

PHI SIGMA PI
NATIONAL HONOR FRATERNITY



Officer Training Manual: Treasurer



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WELCOME

Congratulations on being elected as Chapter Treasurer! 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 financial 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 Treasurer, the membership of this Chapter has the utmost confidence in you by honoring you with this office.

Only in this office might you be challenged by temptation. Temptation defeated tempers character as fire tempers steel. It will be your duty to receive all money and to pay all bills. Much of the honor of any organization depends upon the accuracy and dispatch with which its business is conducted.”

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.

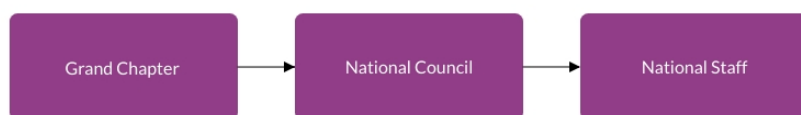
With that, the National Office is designed to support your chartered Chapter to uphold our mission and purpose. To do that the National Office provides the foundational structure.

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.

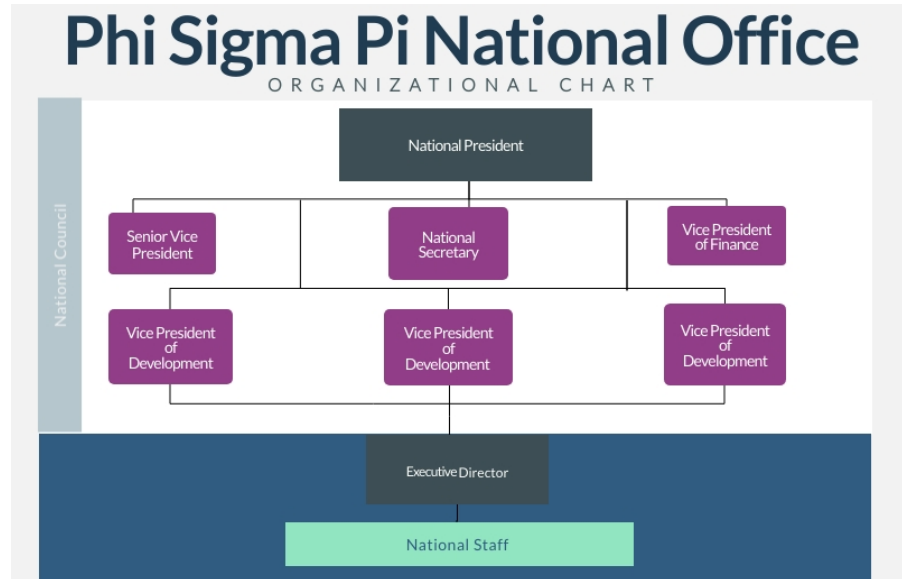
Official business is held once a year during Grand Chapter Business at National Convention. This is the time when amendments to our National Constitution are voted on and elections are held for National Council positions (every other year). It is important to note that changes to the National Constitution 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>

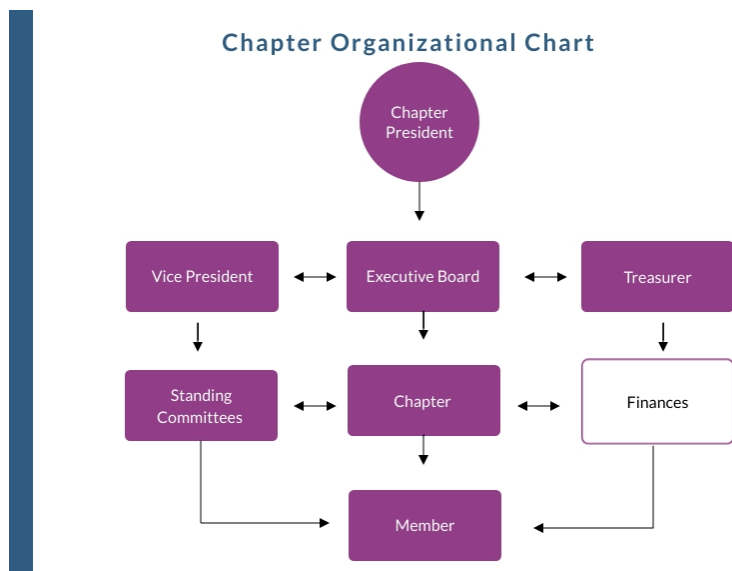
Instagram: <https://instagram.com/phisigmapi>

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 TREASURER

Understanding Your Leadership Strengths

When serving as a leader, especially the Chapter Treasurer, 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 the Executive Board, will set them up for success when approaching you with new ideas. It also provides upfront reasoning if, as Chapter Treasurer, 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](#)



Delegate Tasks to People Who Want to Do Them

The Chapter Treasurer is entrusted by the Brotherhood with the responsibility for budgeting Chapter activities. Although it requires considerable time and effort, your position as Chapter Treasurer 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:

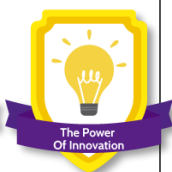
Identify Priorities - Determining which tasks or projects take priority is a good first step in successful delegation. Once you determine which items are most important, meaningful or time-sensitive, you will have a better sense of what you can ask others to do and what you must do yourself.



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](#)

Knowing Your Role

It's important for all Officers to know their role. As Chapter Treasurer it is not required that one be a financial expert. The Treasurer does require one being a finance or related field major, although certainly this can benefit given the duties. The Chapter Treasurer is not the sole party responsible for the Chapter's Finances. This role is not responsible for single-handedly pulling a Chapter from past debt and delinquency. Nor is it this role's fault if, despite constant warnings and penalties, a Member continues not to pay membership dues. The Chapter Treasurer does not make personal determinations regarding the Chapter Finances, but instead works with other Chapter Officers and Advisors and follows a set of detailed regulations.

As Chapter Treasurer, one is not a debt collector as the role has no legal powers to force a Member to pay, beyond simply sending reminders of amounts owed, following disciplinary guidelines and, if all else fails, seeking financial recourse through a collections agency. A Chapter Treasurer, in other words, cannot and will not succeed on their own. Instead the Chapter Treasurer must be supported by the Members and the structure and integrity of the Chapter itself. That written, there are key responsibilities that this role is responsible for.

KEY RESPONSIBILITIES

A great Chapter requires a solid financial foundation to operate properly. As Chapter Treasurer, the responsibility for effective and efficient financial operation and integrity rests upon your shoulders. The position of Treasurer requires persistence and dedication as well as knowledge of accounting procedures. Your ability to manage the Chapter's funds is vital to the long-term success of your Chapter.

Specific Responsibilities

1. **Keep accurate, complete and up-to-date records of all Chapter financial operations.** You must record all deposits and payments (withdrawals). Be informed of all anticipated expenses and income on current projects to update current account balances.

2. **Collect and preserve all monies and distribute monies as the Chapter needs and directs.** You have the responsibility of ensuring that all bills/invoices are paid so that the Chapter's credit reputation is upheld. All money should be immediately deposited upon its receipt and the Chapter's monthly bank statement should be reconciled upon receipt. Please note that accounts should be placed under your Chapter's Greek name, i.e. Zeta Zeta Chapter of Phi Sigma Pi.

If your Chapter has its bank account through the school, requesting an invoice from the National Office is just an email away. But it will be important to ensure that the rosters are up to date so that the correct total is reflected in the invoice.

3. **Work closely with the Chapter Secretary to ensure that all National dues and Induction fees are accompanied by their respective forms and submitted promptly to the National Headquarters.** The Treasurer is responsible for promptly submitting all National dues and Induction fees to the National Headquarters by their respective due dates. Induction fees are one-time fees paid by each new Member at the time of their Initiation.

All Nationally Active Members (active and locally inactive) are required to pay national dues and insurance each semester (semester schools) or for three quarters (quarter schools). If there are any problems, it is up to you to contact the National Headquarters before these due dates (<https://phisigmapi.org/duedates>).

The Chapter Admin Portal (CAP) (<https://chapteradmin.phisigmapi.org>) provides an updated Financial Statement which should be reviewed prior to making payments or submitting invoices to the school. Double check that the Chapter Secretary has updated the Membership Roster (because this updates the Financial Statement).

***Do you know your account number(s) and were the signers updated?*

- 4. Prepare and recommend a budget.** Experience has proven that a successful Chapter is one that budgets so that the current, as well as future Members, can enjoy the tangible benefits of belonging to Phi Sigma Pi. The Chapter will quickly find itself in trouble if it is unable to manage its accounts for the present and the future. Therefore, it is important that you prepare a budget before the beginning of the Chapter's fiscal year (July 1 - June 30).

In preparing the budget, you should get input or budget requests from every Chapter Officer and Committee Chair in order to analyze each area of the Chapter's activities relative to the Chapter's income and expenses. This practice will help to find hidden costs and project a more realistic income. Make sure that your budget includes all details of income and expense so that nothing is overlooked.

When you have completed the budget, it should be presented to the Executive Council, the Chapter, for approval but consider having the Chapter Advisor/Chapter Excellence Board Advisor review it for additional input. As Treasurer, your duty is to see that the provisions of the budget are followed and to review operations on a regular basis to ensure that the Chapter is operating within its means.

Review Officer and Committee Budget Request Form linked in the Additional Resources section.

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



- 5. Inform all Members and Initiates of their financial responsibilities to the National Headquarters and the local Chapter.** As Treasurer, you not only have to manage yourself, but at times you will have to manage others as well. It is your responsibility to inform the Members and Initiates of their financial obligations and instill this discipline so that the Chapter, and the entire Fraternity, may achieve its financial goals. In order to motivate the Chapter on its financial responsibility, you must keep the Members aware of the Chapter's financial position.

- 6. Suggest ways to increase the financial stability of the Chapter.** Remember that financial responsibility has a direct bearing on Chapter morale. It is the Treasurer's duty to keep the membership on the right course; therefore, it is vital that you always keep the Chapter well-informed of its financial position. Be prepared to give regular reports on your Chapter's financial condition at every meeting.

As the chief financial officer, you also must establish policies and programs that will best serve the Chapter. This includes setting long and short-term goals to enable the Chapter to reach the financial position it is seeking. You will need to encourage all Members to become involved in fundraising projects and maintain close ties with the finance (fundraising) chairperson and committee. Also, have your Chapter create a financial goal, whether it is a retreat over summer break or a Phi Sigma Pi banner, and periodically remind Members of that goal. It is also important that your Chapter always keep a reserve account that can be used in times of financial difficulty.

Although you must be able to reason and compromise, you must do what is always right for the Chapter. There may be many occasions when you will need to adhere to the Chapter guidelines and make unpopular decisions. For example, you may need to set a policy in the Chapter Bylaws for collection procedures for overdue accounts. Likewise, it is up to you to speak up if the Chapter has had a “bad” month or some unexpected expenses. You may find it necessary to advise the Chapter to forego some planned activities until the Chapter can acquire additional funds.

- 7. Complete a financial statement at the end of the academic year for the Chapter and the National Headquarters.** The sample Chapter financial statement found at the end of this section is a sample of the required financial statement that must accompany the Chapter End-of-Year Report which is due June 1.
- 8. Serve as an Ex-officio member of the Fundraising Committee.** Having the responsibility as the Chapter’s chief financial officer, it will be beneficial to serve on the fundraising committee. The guidance that can be provided is as simple as knowing the amount of fundraising in dollar amounts that need to be raised in order to have a successful semester/quarter.
- 9. Preside over the meeting in the absence of the President, Vice President and Secretary.**
- 10. Be a voting member of the executive board.**

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

11. Train and assist your successor in office. It is important to your Chapter's continued success that you train your successor. As Chapter Treasurer, you need to spend time with the newly-elected Treasurer in order to train this new officer in the many aspects of this position. You should work together to create a Chapter budget and complete the financial statement required by the National Office. By doing so, the transition of officers will be much smoother.

Your success as Chapter Treasurer will be determined by your persistence and dedication toward putting learned knowledge into practice. By creating and following a budget, you will provide your Chapter with a greater sense of financial security.

TREASURER CHECKLIST

Establishing a Checking Account

Your Chapter will need to set up its own bank account as soon as possible to become financially sound. Check with the student government, your Advisor and/or other campus organizations to determine if the Chapter is required to have their account through the school. Otherwise, check local banks or the National Headquarters if advice is needed. As a risk management control, it is strongly recommended that the Chapter Account has two signers. It may be best that one of the signers is your Chapter Advisor. This is because the Chapter Advisor is often consistent year over year.

Authorized Signatures

Your signature card (provided by the bank) should include the signatures of your organization's president, treasurer and advisor (and co-advisor if applicable). Although three signatures are kept on file (four counting a co-advisor), two signatures are required to process a check.

EIN

Each Chapter must apply for its own "Employer Identification Number" with the Internal Revenue Service. Your EIN is used for establishing a checking and/or savings account. This number is your Chapter's identification number with the IRS. It does not give you tax exempt status.

Review EIN resource linked in the Additional Resources section.

***Have signatures
been updated?*



Filing 990

Each Chapter of the Fraternity must complete the appropriate version of Form 990 each year once it has established its EIN. These forms are available online on the IRS website: www.irs.gov. Chapter Treasurers may want to seek professional assistance in completion of this form.

State laws dictate whether a Chapter is exempt from state taxes (i.e. sales tax). Whoever completes the form will have to enter the amount of gross receipts for the fiscal year. Depending on this figure, a Chapter may be eligible to file Form 990-EZ or Form 990-N (ePostcard).

The Chapter's financial records are required in order to complete Parts I through IV. For Part V, list the names and addresses of all Members who held the office of President, Vice President, Treasurer, or Secretary for any length of time during the fiscal year.

This form must be filed by the Chapter no later than the 15th of November after the fiscal year ends. Completed returns should be sent to:

**Internal Revenue Service Center
Ogden, UT 84201-0027**

Additional Assistance

You may find additional assistance in completing this form on the IRS website or by calling the toll-free service at 877-829-5500 Monday through Friday.

In the Chapter Standards of Excellence (CSE) there is a checkbox that you will indicate the Chapter's progress regarding 990 filing.

Tax Exemption Information

The National Headquarters of Phi Sigma Pi is registered as a 501(c)(3) non-profit organization and is exempt from paying federal income tax. However, it is not exempt from paying state sales tax. Likewise, your Chapter will not be exempt from paying sales tax on items purchased for the Chapter. Please note that the National Headquarters does not have a "Groups Exemption Number" (GEN). If your Chapter wishes to obtain this tax exempt status, you must apply to the state in which your Chapter is chartered. (Please note that many states' tax laws have become stricter and this status is not easily obtained.)

Local Dues

Local dues are set by the Chapter. Chapters can have local dues as low as \$20/term. It is important that the Chapter fund meaningful projects/activities, but it needs to ensure it is not outpricing the Members.

Local dues would cover committee projects, recruitment marketing/materials, potential bank fees, room rentals, etc.

Funding Resources

In preparing for the annual budget keep these possible funding sources in mind:

1. Local dues
2. Fundraising
3. Corporate sponsors
4. Student government/activity funds



Find a sample letter for requesting school funding linked in the Additional Resources section.

Collection of Delinquent Accounts Receivable

For a Chapter to successfully collect its accounts receivable, the Chapter Treasurer should ensure that Members are aware of the constitutional financial responsibilities.

While such resources will undoubtedly increase the Member's awareness and future success of collection efforts, the following practices may assist with your efforts to collect delinquent accounts receivable that have been passed down to you:

- **Social Suspension:** A Member who is financially delinquent should not be allowed to participate in activities which he/she/they has not financially supported. Chapters have identified this technique to be extremely successful, especially when a major function such as a formal is planned.
- **Fines:** Simply stated, if a Member does not pay the financial obligation to the Chapter by the prescribed date, a fine or penalty may be imposed.
- **Reporting:** You may report at each Chapter meeting a list of Members who are financially delinquent and have not previously communicated to the Chapter Treasurer. Mentioning that such delinquency is causing a delay in certain planned activities of the Chapter may generate peer pressure among Members who are

in good financial standing towards delinquent Members to satisfy their accounts.

- **Withholding Academic Records & Registration:** Several schools will place a hold on a Member's academic account if the Member is financially delinquent to a student organization. Such Members may not be eligible to receive grades, register for courses, or obtain a copy of their academic transcript until the Chapter notifies the host institution that the Member has paid.
- **Statement of Delinquent Account:** A certified letter can be mailed to the delinquent Member (or in-person/ delivery/email with read/delivery receipt notice) notifying the Member of the debt and demanding payment within [XX] days. If the delinquent Member fails to respond by sending full payment, the Member will be expelled from the Fraternity. If a delinquent Member pays the account after being expelled, the Member may be reinstated (if approved by the Chapter). You may add a ten-dollar fee to the delinquent account statement to cover the cost incurred by the Chapter for submitting this statement.
- **Collections Agency:** When all other options have been exhausted, you might find it necessary to send the delinquent Member's account to a collection's agency. This is generally a last resort, as even if the individual does pay the amount in full, the collections agency will withhold a large portion of that amount as a fee for their services.
- **Court Action:** As a last resort, a Chapter may consider legal action against a delinquent Member by processing a lawsuit in small claims court. This process requires that the Chapter have accurate records and documentation of the delinquent account.

Turning an account over to a collections agency may be one of the most uncomfortable aspects of your job as Chapter Treasurer. It is important to remember; however, that it is the delinquent Members who have failed to fulfill their obligations to the Chapter, forcing you to these methods.

Chapter Credits and Refunds from National Office

Overpayments or refunds will be applied to the Chapter account. This credit will appear on the Financial Statement in the CAP and may be used for future orders or billings. If there are questions regarding the Financial Statement, please contact the National Office. For large overpayments in excess of \$1,000, the National Office will issue a check upon written request from the Chapter Treasurer. Checks will only be written to the Chapter.



Cautions to Consider

1. Do not sign blank checks.
2. Avoid using person-to-person payment platforms such as Venmo. While convenience is great - the platform is still in beta testing for organizational use. The liability an individual/Chapter takes on by having this cash in personal accounts is too great for the individuals. While not an endorsement, several Chapters use services such as BillHighway and OmegaFi.
3. Constitutionally, Chapter funds can NOT be used to purchase alcohol.
4. Have extra money in the Chapter Bank Account? Make sure that all written checks have cleared (meaning being cashed) before spending.
5. Some activities may require additional insurance (\$250). The Event Planning Form is one tool to determine if additional insurance needs to be purchased for an event/activity.
6. Announce established due dates in advance and often to avoid Members being surprised. Additionally, share how Members will submit their individual dues to the Chapter Treasurer.

Developing a Chapter Budget

A budget is a tool used to plan and control your Chapter's financial resources. It is a guideline for the Chapter's future plan of action, expressed in financial terms within a set period of time. Budgets do not need to be complex -- they can be simple and to the point.

Steps in Developing a Budget

Budgets can help...

- Refine your goals.
- Use funds effectively.
- Provide information to analyze, adjust and evaluate activities.
- Aid in decision making.
- As a historical reference for future planning.

Prior to planning your budget, ask yourself...


- What is the time period (one semester/quarter, entire school year)?
- What are your plans during this time?
- How will you accomplish them?
- How much will it cost?
- Where is the money coming from?

In preparing your budget...

- Outline your future activities (get input from Officers and Chairs).
- Determine available funds (include balance from previous budget).
- Estimate expected funds (dues, fundraisers, etc.).
- Record needed expenses (advertising, printing, Grand Chapter).
- Allow for emergency situations within the budget.
- Review, revise, and assemble into a final budget.
- Submit for approval.

Managing your budget...

- Once prepared and approved, manage your budget closely.
- Set and maintain a minimum cash balance.
- Control cash flow -- allow only approved expenditures.
- Keep an accurate written record of income and expenses.
- Periodically compare proposed budget to actual recorded expenditures.



***Constitutional requirement that the Chapter funds the Grand Chapter Delegate.*

SAMPLE FORMS

Budget

Chapter Budget for Current Academic Year

Chapter Budget for Current Academic Year				
Total in all Accounts:		Beginning Balance July 1		
Checking Account	\$	-		
Savings Account	\$	-		
Other Accounts	\$	-		
Starting Account Balance		\$0.00		
Income		Notes		
Income Report	Budget	Actual	Difference	This should include all forms of income. Add additional lines that relate to your Chapter.
Local Member Dues	\$0.00	\$0.00	\$0.00	(# of Members * Local Dues) X # of academic terms
National Member Dues	\$0.00	\$0.00	\$0.00	(# of Members * National Dues) X # of academic terms
National Induction Fees	\$0.00	\$0.00	\$0.00	# of Initiates * Local & # of New Members * National Induction Dues & Fees
Fundraising Proceeds	\$0.00	\$0.00	\$0.00	Monies collected from Chapter fundraisers
Fines	\$0.00	\$0.00	\$0.00	Fines collected by Members
Donations	\$0.00	\$0.00	\$0.00	Donations from community, Alumni, etc.
School Funding	\$0.00	\$0.00	\$0.00	Monies the institution gives to your Chapter for Convention, etc.
Miscellaneous income	\$0.00	\$0.00	\$0.00	
Total Income	\$0.00	\$0.00	\$0.00	
Expenses		Notes		
	Budget	Actual	Difference	This should include all miscellaneous expenses. Add additional lines for expenses that relate to your Chapter.
Awards/Giveaways	\$0.00	\$0.00	\$0.00	Awards given at formal or during last Chapter meeting
Chapter Consultant Visit	\$0.00	\$0.00	\$0.00	
Grand Chapter/National Convention Fees	\$0.00	\$0.00	\$0.00	Check registration packet for cost. Budget *\$1,200/attendee (includes flight, hotel, registration)
National Dues	\$0.00	\$0.00	\$0.00	(# of Members * National Dues) X # of academic terms
National Induction Fees	\$0.00	\$0.00	\$0.00	(# of New Members * National Induction Dues & Fees) X # of academic terms
Food	\$0.00	\$0.00	\$0.00	Formal meals, invitational snacks
Postage	\$0.00	\$0.00	\$0.00	
Printing	\$0.00	\$0.00	\$0.00	Recruitment posters, invitations, initiate Binders
Promotion/Advertising	\$0.00	\$0.00	\$0.00	
Room Rentals	\$0.00	\$0.00	\$0.00	
Office Supplies (paper, folders, etc.)	\$0.00	\$0.00	\$0.00	
Philanthropy Donations	\$0.00	\$0.00	\$0.00	This can include fundraising for HOBY or a Local Philanthropy
Additional Insurance	\$0.00	\$0.00	\$0.00	For events that include animals or venue requests
Speaker Fees	\$0.00	\$0.00	\$0.00	
Miscellaneous Expenses	\$0.00	\$0.00	\$0.00	
Total Expenses	\$0.00	\$0.00	\$0.00	
Projected Ending Balance		\$0.00	\$0.00	\$0.00

Member Dues

Chapter Name														
COLLECTIONS INSTRUCTIONS														
Enter the name of each initiate/Current Member in the proper column. Enter the amount that each individual owes for each of the various fees and dues in the "Owe" column. As Members pay these fees and dues, enter the total amount they have paid toward each fee or due in the "Paid" column.														
SUMMARY	Fall National Dues		Winter National Dues		Spring National Dues		Fall Initiate Dues		Winter Initiate Dues		Spring Initiate Dues		Fees & Fines	
	Billed	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Collected	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Remaining	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
CURRENT MEMBERS														
1	Name	National Dues FALL		Fees & Fines FALL		National Dues Winter (for quarter schools)		Fees & Fines Winter (for quarter schools)		National Dues SPRING		Fees & Fines SPRING		1
		Owe	Paid	Owe	Paid	Owe	Paid	Owe	Paid	Owe	Paid	Owe	Paid	
2														2
3														3
INITIATED MEMBERS														
1	Name	Membership Dues FALL		Membership Dues Winter		Membership Dues SPRING		1						
		Owe	Paid	Owe	Paid	Owe	Paid							
2								2						
3								3						

Reimbursement Requests

Throughout the academic term expenses may be occurred by individual Officers and Chairs as they prepare for a planned and budgeted event. For example, supplies for a service project. To keep your records consistent and to document how the funds are being spent, the sample reimbursement request form below highlights key information needed for you to keep an accurate record. It is also suggested that a copy of the reimbursement request is provided to the Member along with their reimbursement check.

Reimbursement Request	
Your Name:	Cell: () - -
Project/Category:	
Date Submitted: / /	Date Distributed: / /
Reason for Reimbursement:	
<input type="checkbox"/> Included in Annual Budget OR <input type="checkbox"/> Approved at Meeting (Date: / /)	
Check Payable To:	Amount: \$
Full Address: (Your check will be mailed to you, unless otherwise requested).	
Receipt(s) totaling the amount of the reimbursement must be attached.	
Approved by Officer: (signature)	Date: / /
Approved by Second Office: (signature)	Date: / /
_____ For Treasurer's Use Only: Category _____ Check # _____ Date _____ Logged _____	

***National Headquarters' mailing address:
Phi Sigma Pi National Headquarters,
2119 Ambassador Circle
Lancaster, PA 17603*

How to Write a Check

How checks should be printed: Alpha Nu Chapter of Phi Sigma Pi
Chapter Street Mailing Address
Chapter City, State, Zip

Whom check is being sent to: **PAY TO THE ORDER OF** Phi Sigma Pi National Honor Fraternity

Date check is written: **DATE** 2/14/1916

Check amount written out: **Check amount written numerically**: **\$** 1,000.00

One thousand dollars and no cents **DOLLARS**

Your Bank Name Here
1221 Main Street
Anywhere, US 10001

FOR Spring Dues

Required Signature 1 and Signature 2: Chapter President Signature
Chapter Treasurer Signature

A reminder to you for what the check is for: **74894934** **6793868122** **0101**

After completing the check, make sure to log the information in the checkbook's register.

PAYMENTS AND DEPOSITS						BALANCE
NO.	DATE	TRANSACTION DESCRIPTION	PAYMENT/DEBIT (-)	✓ DEPOSIT/CREDIT (+)		\$
						\$ 5,723.00
101	2/14/1916	Phi Sigma Pi National Dues	\$ 1,000.00			4,723.00
	5/26/1916	Student Government Funding		100.00		4,823.00
102	5/28/1916	C. McClure - Service Project Reimburse	35.00			4,788.00

Officer / Committee Proposed Budget Requests

Budget Request Form for Officers and Committee

All budget requests must be submitted by _____ to be considered for the proposed budget. This allows the Chapter Treasurer time to review all requests and make proper allocations.

All budget requests do not guarantee approval and are submitted for further review. Officers and Committee Chairs will be notified of the allocation prior to sending the proposed budget to the Chapter.

Project	Category	Item	Quantity	Estimated Cost	Total Cost
<i>Ex. Adopt-a-Highway</i>	<i>Supplies</i>	<i>Trash bags</i>	<i>2</i>	<i>15.00</i>	<i>30.00</i>
<i>Ex. Can Drive</i>	<i>Food</i>	<i>Canned goods</i>	<i>25</i>	<i>.75</i>	<i>18.75</i>
Total Request					38.75

Submitted By: _____

Office/Committee: _____

Date: _____

Payment Plan Contract

There may be times that Members need to enact a payment plan. Here is a sample contract:

PAYMENT PLAN CONTRACT

I, _____, agree to make payments on the specified dates and the agreed amounts stated on the payment schedule below to the _____ Chapter of Phi Sigma Pi National Honor Fraternity. I understand the consequences that will be brought against me if the contract is violated. The consequences could be: account handed to collection agency, expulsion from the Fraternity, and/or prosecution in a small claims court. I agree to pay any fees and costs that the Chapter may incur in collection of my balance owed as well as a competitive interest rate on the amount owed.

Total Amount Owed \$ _____ (Beginning Balance)

Payment Date	Payment Amount	Balance
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

Date

Payor (Member requesting payment plan)

Date

Payee (Fraternity Officer)

Chapter Standards of Excellence

Based on the Chapter Standards of Excellence (CSE) there are a few items that the Treasurer oversees. These questions are found in the Chapter Admin Portal. By creating an annual budget and updating it throughout the year, you will be able to easily upload the finalized document as part of your Chapter Standards of Excellence requirements. Additionally, below are a few questions, but not limited to, that you will need to answer for the End of Year report submission.



Upload your Budget

Year: 2018-2019

* What type of account does your Chapter deposit funds into?:

If you chose other above, please explain how your Chapter manages collected funds:

Did the Treasurer provide weekly financial reports to the Chapter?:

* Did your Chapter apply for school funding for regional and/or national events?:

* Did your Chapter budget to send a Delegate to National Convention for the upcoming academic year?:

Please upload your Actual Budget for this Academic Year: No file chosen

Please upload your Projected Budget for the next Academic Year: No file chosen

Other questions

Admin Summary Report

Year: 2018-2019

How long was the Chapter's Officer transition program?:

Was the Officer Installation Ceremony utilized?:

Did the Chapter create and follow a Chapter budget this academic year?:

Does the Chapter budget to send a Delegate to Convention?:

Is the Chapter recognized as a student organization on campus?:

Was the Chapter disciplined/sanctioned by the Chartering School?:

If yes, what was the Chapter disciplined/sanctioned for?:

Do you provide reasonable accommodations for all attendees with disabilities per school policy?:

Did the Chapter submit its goals for the academic year?:

Did the Chapter hold 1 meeting with majority of active members at quorum at least every 2 weeks during academic year?:

Did the Chapter meet with their Chapter Advisor two times in the academic year?:

Were Weekly Board and/or Executive Committee meetings held?:

Did you invite University Administration, College President or Provost to a Phi Sigma Pi sponsored event?:

Are the Social Media links provided in the CAP > Chapter Profile accurate? (Twitter, Instagram, website, etc.):

Any additional information to share about this academic year?:

For a full review of all Chapter requirements, visit <https://phisigmapi.org/resource/chapter-standards-excellence>

What's Due When Administratively for the Treasurer

The following academic year form submissions can be found in the [Chapter Admin Portal](#) (CAP) unless otherwise noted. When submitting dues please coordinate with the Chapter Secretary to ensure that the rosters have been updated. Additionally, in the CAP you will be able to see the Chapter's current financial standing on the [Financial Report](#).

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

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](#)
- Induction Dues and Fees for new Members (Mail)

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)

May 15:

- Change [Initiate to Member](#)
- [Finalize Graduating Seniors](#)
- Induction Dues and Fees for new Members (Mail)
- End of Year Submissions
 - [Administrative 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)

Dec. 15:

- Change [Initiate to Member](#)
- Induction Dues and Fees for new Members (Mail)

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)

March 1:

- Change [Initiate to Member](#)
- [Finalize Graduating Seniors](#)
- Induction Dues and Fees for new Members (Mail)

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)

June 15:

- Change [Initiate to Member](#)
- Induction Dues and Fees for new Members (Mail)
- End of Year Submissions
 - [Administrative Summary](#)
 - [Budget](#) (current year and proposed budget)

POLICIES AND PROCEDURES

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

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.

Return Check Policy

If a Chapter check submitted to the National Office for payment is returned (a.k.a. bounced) to the National Office from the bank due to Insufficient Funds or other similar reasons, the Chapter will be charged \$40 per returned check. This is to cover the bank fees that the National Office incurs due to the check being returned.

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 resource linked in the Additional Resources section.

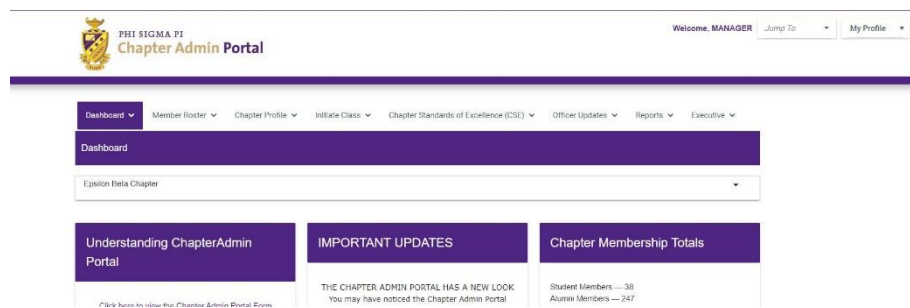


PHI SIGMA PI VOCABULARY/LINGO

Chapter Admin Portal (CAP) (<https://chapteradmin.phisigmapi.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.

***CSE = Chapter Standards of Excellence*

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.



Chapter Excellence Board (CEB) (<https://phisigmapi.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://phisigma.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



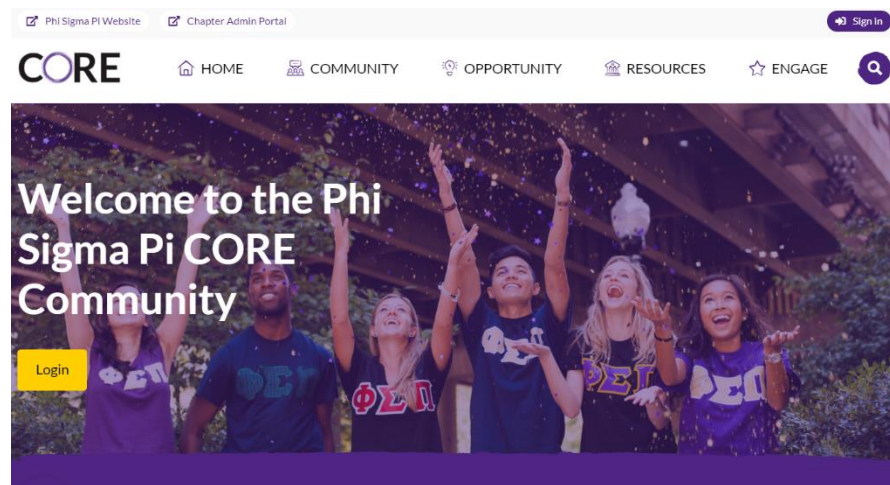
eligibility for awards such as the Joseph Torchia Outstanding Chapter Award, which is the highest designation a Chapter can achieve annually.

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. [Parliamentary Procedure Overview](#)
2. [Risk Management](#)
3. SMART Goals
 - a. [Strategic Planning- Turning Strategy Into Action](#)
 - b. [Strategic Planning- The Achievable, Believable Goal](#)
4. Strategic Planning
 - a. [Strategic Planning- The Power Of A Shared Vision](#)
 - b. [Strategic Planning- Strengthening Your Problem-Solving Skills](#)
5. [Planning Events](#)
6. [National Convention](#)
7. [HOBY](#)
8. [Officer Transition Plan](#)
9. [Officer Training Courses](#)
10. [VIA Character Strengths Assessment](#)
11. [Filling for an EIN](#)
12. [Due Process](#)
13. [Sample Letter for Requesting School Funding](#)
14. [Officer and Committee Budget Request Form](#)
15. [Creating an Annual Budget](#)
16. [Why is Budgeting Important?](#)
17. [The Chapter Budget](#)
18. [Chapter Budget Checklist](#)

