

Chapter Advisor Manual

Phi Sigma Pi National Honor Fraternity



Dear Chapter Advisor,

Greetings! I would like to welcome you to our organization; we are happy to have you join us as a Chapter Advisor. Most importantly, I would like to also thank you for giving us your precious time, experience and expertise. Volunteering as an active Advisor is a rewarding task but we also realize the time commitment you have made. Thank you!

We pride ourselves on developing tomorrow's leaders here at Phi Sigma Pi. We feel that through our Tripod of scholarship, leadership and fellowship, we are helping our Members grow into successful young adults who will impact their community and environment in a positive way. As in life, our Members will experience bumps in the road, but with your guidance these bumps should prove to be nothing more than character building obstacles that should be learned from and used in a positive manner. Through your active role as the Chapter Advisor, you will certainly have the opportunity to impact the Chapter and the Members in a positive way. I am very excited that our Members will be able to share in your wisdom and learn from your experiences. I truly hope that this experience will be as rewarding for you as it will be for our Members.

If you should ever have any questions or concerns, please feel free to contact advisor@phisigmapi.org or call 1-800-366-1916. I would enjoy speaking to you and learning more about your role as a Chapter Advisor. Again, I would like to thank you for taking time away from your personal and professional responsibilities to assist our Members. Good luck in the school year.

Lead on,
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she/her/hers

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About Phi Sigma Pi

Phi Sigma Pi Mission Statement

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.

The Tripod

Phi Sigma Pi is built on a Tripod of three ideals: Scholarship, Leadership and Fellowship which support the ultimate goal of social service. This Tripod provides direction in our organization, our programming and in our actions as Members. Combined, the Tripod guides our Members to be successful contributing citizens while at campus and into their professional careers.

Scholarship: As an honor organization, we expect our Members to maintain good academic standing. Academic standing, however, is just a small part of the scholarship ideal. Scholarship in our organization expands outside the classroom and is a part of a larger “always learning” philosophy. Our Chapters hold scholarship events and can attend National events that encourage the spirit of lifelong learning.

Leadership: Phi Sigma Pi provides the opportunity for students to gain core leadership skills to strengthen oneself; but then, just as importantly, how they apply that skill to pay it forward. The nationally award-winning Leadership in Action program is a personal/professional leadership training and certification program that provides Members with the skills to inspire a positive change in all facets of the Fraternity and within their communities. This certification program opportunity goes beyond the traditional organization leadership roles by exploring communication skills for emerging leaders and team management.

Leadership in Phi Sigma Pi also extends through service in our communities. Our Chapters support our National Philanthropy HOBY and also plan philanthropic events with other organizations that have a meaningful impact to the local community.

Fellowship: Phi Sigma Pi develops a culture of fellowship within the organization. In addition to a fraternal culture that develops friendships, it also fosters a sense of teamwork and camaraderie that allows for the local Chapter to plan successful events and activities. In Phi Sigma Pi, you’re a Member for life. Fellowship provides the passion and stability to fully remain involved with Phi Sigma Pi long after you cross the graduation stage.

Benefits of Being a Chapter Advisor

While the Chapter benefits from having a dedicated Advisor, Advisors also receive some benefits, such as:

- The opportunity to become better acquainted with students outside of the classroom and across disciplines.
- Increase involvement in the community.
- Watching the Chapter develop, grow and succeed.
- Watching the Members develop and grow their interpersonal and leadership skills.
- The chance to informally share knowledge and expertise on relevant subjects.
- Assist the Chapter and its Members meet their goals and accomplishments through the contribution made to a certain group of students.
- Become a mentor to the Chapter and its Members.
- Connect and network with a group of Chapter Advisors on the National level.
- Discuss Higher Ed topics with over one hundred other Chapter Advisors.
- The opportunity to join other organizations such as the [Association of Fraternity/Sorority Advisors](#).
- Invited to all Phi Sigma Pi events on the local, regional and national level.

Role of Chapter Advisor

The role of a Chapter Advisor is an important one. You are the Chapter's contact on the ground at the university/college. Therefore, you offer an expertise and knowledge for the Chapter that cannot be given at the National level.

The National Office has created a Chapter Advisor/Chapter Checklist. This checklist is designed to start the conversation between Chapter Advisors and Chapter Officers to determine a clear role for Chapter Advisors in matters pertaining to the Chapter. Clearly defining the role of the Advisor is critical for building a good Chapter-Advisor relationship. It is important to note that the role of the Chapter Advisor may change yearly depending on the newly elected Executive Board. Roles on the Chapter Advisor/Chapter Checklist include and may differ by Chapter:

Attend Executive Board Meetings

A Chapter Executive Board, according to the [National Constitution](#) (Article XI: Collegiate Chapter Officers), consists of the following positions: President, Vice President, Treasurer, Corresponding Secretary, Recording Secretary (can be combined for one Secretary role), Parliamentarian, Historian and Initiate Advisor. However, the Chapter may add additional positions to the Executive Board. The Executive Board will meet separately from the Chapter.

Attend Chapter Meetings

According to the [National Constitution](#) (Article XII: Meetings And Events), Collegiate Chapters shall hold one Chapter Meeting at least every two weeks during the sheltering institution's academic year. Chapter Meetings are run by the Chapter President following Robert's Rules of Order (see page 28). Chapter Meetings are used to discuss position reports, old business, new business, hold elections, etc. A quorum for a Collegiate Chapter Meeting shall consist of at least a majority of the Active Collegiate Members in good standing.

Attend Chapter activities and events

Chapter Members plan activities and events throughout the academic year. Events should be based on the Tripod (scholarship, leadership and fellowship) to better humanity. Chapter events include ceremonies listed in *The Ritual Ceremonies Book*.

Interject during discussion with relevant information or guidance for decision-making

Chapter Members may need guidance through tough decision-making. This could include university policy, planning events and voting on Initiates.

Supported [Leadership in Action Modules](#) (see page 28) include:

- The Team Foundation- Decisions, Decisions, Decisions
- Strategic Planning- Strengthening Your Problem-Solving Skills

Share opinions during Chapter Meetings

The Advisor should feel comfortable sharing opinions when appropriate during Chapter Meetings. The point is to guide Members in the learning process but also stop behavior that could lead to a bigger issue.

Sign forms as required by the sheltering institution or National Office

Example forms may include, on the sheltering institution, signing documents for room reservations.

Attend Advisor trainings offered by the sheltering institution or National Office

Trainings by the sheltering institution may vary. National Office training topics include but are not limited to Recruitment, Officer Transitions, Phi Sigma Pi's Mission, etc.

Take an active role in strategic planning and goal setting for the group

Executive Board Members are suggested to create a clear strategic plan with goals for the Chapter. Members may use the Strategic Planning Leadership in Action Modules (see page 28) to walk the Chapter through the process of creating S.M.A.R.T. goals and dividing responsibilities to meet those goals. As the Chapter Chapter Advisor, you may assist this process by facilitating the conversation.

Supported [Leadership in Action Modules](#) (see page 28) include:

- Strategic Planning- The Power Of A Shared Vision
- Strategic Planning- Turning Strategy Into Action
- Strategic Planning- The Achievable, Believable Goal

Offer ideas for discussion to help the Chapter make progress toward goals

Once the Chapter has S.M.A.R.T. goals in place, it is up to the Officers, Chairs and Members to work toward the goals.

Supported [Leadership in Action Modules](#) (see page 28) include:

- First Time-Officer- No Dumping
- First Time-Officer- Rally The Troops

Approve Chapter expenditures in cooperation with the Treasurer

According to the [National Constitution](#) (Article XI: Collegiate Chapter Officers, Section 8: Treasurer), the Treasurer is tasked with creating and upholding a Chapter budget for the fiscal year. This position also receives and records all moneys of the Chapter. As a Chapter Advisor, your role would be to add additional security to those funds.

Review the Chapter Budget and other financial records kept by the Treasurer at the end of the term

The Chapter Treasurer is tasked with creating and submitting a Chapter Budget for the upcoming academic term for the End of the Term Report.

Resources include:

- [Chapter Budget Template](#)

Receive a copy of all official correspondence

This includes Chapter Meeting minutes.

Keep official files and facilitate transition between Officers

The Phi Sigma Pi National Office suggests a 4-week Officer Transition (see page 28). This process includes passing on all position related documents. As the Chapter Advisor, your role would include facilitating this transition and keeping official files such as Chapter Bylaws, Chapter Operating Policies, etc.

Resources include:

- [Officer Transitions](#)

Advise the group regarding governing documents, including improvements to Chapter Bylaws and Operating Policy

Chapter governing documents should be updated yearly. Changes may include amendments made during the Grand Chapter Meeting (see page 29) that may contradict Chapter policies.

Resources include:

- [Sample Bylaws](#)
- [Sample Operating Policies](#)

Ensure the proper planning and execution of events that align with Fraternity ideals

All Chapter events should align with Phi Sigma Pi's mission (see page 5) to improve humanity through scholarship, leadership and fellowship.

Mediate interpersonal conflicts that arise between Chapter Members

Interpersonal conflicts arise between Members in Chapters. We have found that it is easier to mediate these conflicts on the ground. You may also suggest resources on campus to mediate the conversation (example: counseling services).

Supported [Leadership in Action Modules](#) (see page 28) include:

- Start The Conversation- Positive Conversations In Tough Situations
- Conflict Management- Talk It Out

Plan and facilitate workshops or other trainings for the Chapter

Workshops and trainings may include but are not limited to Executive Board Retreats, Chapter Retreats and Initiate Retreats.

Meet with Chapter Officers at the beginning of the year to discuss expectations for the Advisor role

This academic year kick-off meeting serves as a way for Chapter Officers to get to know you and vice versa. This meeting can include Chapter updates about the Advisor role, Chapter policies, strategic plan, goals, recruitment and events.

Represent the Chapter in any conflicts with the sheltering institution and its staff

As the Chapter Advisor, you are the liaison between the sheltering institution and the Chapter.

Be familiar with institution facilities, services, procedures and policy and provide clarification when relevant.

As the liaison between the sheltering institution and the Chapter, being familiar with campus policies, which differ from Chapter to Chapter, can help a Chapter succeed on your campus.

Chapter Advisor/Chapter Checklist

The President of each Chapter, in consultation with the Exec Board as appropriate, and the Chapter Advisor should respond to the following items and meet to compare and discuss answers.

For each statement, respond according to the following scale:

- | 1 | 2 | 3 | 4 | 5 |
|-------------------------------|-------------------------------|------------------------------------|---------------------------------|-----------------------------------|
| Essential to the Advisor role | Helpful for the Advisor to do | Not required for the Advisor to do | Would prefer the Advisor not do | Absolutely not the Advisor's role |
-
- _____ 1. Attend Executive Board meetings.
 - _____ 2. Attend Chapter Meetings.
 - _____ 3. Attend Chapter activities and events.
 - _____ 4. Interject during discussion with relevant information or guidance for decision-making.
 - _____ 5. Share opinions during Chapter Meetings.
 - _____ 6. Sign forms as required by the sheltering institution or National Office.
 - _____ 7. Attend Advisor trainings offered by the sheltering institution or National Office.
 - _____ 8. Take an active role in strategic planning and goal setting for the group.
 - _____ 9. Offer ideas for discussion to help the Chapter make progress toward goals.
 - _____ 10. Approve Chapter expenditures in cooperation with the Treasurer.
 - _____ 11. Review the Chapter Budget and other financial records kept by the Treasurer at the end of the term.
 - _____ 12. Receive a copy of all official correspondence.
 - _____ 13. Keep official files and facilitate transition between Officers.
 - _____ 14. Advise the group regarding governing documents, including improvements to bylaws and operating policy.
 - _____ 15. Ensure the proper planning and execution of events that align with Fraternity ideals.
 - _____ 16. Mediate interpersonal conflicts that arise between Chapter Members.
 - _____ 17. Plan and facilitate workshops or other trainings for the Chapter.
 - _____ 18. Meet with Chapter Officers at the beginning of the year to discuss expectations for the Advisor role.
 - _____ 19. Represent the Chapter in any conflicts with the sheltering institution and its staff.
 - _____ 20. Be familiar with institution facilities, services, procedures and policy and provide clarification when relevant.

Organization Structure

National Organization Structure

Phi Sigma Pi National Honor Fraternity is a 501(c)(3) organization incorporated in the Commonwealth of Pennsylvania. As a membership based organization we are led by our Grand Chapter (the supreme legislative body) which is comprised of voting Delegates from National Council (volunteer board of directors), Collegiate and Alumni Chapters as well as National Alumni Association Delegates. When the Grand Chapter is not in session, the National Council serves as the supreme executive and administrative body.

The National Council hires professional staff through the Executive Director to assist with the Fraternity's daily operations.

National Office Organizational Structure

The National Office is a combination of National Council Members and the National Staff. The National Council is the primary executive arm of the Fraternity. It has the legislative power to conduct the affairs of the Fraternity between Grand Chapter Business sessions. The seven volunteer National Officers are elected to the National Council every two years by the Grand Chapter. The National Staff, approximately 15 employees strong, runs the Fraternity's daily administrative and program operations.

The National Staff, through the Director of Leadership Advancement, provides the training and support for Chapter Advisors.

The National Headquarters is located at 2119 Ambassador Circle, Lancaster, PA 17601 and is open Monday – Friday 8:00am – 4:30pm ET.

Your National Office Contact

Your National Office contact is the Director of Leadership Advancement. You can contact this person through email at advisor@phisigmapi.org or call 1-800-366-1916.



Who is the National Spokesperson?

All media inquiries must be directed to the Executive Director. Only those employees who have been specifically authorized may communicate with the press or other media representatives concerning Phi Sigma Pi, its activities, its personnel or its Members.

If an emergency or PR situation does occur and, as a Chapter Advisor, you have or the Chapter has been approached by the media to comment, it is recommended that you share that, “Comments will need to be made by a National Office spokesperson.”

Fiscal Year

According to the National Constitution, “Phi Sigma Pi’s fiscal year shall begin July 1 and end the following June 30.”

National Governing Documents and Policies

The governing documents of Phi Sigma Pi shall be as ordered: the [National Constitution](#) and *The Ritual Ceremonies Book*. All Chapter Bylaws, Chapter Operating Policies and Articles of Incorporation (if necessary) shall conform to these National Phi Sigma Pi Documents.

Additional National policies are the [National Operating Policies](#), [National Risk Management Policy](#), [Initiate Bill of Rights](#) and other [key policies](#). Key policies address anti-hazing, alcohol and illegal substance, non-discrimination, sexual assault and harassment policies.

Local Policies

Each Chapter’s governing documents exist to provide greater detail as to the operation of the Chapter beyond what is provided by the National Constitution. The Chapter Bylaws and Operating Policy together serve to offer the “what” and “how”, respectively, of Chapter operation. Other documents, including the Chapter’s Risk Management Policy, create additional guidelines around specific aspects of how the Chapter operates.

Risk Management

The National Constitution reads that a Chapter Risk Management Policy must be developed taking into consideration the [National Risk Management Policy](#) (NRMP) that highlights the issue of hazing, the responsibilities and liabilities of alcoholic beverages and illicit controlled substance possession, consumption and distribution. The policy must be in compliance with all regulations set forth by Phi Sigma Pi, NRMP, the National Constitution, as well as all federal,

state and local laws. Each Chapter shall be required to hold or attend a minimum of two (2) programs per academic year to further educate Members and Initiates on its Risk Management Policy.

Event Planning Form

The Event Planning Form (EPF) is an education tool to ensure that Chapters have the necessary information and tasks accomplished in order to hold fun and safe events. It is an online form, and provides tips as it is completed based on the components of the Chapter's event. The form provides assistance and guidance with navigating more complex events. This includes making sure that contracts are reviewed and are mutually agreeable to the Chapter's interests. The EPF should be completed if the event falls under one or more of these categories: a contract with a third party is required, evidence of insurance or an additional insured is required, the event requires transportation, attendance will be more than three times the Chapter size (including Members), any athletic activity that has the potential for injury, alcohol will be present, animals will be part of the event, the event is co-sponsored with another organization and the event has been held in the past with an incident. The EPF can be found at phisigmapi.org/planningform.

Certificate of Insurance

Certificate of Insurance requests by Chapters are for various reasons, including but not limited to, vendors for events, University/College requirements, etc. A Certificate of Insurance is a copy of Phi Sigma Pi's general liability insurance listing the Chapter as the insurance policy. An additional insured policy may be requested by the Chapter to list the University/College, vendor, etc. as an additional insured under the general liability insurance for a fee charged to the Chapter of \$250.

Maintaining Campus Recognition

This process varies on each campus. The Chapter will either be a recognized student organization through Student Life, or similar office, or a registered Greek organization through the Greek Life Office. Maintaining recognition may consist of regular submission of a Chapter roster and documents, attending on campus trainings, participation in campus wide programs, etc. Maintaining recognition is vital to utilize campus resources such as room reservations, campus funding, free printing, etc.

How to Report Risky Behavior

There may be times that you will hear about an upcoming event or a past event that includes questionable activities or may go against Phi Sigma Pi policies. It is important that you notify the National Office immediately by contacting the Director of Chapter Services via email at chapterservices@phisigmapi.org or calling the National Office at 717-299-4710.

The Chapter Standards of Excellence

The Chapter Standards of Excellence (CSE) offers an online evaluation resource to empower Chapters to annually meet the highest standards of Chapter governance, management and mission-driven operations. It has been developed to provide transparency for what it means to achieve excellence and be eligible for awards such as the Joseph Torchia Outstanding Chapter Award, which is the highest designation a Chapter can achieve annually. The Chapter Standards of Excellence replaces the Form 110 evaluation method.

The Chapter Standards of Excellence consists of 8 Guiding Principles covering over 40 focus areas and benchmarks that outline best practices and governing requirements of a Chapter's operations, training, Member development and two structured implementation programs: the Tripod Event and Recruitment. This program has been designed to provide an understanding of the basic concepts of leading a non-profit organization, for that is exactly what each Chapter is - a non-profit entity with the mission to improve humanity with honor.

Chapter Standards of Excellence Scoring Guide

Each Advisor and Chapter leader will receive a Chapter Standards of Excellence (CSE) Scoring Guide. **Coming soon.**

The 8 Guiding Principles



Chapter Development

Focus: Leadership in Action, Leadership Academy, Chapter Visits, Chapter Programming

Communication

Focus: National Office, Faculty Advisor, Alumni Advisory/Board, Sheltering Institution

Public Awareness & Engagement

Focus: National Guidelines, Campus/Community Outreach, Social Media

Chapter Sustainability

Focus: Membership Development, Member Onboarding, Member Retention

Strategy & Evaluation

Focus: Mission Driven Scholarship, Leadership, Fellowship as Social Change Agent and Strategic Planning, Evaluation

Chapter Leadership & Governance

Focus: Executive Board Operations, Officers, Committee Chairs, Communication with Chapter

Compliance & Ethics

Focus: National Convention Representation, National Policies, Chapter Policies

Finance & Operation

Focus: Budget, Funding Plan, Dues and Fees, Outside Funding

National Office Due Dates

Due dates can be found online at phisigmapi.org/duedates. CAP=[Chapter Admin Portal](#)

Semester Schools

- September 19: Update Membership Roster (CAP)
- September 20: National Office runs Chapter's Existing Member billing and posts National Dues and Fees Bill to Financial Statement (CAP)
- October 1: National Dues and Fees for Existing Members per Financial Statement (Mail), Add new Initiates and have Initiates Claim Accounts (CAP)
- December 15: Convert Initiate to Member (CAP), Finalize Graduating Seniors (CAP), Chapter Officer Information Update (CAP), Induction Dues and Fees for New Members (Mail), Tripod Event Form (minimum of 3), Risk Management Summary (CAP)
- January 30: Update Membership Roster (CAP)
- February 1: National Office runs Chapter's Existing Member billing and posts National Dues and Fees Bill to Financial Statement (CAP)
- February 15: National Dues and Fees for Existing Members per Financial Statement (Mail), Add new Initiates and have Initiates Claim Accounts (CAP)
- April 15: [Todd Scholarship Application](#)

- May 15: Convert Initiate to Member (CAP), Finalize Graduating Seniors (CAP), Officer Information Update (CAP), Induction Dues and Fees for New Initiate Members (Mail), Tripod Event Form (minimum of 3), Risk Management Policy and Summary (CAP), End of the Year Submissions: Bylaw Upload, Operation Policies Upload, Administrative Summary, Alumni Summary, Budget (current year and proposed budget) (CAP)
- June 1: [Distinguished Service Key and Jeffrey L. Johnson National Fellowship Nomination](#) (Online)
- June 15: [National Award Nominations](#) (Online)

Quarter Schools

- October 14: Update Membership Roster (CAP)
- October 15: National Office runs Chapter's Existing Member billing and posts National Dues and Fees Bill to Financial Statement (CAP)
- October 30: National Dues and Fees for Existing Members per Financial Statement (Mail), Add new Initiates and have Initiates Claim Accounts (CAP)
- December 15: Convert Initiate to Member (CAP), Finalize Graduating Seniors (CAP), Chapter Officer Information Update (CAP), Induction Dues and Fees for New Members (Mail), Tripod Event Form (minimum of 2), Risk Management Summary (CAP)
- January 14: Update Membership Roster (CAP)
- January 15: National Office runs Chapter's Existing Member billing and posts National Dues and Fees Bill to Financial Statement (CAP)
- January 30: National Dues and Fees for Existing Members per Financial Statement (Mail), Add new Initiates and have Initiates Claim Accounts (CAP)
- March 1: Convert Initiate to Member (CAP), Finalize Graduating Seniors (CAP), Chapter Officer Information Update (CAP), Induction Dues and Fees for New Members (Mail), Tripod Event Form (minimum of 2) (CAP)
- April 14: Update Membership Roster (CAP)
- April 15: National Office runs Chapter's Existing Member billing and posts National Dues and Fees Bill to Financial Statement (CAP), [Todd Scholarship Application Due](#)
- April 30: National Dues and Fees for Existing Members per Financial Statement (Mail), Add new Initiates and have Initiates Claim Accounts (CAP)
- June 1: [Distinguished Service Key and Jeffrey L. Johnson National Fellowship Nomination](#) (Online)
- June 15: Convert Initiate to Member (CAP), Finalize Graduating Seniors (CAP), Officer Information Update (CAP), Induction Dues and Fees for New Initiate Members (Mail), Tripod Event Form (minimum of 2) (CAP), Risk Management Policy and Summary (CAP), End of the Year Submissions: Bylaw Upload, Operation Policies Upload, Administrative Summary, Alumni Summary, Budget (current year and proposed budget) (CAP), [National Award Nominations](#) (Online)

Recruitment

According to the National Constitution (Article IX: Collegiate Chapters, Section 4: Membership Drives), each Collegiate Chapter shall hold a minimum of two membership drives per academic year (usually, one in the fall and one in the spring). A membership drive consists of a recruitment period and an Initiation period. The recruitment period begins on the date of the first advertised recruitment event and ends with the Ritual Pinning Ceremony.



Recruitment resources can be found [here](#).

Growth & Chapter Sustainability

As Chapters strive for successful Recruitment, Chapter growth should be kept at the forefront for all Members. Support for Chapters in their Recruitment efforts should include discussing how Chapter growth will benefit the Chapter operationally and financially, how continual growth will ensure long-term sustainability for the Chapter and the Fraternity as a whole and being far reaching in our mission.



There are a number of reasons why growth is good for Chapters and the Fraternity:

- More hands to help plan and execute events
- A greater campus presence
- More students benefiting from being part of Phi Sigma Pi
- Stronger Chapter operations
- Less of a burden on individual Members for all-Chapter initiatives like Recruitment
- Opportunity for greater diversity
- Greater potential to positively impact the community
- Spreading Phi Sigma Pi's mission

Chapter growth also has a financial impact for Chapters because more local dues provide for:

- Lower individual costs
- National event attendance
- Less reliance on fundraising
- Enhanced programming

- Stronger philanthropic support

At the National level, more dues means:

- Lower individual costs
- Continued programming that benefits Members and Alumni
- Sustainability into the future

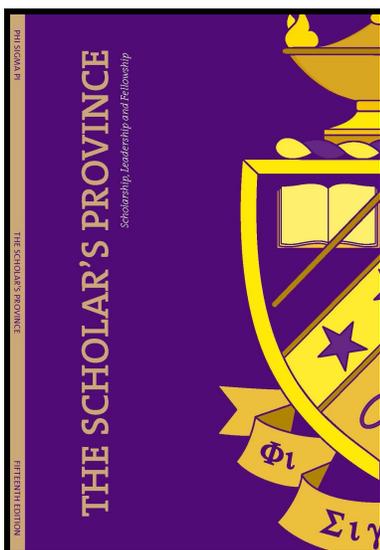
Surge

One way the National Office assists Chapters with recruitment is through our award-winning recruitment program called Surge. Surge is designed to support Chapters in reaching their potential in recruiting new members on their campus. The program includes a Recruitment Dashboard, custom web page on the Phi Sigma Pi website, RSVP form and professional email marketing. Each Chapter is assigned a National Staff contact who provides additional support in ensuring that Chapters hold a successful Recruitment and maintain growth. Though Surge is not mandatory for all Chapters, every Chapter is highly encouraged to participate no matter their level of Recruitment success. More information can be found at phisigmapi.org/surge.



Your Role in Recruitment

The most impactful way you can assist the Chapter with recruitment is by obtaining a list of names and email addresses of students that are eligible to join. The National Staff then takes that list and sends a professional email inviting those students to upcoming Information Sessions and recruitment events.



The Scholar's Province

The Scholar's Province serves as the Initiates' guide throughout their Initiation Program. This guide will educate the Initiate on Phi Sigma Pi's rich history and values, while providing the tools and resources needed to help them decide if they can live up to the principles and expectations of being a Member of Phi Sigma Pi. *The Scholar's Province* is broken into five weeks that align with the Initiate Program.

Hard copies of *The Scholar's Province* can be ordered by the Chapters for free at phisigmapi.org/merchandise. They should place the order prior to Recruitment so they receive the hard copies in time for their Initiates.

Member Requirements

- Completed a minimum of one semester or one quarter of collegiate work
- Achieve a minimum 3.00 cumulative GPA on a 4.00 scale (this differs Chapter to Chapter)
- Have one semester or two quarters of arranged undergraduate study remaining, after completing the Initiation semester or quarter
- Complete all aspects of the approved Initiation Program developed by the individual Chapter
- Receive a two thirds majority vote by the Chapter upon completion of the Initiation Program
- Meet all National and local financial obligations

Initiation Program

The primary goal of the Initiation Program is to orient Initiates to the Fraternity's ideals and educate them about the expectations of Fraternity Members. In addition to becoming acquainted with our Tripod of scholarship, leadership and fellowship, Initiates will learn about the history of the Fraternity, opportunities for personal and professional development as a Member and how they can contribute to the success of the Chapter through holding leadership roles and upholding our values as an organization. A strong Initiation Program will make Initiates feel valued, respected and included, and will offer opportunities for the Initiate to engage in Chapter business through Committee involvement and event planning even before becoming a Member.



Each Initiate Advisor has access to a Curriculum Guide which can be paired with *The Scholar's Province*, to provide for a full and thorough Initiate experience of five weeks. Suggested activities and weekly readings correspond with weekly quizzes to help Initiates prepare for the National Exam.

According to the National Constitution, the Initiation period begins with the Ritual Pinning Ceremony and ends with the Ritual Induction Ceremony with all events having the expressed purpose to educate the Initiates in accordance with the Chapter and National guidelines. The following are requirements for a Chapter's Initiation Program, which may not span more than one academic semester or quarter, according to National policy:

1. Hold a minimum of five Initiate Meetings
2. Require the Initiate class to complete at least one event that represents the ideals of Phi Sigma Pi
3. Require each Initiate to attend at least one Collegiate Chapter Meeting at the sheltering institution
4. Assign each Initiate to one or more Collegiate Members or Active Alumni Members of a Collegiate Chapter who will serve as examples and sources of guidance to their assigned Initiate throughout the Initiation Program
5. Issue copies of the *Scholar's Province*, the governing documents of the National Fraternity, and the governing documents of the Collegiate Chapter, and educate the Initiate on content contained in each
6. Require all Initiates to learn the Fraternity Songs
7. Require all Initiates to learn the Fraternity's history and the Collegiate Chapter's history
8. Require all Initiates to achieve an individual score of at least 80% correct in order to pass the Phi Sigma Pi National Membership Exam
9. Ensure each Initiate is provided feedback in person at least once on their progress in the Chapter Initiation Program.

National Exam

The National Constitution requires all Initiates to achieve an individual score of at least 80% correct in order to pass the Phi Sigma Pi National Membership Exam. The National Exam and quizzes are found on the website's Resource Center.

Officer Positions

According to the National Constitution (Article XI, Section 1), Collegiate Chapters shall elect and install annually at least the following Officers:

- [President](#)
- [Vice President](#)
- [Secretary](#)
- [Treasurer](#)
- [Historian](#)
- [Parliamentarian](#)
- [Initiate Advisor](#)

Many Chapters have created additional positions and Committees to serve their Chapters. The responsibilities of those positions should be listed in the Chapter Bylaws.

Elections

Officer elections should be conducted annually in each Chapter. It can be conducted in the fall or spring based on the preference of your Chapter as outlined in the Chapter Bylaws. Officers should be elected to serve for a term of two semesters or three quarters unless otherwise specified in the Chapter Bylaws. Elections should be run by Robert's Rules of Order.

Additional resources include:

- [Officer and Chair Elections](#)

Parliamentary Procedure

Understanding Robert's Rules of Order

Robert's Rules of Order is synonymous with parliamentary procedure, which is a set of rules for conduct at meetings that allows everyone to be heard and to make decisions without confusion.

Our National Constitution stipulates that we follow the rules contained in the current edition of Robert's Rules of Order Newly Revised unless inconsistent with the National Constitution.



Here are some of the most common motions that may be made when conducting a meeting using Robert's Rules:

- Point of Privilege: Pertains to noise, personal comfort, etc. - may interrupt only if necessary and requires no second
- Point of Information: Generally applies to information desired from the speaker
- Orders of the Day (Agenda): A call to adhere to the agenda
- Point of Order: Infraction of the rules, or improper decorum in speaking. Must be raised immediately after the error is made.
- Main Motion: Brings new business (the next item on the agenda) before the assembly
- Limit Debate: Closing debate at a certain time, or limiting to a certain period of time
- Postpone to a Certain Time: State the time a motion/agenda item will be resumed
- Postpone Indefinitely: Kills the question/resolution for this session - exception: the motion to reconsider can be made this session
- Previous Question: Closes debate if successful - may be moved to "Close Debate" if preferred

Additional resources include:

- [Basic Principles of Parliamentary Procedure](#)
- [Parliamentary Procedure Cheat Sheet](#)
- [Parliamentary Procedure: General Motions](#)
- [Parliamentary Procedure: Special Motions](#)

Conducting Business

What is Quorum?

A quorum is the minimum number of voting Members who must be present at a properly called meeting in order to conduct business in the name of the group (Chapter or Executive Board). If quorum is not outlined in the Chapter Bylaws, Robert's Rules of Order sets quorum at a majority of the Members (50% +1).

How to Set Up a Business Agenda

When using parliamentary procedure, a fixed order of business typically is written as:

1. Call to order
2. Roll call of Members present
3. Reading of minutes of last meeting
4. Officer reports
5. Committee reports
6. Special orders --- Important business previously designated for consideration at this Meeting
7. Unfinished business
8. New business
9. Announcements
10. Adjournment

How to Write Business Minutes

Minutes are the Executive Board or Chapter's official record of actions taken at a meeting, not a record of everything that was said. They serve a historical purpose and a legal purpose, documenting the Chapter's adherence to procedures and governing documents. Minutes and recordings made during a meeting are considered official records, meaning they could be pulled into any legal investigation, so it is imperative to be practical about what is included.

PHI SIGMA PI
NATIONAL HONOR FRATERNITY

Name of Chapter Business Meeting
Meeting Minutes

Total Voting Members- **XX**
Total Non-Voting Members- **XX**
Total Attendance- **XX**

The regularly scheduled meeting of Phi Sigma Pi, **NAME OF** Chapter, was called to order on **DAY, MONTH, YEAR** at **TIME** by President **NAME OF CHAPTER PRESIDENT**. The meeting was held in the **NAME (OR #) OF ROOM** at **NAME OF UNIVERSITY**.

Absent Members
ROLL NUMBERS OF ALL ABSENT MEMBERS

Roll Call
Motion #**XX** that we approve the minutes of the **DATE OF LAST** Chapter meeting.
VICE PRESIDENT/SECRETARY, PASS/FAIL

Presentations (not Phi Sigma Pi related- ie study abroad, resume workshops, etc.)
1. **XXXX**
2. **XXXX**
3. **XXXX**

Officer Reports (Voting does not occur here. Just give information and answer questions)

President's Report:
XXXXXX

What's In

The minutes should include the following:

- Chapter Name
- Meeting date, time and venue
- Names of those in attendance (including Advisors) and the person recording the minutes
- The agenda

The minutes should follow the agenda's order, with a basic, almost vague, summary sentence or two for each item, along with the name of the individual presenting it. Votes taken should be included where they occurred in the agenda. Generally, don't include names. Instead, record what happened: "Action - Motion made, seconded and carried."

Sample meeting minutes can be found [here](#).

Officer Transitions

The Phi Sigma Pi National Office suggests a structured four week [Officer Transition](#) program. This program will ensure that each Officer has the tools to succeed in their role.

Prior to Transitions

- **Organize Transition Documents-** Officers should keep organized records and add to them throughout the term. While some Chapters use physical binders, the use of electronic documents is strongly encouraged to prevent the loss of important information and facilitate easy access.
 - Transition documents should include:
 - Position description per Chapter and National documents
 - Logins and passwords for all accounts
 - Information regarding progress toward goals and long-term plans
 - Details about specific events, including what worked well and what should be improved
 - Tips and tricks learned during the past year

Week 1

- **Meet One on One-** Following elections, outgoing and incoming Officers should meet to discuss position responsibilities and review transition documents. The incoming Officer should prepare questions for the next meeting.
- **Open Meetings-** Exec Board Meetings should be opened up so that newly elected Officers can observe how the meetings are run.

Week 2

- **Meet One on One-** The outgoing Officer should answer questions from the incoming Officer regarding the position or documents. The outgoing Officer should review the logistics of the tasks for which the Officer is typically responsible (updating spreadsheets, reserving rooms, etc.).
- **Open Meetings-** During Exec Board Meetings, the outgoing and incoming Officers should sit together and co-present information.
- **Update Access/Authority-** Changes should be made to ensure that the incoming Officer has access to accounts, forms, etc. as required.

Week 3

- **Meet One on One-** The outgoing Officer should supervise as the incoming Officer completes tasks, answering questions that arise along the way. Their role in the Chapter Meeting should be discussed.
- **Chapter Meetings-** The outgoing and incoming Officers should sit together and co-present information to the Chapter.

Week 4

- **Exec Board and Chapter Meetings-** The incoming Officer should be presenting at meetings and have a firm grasp of their other responsibilities.

Officer Installation Ceremony

At the conclusion of the four week transition, the outgoing Officer should officially pass their duties on to the incoming Officer.

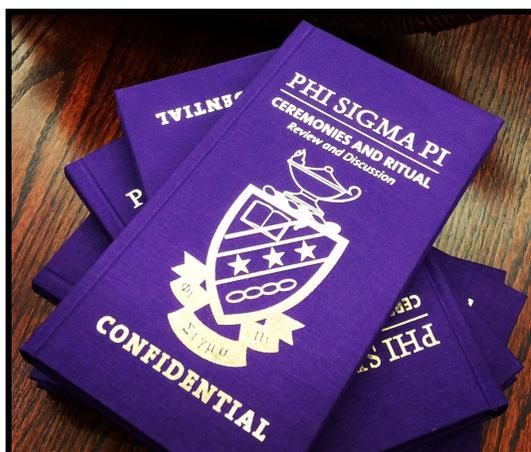
Rituals and Ceremonies

All Phi Sigma Pi ceremonies are listed in the Phi Sigma Pi Ceremonies and Ritual Book. These ceremonies are confidential. Ceremonies include:

- The Pinning Ceremony (for students who agree to go through the Initiation process)
- The Big Brother Ceremony (when Initiates receive their Big Brother)
- *The Ritual:* Formal Induction Ceremony (when Initiates become Members)
- Meeting Commencement Ceremony (the beginning of each Chapter Meeting)
- Officer Installation Ceremony (install new Officers)
- Alumni Ritual (for Members who are entering Alumni status)
- Founders Ceremony (to be held on the Fraternity's Founders Day, February 14th)

Rituals and Subrosa

It's important for Members to understand the significance of all Rituals and Ceremonies. Due to their sacred nature, Rituals and Ceremonies are protected under Subrosa. This means that all Rituals and Ceremonies should be conducted in a private place and should not be photographed. Any images depicting a Ritual or Ceremony or using any sacred props from a Ritual or Ceremony, especially the sword, should be removed from the Chapter website and social media channels when noticed.



Understanding Due Process

A solid disciplinary procedure will provide for due process for any Member accused of violating Chapter or National Fraternity policy. Components of sound due process include notification of the offending behavior, explanation of how the behavior could impact the Member's standing, clearly stated expectations for future behavior and the timeframe in which change is expected. A Member should understand the consequence for not changing the behavior, but they should also be given time to make changes to get them back on track. Having due process built into Chapter disciplinary procedures will ensure fairness in the administration of disciplinary action and contribute to Member retention in the spirit of Membership for life. For more information on due process, check out [these resources](#).

Budgeting

The National Constitution requires that Chapters utilize a budget that will guide the management of Chapter funds throughout the fiscal year. This budget should reflect sources of income and expenses and should include anticipated and actual amounts for each. While the Treasurer is responsible for proposing and adhering to the budget, input may be gathered from a Finance Committee, Chapter Officers and Committee Chairs. The budget must be voted upon and approved by the Chapter.

The budget should be based on:

1. The amount of dues-based income the Chapter will collect during the year
2. The amount of non-dues income (fundraising proceeds, etc.) that the Chapter will raise during the year
3. The amount that will be spent by the Chapter on programming, dues, donations, etc.
4. The amount that may be incurred for fines and fees from the National Office or sheltering institution

There are certain items that must be included in order for a budget to be considered thorough and complete:

- Executive Board - include a line for each Officer
- Executive Council - include a line for each Committee Chair
- Income Report - include dues, fees/fines, fundraising proceeds, donations and school funding
- Miscellaneous Expense Report - include dues, fees/fines, donations and National event registrations
- Budget Summary - include the starting balance, total income, total expenses and projected ending balance

Chapters must also remember these important items to include in the budget:

- National Convention Registration - The Chapter is constitutionally required to provide funding to send the Chapter Delegate to National Convention. This includes the registration fee, hotel, meals and transportation costs.
- Donations to National Funds - Each term, 5% of all fundraising profits to support the Chapter should be donated to the Subrosa Fund or one of the available scholarship funds.
- Emergency Funds - In order to ensure that the Chapter stays in good financial standing even when the unexpected occurs, efforts should be made to establish an Emergency Fund, the details of which should be outlined in Chapter governing documents.

Chapters that are in good financial standing may consider allocating Chapter funds to support Members in need and those deserving of special recognition as follows:

- Appreciation Fund - Graduation gifts, including cords, stoles or NAA Memberships, may be purchased for graduating seniors.
- Subrosa Fund (local) - Support may be providing to Members experiencing extreme hardships like the loss of a loved one, major health issue or destruction of personal property from fire or flood.
- Financial Aid Fund - Assistance may be provided in covering the cost of dues for Members or Initiates who are unable to meet the financial obligation of Membership but deserve to be retained.

National Programs

Leadership in Action

[Leadership in Action](#) is a powerful tool because it is a program to teach Members the importance of soft skills to become stronger leaders in their Chapters and in their workplace. Its mission is to empower Members with the leadership skills they need to inspire a positive change in all facets of our Fraternity and our communities. The program is broken down into [dozens of Modules](#) varying in topics. These soft skills are skills that employers say they are looking for during the hiring process when making decisions on candidates. The skills learned also assist with combing through Chapter conflicts and setting goals for the future of the Chapter.



The Leadership in Action program is also a way for Members to teach and facilitate topics with other Members. This starts a dialogue and bond within the Chapter while giving Members real-life public speaking practice.

Leadership in Action Certified

Members who become [Certified in Leadership in Action](#) are Members who have earned at least 75 Leadership in Action points through Modules and interactive virtual opportunities. Becoming Certified in this program shows future employers or graduate school interviewers that the Member is dedicated to bettering themselves and attaining leadership skills. When Members become Certified they will receive a certificate, a pin and [National recognition](#).

Facilitator

A Leadership in Action Facilitator is a Phi Sigma Pi Member who went through Facilitator Training run by a National Staff Member or Alumni Volunteer. After Members become Facilitators, they are able to facilitate [local Leadership in Action Modules](#) to their Chapter Members.



Tweet & Eat Twitter Chats

The Leadership in Action Tweet & Eat Series is an hour-long Twitter chat held between Members, Alumni and National Staff. Each month a different topic is discussed with a series of questions to get the conversation started and for Members to get tips and tricks from other Chapters.

Lunch & Learn Webinars

The Leadership in Action Lunch & Learn Webinar Series is a collaboration with professionals to teach Members about new leadership skills and specific topics. During each hour-long Lunch & Learn, panelists and a Member of the National Staff discuss topics and skills that Members are encouraged to share with their Chapters and also use in their daily lives. With polls and open-ended questions, Members are involved throughout the conversation.

Leadership Academy

Leadership Academy is an award-winning, professional leadership development program for Phi Sigma Pi Members. The core curriculum includes personal leadership development, Officer and Committee Chair training, strategic planning and interpersonal skills. The program will feature scholarship, leadership and fellowship through: Leadership in Action Regional Modules, Leadership in Action Facilitator Training, large and small group discussions, leadership inventories and networking opportunities to meet Members from different Chapters.



Through the program, Members will reflect and evaluate their own strengths and how to utilize the strengths of fellow Members to develop as an organization. The program has been designed to provide an insightful and challenging experience that will fully engage attendees. Participants will enhance their leadership abilities to aid them to reach their personal and professional potential.

Grand Chapter

The Grand Chapter is an assembly of Delegates composed of representatives from each Collegiate Chapter, each Alumni Chapter, the National Alumni Association and the members of the National Council. The Grand Chapter is the supreme body of Phi Sigma Pi. The Grand Chapter votes on amendments to the National Constitution and elects the National Council.

National Convention

Members attend National Convention to strengthen themselves, their Chapter and the Brotherhood. Held annually, the event brings together students, Alumni, Chapter Advisors and honored guests. Registrants participate in Chapter programming, service projects and our annual Awards Banquet. National Convention is held at a different location every year. Past locations include Philadelphia, Washington, D.C. and Atlanta.

Philanthropy

National Philanthropy

In 2015, Phi Sigma Pi entered into a philanthropic partnership with [Hugh O'Brian Youth Leadership \(HOBY\)](#) and in 2017, the Grand Chapter voted to make HOBY our official National Philanthropy. Ever since, we have been fostering a relationship of volunteerism, service and support that has benefited both organizations in a big way.

All Chapters are encouraged to get involved with HOBY by volunteering at/for one of their many events. HOBY is split up into regions and each region has its own point of contact. To find a Chapter's point of contact, search this [list of Leadership Seminar dates](#) for your area and then click the link to the Seminar. You will then find the region contact information.



Chapters can support HOBY in many ways including making HOBY hugs, donating items for events, volunteering at a Leadership Seminar and organizing a CLeW. However, to find out the opportunities available in a certain area or where HOBY needs you most, the best thing to do is to contact the region's representative.

If a Chapter does work with HOBY, we ask that they share with us their HOBY happenings by emailing hoby@phisigmapi.org. Chapters who work with HOBY are also encouraged to nominate themselves for the [Marder Excellence in National Philanthropy Award](#).

[Resources on HOBY and how to get involved](#)

Local Philanthropies

Apart from our National Philanthropy, many Chapters will choose to also have a local philanthropy. This is not required, but it is a great way for the Chapter to connect with their community. Local philanthropies could include animal shelters, environmental organizations, food pantries, homeless shelters, youth educational programs and so much more. Many Chapters will also choose to support a national charity or organization. When choosing a local philanthropy, it's important to ensure that the organization is a valid and upstanding organization that can align with our mission. It's also important to ensure that the work that will be done to support the local philanthropy adheres to all of Phi Sigma Pi's policies, including risk management policies.



National Scholarships

Phi Sigma Pi currently offers two scholarships for the support of our Members' education: The [Richard Cecil Todd & Claudia Pennock Todd Tripod Scholarship](#) (undergraduate) and the [Rolla F. Wood Graduate Scholarship](#) (graduate). All Scholarship applications are due on April 15.

National Awards

Phi Sigma Pi recognizes excellence within our Chapters by presenting National Awards at the Annual Banquet and Awards Presentation. Chapters may submit award nominations throughout the year. The Chapter Standards of Excellence will serve as the basic expectations for Chapters to achievement and award eligibility. See a full list of awards at phisigmapi.org/awards.



National Award Eligibility

1. To be eligible to receive a National Award, Chapters must have all National Forms, Dues/Fees, Induction Fees and outstanding debts reconciled before May 15 for semester schools and June 15 for quarter schools.
2. Chapters on probation or suspension for any portion of the academic year are ineligible to receive any National Awards for that academic year. However, the Chapter End-of-Semester/Quarter Report (Form 110) must be submitted regardless of whether or not the Chapter is eligible to receive a National Award.

Chapter Excellence Board

[The Chapter Excellence Board](#) (CEB) is to be an extension of the National Office's Chapter Services team in order to provide support from engaged and knowledgeable Phi Sigma Pi Alumni. Chapter Excellence Board volunteers are to serve as educators, coaches and mentors to assist Collegiate Chapters in implementing strong and successful operational practices. Advisor responsibilities and support correspond to the Chapter Standards of Excellence evaluation method.

The objectives of the Chapter Excellence Board are to:

- Assist as an educator to develop and strengthen the leadership skills of Members.
- Act as a coach by offering encouragement and recognition for achievements made by the Chapter and Members.
- Serve as a mentor by counseling and guiding Collegiate Chapters.
- Measure the success of the Chapter while being in compliance with Phi Sigma Pi's standards.

Each Chapter Excellence Board will work with approximately ten Collegiate Chapters. The Chapter Excellence Board will be composed of four Alumni or Honorary Member volunteer Advisors who will each have a specific focus area.

- Operations Advisor: Governing Documents, Chapter Records, Membership Roster, Due Dates, Officer Transitions
- Finance Advisor: Chapter Budget, Fundraising, Managing Accounts, Dues
- Communications Advisor: Branding, Chapter Image, Campus and Community Outreach, Engagement, Communications
- Development Advisor: Chapter Morale, Member Retention, Committees, Programming, Strategy and Evaluation

Each CEB Advisor will oversee a larger, term-long project while following Chapter progress on the Chapter Standards of Excellence scoring-based tasks.

Chapter Admin Portal

The Chapter Admin Portal (CAP) is Phi Sigma Pi's membership portal. Every Member and Advisor of Phi Sigma Pi has a login to the CAP, which can be accessed by clicking

"Member Login" on the Phi Sigma Pi website. If you forget your login information and gets locked out of your account, you can email advisor@phisigmapi.org or call the National Office at (717) 299-4710.



The Chapter Admin Portal services several purposes:

- Provide Members with information about their Chapter, such as their Chapter status and how much their Chapter owes the National Office.
- Keeps a listing of active Chapter Members, Executive Board Members and Alumni Members and allows Chapters to change a Member's status.
- Allows the Chapter to submit information to the National Office, such as their Chapter budget and information about Honorary Members.
- Hosts National Event registration.

[Instructional videos](#) are available to educate Members on how to use the CAP.

National Style Guide

The [Phi Sigma Pi Style Guide](#) is designed to give clear expectations on what terms are to be used when discussing Phi Sigma Pi, as well as how to use them. The guide will give the preferred terminology and use from everything from proper abbreviations to which words should be italicized and capitalized. It also provides examples of words we would prefer you use alternatives for instead (ie. recruitment instead of rush).

Approved Vendors

Phi Sigma Pi's reputation depends on the use of our name and image, which we exclusively own. Our name includes: Phi Sigma Pi's Greek letters (ΦΣΠ), our Shield, Official pins, the logos and the name Phi Sigma Pi National Honor Fraternity, including our abbreviated name, Phi Sigma Pi. In order to protect our reputation, we have implemented a program and partnership with Affinity Consultants to ensure the proper use of our insignia.



Affinity Consultants works closely with Greek letter organizations and their licensed vendors to maintain quality and appropriate designs and products that contain our official colors and logos. In addition, they ensure that the companies they work with “firmly oppose any product, service or design that attempts to glorify alcohol, hazing, sexism, racism or any other image that conflicts with values and missions of our clients.”

Phi Sigma Pi products and merchandise can be found at greeklicensing.com. All vendors listed here are licensed vendors and all Chapters should only be using these vendors to approve merchandise. You can also look for the above logo. Remember: No Seal, No Deal.

The Phi Sigma Pi Foundation

The Phi Sigma Pi Foundation, approved by the 2004 Grand Chapter, is a charitable foundation that collects and distributes funds in support of the Fraternity's programs and goals. The Foundation has its own Constitution and Board of Directors and works within an operating agreement with the Fraternity. Find more information at phisigmapi.org/foundation.



Membership in The Foundation is granted to those who have made significant financial contributions. These Members reflect the dedication and commitment to Phi Sigma Pi's Mission to enhance the Collegiate Member experience.

Support by The Foundation is given from funds including:

1. Unrestricted Annual Fund
2. Richard Cecil Todd & Claudia Pennock Todd Tripod Scholarship
3. Rolla F. Wood Graduate Scholarship Fund
4. Leadership in Action Program
5. Subrosa Fund
6. Jeff and Kim Existence & Expansion Endowment Fund
7. Torchia Capital Fund

Donors to the Phi Sigma Pi Foundation are giving back to the programs and initiatives that support Chapters, Members and programs, including the Chapter Excellence Board. Please join them in making an annual contribution to The Foundation.