

PHI SIGMA PI
NATIONAL HONOR FRATERNITY



Officer Training Manual: President



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WELCOME

Congratulations on being elected as Chapter President! The Membership elected you and has put their trust in you to take the Chapter to a new level of success. The campus administrators, the Alumni Members and National Office will look to you as the main representative. Your actions are intended to inspire those around you as we look to balance the Tripod of Scholarship, Leadership and Fellowship.

The following words are from Officer Installation Ceremony in *The Ceremonies and Ritual* book. This passage describes the importance of the position and role as President.

“As Chapter President, your Chapter, in its wisdom and judgment, has selected you to serve as President, the highest honor it can confer. With this high office comes much responsibility and many duties. You not only lead the meetings, but also uphold the image of the Chapter. These duties should be discharged with your utmost thought and ability. As your decisions should be characterized by thought and tempered with judgment, so should your life be influenced by kindness and tempered with the fine steel of service. May you uphold the ideals of scholarship, leadership and fellowship and may the Chapter prosper under your leadership and direction.”

Mission

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.

Our 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 on campus

and into their professional careers.

Scholarship: As an honor organization, we expect our Members to maintain good academic standing, although a GPA of 3.0 is only needed to begin the Initiation Program. Academic standing, however, is just a

small part of the scholarship ideal. Scholarship in our organization expands outside the classroom and is part of a larger “always learning” philosophy. Our Chapters hold scholarship events and can attend National events that encourage the spirit of lifelong learning.

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: Phi Sigma Pi provides the opportunity for students to gain core leadership skills to strengthen oneself; but then, just as important, how to apply that skill to pay it forward. Leadership in Phi Sigma Pi also extends through service in our communities. Our Chapters support our National Philanthropy, HOBY, (learn more in the [Lingo section](#)) and also plan philanthropic events with other organizations that have a meaningful impact to the local community such as the Sleep Out for Homeless Youth and Spring Break Service Projects.

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.

NATIONAL OFFICE OVERVIEW

Our purpose as Phi Sigma Pi is an Honor Fraternity for students in four-year collegiate institutions and Phi Sigma Pi Alumni, founded upon a basis of superior scholarship with the avowed purpose of advancing academic, professional and social ideals. Phi Sigma Pi shall exist to meet the needs of close fellowship among students of like ideals who are interested in the same end.

The Fraternity is a brotherhood with roots in the collegiate experience that engenders a lifelong commitment to strive to achieve true fellowship, leadership and the fulfillment of scholarship as part of Members’ overall responsibilities to the broader communities in which they live. Your Chapter is an established and identifiable association of Members perpetuating itself and holding, at the pleasure of Phi Sigma Pi National Honor Fraternity, a duly-issued Charter. The designation

“Active Chapter” shall apply and refer to any Chapter duly chartered at, and associated by Charter with, an institution of higher learning. Your Chapter is an unincorporated association that is a separate and distinct entity from Phi Sigma Pi National Honor Fraternity.

With that, the National Office is designed to support your chartered Chapter to uphold our mission and purpose. To do that the National Office provides the foundational structure.

The Grand Chapter is the supreme legislative body of the national Fraternity and consists of the National Council, one Delegate from each Chapter and two Delegates representing the National Alumni Association. Each National Officer, Collegiate and Alumni Chapter Delegate and NAA Delegate receives one vote during official business.

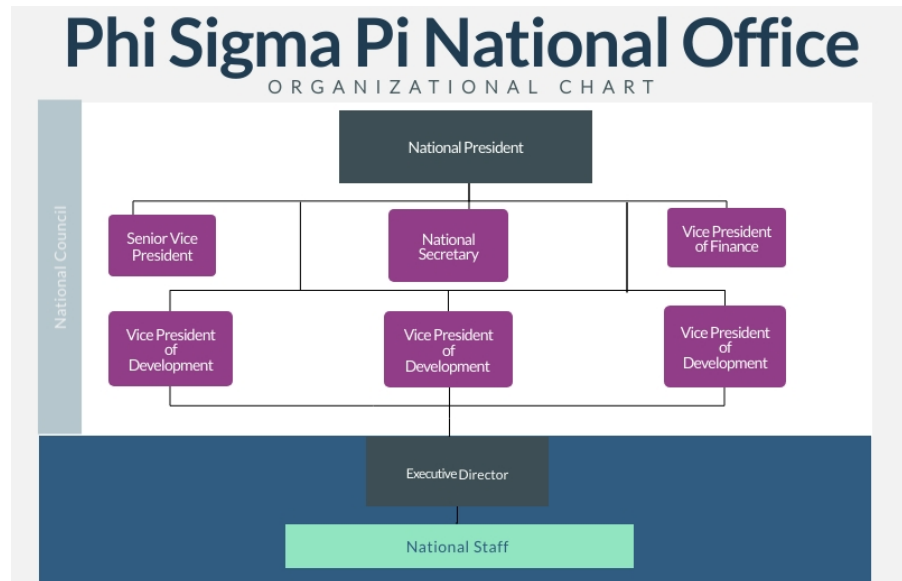
Official business is held once a year during Grand Chapter Business at National Convention. This is the time when amendments to our National Constitution are voted on and elections are held for National Council positions (every other year). It is important to note that changes to the National Constitution are only made by Members of the National Council, Members of Chapters and/or NAA delegates. The requirements and directions listed in the National Constitution, on which our Fraternity is run, are entirely in your hands. The National Staff is not able to amend or change the National Constitution. It is the job of the National Staff to make sure the National Constitution is upheld as you have approved it.

Phi Sigma Pi

Governance



The supreme executive and administrative body of the National Fraternity is the National Council. [The National Council](#) is made up of 7 volunteer positions. The National Officers are elected on the even years by the Grand Chapter at National Convention. These positions are National President, Senior Vice President, National Secretary, Vice President of Finance and three Vice Presidents of Development. The National Council is charged with enforcing the National Constitution and leading the Fraternity through strategic planning.



The National Council employs full-time professionals to assist in the administrative affairs of the Fraternity, the National Staff. The Executive Director is hired by the National Council. It is then the Executive Director's responsibility to hire and supervise the entire National Staff. The National Staff works for its Members, through Chapter Services, Alumni Relations, Membership training and risk management oversight. The National Staff is available to all Members whenever you have a question, need guidance or have a suggestion.

***National Office info! Share with Eboard Members*

Contact the National Office

The National Office is here for you!

Phone: 717-299-4710

Email: pspoffice@phisigmapi.org

Web: <https://phisigmapi.org>

Facebook: <https://facebook.com/phisigmapifraternity>

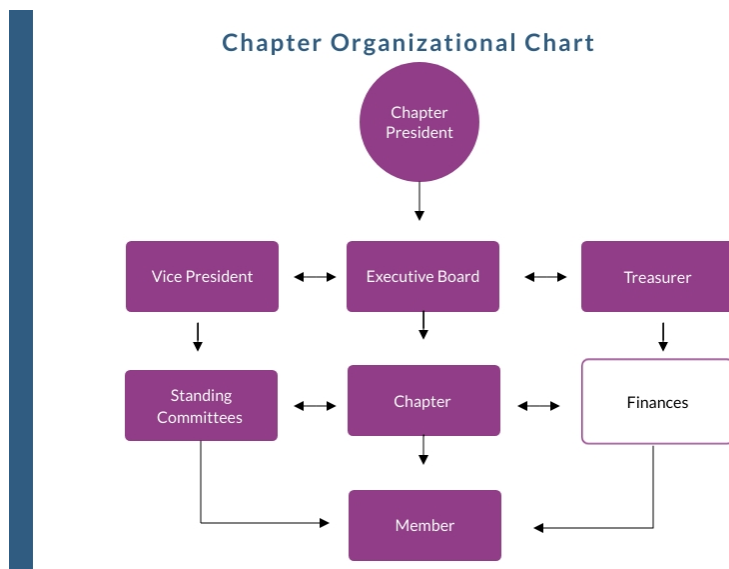
Instagram: <https://instagram.com/phisigmapi>

Twitter: <https://twitter.com/phisigmapi>

YouTube: <https://youtube.com/user/PhiSigmaPi>

CHAPTER ORGANIZATIONAL CHART

The National Constitution provides the basic structure and responsibilities of the chartered Chapter. Through Chapter Bylaws the Chapter has the right to add new positions to the Executive Board and/or Executive Committee (EBoard and Committee Chairs). At no time can the Chapter Bylaws contradict the National Constitution, instead, it is an addition to the National Constitution. Below is the foundational structure for Chapters.



TIPS FOR BECOMING A SUCCESSFUL CHAPTER PRESIDENT

Understanding Your Leadership Strengths

When serving as a leader, especially the Chapter President, it is important to understand your leadership strengths. It also is important to understand how others may perceive your communication style.

All Members should work through a leadership assessment (examples provided in the Additional Resources) to gain clarity on their styles. By knowing your style it allows you to communicate effectively with other leadership styles - all of which are important.

For example, you may be a leader that requires data to make decisions. Knowing this, and communicating this to your Executive Board, will set them up for success when approaching you with new ideas. It also provides upfront reasoning if, as Chapter President, you request information.



***Check out the different LIA Modules on CORE!
Earn badges for completing Modules.*

Improve your skills with Leadership in Action Modules:

- [The Art Of Effective Communication- Communicating By Styles](#)
- [First-Time Officer- Face Your Fears](#)

How to Motivate and Involve People

You've most likely heard this before but is worth repeating, you have three types of Members: 1) Go-getters, or Members who are highly enthusiastic; 2) Wait-and-see-ers, or Members who are non-committal; and 3) Resume-seekers, or Members who are not interested in participation.

Past experience has shown that each group constitutes about one-third of your group and about one-third of your entire membership will want to participate. The Resume-seekers are not interested in participating and are the most challenging to motivate.

The people you need to motivate, cultivate and inspire are the Wait-and-see-ers. Those in this group are waiting to see if this organization is worth their time. Get them involved and prove to them that Phi Sigma Pi is a worthwhile organization. This is how you will keep and make these individuals strong contributors. If you ignore them, they will abandon the Chapter along with the Resume-seekers. You certainly do not want to lose a potentially good group of Members. Give them responsibilities. Make them feel important. Make a special effort to invite or persuade these people to participate in events that promote interaction. Getting this group involved is the key to developing a strong Chapter.



Improve your skills with Leadership in Action Modules:

- [The Team Foundation- The Winning Combination](#)
- [First-Time Officer- Rally The Troops](#)

Striking a Balance Between Scholarship, Leadership and Fellowship

Phi Sigma Pi is an honor fraternity that stresses the principles of Scholarship, Leadership and Fellowship.

It has been asked many times, "What is Phi Sigma Pi?" The most concrete answer is that it is 1/3 honor society, 1/3 service organization, and 1/3 social fraternity. Phi Sigma Pi seeks to incorporate the best and most beneficial aspects of all of these types of organizations into its own program. The honor society portion sets Phi Sigma Pi apart and

commands respect. The social fraternity part builds fellowship and commitment which then serves as a stimulus to undertake service projects, the greatest expression of leadership. Phi Sigma Pi is a balance; a balance between scholarship, leadership and fellowship. Each leg of the Tripod must be equally stressed. If too much stress is placed on one principle, the Chapter will resemble an honor society, service organization or social fraternity.

The national organization allows each Chapter to seek its own balance of scholarship, leadership and fellowship. Phi Sigma Pi's goal is to cultivate and encourage high scholastic achievement, build leadership skills through service to others, and strengthen social skills which allow the individual to mature and develop into a thinking, concerned person who can be an asset to society. Chapters that need assistance in developing a well-balanced program should consult the various national publications or contact the National Office for advice.

Communication is the Key

To be successful as a Chapter it is important to communicate extensively. Reminding Members numerous times about Fraternity functions will keep them accountable to participate. Get into the habit of planning and using group text, email distribution lists and reminder notifications. It is also a good practice to use a whiteboard/PowerPoint presentation at all meetings, post in a Google calendar and verbally remind Members of important information.

Email updates can be one of the most successful tools that can be used. An email should be sent out to all Chapter Members immediately following each Chapter Meeting. The email lists all upcoming events that will occur before the next meeting. A description of all planned social, fundraising, service or other projects is given, along with the time, date and location of each. Also listed are the date, time and place of the next meeting. Lists of the names of people who have volunteered or signed up for special assignments should also be included. This email should be sent out ahead of the events in a timely manner to be most effective.

Improve your skills with Leadership in Action Modules:

- [The Art Of Effective Communication- Communicating By Style](#)
- [Talk Like A Leader- Holding Yourself Accountable](#)

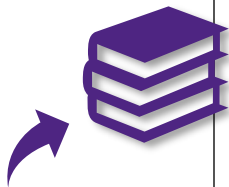


Team Building

Your Chapter is a team and cooperation is the name of the game. The key to your success is realizing that the team is only as strong as its weakest component and that you are one of those components. The team depends on you and your performance as an Officer. As you build your Chapter into a successful team, there are some key areas to address:

- Get to know all Members of your Chapter. Discover their needs and desires.
- Establish a common goal. Everyone should be working together toward accomplishing the same goal.
- Establish a common identity. Develop pride in being part of the group.
- Provide recognition. Constantly recognize people for their efforts in helping the Chapter achieve its common goal. This includes thank-you's, service keys, scholarships and certificates of recognition.
- Learn to understand the Chapter Members. Everyone in your Chapter is a unique individual. You must learn how the Chapter can benefit each Member as well as have the Member benefit the Chapter.
- Encourage involvement. Provide programs that allow all Members and potential Members the opportunity to become involved.

As you deal with your responsibilities as a Chapter Officer, keep these important aspects in mind. Teamwork is a building block that strengthens the fellowship leg of Phi Sigma Pi's Tripod. A team accomplishes much more than a group of individuals who have no common ties to one another. As an Officer, you are an important and integral part of that team.



***This means there are additional materials for you!*

See the Team Building Activities linked in the Additional Resources section in the back of this manual. Some activities included: "Human Knot," "Step Forward" and "Know Your Team."

Delegate Tasks to People Who Want to Do Them

The Chapter President is entrusted by the Brotherhood with the responsibility for all Chapter activities. This office is the most challenging of the Chapter positions. Although it requires considerable time and effort, your position as Chapter President can be rewarding and provide a great deal of satisfaction through individual and Chapter achievements. It is a singular honor and provides various worthwhile experiences for future leadership roles. It also provides an opportunity for you to cultivate future leaders.

Always encourage an enthusiastic individual. If someone is eager to take on responsibilities, find projects for that person to handle, it may be an Officer/Chair position or a spot on a committee. Delegate to Members to keep them interested in the Chapter and the Fraternity. Find out what Members like and what they enjoy most in the Chapter and find tasks that align. Delegating tasks will unify your Chapter as each Member becomes part of the team.

Some of the most effective leaders are those who know how to delegate effectively. These are individuals who know that when they use other people's strengths, the end result is that their Chapter is stronger, more productive and more efficient. By delegating you also are allowing yourself to avoid burnout.

Here are some things to keep in mind when delegating tasks to others:

Identify Priorities - Determining which tasks or projects take priority is a good first step in successful delegation. Once you determine which items are most important, meaningful or time- sensitive, you will have a better sense of what you can ask others to do and what you must do yourself.

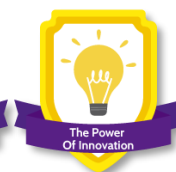
Improve your skills with Leadership in Action Modules:

- [First-Time Officer- No Dumping](#)

Capitalize on Individual Strengths - You must get to know each individual's strengths and areas for improvement in order to delegate tasks effectively to those on your team. In some cases, an individual may not have a certain skill yet, but you may be able to provide guidance and training to develop that skill in them. Once you know those on your team well, you will be more equipped to delegate tasks based on who has the most relevant skills for the job.

Improve your skills with Leadership in Action Modules:

- [The Great Balancing Act- Take A Chance On Me](#)
- [The Power Of Innovation- Discovering Your Innovative Style](#)





Provide Guidance - When delegating, it is important to make sure that the person completing the task is set up for success. If you have a preference for how you want something done or an idea about what the final product should look like, take the time to share that with the person working on the project. Don't assume that expectations are clear unless you clearly communicate what needs to be done and by when.

Improve your skills with Leadership in Action Modules:

- [First-Time Officer- No Dumping](#)



Demonstrate Trust - Once a task is delegated, trust the person doing the job to get it done as instructed and in the time allowed. Being willing to let go of the project and defer to that individual's expertise will demonstrate your confidence in their abilities while freeing you up to accomplish other tasks. Consider scheduling check-ins in advance so that you can ensure that the project is moving along as expected without micromanaging.

Improve your skills with Leadership in Action Modules:

- [Building Trust- The Seeds Of Success](#)
- [The Art Of Effective Communication- Building Rapport](#)



Offer Feedback - Upon completion of a task or project, take the time to provide feedback on the end product. You may find opportunities throughout the process when you can interject to encourage adjustments be made or acknowledge progress and motivate. You should always acknowledge a job well done publicly and offer constructive criticism privately.

Improve your skills with Leadership in Action Modules:

- [Successful Feedback- Giving Constructive Feedback](#)
- [Successful Feedback- Receiving Feedback](#)

Officers Must Be Organized and Enthusiastic

Chapter Members are energized and dedicated by seeing leaders enthusiastic and dedicated. Chapter Officers are role models. As such, people look up to them for insight and inspiration. Therefore, it is important to choose carefully when electing new Officers or selecting Committee Chairs. Ideally these individuals should have more enthusiasm and dedication to the organization than the Members, so that the Chapter continues to move forward.

Improve your skills with Leadership in Action Modules:

- [First-Time Officer- Rally The Troops](#)
- [The Team Foundation- There Is No I In Team](#)



The Chapter Business Meeting

During Chapter Business Meetings it is important to stay on track. Chapter Meetings discussion should surround Chapter operations, including Chapter events. It is important to make sure events are being planned during summer and winter breaks so that when Members gets back to school, they can take off. Having events planned right away will allow Members to stay engaged and interested in the Chapter. If you do not have anything planned and approved by the second business meeting, this should become a priority.

See the Sample Business Meeting Agenda and review Parliamentary Procedure Overview linked in the Additional Resources section of the manual.



KEY RESPONSIBILITIES

Again, the Chapter President is the chief executive Officer of the Chapter and is entrusted by the Brotherhood with the responsibility for all Chapter activities. This office is the most challenging of the Chapter positions. Although it requires considerable time and effort, your position as Chapter President can be rewarding and provide a great deal of satisfaction through individual and Chapter achievements. It is a singular honor and provides various worthwhile experiences for future leadership roles.

Specific Responsibilities

1. **Know the specific responsibilities of each Chapter Officer. Delegate responsibility to Officers and ensure that tasks are completed properly and efficiently.** As the Chapter President, you are responsible for the performance of the other Chapter Officers. This does not mean that you must perform their work; it means that you should ensure that each Officer is fulfilling their responsibilities. You may need to put forth your personal efforts to assist the other Officers; but generally, offering information, advice, suggestions and constructive criticism will help when assistance is needed.

2. **Master the National Constitution, National Operating Policies, Chapter Bylaws, and university/college regulations ensuring that all policies are abided by and enforced.** The rules and regulations set forth in the National Constitution, National Operating Policies and Chapter Bylaws serve to protect the ideals, image, prosperity and financial stability of Phi Sigma Pi. They are the basis for the Fraternity's organization and operation. As your Chapter's Chief Officer, you will need to know these documents thoroughly to properly enforce their policies. Additionally, as Chapter President, you also must know and ensure that your Chapter adheres to the rules and regulations of your university/college.
3. **Preside at formal and informal Chapter meetings.** Follow the correct rules of parliamentary procedure as recommended in *Robert's Rules of Order, Newly Revised*. Work closely with the Parliamentarian to ensure that business meetings are run efficiently. Prepare the agenda in consultation with the Executive Board.

Regular business meetings are essential to the operation of your Chapter. The success of these meetings will largely depend on the President's leadership skills. It is your primary duty to see that all meetings run as smoothly as possible. Before each meeting, you will need to prepare an agenda, make sure that adequate meeting space is reserved and ensure that all necessary materials and equipment are provided.

To conduct your Chapter Meetings successfully, you also should have a comprehensive knowledge of parliamentary procedure. You will need to obtain a copy of *Robert's Rules of Order, Newly Revised*, which is the basic handbook of operation for most clubs and organizations. As President, you are the leader of the meeting. Follow the agenda closely and act as facilitator when necessary to keep the meeting moving and productive.

4. **Serve as the chairperson of the Executive Board.**
5. **Serve as spokesperson and most visible Member of the Chapter.** All contacts, such as the university's administration, faculty, other Chapters, other Fraternities/Sororities, other campus organizations and the National Office, are important to the welfare of the Chapter. Therefore, someone qualified and knowledgeable of Phi Sigma Pi should represent the views,

feelings and attitudes of the Chapter. Because the President oversees all Chapter Officers and activities and knows the progress of its Committees, the Chapter President acts as the Chapter's spokesperson and liaison when one is needed.

6. **Have removal power of all appointed positions in the Chapter subject to the approval of the Executive Board.**
7. **Maintain a close relationship with the National Office.** As President, you need to ensure that all correspondence received from the National Office is properly noted, acted upon and answered. Keep the lines of communication open with the National Staff. They are there to assist your Chapter, so keep them informed of any problems you or your Chapter may be experiencing. It is also important to make the National Headquarters aware of your Chapter's progress.
8. **Maintain and strengthen the Chapter's activities and accomplishments in organization, Recruitment, Initiation, Alumni, campus and community relations, publications, financial operations and other Chapter endeavors.**
 Organization is essential to a Chapter running smoothly. This can be done through Chapter calendars and meeting agendas. Ensuring that the Chapter Members are aware of the events/happenings secures that they will be present and ready to assist. For example, engaging Members through the recruitment process by asking for feedback, providing advance notice of dates and times and expressing the important role they will play strengthens the Chapter and the outcomes.
9. **Ensure that *The Ritual* and all ceremonies are prepared for and conducted with meaning.** *The Ritual* is the primary element which distinguishes Phi Sigma Pi from all other organizations. It is the ceremony by which an Initiate becomes a Member of Phi Sigma Pi. *The Ritual* is based on commitment and should be an inspiration to all Members of the Fraternity.

The President needs to ensure that the Chapter treats *The Ritual* seriously. Laughing and horseplay detract from the sincerity of the ceremony and will not be tolerated. All ceremonies should be conducted in a professional manner (no mispronunciations, mumbling, etc.) with the appropriate altar supplies (candles, badge, coat of arms, etc.) for the right atmosphere.

The President also should ensure the privacy of *The Ritual*. It should be conducted in complete privacy and only in the presence of Fraternity Members.

10. Ensure that the Chapter's Initiation Program is meaningful, in good taste, and promotes the benefits of responsible membership in Phi Sigma Pi. The Initiation Program should be a process of learning, inspiration, cohesiveness and achievement. It should not involve degradation, humiliation or hazing. As Chapter President you should review the Initiation Program to ensure that membership is achieved in a positive, dignified and constructive manner and that the Chapter's requirements are in agreement with the National Constitution, National Operating Policies, Chapter Bylaws and university/college policies.

11. Serve as the Risk Management Advisor. Risk management is essential to every Chapter of this Fraternity. As Chapter President, you need to ensure the safety of the Chapter and each of its Members by helping the Chapter develop a risk management policy and various risk management programs per the National Constitution.

12. Train and assist your successor in office. Officer training is vital to the continued success of your Chapter. As Chapter President, you need to spend time training the newly-elected President so that the transition of Officers is a smooth one. Chapters oftentimes elect Officers early so that the current Officer and the newly-elected Officer have the opportunity to work together before the newly-elected Officer actually takes office.

The above responsibilities are by no means all-inclusive. As Chapter President, you will be faced with specific circumstances that result in additional responsibilities. Simply keep in mind that as President, you will be interpreting the ideals of Phi Sigma Pi to the Members and representing its ideals and principles to the outside world.

**Officer Training
available on the
CORE E-Learning
Center

OVERCOMING CHALLENGES

Serving as the Chapter President can provide challenges that will impact you as a leader and as a Member. Situations that can create conflict can include:

- Mediating disagreements within the Membership about campus and/or Fraternity policies.
- Ensuring your energy level is high and that you serve as a motivator for all.
- Managing and resolving sensitive situations with the Membership.
- Realizing that it takes the Executive Board and the Membership to be successful (one person alone cannot do this).
- Needing to be flexible with time and patience.

The examples above could impact your performance as the Chapter President, however, being aware that they could occur and preparing for how to handle them sets you up for success. As Chapter President you hold a position that very few will have the privilege to hold and from this experience you will gain strong leadership skills. As you develop these skills the following are suggested:

- Utilize the Fraternity's resources
- Delegate to the Executive Committee
- Stay consistent
- Serve as a mentor and be flexible
- Accept responsibility. Doing so allows each Member to make positive contributions to the Chapter and they know who is leading
- Learn to take criticism. No person in a position of authority is immune from criticism. You must learn to sort out the constructive feedback
- Learn how to set healthy boundaries
- Pass on what you have learned
- Praise, share and give credit where credit is due
- Make the tough decisions. Be prepared to take a stand for the Chapter

Improve your skills with Leadership in Action Modules:

- [Conflict Management- Talk It Out](#)
- [Start The Conversation- Positive Conversations In Tough Situations](#)
- [The Team Foundation- Team Conflict](#)



AUDIENCES

As Chapter President you serve as the spokesperson for the entire Chapter. With that comes the opportunity to talk and interact with several different “audiences.” You will be speaking with individual campus administrators to reserve rooms or confirm Chapter recognition as well as your full Chapter membership during meetings and events while in office. It will be important to understand who your key audiences are and how to foster those interactions.

Chapter Members

- Designation - All undergraduate Members who are in good standing with the Chapter.
- Interactions - This is the body that elected you to Chapter President. Your goal is to lead by example. You should work with the entire Chapter to achieve the goals and vision.

Executive Board

- Designation - The Executive Board is the elected Officers and most important committee in the Chapter. According to the National Constitution, that consists of: President, Vice President, Secretary, Treasurer, Historian, Parliamentarian and Initiate Advisor. Your Chapter may establish additional Officer positions.
- Interactions - This is your team - you are the chairperson. As such you are responsible to work with each Officer to assist in achieving their goals. You are to hold regular (weekly or bi-weekly) Executive Board Meetings. As President, you should meet with the individual Officers to provide advice and hold them accountable through constructive criticism.

Chapter Advisor

- Designation - A member of the faculty, staff or administration of the sheltering institution appointed or elected by Members of the Collegiate Chapter in a manner approved by the Collegiate Chapter.
- Interactions - The Chapter President and Executive Board should communicate regularly with the Chapter Advisor. They are your strongest ally and mentor because they know the ins and outs of campus. Represent Phi Sigma Pi well when interacting with a Chapter Advisor.

***Our Chapter Advisor's name and contact information is:*



Chapter Excellence Board (CEB)

- Designation - An extension of the National Office's Chapter Services team. The board consists of Alumni Volunteers vetted by the National Office. This vetting is done through a required application submission, a background check and participation in the CEB training. The four main areas of focus are: communications, development, financial and operations.
- Interactions - The CEB is there to provide you and the Executive Board with support and guidance. Their primary focus is in alignment with the Chapter Standards of Excellence.

Chapter Consultant

- Designation - Phi Sigma Pi National Staff member who works with Chapters to assist the Members to achieve their goals, specifically in the areas of recruitment and membership experience.
- Interaction - Your Chapter Consultant can be a great resource to assist you and your Chapter. Use their experience to guide the Chapter by asking questions anytime and engaging with them during Chapter Visits.

Parents

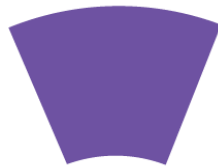
- Designation - Parents of the Chapters' Members.
- Interaction - Parents are very connected to their students' lives. For this reason, they will expect to see healthy programming and development experiences from the Chapter.

PRESIDENT CHECKLIST

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. The Chapter Standards of Excellence consists of 8 Guiding Principles covering over 40 focus areas and benchmarks. Based on the Chapter Standards of Excellence here are a few items that the Chapter President oversees, but is not limited to,

Chapter Development



- Hold two (2) Risk Management programs for Chapter Members and Initiates
- Participate in an annual Chapter Visit by National Office
- Send a National Delegate to National Convention

Communications



- Meet with your Chapter Advisor twice in the Academic Year
- Have a Chapter Advisor
- Invite President or Provost to a minimum of one sponsored Phi Sigma Pi event

Chapter Leadership



- Executive Board reports submitted
- Held Officer Transition program
- Held weekly Executive Board meetings
- Host Ritual Review two (2) times
- Officer Installation Ceremony performed

For a full review, visit :

<https://phisigmapi.org/resource/chapter-standards-excellence>

President's General Calendar

This general schedule is based on a calendar year term and can be adjusted to best fit your Chapter's election cycle. Talk with previous Officers, Faculty Advisor and/or CEB Advisors to develop a specific calendar that works best for your Chapter and campus calendar.

January - Hold the Executive Board retreat and discuss a Chapter goal.

February - Add team building activities to Chapter Meetings to boost Chapter morale.

May - Ensure Chapter Officers/Chairs are prepared to submit their CSE forms.

July/August - Attend National Convention.

September - Schedule an Executive Board and/or Chapter one day Retreat. Confirm Chapter meeting location and time.

November - Prepare and assist for Officer shadowing and transition.

December - Confirm National Convention attendees (Note: At least one Delegate is required per the National Constitution)

What's Due When Administratively

The following academic year form submissions can be found in the [Chapter Admin Portal](#) (CAP) unless otherwise noted.

Semester Schools

Fall Semester

Sept. 19:

- [Update Member Roster](#) (Sept. 20 National Office runs the Chapter's existing Member billing and posts National Dues and Fees Bill to Financial Statement)

Oct. 1:

- Fall National Dues and Fees for existing Members per [Financial Statement](#) (Mail)
- [Add new Initiates](#) and have Initiates claim accounts

Dec. 15:

- Change [Initiate to Member](#)
- [Finalize Graduating Seniors](#)
- [Chapter Officer Information Update](#)
- Induction Dues and Fees for new Members (Mail)
- [Tripod Event Form](#) (minimum of 3)
- [Risk Management Summary](#)
- [Recruitment/Initiation Planning Form, upload Recruitment and Initiation Calendar](#) and [upload Initiation Handbook and Manual](#)



***Click on dates to automatically add the due dates to your calendar. Coordinate with Officers and Committee Chairs to ensure everything is on time!*

Spring Semester**Feb. 7:**

- [Update Member Roster](#) (Feb. 8 National Office runs the Chapter's Existing Member billing and posts National Dues and Fees Bill to Financial Statement)

Feb. 22:

- Spring National Dues and Fees for existing Members per [Financial Statement](#) (Mail)

March 16:

- [Add new Initiates](#) and have Initiates claim accounts

May 15:

- Change [Initiate to Member](#)
- [Finalize Graduating Seniors](#)
- [Chapter Officer Information Update](#)
- Induction Dues and Fees for new Members (Mail)
- [Tripod Event Form](#) (minimum of 3)
- [Risk Management Summary](#)
- [Recruitment/Initiation Planning Form, upload Recruitment and Initiation Calendar](#) and [upload Initiation Handbook and Manual](#)
- End of Year Submissions
 - [Bylaws Upload](#)
 - [Operation Policies Upload](#)
 - [Administrative Summary](#)
 - [Alumni Summary](#)
 - [Budget](#) (current year and proposed budget)

Quarter Schools**Fall Quarter**

[CAP = Chapter Admin Portal](#)

Oct. 14:

- [Update Member Roster](#) (Oct. 15 National Office runs the Chapter's Existing Member billing and posts National Dues and Fees Bill to Financial Statement)

Oct. 30:

- Fall National Dues and Fees for existing Members per [Financial Statement](#) (Mail)
- [Add new Initiates](#) and have Initiates claim accounts

Dec. 15:

- Change [Initiate to Member](#)
- [Finalize Graduating Seniors](#)
- [Chapter Officer Information Update](#)
- Induction Dues and Fees for new Members (Mail)
- [Tripod Event Form](#) (minimum of 2)
- [Risk Management Summary](#)
- [Recruitment/Initiation Planning Form, upload Recruitment and Initiation Calendar](#) and [upload Initiation Handbook and Manual](#)

Winter Quarter**Jan. 14:**

- [Update Member Roster](#) (Jan. 15 *National Office runs the Chapter's existing Member billing and posts National Dues and Fees Bill to Financial Statement*)

Jan. 30:

- Winter National Dues and Fees for existing Members per [Financial Statement](#) (Mail)
- [Add new Initiates](#) and have Initiates claim accounts

March 1:

- Change [Initiate to Member](#)
- [Finalize Graduating Seniors](#)
- [Chapter Officer Information Update](#)
- Induction Dues and Fees for new Members (Mail)
- [Tripod Event Form](#) (minimum of 2)
- [Recruitment/Initiation Planning Form, upload Recruitment and Initiation Calendar](#) and [upload Initiation Handbook and Manual](#)

Spring Quarter**April 14:**

- [Update Member Roster](#) (April 15 *National Office runs the Chapter's Existing Member billing and posts National Dues and Fees Bill to Financial Statement*)

April 30:

- Spring National Dues and Fees for existing Members per [Financial Statement](#) (Mail)
- [Add new Initiates](#) and have Initiates claim accounts

June 15:

- Change Initiate to Member
- Finalize Graduating Seniors
- Change [Initiate to Member](#)
- [Finalize Graduating Seniors](#)
- [Chapter Officer Information Update](#)
- Induction Dues and Fees for new Members (Mail)
- [Tripod Event Form](#) (minimum of 2)
- [Risk Management Summary](#)
- [Recruitment/Initiation Planning Form, upload Recruitment and Initiation Calendar](#) and [upload Initiation Handbook and Manual](#)
- End of Year Submissions
 - [Bylaws Upload](#)
 - [Operation Policies Upload](#)
 - [Administrative Summary](#)
 - [Alumni Summary](#)
 - [Budget](#) (current year and proposed budget)

Tutorials are provided in the [Resource Center](#).

POLICIES AND PROCEDURES

The following are National policies, procedures and necessary Chapter documents that will aid in your role as President.

National Constitution

The National Constitution (<https://phisigmapi.org/nationalconstitution>) is the highest governing document for all of the National Organization. It is voted on and approved by Chapter Delegates during the Grand Chapter Business Meeting. Meaning this governing document is for and by the Members.

Chapters have the right to submit changes to the National Constitution for the entire organization to consider. This document, once approved by the Membership, then becomes the document in which the National Office enforces. The National Staff has no say in changes to the National Constitution.

National Risk Management Policy

The National Risk Management Policy (<https://phisigmapi.org/nrmp>) provides definitions, report steps for Inter-Chapter events and expectations for Phi Sigma Pi events.

National Operating Policies

The National Operating Policies (<https://phisigmapi.org/nop>) contains the official administrative policies of Phi Sigma Pi National Honor Fraternity. This includes a communication policy, marketing/branding policy, national award eligibility, etc.

Amnesty Program

The purpose of Phi Sigma Pi's Amnesty Program (<https://phisigmapi.org/amnesty>) is to provide a path for Phi Sigma Pi's Members to report hazing and/or poor risk management practices that jeopardize the integrity of our Brotherhood to the National Office without the fear of being singled out or sanctioned for these practices. Members who opt to participate in the Amnesty Program must be committed to reforming Chapter hazing and other poor Risk Management practices and must agree to work with the National Office to effect change in Chapter policies and practices.

Chapter Bylaws

Chapter Bylaws are stable and should not change often. As time passes, you may begin to note inadequacies, loopholes and ambiguities in the document. Be aware of these concerns as they arise. The Chapter can amend your Bylaws at any time. However, do not sit around looking for ways to improve your Bylaws. Haggling over changes can dominate valuable Chapter Meeting time. You will know when it is necessary to make changes. And when that time arises, establish a special Committee to handle these Bylaw revisions.

Chapter Operating Policies

The Chapter Operating Policies should contain the official administrative policies developed by the Chapter. For example, it may outline the attendance policies to which events are mandatory and what local dues are.

Chapter Risk Management Policy

The Chapter Risk Management Policy should contain the Chapter's approach for managing risk. Areas of consideration are: financial, reputational, emotional, facilitates and physical. For example, financial - that the Chapter is required to have two bank signers for the Chapter's bank account. Additionally, your university/college may have guidelines that the Chapter could implement.



Review Risk Management recourse linked in the Additional Resources section.

PHI SIGMA PI VOCABULARY/LINGO

Chapter Admin Portal (CAP) (<https://chapteradmin.phisigmapl.org>) - the administrative platform that Chapter Officers and Committee Chairs use to communicate with the National Office. In the CAP, Officers/Chairs are able to update the Chapter Roster, add new Members, update your Faculty Advisor and Chapter Officers as well as submit your Chapter Standards of Excellence forms.

Each Chapter Officer and Committee Chair is given access to the CAP based on their position. Check out the CSE Manual Page 26 to read what each position has access to.

***CSE = Chapter Standards of Excellence*

The screenshot shows the Phi Sigma Pi Chapter Admin Portal interface. At the top, there is a navigation bar with the CORE logo, a welcome message for Suzanne Schaffer, a 'Jump To' dropdown menu, and a 'My Profile' link. Below this is the Phi Sigma Pi logo and the title 'Chapter Admin Portal'. A secondary navigation bar contains links for Dashboard, Member Roster, Chapter Profile, Initiate Class, Chapter Standards of Excellence (CSE), Officer Updates, Reports, and Executive. The main content area features a 'Dashboard' section with a 'Test Chapter A1' button and a section for 'IMPORTANT UPDATES' with a link to 'Chapter Membership Totals'.

Chapter Excellence Board (CEB) (<https://phisigmapl.org/ceb>) - an extension of the National Office's Chapter Services team in order to provide support from engaged and knowledgeable Alumni. There are four (4) Advisors that compose your CEB, each having a specific focus area. CEB Advisors work with Chapter leaders responsible for the Chapter Standards of Excellence area that they advise. Look up your CEB Advisors in the CAP (Reports>CEB Advisor Roster).

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

Chapter Standards of Excellence (CSE)

(<https://phisigmapi.org/resource/chapter-standards-excellence>) - an online evaluation for Chapters to annually meet the standards for Chapter governance, management and mission-driven operations. It provides transparency for what Chapters strive for and outlines

The 8 Guiding Principles



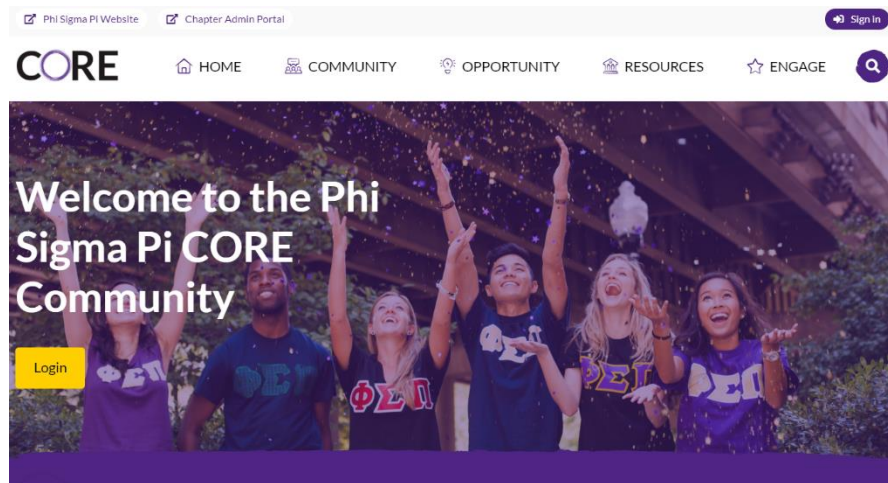
eligibility for awards such as the Joseph Torchia Outstanding Chapter Award, which is the highest designation a Chapter can achieve annually.

The Chapter Standards of Excellence consists of 8 Guiding Principles covering over 40 focus areas and benchmarks.

Together these 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 provides 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 through Scholarship, Leadership and Fellowship. *Also see Scorecard.*

Chapter Visit - The official meeting between your Chapter and a National Staff member. While there is often a sense that the National Office is coming to critique a Chapter, the main goal is to support the Chapter with direct interaction and address challenges the Chapter may be having, provide requested training/development and/or celebrate the Chapter's successes. Visits occur once a year, in person or virtually.

CORE (<https://core.phisigmapi.org>) - an acronym for Community, Opportunity, Resources and Engagement. CORE is Phi Sigma Pi's online Member community platform. CORE connects all Members, Collegiate and Alumni, and provides a place to network, discover training resources, participate in a Leadership in Action Module and engage in thoughtful discussion boards. The best CORE experience will be driven by you, so jump right in by updating your profile, commenting on a discussion post and connecting with fellow Members. As a Chapter Officer you are automatically enrolled in The Leader Board on CORE.



Event Planning Form (PF) (<https://phisigmapi.org/planningform>) - an educational tool to ensure that Chapters and Associations have the necessary information and tasks accomplished in order to hold fun and safe events. This includes making sure that contracts are reviewed and

are mutually agreeable to the Chapter/Association's interests. The form also provides assistance and guidance with navigating more complex events.

Hugh O'Brian Youth Leadership (HOBY)

(<https://phisigmapi.org/service>) - In 2015, Phi Sigma Pi National Honor Fraternity approved to enter into a philanthropic partnership with Hugh



O'Brian Youth Leadership. Ever since we have been fostering a relationship of volunteerism, service and support that has

benefited both of our organizations in big ways. HOBY's mission is to inspire young people to make a difference and become catalysts for positive change in their home, school, workplace and community.

Leadership in Action (LiA) (<https://phisigmapi.org/lia>) - a nationally



**LEADERSHIP
IN ACTION**

award-winning certification program that consists of interactive Modules for Members. The Modules are flexible courses based on leadership skills and soft skills that can be applied immediately to the participant's daily life. Modules tackle a variety of topics that can take your leadership skills to the

next level and leave you better equipped to empower your fellow Members and handle situations within your Chapter and in the workforce.

National Convention (<https://phisigmapi.org/nationalconvention>) - Our Annual National Convention is our premier event of the year. Members, both Collegiate and Alumni, from across the country converge on the host city for 4 full days of programming. We hold our annual Grand Chapter business meeting (Per the National Constitution each Chapter must send at least one voting delegate - though more are welcome to attend!) at the beginning of the convention. Here, Members decide the governing of the Fraternity and make decisions that will affect our future as an organization.

After the business meeting is complete, we move onto Leadership programming. Members will learn how to be skilled leaders in their Chapters, on their campuses and in their communities. It

concludes with our annual Banquet and Awards Presentation. This event is the biggest of the year.

The Ritual - Also known as the Formal Induction Ceremony. It is the culmination of an Initiate's work and the celebration and official



recognition as a Member. It is intended to be a memorable and distinguished occasion and is the one ceremony that binds all Phi Sigma Pi Members together.

The Ritual is not an online resource, but every Chapter should have six (6) copies of the *Ceremonies and Ritual Book*. In addition to *The Ritual*, the book contains; The Meeting Commencement Ceremony, Officer

Installation Ceremony, Alumni Ritual and The Big Brother Ceremony.

If there are questions or your Chapter needs to acquire copies of the Ceremonies and Ritual Book please contact the National Office (pspoffice@phisigmapi.org) or place an order for Chapter Materials (<https://phisigmapi.org/merchandise>).

Scorecard - a visual Chapter Standards of Excellence report card that acknowledges the Chapter's achievements. As the Chapter accomplishes the various tasks in CAP throughout the academic year, a Scorecard

Group	Component	Indicator
Chapter Development	Risk Management Programs	✓
	Host National Office Visit	✓
	Leadership in Action Facilitator	✗
	Leadership in Action modules	✗
	Leadership Academy Attendance	✗
	National Convention attendance	✓
Communication	Meet with Advisor at least twice	✓

captures whether a particular focus area has been completed (with a green checkmark) or still needs to be completed (red X).

You can see both the current year Scorecard and previous Scorecards in the CAP (Reports > CSE Reports).

Surge (<https://phisigmapi.org/surge>) - an optional Recruitment initiative that supports Chapters with the technical and operational tasks, such as sending Recruitment invitations, collecting RSVPs through a dedicated Chapter-specific landing page on the main Phi Sigma Pi website specifically for recruitment and creating professional Recruitment materials.



ADDITIONAL RESOURCES



1. [Marketing/Style Guide](#)
2. [Sample Business Meeting Agenda](#)
3. [Parliamentary Procedure Overview](#)
4. [Risk Management](#)
5. SMART Goals
 - a. [Strategic Planning- Turning Strategy Into Action](#)
 - b. [Strategic Planning- The Achievable, Believable Goal](#)
6. Strategic Planning
 - a. [Strategic Planning- The Power Of A Shared Vision](#)
 - b. [Strategic Planning- Strengthening Your Problem-Solving Skills](#)
7. [Planning Events](#)
8. Conflict Resolution
 - a. [Conflict Management- Diffusing Explosive Situations](#)
 - b. [Conflict Management- Say What?](#)
 - c. [Conflict Management- Talk It Out](#)
 - d. [Conflict Management- That's Not The Issue](#)
 - e. [Start The Conversation- Positive Conversations In Tough Situations](#)
9. [National Convention](#)
10. [HOBY](#)
11. [The Scholar's Province](#)
12. [The Ritual and Ceremonies Book](#)
13. [Team Building Activities](#)
14. [Officer Transition Plan](#)
15. [Officer Training Courses](#)
16. [Apology Languages](#)
17. [VIA Character Strengths Assessment](#)
18. [Characteristics of an Ideal Member](#)