# Officer Training Manual:

# Vice President

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# WELCOME

Congratulations on being elected as Chapter Vice 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 a 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 Vice President.

"Because of your interest and devotion to this Chapter, you have been selected to its second highest office, that of Vice President. The responsibilities of your office are great. You not only serve in the absence of the President, but you also lead the Committees and ensure that their work is done for the welfare of the Chapter. Cooperate with the President in all things. Without cooperation, the unity of the Chapter would be broken, and we would not operate efficiently. Guard well your life's patterns that you may reflect the high image this Chapter holds for its Members."

## 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

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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 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

Grand Chapter → National Council → National Staff

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.
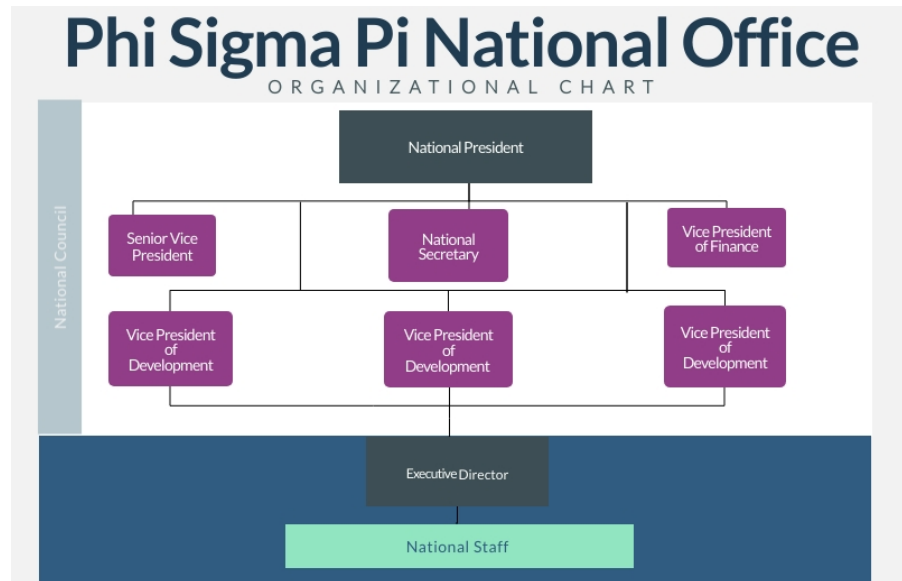


The National Council employs full-time professionals to assist in the administrative affairs of the Fraternity, the National Staff. The Executive Director is hired by the National Council. It is then the Executive Director's responsibility to hire and supervise the entire National Staff. The National 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.

## 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

**National Office info! Share with Eboard Members

**Vice President**
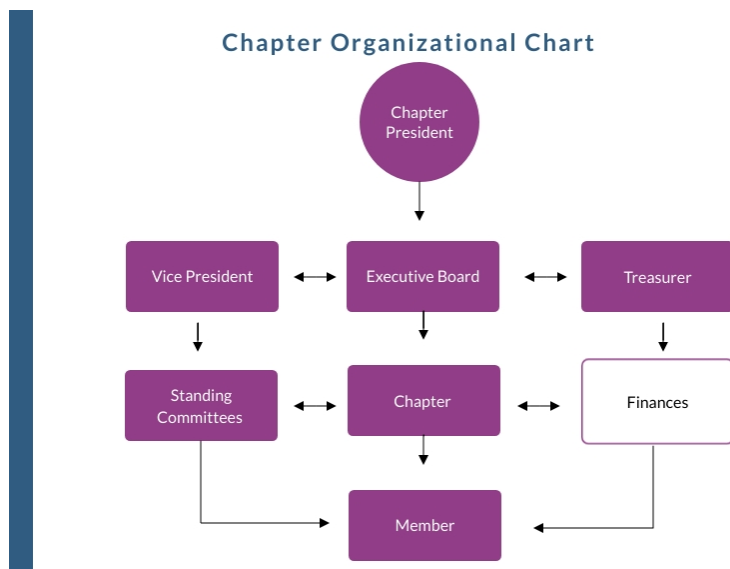
# CHAPTER ORGANIZATIONAL CHART

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.

**Chapter Organizational Chart**

Chapter President → Vice President ↔ Executive Board ↔ Treasurer

Vice President → Standing Committees ↔ Chapter ↔ Finances

Standing Committees → Member ← Finances

Chapter → Member

# TIPS FOR BECOMING A SUCCESSFUL CHAPTER VICE PRESIDENT

## Understanding Your Leadership Strengths

When serving as a leader, especially the Chapter Vice 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 Committee Chairs, will set them up for success when approaching you with new ideas. It also provides upfront reasoning if, as Chapter Vice President, you request information.

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

## 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.

## 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

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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.

# KEY RESPONSIBILITIES

As Vice President, your main responsibility is to coordinate and supervise the Chapter Committees. Your role is that of an executive assistant to the President, and you should be actively involved in all Chapter activities, especially in Chapter Committees. The Chapter Vice President has the responsibility of fulfilling the President's duties in the President's absence.

Specific Responsibilities

1. **Serve as second principal Officer.**
   As Chapter Vice President, you are the Chapter President's right hand or chief operating officer. You assist the President in conducting all Chapter affairs and operations thoroughly and efficiently, see that all Chapter activities are carried out in the best manner possible and ensure that all Members and Initiates always conduct themselves in the best interest of the Fraternity.

   You are the President's eyes and ears. You must constantly be informed of all Fraternity affairs and activities so that you can advise and assist the President in leading your Chapter. Get to know the President's thoughts on policy and direction and provide support and endorsement of new goals or programs. Work closely with the Chapter President as you are the sounding board and confidant. As such, provide your own suggestions and comments and gather those from other Chapter Members.

Additionally, you are responsible for carrying out other duties that the Chapter President may direct to you.

2. **Serve in the Chapter President's absence.**
   As the second principal officer, the Chapter Vice President can be called upon to perform duties in an absence of the Chapter President. Therefore, you must always be prepared to assume these duties. Be involved with the Executive Committee at all times so that you know the status of every Officer's plans, projects and Committee goals. Review and familiarize yourself with all of the specified responsibilities of the Chapter President listed in the Chapter President's Training Manual.

3. **Supervise committees.**
   Chapter Committees are what make all projects, activities and events possible. If Committees do not function properly, the Chapter will miss reaching its full potential, and Chapter activities may be few and unorganized. Therefore, Committee leadership is essential. The Chapter Vice President is responsible for overseeing and guiding the work of all permanent and temporary Committees, ensuring that each is functioning properly and performing its designated duties. You will need to either appoint a Committee chairperson or allow the Committee members to elect a leader.

   Request written goals and Committee reports from all Committee chairpersons at least monthly. These reports should outline what the Committee has accomplished and on which projects it is currently working on. This will enable you to chart each Committee's progress as you see what projects are being completed. If a Committee does not have a report, you may want to discuss the importance of Committee reports with the Chairperson. If this does not motivate the Chairperson, the Committee may need to be reorganized and a new Chairperson elected.

   Additionally, as the Vice President sit down with the Committees to evaluate the event. A sample event evaluation form can be found in the Resource Center. By working through an evaluation it will double as prep work when completing the Tripod Event Form.

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

See the Sample Event Evaluation guide linked in the Additional Resources section in the back of this manual.

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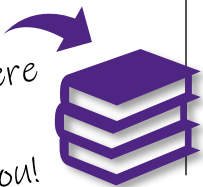
Specific Committee information is included in this manual. Read this information thoroughly so that you are prepared to assist your Committees. This information appears in all Committee manuals and focuses on how to be a good Committee Chairperson and how to get Members involved and enthusiastic.

4. **Train and assist your successor in office.**
Officer training is vital to the continued success of your Chapter. As Chapter Vice President, you need to spend time training the newly elected Vice President so that the transition is a smooth one. Your Chapter may choose to hold Officer elections in early November or early April so that you can work with the newly elected Chapter Vice President in order to onboard the new Officer.

Although the majority of the Vice President's role may be behind the scenes, their impact should be widely felt throughout the Chapter. Chapter Committees will require a great deal of time to organize and maintain. In addition, take it upon yourself to tackle some of your Chapter's challenges and/or promote your own or other Members' ideas to accomplish some of the goals that are next to be addressed. Also, if you plan to run for the Chapter President position at the end of your term, this is an ideal opportunity to demonstrate your leadership skills. The Chapter Vice President's role is an active one. Take advantage of the opportunities at hand and make the most of your position.

# MANAGING COMMITTEES
## Four Good Aspects of an Active Committee
1. **Good Leadership**
A good leader will encourage a team effort by delegating responsibility and involving other Members in the planning and organizing of an event or project. Select Committee Chairpersons carefully so that the Chairpersons are Members who will take responsibility and work with their Committee to accomplish the Committee's goals. Keep meetings prompt, on the subject, and encourage discussion of all viewpoints. Recognize those who have done a good job and keep up with those who slow down on their responsibility.

2. **Good Organization**
   Good leadership, sound planning and conscientious follow through are the results of good organization. A dedicated group of leaders with good organizational skills will plan meetings, special events, activities or projects that result in the Members actively participating in these events.

3. **Good Meetings**
   Meetings that are informative, productive and free of ambiguities are good meetings. Chapters that use parliamentary procedure and have well-constructed agendas have productive meetings where decisions are made, business is accomplished and the time is considered to be well spent.

4. **Good Projects**
   Good, successful projects are the direct result of sound advance planning. A good project is well designed, well-staffed, well-advertised, well planned and most of all well attended.

## Chapter Committees

Chapters need specific Committees in order to organize and carry out a variety of Chapter events, projects and activities. Chapter Committees are the means by which all Chapter ideas become reality and the ideals of scholarship, leadership and fellowship are recognized.

Chapters should have permanent Committees and may establish temporary committees as needed. Permanent Committees exist due to a continued need. Temporary or ad hoc Committees are established on a short term basis as the need arises.

**Permanent committees may include*:**

- Alumni
- Awards and Scholarship
- Fundraising
- Initiation
- Program and Public Relations
- Service
- Social and/or Recreational

*Additional permanent Committees may be established to best fit the needs of the Chapter.*

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**Temporary or ad hoc committees can include:**

- Chapter Bylaws
- National Constitution (proposing changes)
- Retreat Planning
- Special Events (volleyball tournament, Brotherhood games, etc.)

Ensuring that all Committees, except the Initiation Committee, are functioning properly is the primary responsibility of the Vice President. Because the Initiate Advisor is an elected Officer and the Chairperson of the Initiation Committee, the President is responsible for overseeing that the Initiation Committee functions properly.

Committees should represent a system characterized by these three distinct features:

1. **Specialization** - Each Committee member performs a special responsibility.
2. **Commensurate Authority** - Each specialized Committee member possesses the authority to execute the Committee functions in the same manner as an Officer.
3. **Budgeted Funds** - Each specialized Committee member has the necessary funds to complete the responsibilities within the Chapter budgetary limits as determined by the Chapter Treasurer but approved by the Chapter.

The key to successful Chapter Committees is to have every Member and Initiate involved in a Committee. Involvement includes, attending meetings, being assigned tasks and participating in the planned events. Members who have a specific interest or preference in a Committee should be placed on that Committee.

Many Chapters allow Members to list their top three Committee choices. The Vice President, then, creates the Committees based on each Member's preference. By doing this, the Members are placed on a Committee in which they have some interest and, therefore, will participate in the planning and organization of Committee events. This should not be a problem with the many existing Committees that offer more than ample opportunities. Also, participation in additional Committee positions is possible as special Committees and ad hoc Committees are established for seasonal events.

To further ensure the success of each Committee, each Initiate should be treated equally as an essential Committee member with the necessary authority to perform responsibilities. Although an Initiate cannot hold positions on certain Committees, such as the Initiation Committee, it is to the Chapter's benefit to involve Initiates on

*\*\* The key to successful Chapter Committees is to have every Member and Initiate involved in a Committee*

Committees. By doing so, the Initiates begin to learn and understand the responsibilities of membership and will become Active Members.

Committees should meet at least every two weeks, if not weekly. The small nature of Committees makes gathering Members easy and has minimum time requirements. Because Members are already present for a Chapter Meeting, many Chapters schedule Committee meetings either immediately before or after their Chapter meetings. Other Chapters allow time on the meeting agenda for Committees to meet (about 15 minutes or so). If additional time is needed for a Committee, that Committee must then schedule a separate meeting time and place outside of the Chapter Meeting.

## Tips for Effective Committees

1. Distribute a Committee list and have Members select three (3) Committees on which they would like to serve.
2. Every Chapter Member is required to serve on at least one Committee (excluding Officers). Therefore, attendance at Committee meetings should be taken to ensure that all Members are participating in a Committee.
3. A list of Chairpersons and Committee members should be distributed/accessible to each Member, complete with phone numbers of all Committee members.
4. Committees should meet weekly whenever possible, but definitely no less than every two weeks.
5. Chairpersons are responsible for giving a report at each regular Chapter Meeting. This could be about a minute pending the report (Committee attendance can also be reported).
6. Assign an assistant or co-chair to each Committee Chairperson.
7. Committees should have a written set of goals which should be distributed to the entire Chapter.
8. Each Committee's performance should be evaluated periodically.
9. Each Committee Chairperson should be instructed on how to run a Committee meeting and delegate authority.
10. Committee Chairpersons should be included in Executive Board Meetings to help coordinate activities.

# ORGANIZING A COMMITTEE

## A Plan of Action

A plan of action is the result of basic research done by the Chairperson in order to get the project started. The Chairperson should have knowledge of the objective to be accomplished in terms of the people power available, time required, organizational structure proposed and

budget required (when applicable). Its form should generally follow this outline:

- Purpose and general method of accomplishment
- People power required (people backing the project)
- Proposed Committee organization
- Proposed timetable
- Budget required

Once the plan of action has been developed, it should be put in writing and presented to the Chapter for approval.

## Chapter Approval

The plan of action for every project should be approved by the Chapter before the Committee proceeds in planning the project. Once the Chapter has approved the project, the Committee may proceed with a plan of action. Each plan of action should stay within the guidelines of the Fraternity and carry out the purpose of Phi Sigma Pi.

How do you get the Chapter's approval? You will have to sell your idea(s) and how you think it can be accomplished. Begin by presenting your plan to the Executive Committee. Discuss the plan with the Executive Committee members and ask for their suggestions. Next, present your plan at a Chapter Meeting. Be enthusiastic, but realistic, in your presentation. Be sure to cover your bases so that all obvious questions are answered without getting too lengthy.

## The Organizational Meeting

**PLAN**.  When you have a list of your Committee Members, you are ready to begin. The organizational meeting is the kick off for your project. Do your best to hold it at a time and place where everyone on the Committee can be present. It is a good idea to send each Committee Member a reminder 12 to 24 hours before the meeting. Keep in mind that they may not be as interested as you are yet! Plan to start on time and end on time. Keep the meeting quick moving, vital and interesting. Don't get caught up on too many details that can be handled on an individual basis.

**COMPROMISE**. Always be willing to compromise. Don't hold on to your own viewpoints until the Members lose interest or become discouraged. Be open minded to other ideas, comments and suggestions. Agree on the Committee method that gives everyone a job. It is up to you to ensure that the job fits the Member's ability and that the job gets done.

**BRAINSTORM**. Get the most out of your Committee members by using their creative imaginations and enthusiasm as you brainstorm for ideas. Your responsibility as a Committee Chairperson is to suggest the first few ideas and pinpoint any problems. Then, ask each Committee member to contribute their own ideas or suggestions. Do not allow criticism at this point. You may want to give each Member a pen and paper to write down as many ideas as they can come up with in five minutes. After the brainstorming session, the Committee can then review each idea, no matter how wild it may seem, as it relates to the project or problem.

**GO**. Remember that the secret of creative imagination is that one idea leads to another like a string of popping firecrackers. So... let yourself and your Committee go! This is one time where your feet do not have to be on the ground. However, you need to put your feet back on the ground when the time comes to judge the usefulness of each idea.

## Provide an Agenda

All meetings should have an agenda. This applies to all phases of the organization, but especially to the Committee. One of the greatest advantages is a psychological one. The Members will know and appreciate that the meeting was prepared in advance. All items of business should be written down in the sequence that they will be discussed. Make the most of your time by following the agenda.

## Appoint a Committee Secretary

The Committee needs to keep records - this will be important for completing the Chapter Standards of Excellence's Tripod Event Form. Therefore, the first order of business should be to appoint a Committee Secretary. The Committee Secretary should be instructed to keep the minutes of the meeting so that you can distribute them to absent Members and keep them up to date with the workings of the Committee. Keep a copy of the minutes from each meeting in a binder, Google Drive or other chapter management systems (OrgSync, Engage, etc.) so they may be referred to at a moments notice if necessary.

## Delegate Responsibility

A project is really a series of small jobs grouped together. While this may be an obvious statement, it is often neglected in the Committee Chairperson's mind. Many times we think of a project as one, sometimes overwhelming, job. In truth, the project consists of many small interrelated situations which can be handled separately. So, assign different jobs to each Committee member and ensure that the project will become a team effort. Share the wealth!

It is the Chairperson's responsibility, and a true test of leadership ability, is to think through a project and envision how it can be broken down into separate tasks. Once the project has been broken down into individual assignments, the Chairperson should delegate responsibility to Committee members. Give people a job and allow them to do it. In assuming the duties that need to be carried out, brief the Committee member completely regarding the responsibilities.  Make sure that all Members know:

1. Exactly what they must do.
2. To whom they report.
3. How much authority they have.
4. The deadline for their tasks.

Many times a well-intentioned Chairperson assigns a job and then proceeds to help the person carry it out. This is not a good idea because the Member will question why they were asked to help in the first place. It is better to make the assignment, allow a reasonable length of time for the job to be completed, and then check to ensure that the job was done.

It is important when delegating responsibility to assign the right person to the right job. For example, if a job involves phone calls, choose a person who is comfortable making calls and/or is willing to stretch themselves in this area. Have a general idea as to when each Committee member is available throughout the day and after school hours.

## The Timetable

Start with the "deadline day" or the day you would like everything completed or when the event takes place. It is important that this decision be made by the whole Committee in conjunction with the Chapter. Many projects are not completed because the deadline day is too soon and Members don't believe that there is enough time to prepare for the event. Set a realistic deadline so the Committee has sufficient planning time and the Chapter will be able to attend. You will find how smoothly things run as soon as the deadline day is set.

Start with the day of the event and work backwards. There is a logical sequence of actions that should be coordinated; when planned out, the result is a timetable. Consider the following:

1. **Sequence** - planning the steps in the best possible arrangement to do the job effectively.
2. **Timing** - calculating the length of time required to do each phase of the project.

Once your schedule or timetable has been agreed upon, don't let any argument upset it. If, however, something occurs which seems to change the picture, call a Committee meeting immediately and explain the facts to the Members, then ask them to decide what to do.

## The Project

The accomplishment of any project is a matter of following through once it has been adequately organized. It is important that you delegate assignments and ensure that each Committee member understands their responsibility. You must also be prepared to intervene at any time if the progress begins to slow down. Additionally, you should receive interim reports from your Committee members and report your Committee's progress to the Chapter at business meetings.

As Committee Chairperson, it is your responsibility to check and check again with your Members until the assignments given to them are complete. The following is a checklist to help any project you organize result in success.

## Checklist for Success:

- Do you have the names, emails and telephone numbers of everyone on your Committee?
- Do you know when each person on your Committee is available for work?
- Do you know the best time and place to call meetings so that everyone can attend?
- Does your Committee know where and when they can contact you?
- Are you avoiding details in group meetings and settling them with individuals?
- Do you keep the group moving on big problems and decisions?
- Has everyone been assigned a job or task?
- Are you brainstorming with your Committee members and not dictating to them?
- Are you keeping an open mind to other ideas and suggestions?
- Are you compromising on secondary points?
- Is your Committee submitting receipts to the Treasurer or yourself?
- Is your Committee paying its bills promptly?
- Are you keeping the enthusiasm of the group high?
- Have you been honest with your Committee concerning the time and effort that will be required?
- When the project is completed, have you recognized and/or rewarded everyone who helped you?

# Committee Responsibilities

## Alumni Committee

The main purpose of an Alumni Committee is to inform your Chapter's Alumni of events and the Chapter's progress. This can be accomplished by publishing semesterly/quarterly newsletters. The Alumni Committee is the link between the active membership and the Alumni.

## Awards & Scholarships Committee

The purpose of an Awards and Scholarships Committee is to initiate and create tradition. A positive tradition that recognizes those Members for their achievements in and outside of Phi Sigma Pi. Many Chapters nominate and vote on a particular Member to win the award, which is then presented at such events as Founder's Day Banquets. It is the Committee's responsibility to facilitate the process.

One such example of an award is the Chapter Service Key (CSK). The Chapter can determine what the eligibility requirements are to receive a CSK. The CSK can be ordered through our official jeweler. https://www.hjgreek.com/products/showCategories/OrganizationID/10

## Fundraising Committee

The purpose of the Fundraising Committee is to raise money for a particular reason. For example, Chapters may wish to raise money for a local charity or they may wish to raise money to send Delegates and representatives to the National Convention. It is important that the Committee work closely with the Treasurer. The Treasurer can provide the insight of the Chapter's financial standings. The responsibility of the Fundraising Committee is to coordinate the events whether it is a car wash, bake sale or battle of the bands. Ensure that the Committee has reviewed the Risk Management Manual and any other related policies.

## Service Committee

The Service Committee is an integral part of the organization. As a National requirement, each Chapter should have at least one well coordinated service project every semester/quarter. The events can be Adopt-A-Highway, visiting a nursing home and/or working with local elementary schools. The Committee's responsibility is to ensure that this opportunity is available to the Chapter Members. Ensure that the

Committee has reviewed the Risk Management Manual and any other related policies.

## Public Relations Committee

This Committee has an important task that it must accomplish every semester/quarter. The Public Relations Committee is of course in charge of advertising and promoting the Chapter throughout both the campus and community. The Chapter Standards of Excellence form submission allows the Committee to demonstrate the work that they have accomplished.

## Social Committee

The responsibility of this Committee is to ensure that fellowship exists within the Chapter.  Knowing that fellowship is one of the ideals of the Fraternity, its importance can be recognized. The Social Committee is responsible for planning such events. Ensure that the Committee has reviewed the Risk Management Manual and any other related policies.

## Initiation Committee

The Initiation Committee is a joint effort between the President and the Initiate Advisor. The Committee membership is selected by the President but is under the direction of the Initiate Advisor. Any questions regarding the Initiation Committee should be directed to the Initiate Advisor.

## What's Due When Administratively

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

As Vice President, your main due dates center around the Tripod Event Form(s). These are submitted by each Committee Chair (overseen by the Vice President). This form allows the Committee Chairs to share their planned event details. In addition to updating the Chapter's Standards of Excellence Scorecard (See Chapter Standards of Excellence and Score Card below) the submission also serves as a great Committee Chair transition training as the submitted reports are stored in the CAP.

### Semester Schools
**Fall Semester**

**Dec. 15:**
- ☐ Tripod Event Form (minimum of 3)

**Spring Semester**

**May 15:**
- ☐ Tripod Event Form (minimum of 3)
- ☐ End of Year Submissions
  - ☐ Alumni Summary

### Quarter Schools
*CAP = Chapter Admin Portal*

**Fall Quarter**

**Dec. 15:**

- ☐ Tripod Event Form (minimum of 2)

**Winter Quarter**

**March 1:**
- ☐ Tripod Event Form (minimum of 2)

**Spring Quarter**

**June 15:**
- ☐ Tripod Event Form (minimum of 2)
- ☐ End of Year Submissions
  - ☐ Alumni Summary

Tutorials are provided in the Resource Center.

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

# 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.

**Vice President**

## 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.
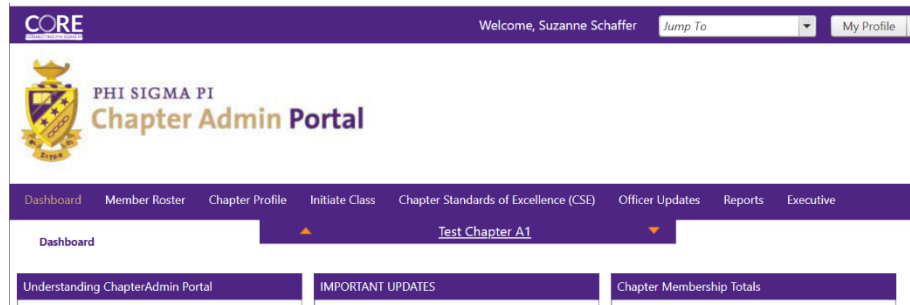


**Chapter Excellence Board (CEB)** (https://phisigmapi.org/ceb) - an extension of the National Office's Chapter Services team in order to provide support from engaged and knowledgeable Alumni. There are four (4) Advisors that compose your CEB, each having a specific focus area. CEB Advisors work with 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://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 eligibility for awards such as the Joseph Torchia Outstanding Chapter Award, which is the highest designation a Chapter can achieve annually.

**The 8 Guiding Principles**



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.

**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.

**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.
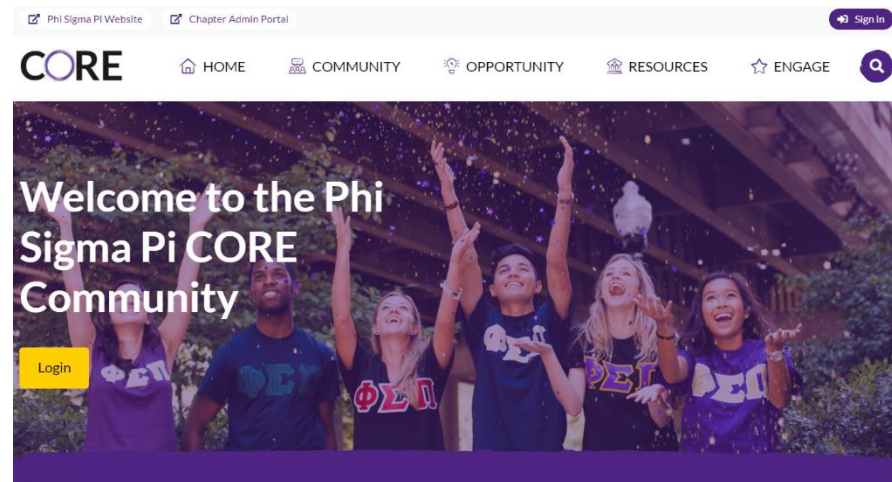


**Event Planning Form (PF)** (https://phisigmapi.org/planningform) - an educational tool to ensure that Chapters and Associations have the necessary information and tasks accomplished in order to hold fun and safe events. This includes making sure that contracts are reviewed and are mutually agreeable to the Chapter/Association's interests. The form also provides assistance and guidance with navigating more complex events.

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

**Vice President**

**Hugh O'Brian Youth Leadership (HOBY)**
([https://phisigmapi.org/service](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.

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

**Leadership in Action (LiA)** ([https://phisigmapi.org/lia](https://phisigmapi.org/lia) ) - a nationally 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](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

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**Vice President**                                                                                           27

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 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).

**Tripod Event Form**

The Tripod Event Form is submitted by each Committee Chair (overseen by the Vice President) for each event planned. This form allows the Committee Chairs to share their planned event details with the National Office as well as captures the event for Committee Chair transition training.

**Tripod Event Form**

| | |
|---|---|
| **Academic Year:** | 2019-2020 |
| * Academic Term: | Select a value ▼ |
| * Should this event be considered for a national award?: | Select a value ▼ |
| * Title of the Event: | |
| * What is the Event Type?: | Select a value ▼ |
| If it was a Philanthropy event; what is the name of the local Philanthropic Partner?: | |
| * What was the Purpose of the Event?: | Select a value ▼ |
| * What was the secondary purpose of the event?: | Select a value ▼ |
| Please upload an image from the Event.: | Choose File   No file chosen |

*By uploading an image we agree to allow Phi Sigma Pi National Honor Fraternity the use of our name and likeness, in connection with any advertising or promotion (both past and future) worldwide in perpetuity in all forms of media now and forever known.*

**Which legs of the Tripod were met?:**

| | |
|---|---|
| * Scholarship: | Select a value ▼ |
| * Leadership: | Select a value ▼ |
| * Fellowship: | Select a value ▼ |
| * Was this a Chapter Event or a Public (campus-wide) Event?: | Select a value ▼ |
| * What was it? (Please provide a detailed event description including scope and summary of activities) - 2000 character limit: | |
| Location of Event: | |
| * Date of Event: | 📅 |
| * Has the event been held before?: | Select a value ▼ |
| If yes, has the event grown from the previous event?: | |
| What external resources were utilized in the planning and completion of this event? These resources may include access to an expert, using university resources or partnering with a community organization.: | |
| * Did you implement Risk Management steps?: | Select a value ▼ |
| # of hours to plan and execute event (rounding is acceptable): | |
| On a Scale of 1-5, how would you rate the overall success, with 5 being very successful?: | |

ℹ 💾 Save

**SOCIAL CHANGE**

| | |
|---|---|
| How did the event build a sense of identity in the Chapter and/or community?: | |

**FINANCING**

| | |
|---|---|
| Was it a fundraising event?: | Select a value ▼ |
| If yes, how much was raised?: | |
| If yes, which organization was the fundraising event benefitting?: | |
| What were the budgeted and actual expenses?: | Choose File   No file chosen |

**PARTICIPATION**

**Who was invited? Check all that apply:**

| | |
|---|---|
| Collegiate members invited: | ☐ |
| Students invited: | ☐ |
| Alumni invited: | ☐ |
| Admin invited: | ☐ |
| Community invited: | ☐ |
| # of attending Collegiates Members: | |
| # of attending Alumni Members: | |
| # of attending Guests: | |
| # of Volunteers: | |
| * Were other campus groups involved?: | Select a value ▼ |
| If yes, who?: | |

**PROMOTION**

| | |
|---|---|
| How was the event advertised? (Print Ad, Social Media, Flyer, etc.): | |
| * Was there media exposure for the event? (local TV, newspaper, etc.): | Select a value ▼ |
| If yes, please share links: | |

**EVALUATION**

| | |
|---|---|
| * Who evaluated the event?: | Select a value ▼ |

**CONCLUSION**

| | |
|---|---|
| Will the event be held in the future?: | Select a value ▼ |
| Key Recommendations for future event?: | |
| Other comments: | |

Back                    Step: Enter Information                    Continue
(Selection)                                                       (Validation)

# ADDITIONAL RESOURCES

1. Marketing/Style Guide
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. Event Evaluation
7. National Convention
8. HOBY
9. *The Scholar's Province*
10. The Ritual and Ceremonies Book
11. Team Building Activities
12. Officer Transition Plan
13. Officer Training Courses
14. VIA Character Strengths Assessment
15. *Motivating the Middle* by T.J. Sullivan

**Vice President**