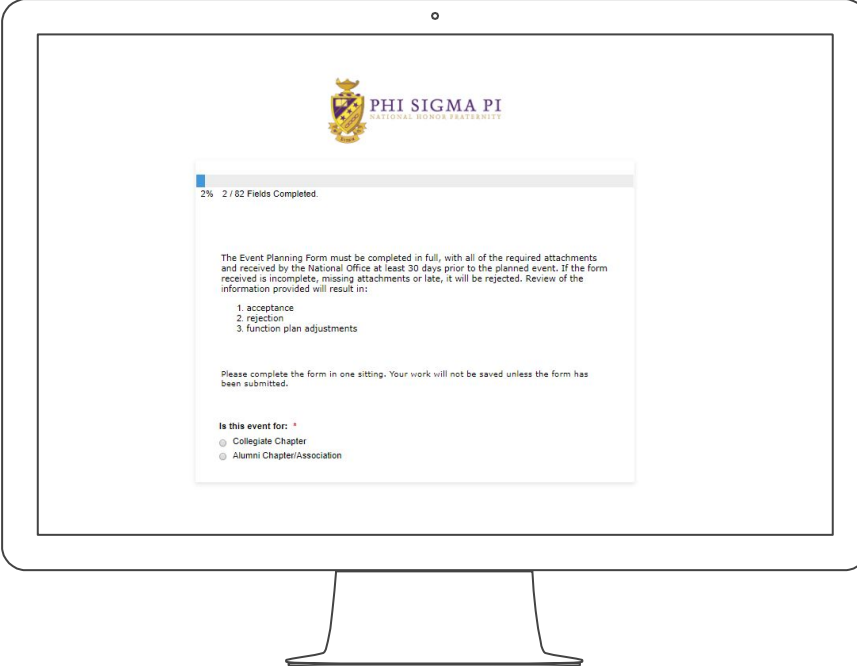
5 Areas Of Risk


1. Physical- Could someone get hurt?
2. Reputational- Would I invite the University President?
3. Emotional- Will this event be inclusive?
4. Financial- Has the National Office reviewed contracts?
5. Facilities- Is the area safe and accessible to all who attend?



Event Planning Form

Completed 30 days prior
to the scheduled event



 PHI SIGMA PI
NATIONAL HONOR FRATERNITY

2% 2 / 62 Fields Completed.

The Event Planning Form must be completed in full, with all of the required attachments and received by the National Office at least 30 days prior to the planned event. If the form received is incomplete, missing attachments or late, it will be rejected. Review of the information provided will result in:

1. acceptance
2. rejection
3. function plan adjustments

Please complete the form in one sitting. Your work will not be saved unless the form has been submitted.

Is this event for: *

- Collegiate Chapter
- Alumni Chapter/Association



Event Planning Form

1. A contract/agreement with a third party
2. Alcohol will be permitted/present
3. The event is an ICR event and/or anticipated attendance will be more than three times the Chapter/Association size, including Members
4. The event requires transportation
5. Evidence of insurance or an additional insured added to a certificate of insurance is required
6. Any athletic event that has the potential for injury
7. Animals will be part of the event
8. The event will be held on the water
9. The event is co-sponsored with another Chapter/Association or organization
10. The event has been held in the past with an incident

Game 7: To Fill Out The Event Planning Form or Not To

Choose if the described event requires that the Event Planning Form should be completed.

Pick either “Yes, you **must** fill out the Event Planning Form” or “No, you don’t have to” with the paper in front of you.



Game 7: To Fill Out The Event Planning Form or Not To

Choose if the described event requires that the Event Planning Form should be completed.

Pick either “Yes, you **must** fill out the Event Planning Form” or “No, you don’t have to” with the paper in front of you.

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Officer Transitions

Leading Your Chapter

Prior To Officer Transitions

Organize Transition Documents

Documents include:

- Position descriptions
- Logins and passwords
- Information regarding progress toward goals
- Details about specific events
- Tips and tricks learned during the past year



Officer Transitions

Week 1

- 1:1 Meeting
- Open Executive Board Meeting

Week 3

- Outgoing officer supervises incoming Officer tasks
- Co-present during Executive Board and Chapter Meetings

Week 2

- 1:1 Meeting
- Co-present during Executive Board and Chapter Meetings
- Update Access/Authority to accounts

Week 4

- Co-present during Executive Board and Chapter Meetings
- Incoming Officer should understand responsibilities

Game 8: What's Inside The Binder

Choose if the information read to you should or shouldn't be inside your transition binder.

Pick either **“Yes, it should be in the binder”** or **“No, it should not be in the binder”** with the paper in front of you.



Game 8: What's Inside The Binder

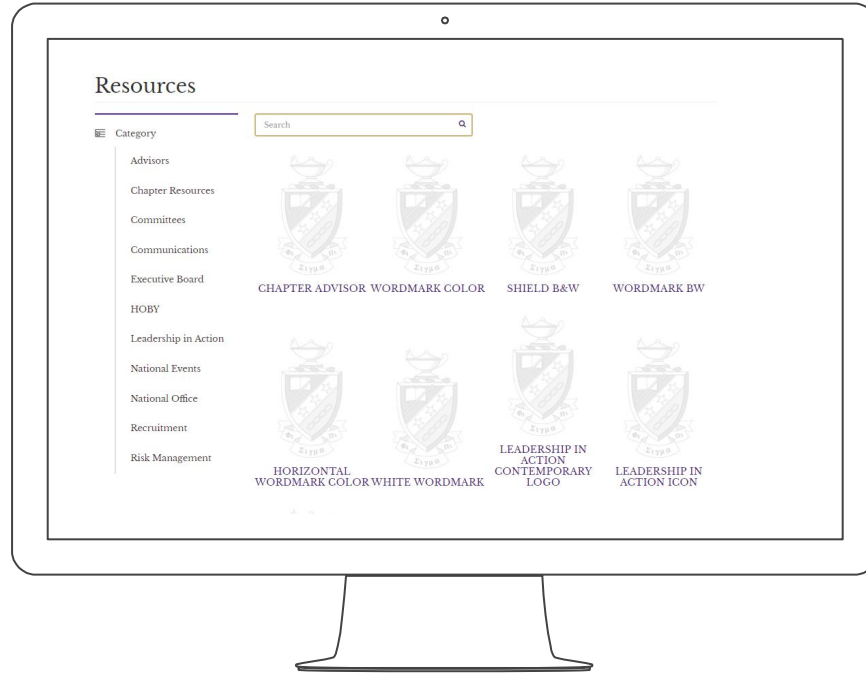
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Pick either **“Yes, it should be in the binder”** or **“No, it should not be in the binder”** with the paper in front of you.

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Congratulations!



phisigma.org/laresources